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FAFSA Simplification Act and Using the NASFAA SAI Tool

February 2023

**Dr. JoEllen Price, Executive Director of Financial Aid
Houston Community College**

Agenda



FAFSA Simplification Act Overview



Pell Grant Changes - What to expect in 2024-2025



FAFSA Changes Coming



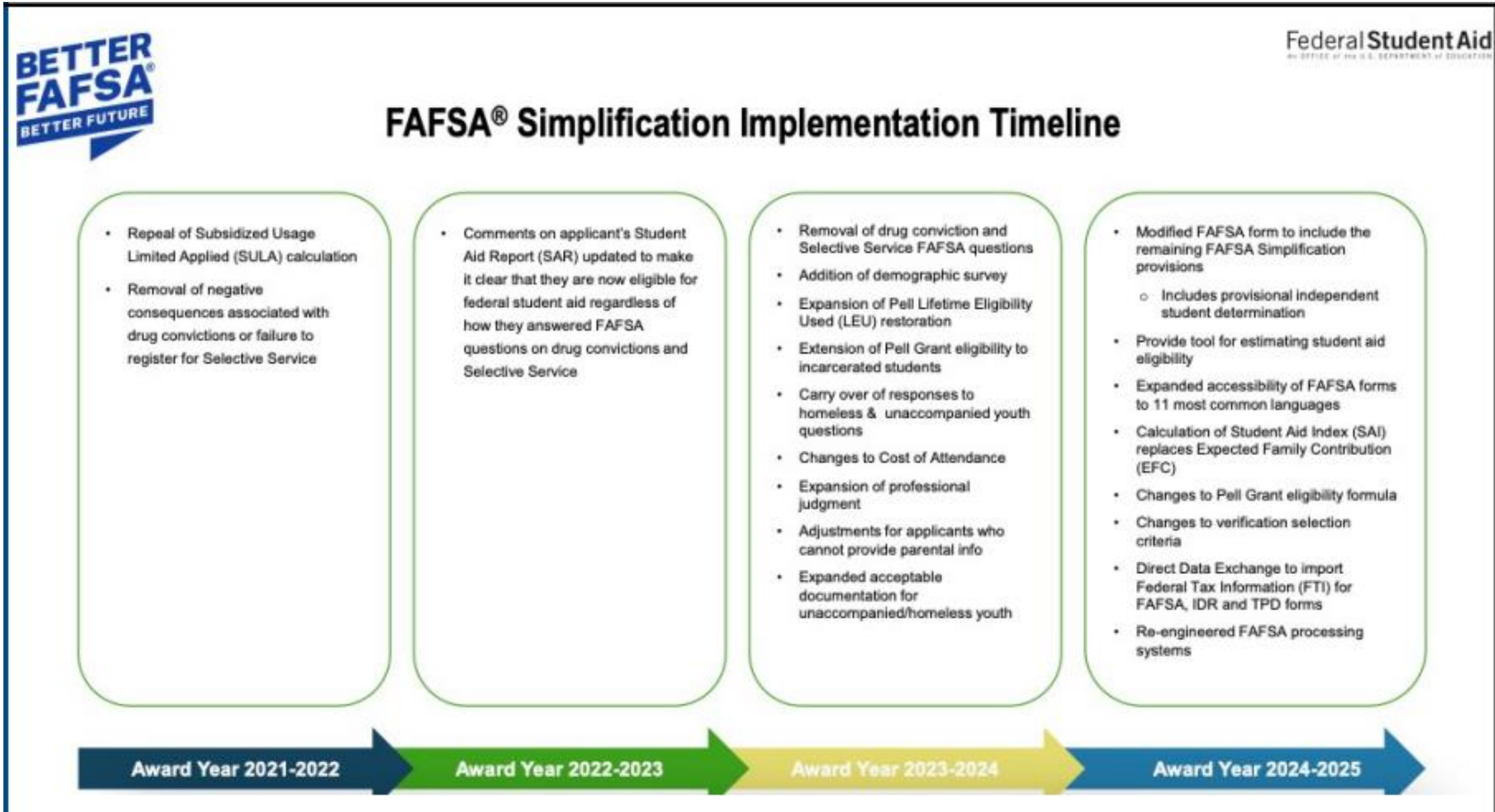
SAI Model Tool



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FAFSA Simplification – Implementation Timeline

NASFAA – FAFSA SIMPLIFICATION CONVERSATION (1/25/2023)



EFC



FASFA Simplification Act

Student Aid Index (SAI)

- Implementation was supposed to be for 2023-2024, extended to 2024-2025 – ED was not ready
- Student Aid Index (SAI) replaces Expected Family Contribution (EFC)
- SAI will determine eligibility for all aid except for determining minimum and maximum Pell Grants
- Pell Grant will be based on Dependency, Marital Status, AGI, Poverty Level and Enrollment Status
- EFC could never go below 0 – SAI can be as low as negative -1500
- SAI formula removes the state and other tax income exclusion
- SAI formula eliminates the family farm and small business asset exclusions – families have to report
- Income protection allowances updated to higher amounts
- Number in college is eliminated – SAI will not be divided by number in college
- Parent reported on the FAFSA is the one that provided a greater portion of student's financial support, no longer who student lived with the most

Pell Grant Guarantee

Eligibility for the maximum Pell Grant award is guaranteed to the following individuals:

- Students in single-parent households (both dependent children of single parents and single parents who are themselves students) with an AGI of less than 225% of FPL; and
- Students in all other households with an AGI of less than 175% FPL

Under this section, students with AGIs under a second, higher set of thresholds will be guaranteed eligibility for the minimum Pell Grant even when they would not be Pell eligible based on their SAI.

Eligibility for the minimum Pell Grant is guaranteed to the following individuals:

- Single student parents with an AGI of less than 400% FPL
- Married student parents with an AGI of less than 350% FPL
- Dependent children of single parents with an AGI of less than 325% FPL
- All other students with an AGI of less than 275% FPL

FLP = Federal Poverty Line (new acronym)

COA Changes – Effective for 2023-2024

GEN-22-15

Changes required:

- Costs for rental or purchase of equipment, materials, or supplies has moved into a broader definition of “books, course materials, supplies, and equipment.”
- Transportation may include transportation between campus, residences, and place of work.
- Room and board are grouped as Living expenses.
- Institutions may no longer include loan fees for non-Federal student loans.
- First professional credentials no longer restricted to a one-time allowance.
- “Course materials” and “First professional credential” included for incarcerated students.
- Enrolled less than half time has been broadened to include components not otherwise prohibited.

Remains the same:

- Enrolled at least half time to include miscellaneous personal expenses.
- No changes to study abroad, cooperative education expenses, dependent care, and disability-related.
- No substantive changes to components for correspondence study or distance education.

SEE DEFINITIONS SECTION OF GEN-22-15 FOR MORE INFORMATION.

FEDERAL METHODOLOGY STUDENT AID ELIGIBILITY DETERMINATION EFFECTIVE 2024-25 FAFSA

Did the dependent student's parent(s) or independent student file taxes for the applicable tax year?

Is the student under the age of 33 and child of a post-9/11 veteran or public safety officer who died while serving or in the line of duty?

Yes

No

Single-parent household?

Yes

No

AGI < 225%
of poverty?

AGI < 175%
of poverty?

Yes

No

No

Yes

- AGI < \$60K and no schedules **OR**
- AGI < \$60K and only Schedule C filed with gain/loss < \$10K **OR**
- MTB* recipient?

* Eligible Means-tested Benefit (MTB) programs:
SSI; SNAP; TANF; WIC; Medicaid; Housing assistance

Yes (No Asset Questions on FAFSA)

No

Maximum Pell:
Auto -1,500 SAI - Other aid
types based on SAI.
No Asset Questions on FAFSA.

Maximum Pell:
Auto 0 SAI – Other aid types
based on SAI. No asset
questions on FAFSA.

Maximum Pell:
Other aid types based
on SAI.

Pell Amount Stays at Calculated Amount:
Other aid types based on SAI.

Minimum Pell:
Other aid types based
on SAI.

No Pell:
Other aid types based
on SAI.

Pell & other aid types

Pell award = 0?

Yes

No

Dependent Student

Single parent household with
AGI < 325% of poverty?

Yes

No

Two parent household with
AGI < 275% of poverty?

Yes

No

Independent Student

Single parent household with
AGI < 400% of poverty?

No

Two parent household with
AGI < 350% of poverty?

No

Not a parent with
AGI < 275% of poverty?

No



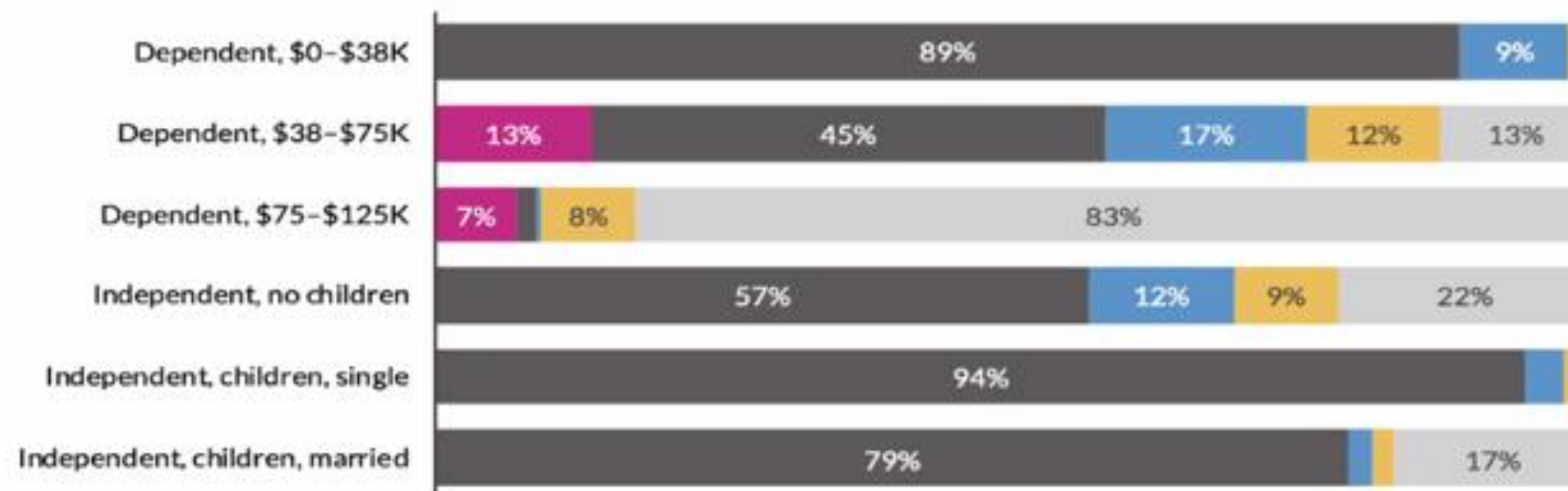
How Will the New Pell Grant Formula Affect Students?

Pell Grant Distributions Under New Formula

Projected Changes to Pell Distribution

Implementing new maximum and minimum Pell rules and sibling adjustment

■ Reduce award by more than \$500 ■ Within \$500 ■ Increase award by more than \$500
■ New Pell award ■ No Pell award (before or after changes)



Share of students who applied for federal financial aid

Source: Urban Institute analysis of 2016 National Postsecondary Student Aid Study data.

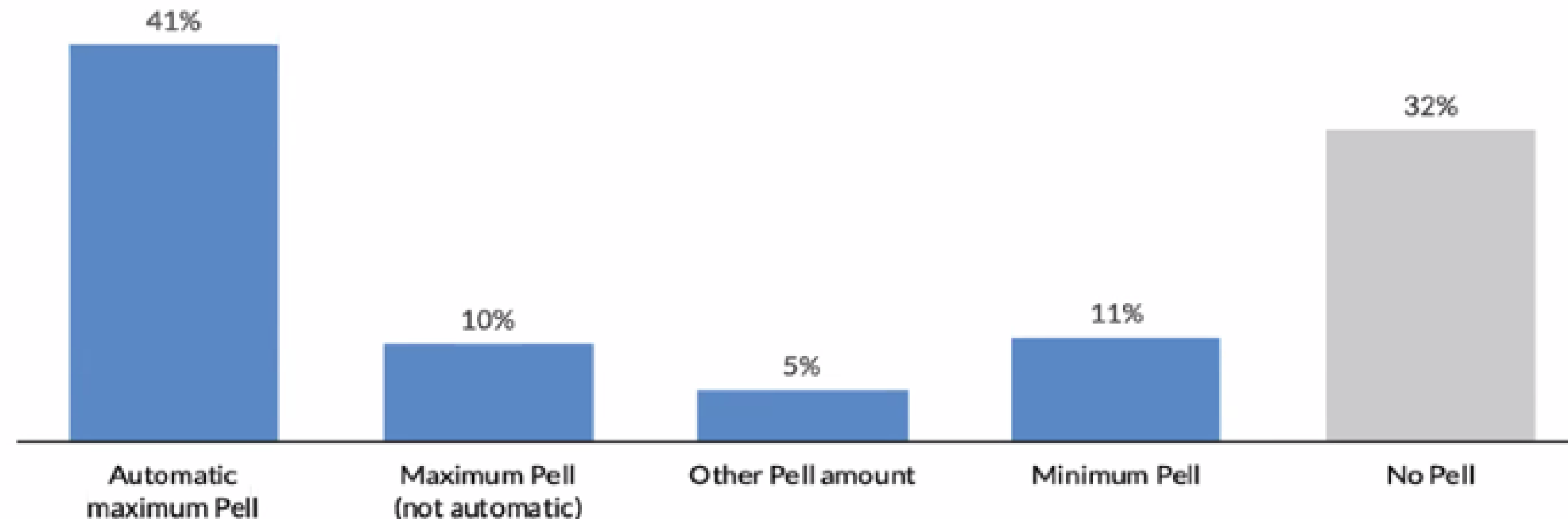
URBAN INSTITUTE

How Will the New Pell Grant Formula Affect Students?

How Students' Pell Grant Eligibility Will Be Determined

Most students who receive Pell will obtain the grant through automatic eligibility

Share of students who applied for federal financial aid



Source: Urban Institute analysis of 2016 National Postsecondary Student Aid Study data.

URBAN INSTITUTE

FAFSA Simplification Act Resources

- [NASFAA FAFSA Simplification Website](#)
- [NASFAA Legislative Changes Chart 2021](#)
- [NASFAA Detailed Summary of FAFSA Simplification Act](#)
- [NASFAA Timeline of Effective Dates](#)
- [Early Implementation of the FAFSA Simplification Act](#)
- [Consolidated Appropriations Act, 2021](#)
- [FAFSA Simplification Act of 2019](#)
- [Congressional Research Service Report – FAFSA Simplification Act – August 2, 2022](#)
- [Urban Institute – How Will the New Pell Grant Formula Affect Students](#)
- [AACRAO – Pell Grant Program Impacts](#)
- [NASFAA Student Aid Index \(SAI\) Modeling Tool](#)
- [2024-2025 Draft Pell Eligibility and SAI Guide](#)

FAFSA Changes Coming

- Beginning with 2024-2025 aid year
- Number of questions reduced from a maximum of 108 questions to 36 questions
- Changes to how and when assets are reported – Simplified Needs Test eliminated
- Cash support paid on student's behalf is removed
- Child support received eliminated as income and added as an asset
- Number is college removed
- Reduces types of excludable income considered in the SAI calculation
- New question added to collect Race and Ethnicity information
- Special Circumstance/PJ will affect Pell and SAI separately and sometimes differently
- Updates to PJ adjustments and dependency override rules
- New FAFSA bans charging a fee to complete the FAFSA

SAI Model Overview

SAI Model Overview

- **Export** data from your FAMS
- **Format** your data
- **Import** your data into tool
- **Analyze** your results



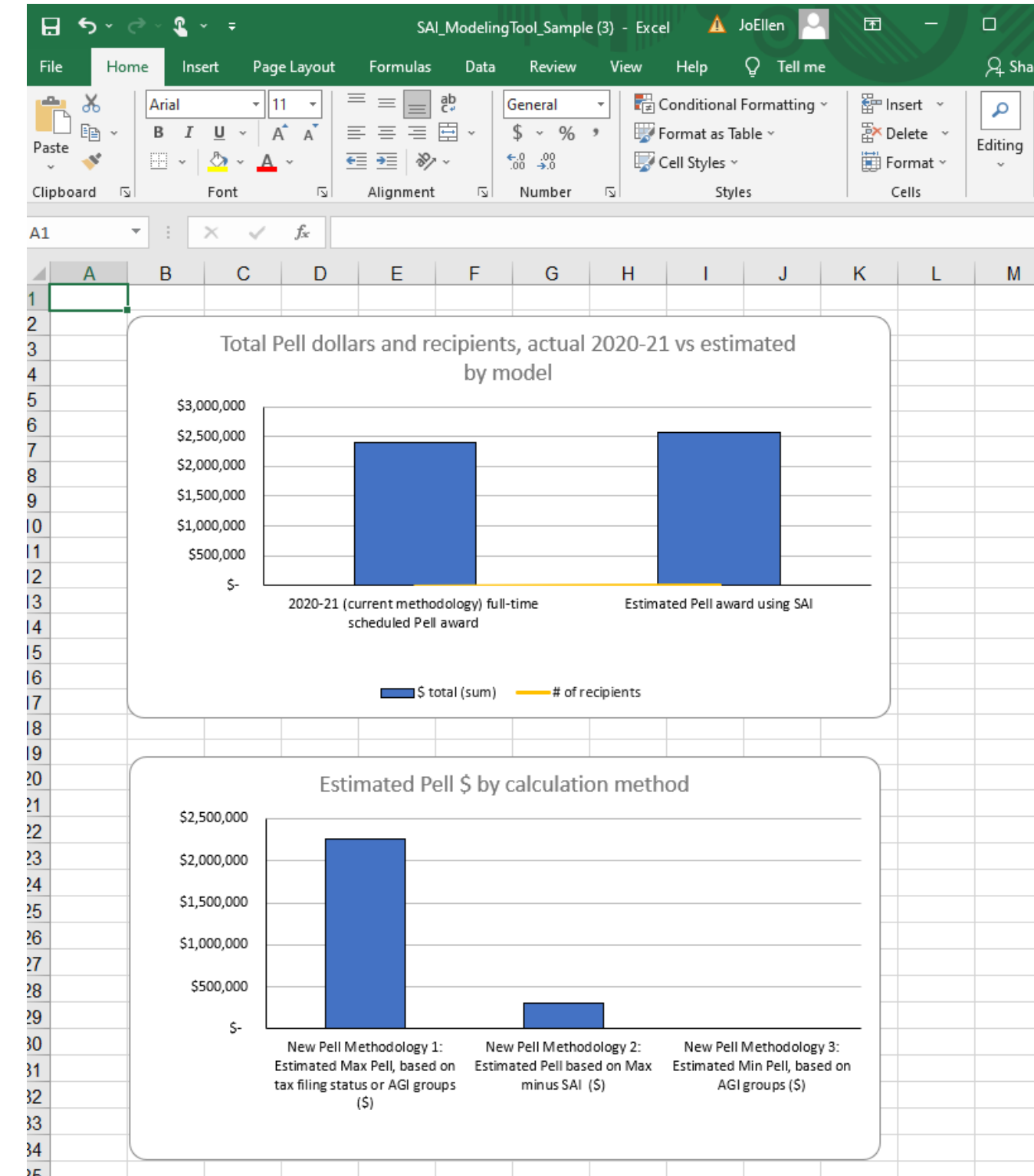
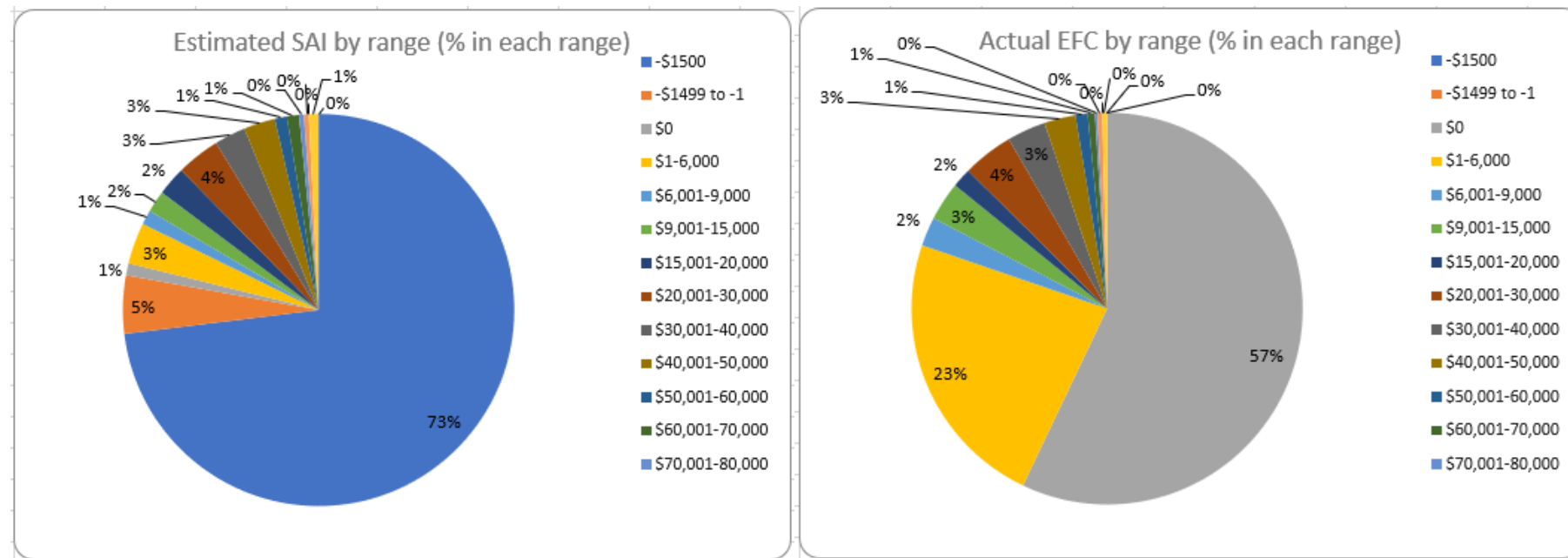
- https://www.nasfaa.org/fafsa_simplification
- https://www.nasfaa.org/SAI_modeling_tool

Use of the SAI Tool

- Participated in the pilot
- Inputted multiple groups of aid recipients into the tool
- Robust tool – high use of computer resources
- Caution –10,000 record limit – problems with going above
- Verified results - NASFAA team was very helpful
- **These are only Estimates** – Pay attention to the assumptions
- As ED provides guidance, NASFAA will be updating the SAI Tool to go from assumptions to actuals – Most recent version was released on February 2, 2023
- https://www.nasfaa.org/SAI_modeling_tool

Accessing the SAI Tool

- [SAI Modeling Tool Instructions](#)
- [SAI Modeling Tool Sample](#)
- [SAI Modeling Tool Excel Workbook](#)
- [SAI Modeling Tool User Group Interest Form](#)



Getting Data into the SAI Tool

ENTER DATA STARTING ON ROW 9								
The data will automatically be restructured into dependency groups in the 'Student Data' tab.								
FAFSA field	58	72	79	81	16	32	34	93
Variable codes	1 = Married/remarried,2 = Never married,3 = Divorced/separated,4 = Widowed,5 = Unmarried and both parents living together		1 = Already completed,2 = Will file,3 = Will not file	1 = Single,2= Married-filed joint return,3= Married-filed separate return,4= Head of household,5= Qualifying widow(er),6= Don't know	1 = Single,2 = Married/remarried,3 = Separated,4 = Divorced/widowed	1 = Already completed,2 = Will file,3 = Will not file	1 = Single,2= Married-filed joint return,3= Married-filed separate return,4= Head of household,5= Qualifying widow(er),6= Don't know	
Student ID (enter as text)	Marital status (parent)	# in Family/Household (include parents and dependents)	Tax Return Completion Status (parent)	Tax Filing Status (parent)	Marital status (student)	Tax Return Completion Status (student)	Tax Filing Status (student)	# in Family/Household (include spouse & dependents)
DO NOT USE								
1					6	1	1	1
2					6	1	1	4
3					6	1	1	1
4					6	1	1	1
5					6	2	1	2
6					6	3	1	1
7					6	3	3	6
8					6	2	3	6
9					6	1	2	1
10					6	4	3	6
11					6	1	3	6
12					6	1	1	4
13					6	1	1	4
14					6	4	3	6
15					6	1	1	4
16					6	3	1	4
17					6	4	1	4
18					6	3	3	6
19					6	1	1	1

Caution!
Be sure numbers
are not formatted
as text!

Analyzing the SAI Tool Data

Student Data Tab

Automatically Calculated –
Data not to be altered

43B	43E	43F	44A	44F	44G	44H	44I									43B	43E	43F	44A	44F	44G
Formula B EFC: Child supp	Formula B EFC: Combat pay	Formula B EFC: Coop	Formula B EFC: Tax- deferred	Formula B EFC: Military or clergy	Formula B EFC: Veterans non-	Formula B EFC: Other untaxed	Formula B EFC: Money received	Formula B EFC: total allowanc	Formula B EFC: state allowanc	Formula B EFC: IPA	Formula B EFC: EA	Formula B EFC: Contribut ion from	Formula B EFC: Contribut ion from	Formula B EFC	Formula C EFC: student total	Formula C EFC: Child supp	Formula C EFC: Combat pay	Formula C EFC: Coop	Formula C EFC: Tax- deferred	Formula C EFC: Military or clergy	Formula C EFC: Veterans non-
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11198.00	101.00	10640.00	0.00	-536.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10732.00	92.00	10640.00	0.00	-748.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	26144.00	321.00	17060.00	4000.00	2981.00	0.00	2981.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11327.00	79.00	10640.00	0.00	-1690.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	12000.00	0.00	10760.00	120.00	10640.00	0.00	620.00	0.00	620.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	1500.00	0.00	17075.00	15.00	17060.00	0.00	-7788.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10640.00	0.00	10640.00	0.00	-5320.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10640.00	0.00	10640.00	0.00	-5320.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
															0.00	0.00	0.00	0.00	0.00	0.00	0.00
															0.00	0.00	0.00	0.00	0.00	0.00	0.00
															0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10640.00	0.00	10640.00	0.00	-5320.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11269.00	73.00	10640.00	0.00	-1998.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
															28396.00	0.00	0.00	0.00	0.00	0.00	0.00
															0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10640.00	0.00	10640.00	0.00	-5320.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12876.00	184.00	10640.00	0.00	2772.00	0.00	2772.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11544.00	98.00	10640.00	0.00	-874.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11810.00	74.00	10640.00	0.00	-2192.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10736.00	22.00	10640.00	0.00	-4274.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
															36948.00	0.00	0.00	0.00	0.00	0.00	0.00
															30122.00	0.00	0.00	0.00	0.00	0.00	0.00

Analyzing the SAI Tool Data

Pell Compare Tab

Least Amount of Data
Greatest Impact

	2020-21 (current methodology) full-time scheduled Pell award	Estimated Pell award using SAI	New Pell Methodology 1: Estimated Max Pell, based on tax filing status or AGI groups (\$)	New Pell Methodology 2: Estimated Pell based on Max minus SAI (\$)	New Pell Methodology 3: Estimated Min Pell, based on AGI groups (\$)	Estimated # students elig for Pell (all methods) using new Pell methodology	Estimated # students elig for max Pell based on tax filing status or AGI groups using new Pell methodology	Estimated # students elig for Pell based on SAI using new Pell methodology	Estimated # students elig for min Pell based on AGI groups using new Pell methodology	2020-21 (current methodology) # students receiving Pell
\$ total (sum)	45620361.00	54318620.50	44852805.00	9371275.00	94540.50	9073.00	7069.00	1855.00	149.00	7784.00
Average received	4562.04	5986.84								
Median	6495.00	6345.00								
# of recipients	7784.00	9073								

2020-21 (current methodology) full-time scheduled Pell award

\$ total (sum)	45620361.00	54318620.50
Average received	4562.04	5986.84
Median	6495.00	6345.00
# of recipients	7784.00	9073

Student Data calcs SAI Pell summary data Pell compare SAI compare charts APA nev ...



Analyzing the SAI Tool Data

SAI Compare Tab

What ranges does your student population fall into?

EFC vs SAI
Compare

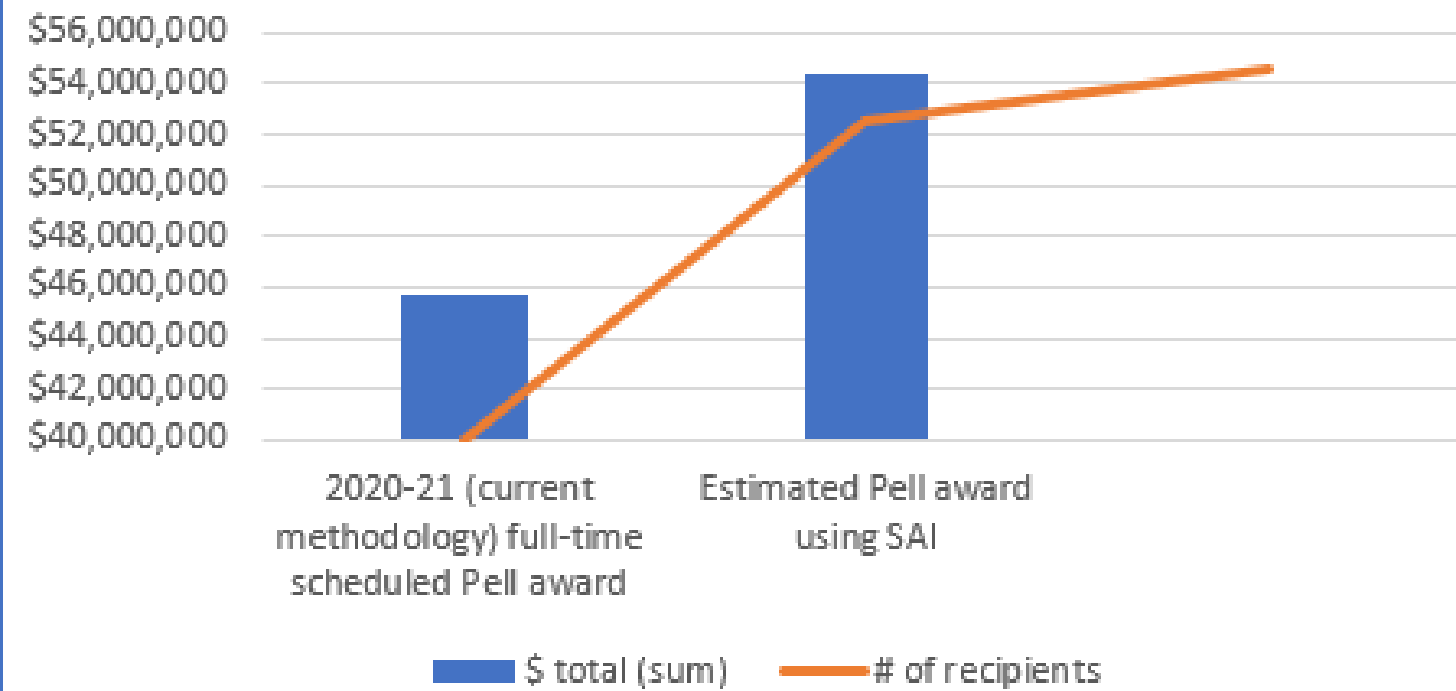
Estimated SAI (\$)	2020-21 (current methodology) EFC (\$)	Difference	Increased/ same	Decreased	2020-21 (current methodology) Auto zero flag	2020-21 (current methodology) Pell elig flag	Summary: estimated SAI	# in range				2020-21 (current methodology) ALL EFC \$	Estimated SAI (\$)
-1500.00	0.00	-1500.00		1.00	1.00	1.00	-\$1500	7437			Average	3444.31	1487.40
-1500.00	0.00	-1500.00		1.00	2.00	1.00	-\$1499 to -1	405			Median	0.00	-1500.00
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$0	253					
-1500.00	0.00	-1500.00		1.00	1.00	1.00	\$1-6,000	870					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$6,001-9,000	295					
-1500.00	0.00	-1500.00		1.00	1.00	1.00	\$9,001-15,000	291					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$15,001-20,00	143					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$20,001-30,00	129					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$30,001-40,00	71					
-1500.00	0.00	-1500.00		1.00	1.00	1.00	\$40,001-50,00	37					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$50,001-60,00	16					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$60,001-70,00	11					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$70,001-80,00	5					
-1500.00	0.00	-1500.00		1.00	1.00	1.00	\$80,001-90,00	1					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$90,001-100,0	4					
-1500.00	0.00	-1500.00		1.00	1.00	1.00	\$100,001+	20					
-1500.00	0.00	-1500.00		1.00	1.00	1.00							
-1500.00	0.00	-1500.00		1.00	1.00	1.00							
-1500.00	0.00	-1500.00		1.00	1.00	1.00							
-1500.00	0.00	-1500.00		1.00	1.00	1.00	Summary: actual EFC	# in range					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	-\$1500	0					
-1500.00	0.00	-1500.00		1.00	1.00	1.00	-\$1499 to -1	0					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$0	5788					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$1-6,000	2693					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$6,001-9,000	514					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$9,001-15,000	451					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$15,001-20,00	185					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$20,001-30,00	174					
-1500.00	0.00	-1500.00		1.00	1.00	1.00	\$30,001-40,00	87					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$40,001-50,00	43					
-1500.00	0.00	-1500.00		1.00	2.00	1.00	\$50,001-60,00	18					

Analyzing the SAI Tool Data

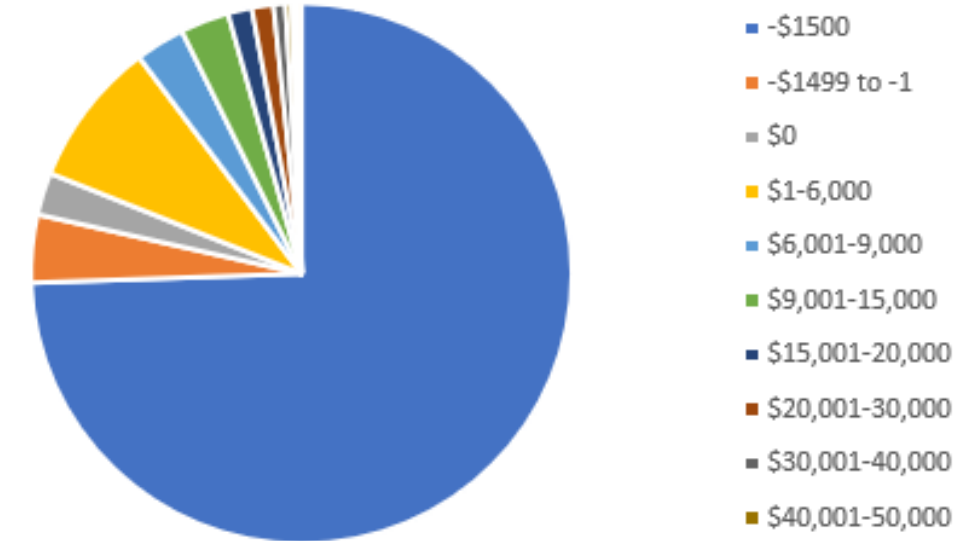
Charts Tab

Great Charts!

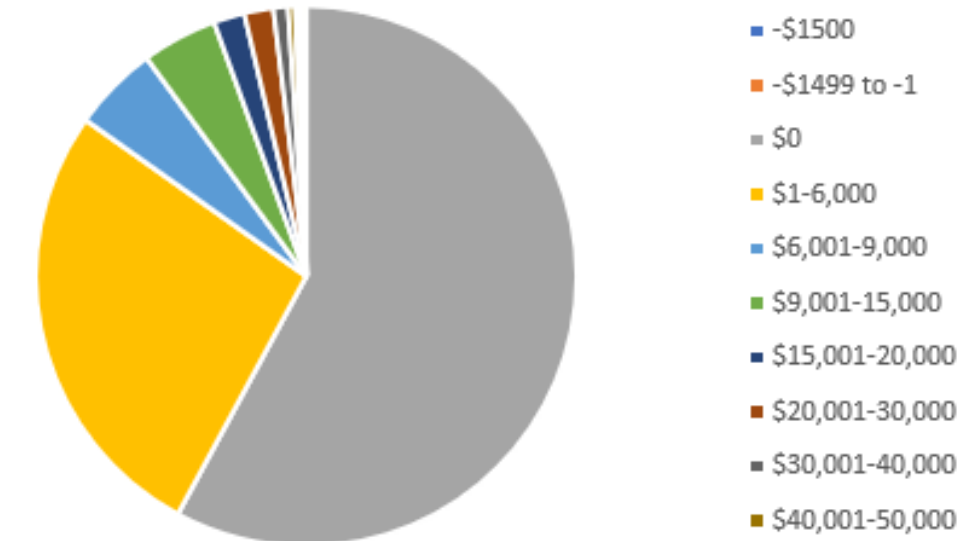
Total Pell dollars and recipients, actual 2020-21
vs estimated by model



Estimated SAI by range (# in each range)



Estimated EFC by range (# in each range)



Analyzing the SAI Tool Data

New Tables from Legislation Tab

Poverty guidelines for 2018		https://aspe.hhs.gov/2018-poverty-guidelines									
Persons in family/household		Poverty guideline									
	1	\$12,140									
	2	\$16,460									
	3	\$20,780									
	4	\$25,100									
	5	\$29,420									
	6	\$33,740									
	7	\$38,060									
	8	\$42,380									
For families/households with more than 8 persons, add \$4,320 for each additional person.											
	9	\$46,700									
	10	\$51,020									
	11	\$55,340									
	12	\$59,660									
	13	\$63,980									
	14	\$68,300									
	15	\$72,620									
	16	\$76,940									
Income Protection Allowance (to be adjusted for 2023–2024 and succeeding years)											
Dependent students - parent		Dependent students - student				Indep without dependents		Indep with dependents			
Family Size (including student)	\$	#	\$			status	\$	status	Family siz \$	status	Family siz \$
2	\$23,330		9410			single	14630	Single	2 \$43,920	Married	
3	29040					married	23460		3 54690		3 46140
4	35870								4 67520		4 56970
5	42320								5 79680		5 67230
6	49500								6 93180		6 78620
7	55090								7 103710		7 87500
8	60680								8 114240		8 96380

Assumptions made Based on Legislation and 2018 Poverty Guidelines

Assumptions made Based on
Legislation and 2018 Poverty
Guidelines

Case Studies

NASFAA – FAFSA SIMPLIFICATION CONVERSATION (1/25/2023)

What the Case Studies Tell Us

- Illustrate cases in which Pell will be lost due to the number in college methodology change
- Illustrate cases in which increases in Pell eligibility due to the methodology change (IPA increase)
- Unusual occurrences – max Pell eligibility created based on parent income and high student income is not considered
- Lower SAI based on change exclusion of retirement contributions not on the tax return
- Need to watch for who qualifies for SNT – low income; high asset (schedules filed?)

Budget Implications

NASFAA – FAFSA SIMPLIFICATION CONVERSATION (1/25/2023)

Budgetary Challenges for Institutions



Increases in Pell Recipients / SAI

- Institutional funding tied to Pell eligibility
- State funding?



Decreases in Pell Recipients / SAI

- Managing retention and expectations
- Institutional funding as a percentage of need
- State funding?



Other Impacts on Institutional Funding

- Impact of return of small businesses and family farms
- Impact on campus-based aid dollars (i.e., SEOG)
- COA (housing/food) requirements

Policy Implications

NASFAA – FAFSA SIMPLIFICATION CONVERSATION (1/25/2023)

Policy Challenges for Institutions

- Use of professional judgment and number in college
 - ED Guidance?
- Reporting family size
 - Conflicting information with tax filing
 - Direct Data Exchange (DDX) – masked data
- How to use the negative SAI?
- If keep institutional funding level – are unsubsidized loans part of the package (i.e. if federal need falls below institutional need)?
- Will students be able to work on campus?
- Summary of changes to educate across campus

System Implications

NASFAA – FAFSA SIMPLIFICATION CONVERSATION (1/25/2023)

Systems Planning Challenges for Institutions

- Need time to customize and program
- Need time to test and train staff
- Validity in using Net Price Calculators
- Where else on campus is Pell eligibility used?
 - Implications – eligibility for support services (emergency aid, storage, food insecurity, housing insecurity)
 - Institutional Research - Longitudinal data validity

Important Timelines

NASFAA – FAFSA SIMPLIFICATION CONVERSATION (1/25/2023)

IMPORTANT TIMELINES

- With the significant changes to the 2024-2025 FAFSA Processing, FSA plans to provide additional details in the coming months. Some important dates to remember are:
 - ISIR Record Layout
 - Rough draft December 2022
 - Draft Spring of 2023
 - Final Summer 2023
 - FAFSA Specifications for Software Developers
 - Draft Spring 2023
 - Final Summer 2023
 - Summary of Changes for Application Processing
 - Draft Spring 2023
 - Final Summer 2023
 - Test ISIRs: Late Summer 2023

Using the SAI Tool

Houston Community College

POPULATIONS EXAMINED SEPARATELY

- 2021-2022 – 10,000 Random Records
- 2020-2021 – 9,000 Pell Grant Recipients
- 2020-2021 – 9,000 Non-Pell Aid Recipients
- 2021-2022 – 9,000 Pell Grant Recipients
- 2021-2022 – 9,000 Non-Pell Aid Recipients

Houston Community College Results

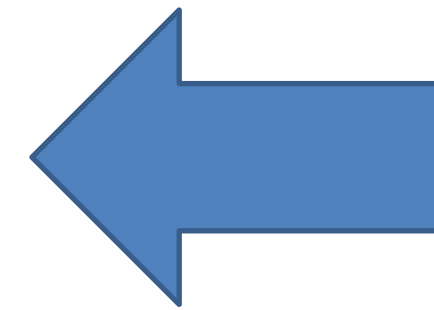
Estimated SAI (\$)	2020-21 (current methodology) EFC (\$)	Difference
9317	205734	-196417
7110	99519	-92409
305726	363228	-57502
-1500	55624	-57124
-1500	31169	-32669
-1500	24020	-25520
42545	67599	-25054
2890	23083	-20193
10136	26723	-16587
-1500	12739	-14239
1762	15655	-13893
3304	17193	-13889
55527	68272	-12745
9989	22040	-12051
555	11670	-11115
114806	125846	-11040
7880	18537	-10657
30211	40725	-10514
8864	19063	-10199
17728	27759	-10031
-1500	8473	-9973
7119	17067	-9948
28671	38470	-9799
33877	43591	-9714
14760	24464	-9704
5039	14511	-9472
31215	40588	-9373
17400	26196	-8796
-1500	7177	-8677
6706	15153	-8447
8440	16772	-8332
22166	30421	-8255
6693	14905	-8212
-1500	6585	-8085
7363	15299	-7936
-931	6992	-7923

ALL
0 EFC
New Pell
Pell up
Pell down
Lost Pell
NonPell EFC

- Copied from SAI Compare Tab (cannot sort in the Tool) and pasted to a new Excel Spreadsheet
- Sorted and Broke Down the Results:
 - 0 EFC
 - Pell EFC
 - Pell went Up
 - Pell went Down
 - Gained Pell
 - Lost Pell
 - Non-Pell – Did not Change

Houston Community College Results

SAI WENT UP SIGNIFICANTLY												
Student ID	Estimated SAI (\$)	2020-21 (current methodology) EFC (\$)	Difference	Dependency	Marital	# in Household	# in College	Student AGI	Child Support Paid	Student Exclusions	Parent AGI	Parent Exclusions
1	4586	662	3924	Independent	S-Single	1	1	25,699	11,497			
2	9596	596	9000	Dependent	P-Married	6	1	4,535			105,610	45,217 (combat)
3	2989	2462	527	Dependent	P-Single-HOH	3	1	7,628			56,533	
4	7312	4086	3226	Independent	S-Single	1	1	34,342		10000 (CS Paid)		
5	9120	4824	4296	Dependent	P-Single-HOH	4	3	5,501			91,932	
6	7565	5326	2239	Dependent	P-Single-HOH	4	3	12,330			70,839	
7	7050	5757	1293	Dependent	P-Married	5	3	0			101,600	
8	22134	16857	5277	Dependent	P-Married	4	2	0			143,823	3,000 (Ed. Cr.)
9	22798	16871	5927	Dependent	P-Married	7	2	7,058			159,219	
10	31015	19485	11530	Dependent	P-Married	4	2	0			121,186	
11	17471	13020	4451	Dependent	P-Married	5	2	0			119,127	3,000 (Ed. Cr.)
12	90121	46824	43297	Dependent	P-Married	4	2	8,264			279,635	
SAI WENT DOWN SIGNIFICANTLY												
Student ID	Estimated SAI (\$)	2020-21 (current methodology) EFC (\$)	Difference	Dependency	Marital	# in Household	# in College	Student AGI	Student Untaxed	Student Exclusions	Parent AGI	Parent Exclusions
13	707	1816	-1109	Dependent	P-Single	2	1	8,113			33,410	
14	0	1822	-1822	Independent	S-Single	1	1	16,247				
15	0	1840	-1840	Independent	S-Single	1	1	16,353				
16	0	1867	-1867	Independent	S-Single	1	1	16,416				
17	0	1879	-1879	Independent	S-Single	1	1	16,442				
18	0	1880	-1880	Independent	S-Single	1	1	16,451				
19	0	1886	-1886	Independent	S-Single	1	1	16,465				
20	0	1888	-1888	Independent	S-Single	1	1	16,000				
21	0	1895	-1895	Independent	S-Single	1	1	16,482				
22	0	3158	-3158	Independent	S-Single	1	1	20,071				
23	0	3160	-3160	Independent	S-Single	1	1	19,593				
24	0	5384	-5384	Dependent	P-Single-HOH	2	1	0			32,919	
25	2629	9661	-7032	Dependent	P-Single-HOH	2	1	0			61,414	
26	3340	13212	-9872	Dependent	P-Married	3	1	0			74,470	
27	3226	9723	-6497	Dependent	P-Married	4	1	0			79,238	
28	12485	23606	-11121	Dependent	P-Married	4	1	0			104,270	



Identified data elements that may have caused significant changes up or down

Houston Community College Results - Random

2021-2022 Data – 10,000 Random Records

7,784 Pell Recipients using EFC – Average award of \$4,562

9,073 Pell Recipients using SAI – Average award of \$5,986

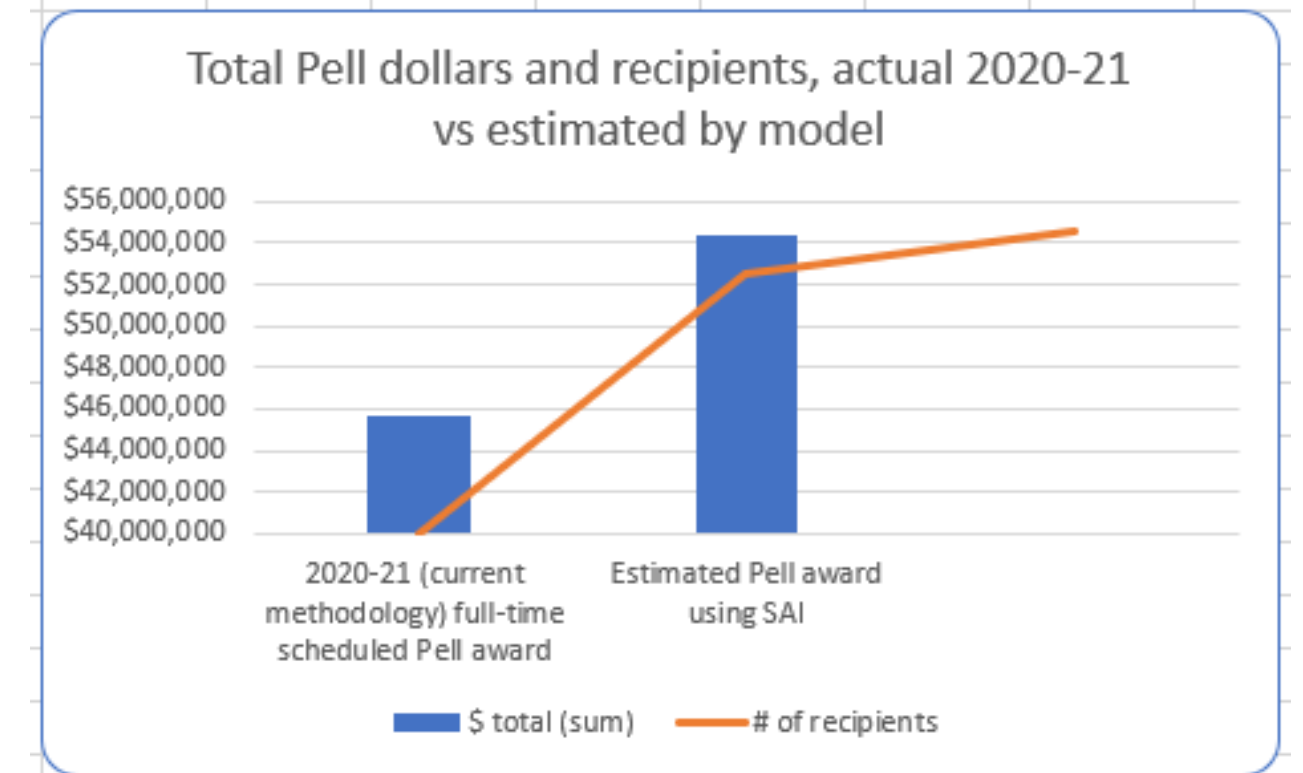
16% Increase in Pell Recipients

- 5,776 Students have 0 EFC and SAI is calculated as **-1,500**
- 5 Students have 0 EFC and SAI is calculated at **-1** to **-1,499**
- 3 Student have 0 EFC and SAI is calculated at 0
- 0 Students have a 0 EFC and SAI is calculated at 1 to 5,846
- 1 Students have a 0 EFC and SAI is calculated at 5,846 to 28,006
- 1,638 Students have a 1 – 5,846 EFC and SAI is calculated at **-1,500**
- 372 Students have a 1 – 5,846 EFC and SAI is calculated at **-1** to **-1,499**
- 230 Student has a 1 – 5,846 EFC and SAI is calculated at 0
- 395 Students have a 1 to 5,846 EFC and SAI is calculated at 1 to 5,846 (SAI went down)
- 8 Students have a 1 to 5,846 EFC and SAI is calculated at 1 to 5,846 (SAI went up)
- 11 Students have a 1 to 5,846 EFC and SAI is calculated greater than 5,846
- 71 Students have an EFC greater than 5,846 and SAI is calculated at 0 to **-1,500**
- 492 Students have an EFC greater than 5,846 and SAI is calculated at 1 to 5,846
- 833 Non-Pell Students have an SAI less than EFC
- 165 Non-Pell Students have an SAI greater than EFC

Total Average EFC = 3,444

Total Average SAI = 1,487

THESE ARE ONLY ESTIMATES



Houston Community College Results – 2021-2022

2021-2022 Data – 9,000 Pell Recipients Only

9,000 Pell Recipients using EFC – Average award of \$6,040

8,998 Pell Recipients using SAI – Average award of \$6,259

Average Award increase of 4%

2 Students lose Pell Eligibility due to number in college

- 7,046 Students have 0 EFC and SAI is calculated as **-1,500**
- 3 Students have 0 EFC and SAI is calculated at **-1** to **-1,499**
- 6 Student have 0 EFC and SAI is calculated at 0
- 1 Students have a 0 EFC and SAI is calculated at 1 to 5,846
- 1 Students have a 0 EFC and SAI is calculated at 5,846 to 17,182
- 1,261 Students have a 1 – 5,846 EFC and SAI is calculated at **-1** to **-1,500**
- 383 Students have a 1 – 5,846 EFC and SAI is calculated at 0
- 290 Students have a 1 to 5,846 EFC and SAI is calculated at 1 to 5,846 (SAI went down)
- 7 Students have a 1 to 5,846 EFC and SAI is calculated at 1 to 5,846 (SAI went up)
- 2 Student have a 1 to 5,846 EFC and SAI greater than 5,846 – Lost Pell

Total Average EFC = 455

Total Average SAI = **-1,275**

THESE ARE ONLY ESTIMATES

2021-2022 Data – 9,000 Non-Pell Students – EFC >5846

0 Pell Recipients using EFC – Average award of \$0

3,547 Pell Recipients using SAI – Average award of \$1,795

40% Increase in Pell Grant Recipients

- 423 Students have an EFC greater than 5,846 and SAI is calculated at 0 to -1,500
- 2,298 Students have an EFC greater than 5,846 and SAI is calculated at 1 to 5,846
- 5,160 Students have an SAI less than EFC
- 1,119 Students have an SAI greater than EFC

Total Average EFC = 19,040

Total Average SAI = 16,502

Houston Community College Results – 2020-2021

2020-2021 Data – 9,000 Pell Recipients Only

9,000 Pell Recipients using EFC – Average award of \$5,773

8,997 Pell Recipients using SAI – Average award of \$6,272

Average Award increase of 9%

3 Students lose Pell Eligibility due to number in college

- 6,453 Students have 0 EFC and SAI is calculated as **-1,500**
- 4 Students have 0 EFC and SAI is calculated at **-1** to **-1,499**
- 6 Student have 0 EFC and SAI is calculated at 0
- 1 Students have a 0 EFC and SAI is calculated at 1 to 5,846
- 0 Students have a 0 EFC and SAI is calculated at 5,846 to 17,182
- 1,993 Students have a 1 – 5,846 EFC and SAI is calculated at **-1** to **-1,500**
- 245 Students have a 1 – 5,846 EFC and SAI is calculated at 0
- 288 Students have a 1 to 5,846 EFC and SAI is calculated at 1 to 5,846 (SAI went down)
- 5 Students have a 1 to 5,846 EFC and SAI is calculated at 1 to 5,846 (SAI went up)
- 5 Students have a 1 to 5,846 EFC and SAI is calculated greater than 5,846 however only 3 of 5 will lose Pell as a result of the new Pell Calculated using a percentage of the Poverty Guidelines

Total Average EFC = 572

Total Average SAI = **-1,296**

THESE ARE ONLY ESTIMATES

2020-2021 Data – 9,000 Non-Pell Students – EFC >5846

0 Pell Recipients using EFC – Average award of \$0

3,772 Pell Recipients using SAI – Average award of \$2,630

42% Increase in Pell Grant Recipients

- 440 Students have an EFC greater than 5,846 and SAI is calculated at 0 to **-1,500**
- 2,579 Students have an EFC greater than 5,846 and SAI is calculated at 1 to 5,846
- 4,898 Students have an SAI less than EFC
- 1,083 Students have an SAI greater than EFC

Total Average EFC = 18,504

Total Average SAI = 16,551

Houston Community College – Next Steps

- Educate Financial Aid Team – Upcoming Changes and Impact
- Communicate to Executive Leadership
- Coordinator of Communications and Social Media – Develop Plan
 - PowerPoint Presentations
 - Social Media Posts
 - Flyers
 - Virtual Backgrounds
 - Email Communications
- Review Financial Implications to FA Budget – Promise Program and Impact Scholarships
- Communications to the Public/Houston before our competitors – Next Summer

Any Questions?



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