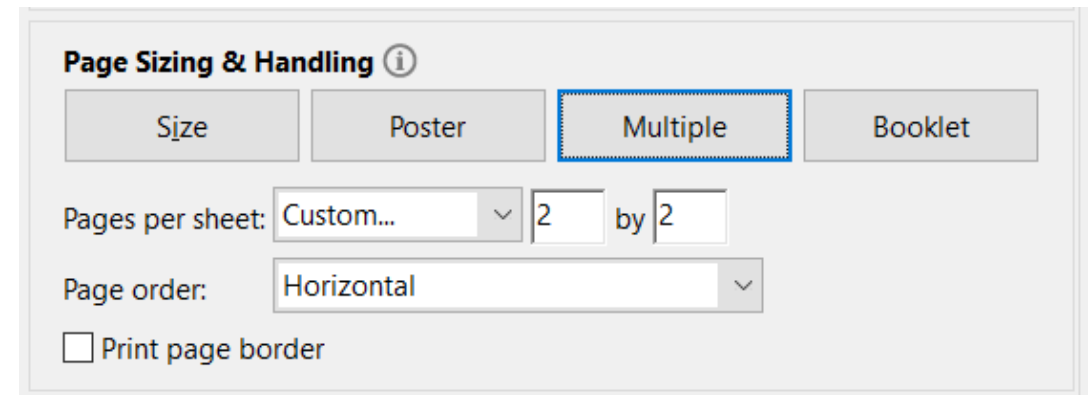


PRINTING MULTIPLE SLIDES PER PAGE

From Adobe Acrobat or Reader:

1. Select *File*, then *Print* or use the printer icon.
2. Select *Multiple* under **Page Sizing & Handling**.
3. Choose number of pages (slides per page) and page order (slide orientation).



This presentation was reviewed for accessibility in its original format. To preserve accessibility, please do not redistribute electronic PDFs saved from the "Print to PDF" function when used to print hard copies of multiple slides per page.

EDEXPRESS: YOUR SOLUTION FOR ACCESSING FTI

Wednesday Webinar Series

Casey Wade | Training Officer
U.S. Department of Education

February 28, 2024



Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

AGENDA

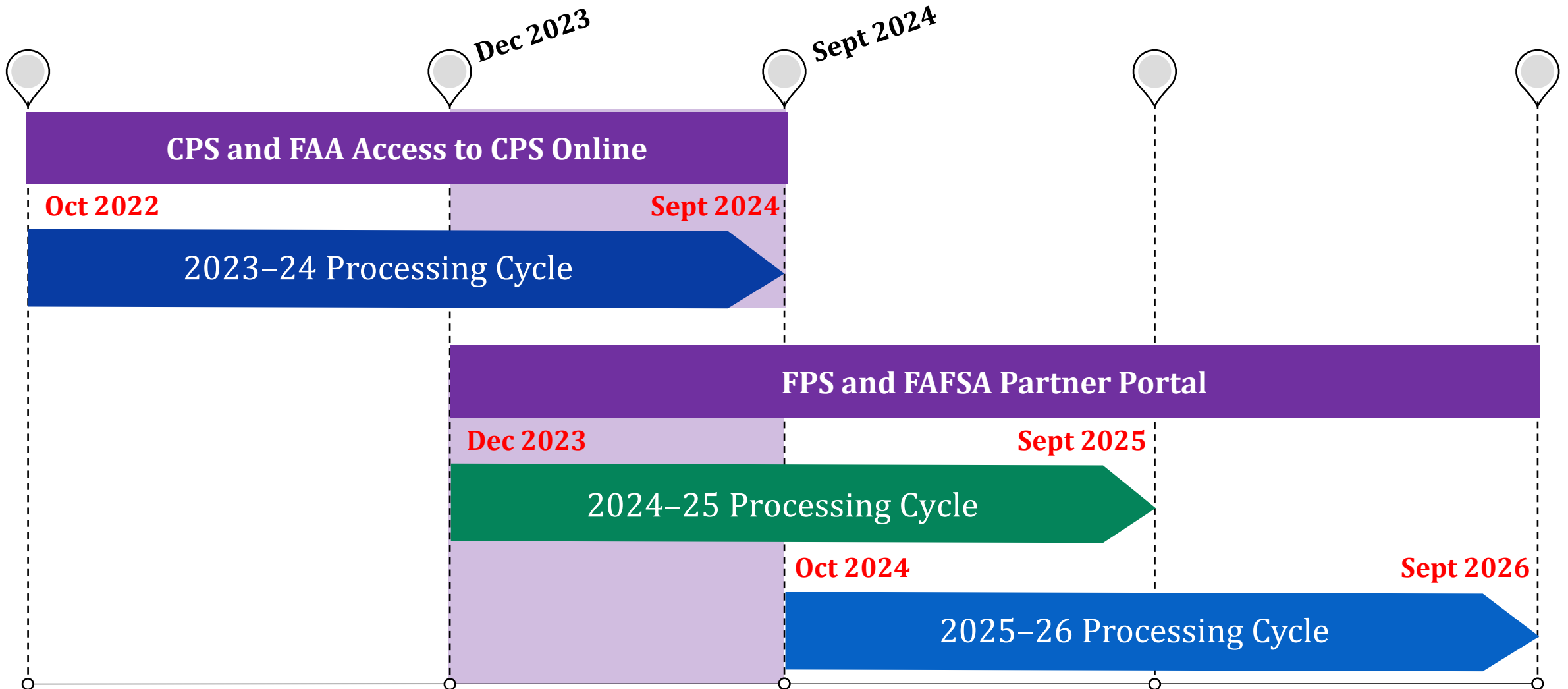
1. System Changes and EDEXpress Overview
2. Protecting Federal Tax Information Data
3. 2024-25 EDEXpress Version 1.0 Demonstration
4. References and Resources
5. Q&A

SYSTEM CHANGES AND EDEXPRESS OVERVIEW

SYSTEM CHANGES

- FAFSA Processing System (FPS) will replace Central Processing System (CPS)
- FAFSA Partner Portal will replace FAA Access to CPS Online with a link available within Partner Connect
- Institutions will need a separate Student Aid Internet Gateway (SAIG) mailbox and upgraded SAIG software for Federal Tax Information (FTI) [EA GENERAL-23-79](#)

FAFSA® PROCESSING TIMELINES



STUDENT AID INTERNET GATEWAY SOFTWARE UPGRADE

- Must install to receive 2024-25 ISIRs
- Use to access ISIRs for all award years
- Includes increased security for authentication of FTI-SAIG authorized users



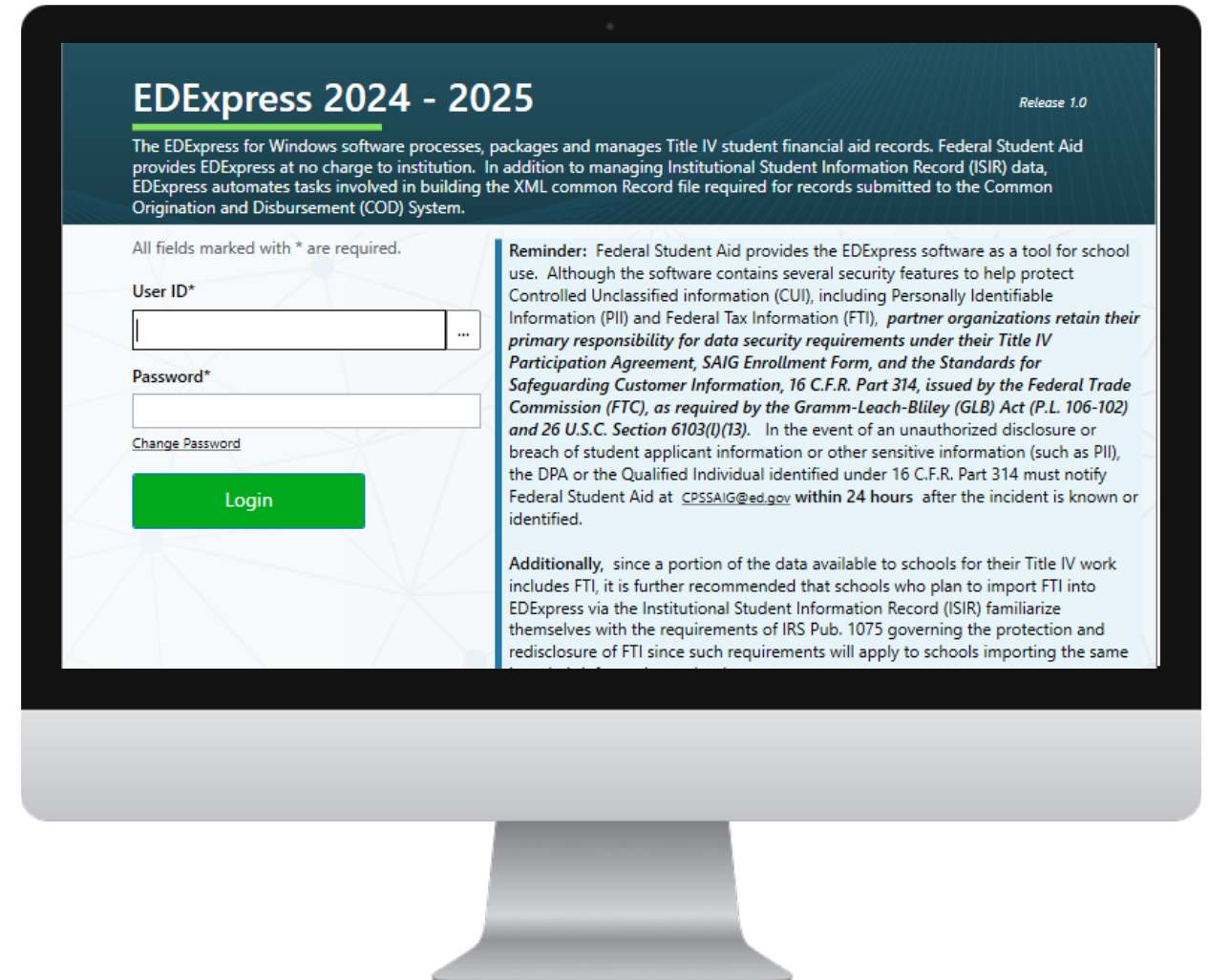
FAA ACCESS → FAFSA® PARTNER PORTAL

- Cannot submit original/renewal applications on behalf of applicants
- Can still make corrections, professional judgments, and dependency overrides
- Will still provide Identify Verification results
- Will display any data fields manually entered by an applicant, but will not display Federal Tax Information (FTI)

EDEXPRESS FOR WINDOWS

Department-provided financial aid management software

Can use to view and print ISIRs and Federal Tax Information (FTI) if you do not have your own system



EDEXPRESS SOFTWARE



RELEASE 1.0

- Setup
- Application Processing
- Packaging

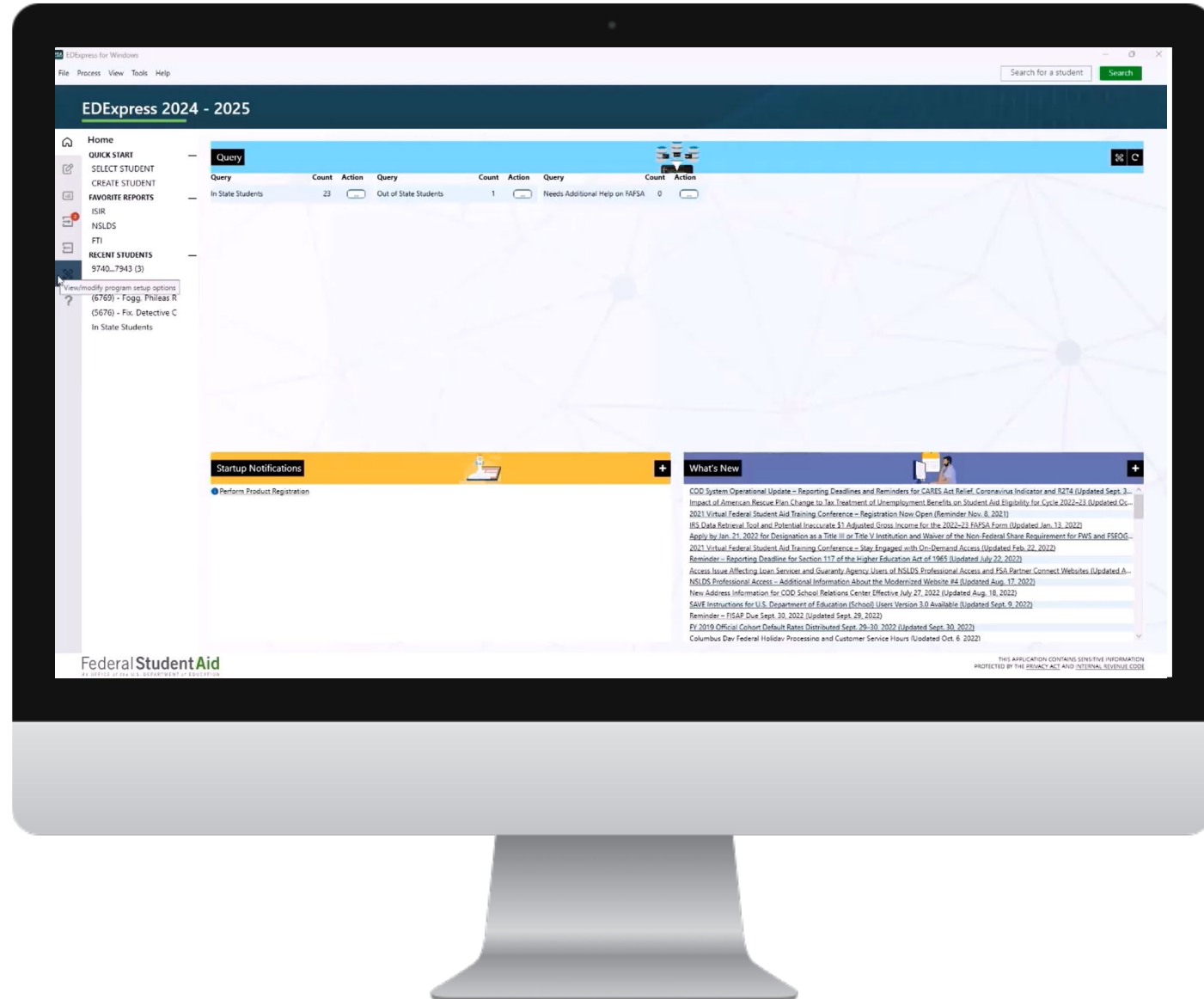
RELEASE 2.0

- Pell
- TEACH Grant
- Direct Loans

RELEASE 3.0

- Campus Based
- Direct Loan Tools

EDEXPRESS VIDEO: INTRODUCTION AND NAVIGATION



PROTECTING FEDERAL TAX INFORMATION

FAFSA DATA VS. FTI DATA



FAFSA DATA

All data and information provided by a contributor (including parent(s) or spouse) on the FAFSA.

- Personally-Identifiable Information (PII) (e.g., name, SSN, address, etc.)
- Dependency status, other financial information (non-FTI), and college information
- Includes data that is derived from the FAFSA (e.g., EFC/ SAI, Pell eligibility)



FTI DATA

Includes federal tax information for any contributor on the FAFSA (i.e., applicant, parent(s), and spouse).

- Any data provided by the IRS to the Department
- Includes IRS response codes
- Includes the existence or non-existence of FTI

AUTHORIZED PERSON

[IRC § 6103\(l\)\(13\)\(E\)](#)

ED officer, employee, or contractor specifically authorized and designated by the Secretary for purposes of:

- Income-Driven Repayment (IDR) applications/recertifications
- Total and Permanent Disability (TPD) loan discharges
- Federal student financial aid



SCHOOL USE OF FAFSA DATA

Schools may use FAFSA data for limited purposes



FINANCIAL AID

- For application, award, administration of financial aid to the applicant



RESEARCH PURPOSES

- To promote college attendance, persistence, and completion
- Cannot use FTI
- Research cannot release PII



SHARE WITH OTHER ENTITIES

- Must first obtain applicant's explicit written consent
- Cannot share FTI at all

[HEA 20 USC 1090\(a\)\(3\)\(C\)](#) – See p. 630

SAFEGUARDING FTI

[IRC § 6103\(l\)\(13\)\(D\)\(iii\)](#); [NIST Special Publication 800-171](#)

- Maintain appropriate receipt, handling, marking, and safeguard of CUI data
- IHE and TPS should use NIST SP 800-171 guidance to effectively safeguard FTI
- Watch for upcoming updates to Program Participation Agreements (PPA), Student Aid Internet Gateway (SAIG)



Violations of Section 6103(l) of the IRC may carry criminal and civil penalties

SAFEGUARDING FTI- CUI MARKINGS

- ❑ Must retain CUI//SP-TAX labeling of FTI wherever data is stored
- ❑ Labels must be present when FTI is inspected or used
- ❑ Federal aid applicant's ISIR will include (2) FTI label fields:
 - FTI Label Start at the **beginning**: 'CUI//SP-TAX'
 - FTI Label End near the **end**: 'CUI//SP-TAX'
 - OR-
 - It may accompany each individual FTI data element

CUI MARKINGS- EXAMPLES

#	FAFSA #	Start	End	Length	Field Name	Valid Content
Student FTI-M Information						
934	N/A	6999	7048	50	Filler	For Federal Student Aid use only
935	N/A	7049	7059	11	FTI label start	Exact string: "CUI//SP-TAX"
936	N/A	7060	7063	4	Returned tax year	Year in format: "CCYY"
937	N/A	7064	7064	1	Filing status code	1 - Single 2 - Married-Filed Joint Return 3 - Married-Filed Separate Return 4 - Head of Household 5 - Qualifying Widow(er)
938	N/A	7065	7073	9	Adjusted Gross Income	-999999999 - 999999999 <Blank>
939	N/A	7074	7075	2	Number of exemptions	0 - 99
940	N/A	7076	7077	2	Number of dependents	0 - 99
941	N/A	7078	7088	11	Total income earned amount	0000000000 - 9999999999 <Blank>
1013	N/A	7476	7476	1	Schedule F indicator	1 - Yes 2 - No
1014	N/A	7477	7477	1	Schedule H indicator	1 - Yes 2 - No
1015	N/A	7478	7480	3	IRS response code	Possible values: 200, 203, 212, 214
1016	N/A	7481	7491	11	FTI label end	Exact string: "CUI//SP-TAX"
1017	N/A	7492	7541	50	Filler	FSA Use Only
1018	N/A	7542	7556	15	Student total income	-99999999999 - 99999999999
1019	N/A	7557	7571	15	Parent total income	-99999999999 - 99999999999
1020	N/A	7572	7586	15	FISAP total income	-99999999999 - 99999999999
1021	N/A	7587	7636	50	Filler	FSA Use Only
			7636		Total Field Length	



FTI AND SCHOOL RESPONSIBILITY



RESPONSIBILITY OF SCHOOL

- Read and sign SAIG enrollment agreement (Fall 2023)
- Install (upgraded) SAIG software
- Maintain CUI Markings



WHO SHOULD HAVE ACCESS

- **Only** those with an **official** need (for purposes of determining eligibility for and amount of federal, state, and institutional aid) under *Title IV* of the HEA



SAFEGUARDING FTI IN YOUR SYSTEM

- Maintain appropriate receipt, handling, marking, and safeguarding of CUI data
- Establish appropriate cybersecurity safeguard

RISKS OF MISUSING FTI

IRC §7213

Willful unauthorized **disclosure** of tax return or return information

Felony; fine up to \$5,000, or imprisonment up to 5 years, or both, plus the costs of prosecution

IRC §7213A

Willful unauthorized **inspection** of tax return or return information

Fine up to \$1,000, imprisonment up to 1 year, or both, plus the costs of prosecution

IRC §7431

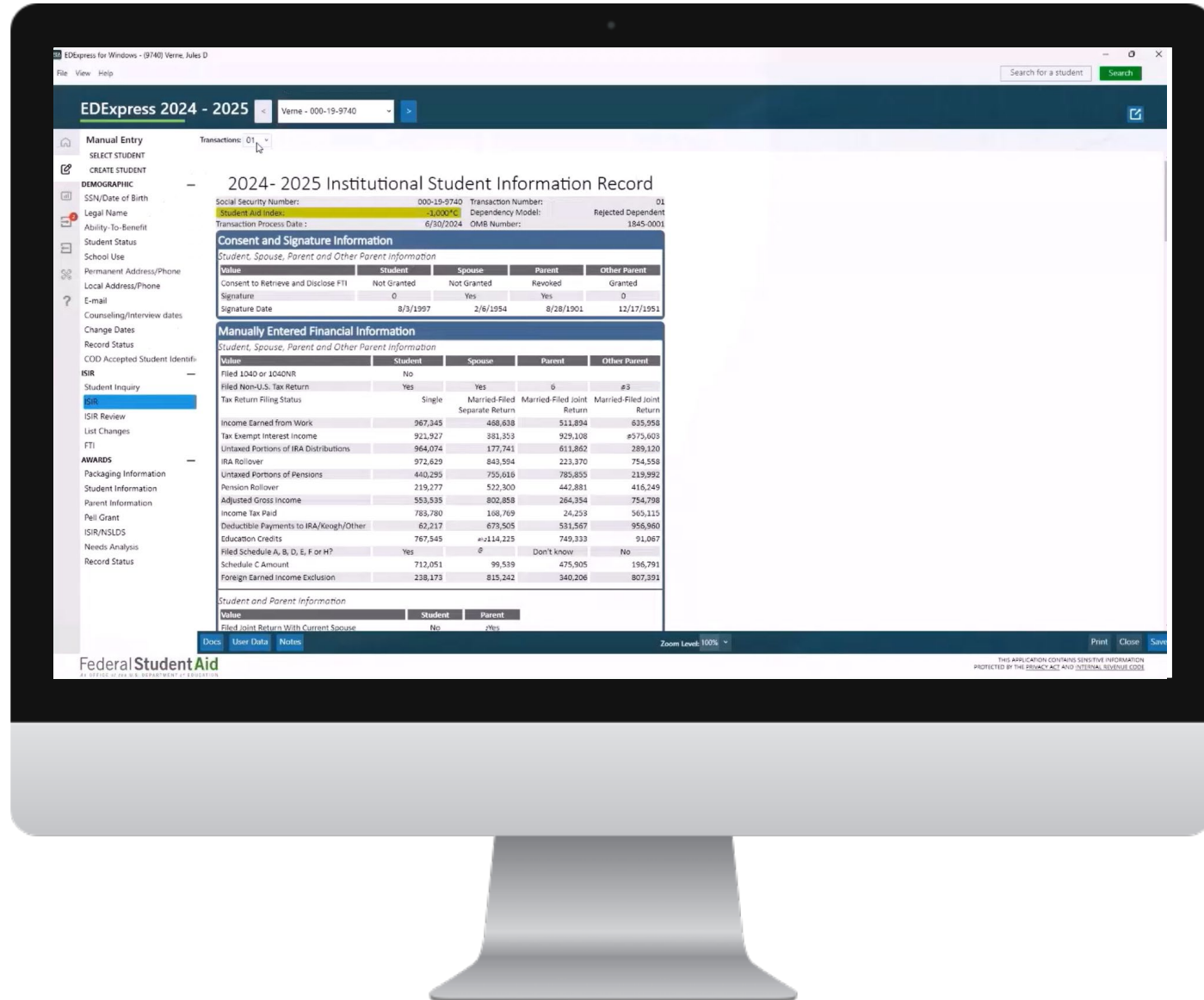
Knowing or negligent inspection or disclosure of tax return or return information by officer or employee in violation of any provision of IRC §6103

Taxpayer may bring a civil action for damages against officer or employee

FTI received via an ISIR in 2024-25 FAFSA cycle is considered FTI data

EDEXPRESS VIDEO

EDEXPRESS VIDEO: VIEWING ISIR RECORDS AND FTI



MAKING A CORRECTION

STUDENT		
FIELD	ORIGINAL VALUE	CORRECTED VALUE
First Name*	[VALUE]	<input type="text"/> <input type="checkbox"/> Correct to blank
Middle Name	[VALUE]	<input type="text"/> <input type="checkbox"/> Correct to blank
Last Name*	[VALUE]	<input type="text"/> <input type="checkbox"/> Correct to blank
Suffix	[VALUE]	<input type="text"/> <input type="checkbox"/> Correct to blank
Date of Birth*	[VALUE]	<input type="text"/> <input type="checkbox"/> Correct to blank
SSN*	[VALUE]	<input type="text"/> <input type="checkbox"/> Correct to blank
ITIN	[VALUE]	<input type="text"/> <input type="checkbox"/> Correct to blank
Mobile Number	[VALUE]	<input type="text"/> <input type="checkbox"/> Correct to blank
Email Address*	[VALUE]	<input type="text"/> <input type="checkbox"/> Correct to blank

RESOURCES

RESOURCES

- [EA ID: General-23-34](#) – Access and Use of FTI for FSA Programs Beginning with the 2024–25 FAFSA Processing Cycle
- [EA ID: GENERAL-23-40](#) – SAIG Software Upgrade for FTI Data Transmission – Preliminary Information for SAIG Software Users
- [EA ID: GENERAL-23-79](#) – Updated SAIG Enrollment Agreement Available October 23, 2023

RESOURCES CONTINUED

- [EDExpress 2024–25 Modernization Part 1 \(Video\)](#)
- [NIST Special Publication 800-171](#) – Protecting Controlled Unclassified Information in Nonfederal Systems and Organizations
- [2023 FSA Training Conference Session B010](#) – Data Use and Considerations Under the *FUTURE Act* and *FAFSA Simplification Act*

OTHER RESOURCES

1

Knowledge Center

[Knowledge Center Homepage](#)

Subscribe for daily or weekly email updates.

2

FSA Training Center

FSAttraining.ed.gov

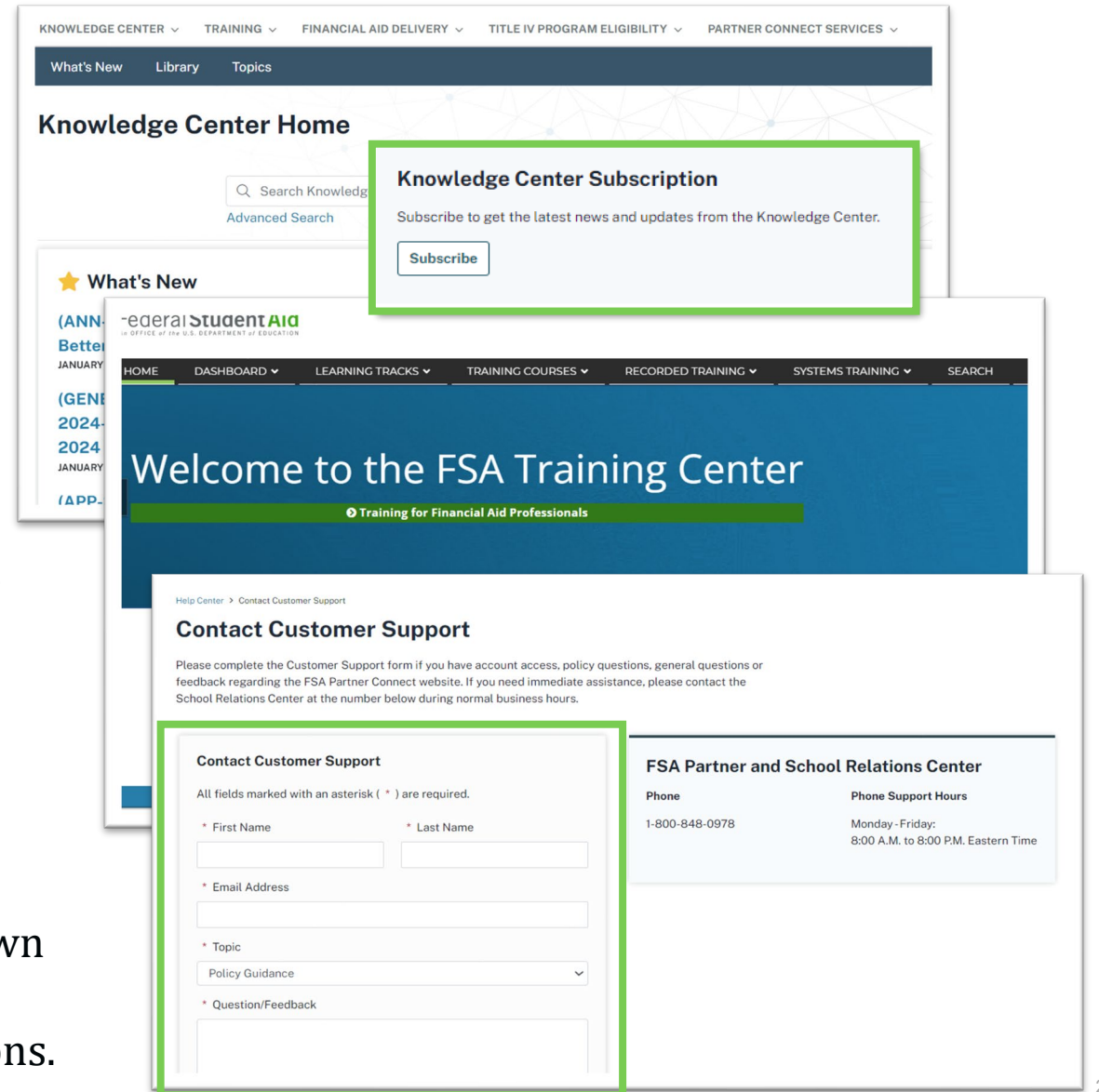
View learning tracks, training courses, videos, and software training.

3

FSA Partner Connect Help Center

[Contact Customer Support](#)

Choose "Policy Guidance" from Topic dropdown list to ask policy questions. Choose "Technical Support" for EDExpress or EDconnect questions.



FEEDBACK SURVEY



<https://www.surveymonkey.com/r/EDExpressAccessingFTI2024>

Survey open until February 28, 2025

QUESTIONS?

