

FAFSA[®] Messaging and Planning Calendar

This document provides suggested outreach activities that can help you plan your communications to students and parents about the *Free Application for Federal Student Aid* (FAFSA[®]) process. It provides information on optimal timing, messaging objectives, target audiences, outreach activities, and resources.

You can access an electronic version with live links to all the resources at FinancialAidToolkit.ed.gov/resources/fafsa-messaging-calendar.pdf.

FAFSA[®] Outreach Objectives and Timing

- **Prepare Students**
 - Spring (April–June): Make students aware that federal student aid is available to help pay for college or career school.
 - Fall (August–September): Encourage students to get an FSA ID (account username and password) and let them know the FAFSA form launches Oct. 1.
- **FAFSA[®] Launch:** Oct. 1: Ensure that students are aware the FAFSA[®] form can be submitted starting Oct. 1.
- **Motivate Students:** October–March: Tell students that filling out the FAFSA form early could open them up to more aid from many sources. Advise students on how to make the right financial decisions for college or career school.

Prepare Students—Spring

Goal: As you encourage students to begin exploring their college or career school options, let them know about resources, such as federal student aid, that are available to help them cover the costs of these options. We don't want students to rule out a college or career school education just because of the cost.

Timing: April–June

Target Audience: High school juniors/rising seniors

Secondary Audience: Parents of high school juniors/rising seniors (Note: While this document focuses on outreach to students, it also can be used in your outreach to parents.)

Primary Messaging Objective: Educate students (and their families) about federal student aid and ensure they're aware that aid is available to help pay for college or career school.

Secondary Messaging Objective: Tell students and their parents they are each required to create their own FSA ID—account username and password—to sign the online FAFSA[®] form.

Thought and Conversation Starters

- Get students thinking about their futures.
 - Have you thought about what you want to do after high school?
 - A majority of jobs require more than a high school education.
 - It's time to start planning for college or career school.
- Introduce the financial aspect of college or career school into their planning.
 - How will you pay for college or career school?
 - There are programs, such as federal student aid, that can help pay for college or career school.
 - Applying for federal student aid is completely free using the FAFSA form.
- Get them comfortable with the federal student aid process.
 - You and your parent will each need an FSA ID—account username and password—to sign the online FAFSA form electronically. You and your parent should get your FSA IDs now before starting the FAFSA form.
 - Completing the FAFSA form is an important step in the federal student aid process. By completing the FAFSA form, you can see if you're eligible for federal grants and work-study funds you don't have to pay back, as well as low-interest loans. Plus, many states and schools use your FAFSA data to determine your eligibility for state and school aid.
 - You can start filling out the FAFSA form on Oct. 1 for the next school year.

Suggested Outreach and Resources

The following outreach activities and resources are for your consideration as you work with students and parents. These are intended to serve as a menu of options from which you can choose based on your audience's needs. Remember, you can find the resources below at FinancialAidToolkit.ed.gov/resources unless otherwise noted.

- Share information on federal student aid.
 - Use the *Finding Money for College or Career School* basic introductory presentation slides in your presentations.
 - Recommend StudentAid.gov, a website with information on planning and paying for college or career school. Consider pointing students to the following pages:
 - StudentAid.gov/prepare: Provides information on exploring careers, choosing a school, applying to schools, and budgeting. Also includes checklists on getting ready for college or career school.
 - StudentAid.gov/types: Provides information on financial aid—including federal student aid, state aid, college and institutional aid, and private scholarships—to help pay for college or career school.
- Share information about the aid application process.
 - Share *The Financial Aid Process* graphic, which explains the steps in the process and can be found at StudentAid.gov/sites/default/files/financial-aid-process.png.

Remember: The Financial Aid Toolkit site is specifically for you, the counselor or advisor. Your students and their parents can access resources at StudentAid.gov/resources. Many of the resources are also available in Spanish.

Prepare Students—Fall

Goal: Encourage students to think about how they will pay for college or career school. Teach them how federal student aid can directly help them cover the costs, and how applying for federal student aid may allow them to qualify for state, institutional, and/or organizational aid.

Timing: August–September

Target Audience: High school seniors and adult learners

Secondary Audience: Parents of high school seniors (Note: While this document focuses on outreach to students, it also can be used in your outreach to parents.)

Primary Messaging Objective: Educate students (and their families) about the federal student aid process. First encourage each student to create an FSA ID (and remind them to keep it private), then to submit the FAFSA form online at fafsa.gov starting Oct. 1.

Secondary Messaging Objective: Encourage students to compare their various college or career school options by using the *College Scorecard* at collegescorecard.ed.gov.

Thought and Conversation Starters

Get students and parents comfortable with the aid process—preparing for the FAFSA form, filling out the FAFSA form, and following through after submitting the application.

- Remind them what the FAFSA form is, and help them get ready to fill it out.
 - By completing the FAFSA form, you can see if you're eligible for federal grants and work-study funds you don't have to pay back, as well as low-interest loans. Plus, many states and schools use your FAFSA data to determine your eligibility for state and school aid.
 - You and your parent will each need your own FSA ID—account username and password—to sign the online FAFSA form electronically. You and your parent should get your FSA IDs now before starting the FAFSA form.
 - You'll find a short list of the types of information to gather for the FAFSA form at StudentAid.gov/fafsa-help under the "Getting Started" section.
- Get them comfortable with the FAFSA form.
 - On Oct. 1, you can start filling out the FAFSA form online at fafsa.gov.
 - You should add every school you're considering to the FAFSA form, even if you haven't applied for admission or been accepted yet. Adding several schools doesn't hurt your chances of getting financial aid; schools can't see the other schools you've added.
 - The FAFSA form will ask for your and your parents' tax information from the tax year two years prior to the start of the school year for which you're applying for aid. For example, the 2023–24 FAFSA form asks for 2021 tax and income information. You

may be able to retrieve tax information directly from the IRS as you complete the FAFSA form online.

- Introduce them to what happens once they fill out the FAFSA form.
 - After you fill out the FAFSA form, you will receive a *Student Aid Report (SAR)* that contains your Expected Family Contribution (EFC), a figure schools use when determining the amount of financial aid for which you're eligible.
 - After a college or career school has decided to offer you admission, you will receive an aid offer from the school that will tell you how much and what types of financial aid you may receive at that school. The timing of the aid offer varies from school to school. It depends on when you apply and how the school prefers to schedule aid offers.
 - Review aid offers from schools to compare amounts and types of aid being offered. Decide which school to attend based on a combination of (a) how well the school suits your needs and (b) its affordability after all aid is taken into account. Remember to borrow only the amount you need. You don't have to borrow the entire amount you're offered.

Suggested Outreach and Resources

The following activities and resources are for your consideration as you work with students and parents. This is intended to serve as a menu of options from which you can choose based on your audience's needs. Remember, you can find the resources below at FinancialAidToolkit.ed.gov/resources unless otherwise noted.

- Share information on federal student aid and the aid application process with students.
 - Share *The FAFSA® Process* graphic to help students understand what to expect as they prepare to fill out the FAFSA form.
 - Show the "FAFSA Overview" video.
 - Explain the EFC to students and parents using StudentAid.gov/how-calculated.
- Encourage students (and their parents) to get FSA IDs. We have a fact sheet, presentation, video, and blog post that you can use.
 - Share the *Creating and Using the FSA ID* fact sheet with students and parents.
 - Use the *Creating and Using Your FSA ID* presentation at an outreach event.
 - Show the "How to Create an Account Username and Password (FSA ID)" video.

FAFSA® Launch

Goal: Ensure that students are aware the FAFSA® form can be submitted starting Oct. 1. Encourage students to go to fafsa.gov to fill out the FAFSA form as soon as possible.

Timing: Oct. 1

Target Audience: High school seniors and adult learners

Secondary Audience: Parents of high school seniors (Note: While this document focuses on outreach to students, it also can be used in your outreach to parents.)

Primary Messaging Objective: Create awareness of the Oct. 1 FAFSA start date.

Secondary Messaging Objective: Tell students (and their parents) to fill out the FAFSA form.

Ensure they know what will be expected of them, including that

- (1) they will need to create their own FSA IDs, which are account username and password combinations to sign the online FAFSA form electronically, and
- (2) the FAFSA form will ask for tax information from them and their parents.

Thought and Conversation Starters

Get students and parents to understand the value of filling out the FAFSA form immediately.

- Help them understand that the FAFSA form is the starting point for many types of student aid, including federal, state, and/or school aid.
 - The FAFSA form is the first step in determining how you can pay for college or career school.
 - By completing the FAFSA form, you can see if you're eligible for federal grants and work-study funds (which you don't have to pay back), as well as low-interest loans.
 - The FAFSA form isn't just for federal student aid. Many states and schools use your FAFSA information to determine your eligibility for state and school aid too.
- Remind students about what to expect as they fill out the FAFSA form.
 - You'll find a short list of the types of information to gather for the FAFSA form at [StudentAid.gov/fafsa/help](https://studentaid.gov/fafsa/help) under the "Getting Started" section.
 - You should add every school you're considering to the FAFSA form, even if you haven't applied for admission or been accepted yet. Adding several schools doesn't hurt your chances of getting financial aid; schools can't see the other schools you've added.
 - The FAFSA form will ask for your and your parents' tax information from the tax year two years prior to the start of the school year for which you're applying for aid. For example, the 2023–24 FAFSA form asks for 2021 tax and income information. You may be able to retrieve tax information directly from the IRS as you complete the FAFSA form online.
 - You and your parent will each need your own FSA ID to sign the FAFSA form online.
- Reinforce what happens once they fill out the FAFSA form.
 - After you submit the FAFSA form, you'll receive a *Student Aid Report* that contains your Expected Family Contribution (EFC), a figure schools use when determining the amount of financial aid for which you're eligible.
 - After a college or career school has decided to offer you admission, you'll receive an aid offer from that school telling you how much and what types of financial aid you may receive at that school. The timing of the aid offer varies from school to school. It depends on when you apply and how the school prefers to schedule aid offers.
 - Review aid offers from schools to compare amounts and types of aid being offered. Decide which school to attend based on a combination of (a) how well the school suits your needs and (b) its affordability after all aid is taken into account. You should always exhaust federal student loan options first before considering a private loan. Remember to borrow only the amount you need. You don't have to borrow the entire amount you're offered.

Suggested Outreach and Resources

The following activities and resources are for your consideration as you work with students and parents. This is intended to serve as a menu of options from which you can choose based on your audience's needs. Remember, you can find the resources below at FinancialAidToolkit.ed.gov/resources unless otherwise noted.

- Share information with students about federal student aid and the aid application process.
 - Share the *Am I Dependent or Independent?* fact sheet to help students determine their dependency status before filling out the FAFSA form.
 - Share *The FAFSA® Process* graphic to help students understand what to expect as they prepare to fill out the FAFSA form.
 - Explain the EFC to students and parents using StudentAid.gov/how-calculated.
 - Show the “How to Fill Out the FAFSA® Form” video.
- Educate students and their parents about what happens after they fill out the FAFSA form.
 - Show the “After the FAFSA: What Happens Next” video to explain what students and their parents should expect after submitting the FAFSA form. It includes information on the SAR, EFC, the role of schools, aid offers, and receiving aid.
 - Use the “How to Review and Correct Your FAFSA® Application” page on StudentAid.gov/apply-for-aid/fafsa/review-and-correct to help students understand what to expect after they've filled out and submitted the FAFSA form.

Motivate Students

Goal: Encourage students to fill out the FAFSA form immediately.

Timing: October–March

Target Audience: High school seniors

Secondary Audience: Parents of high school seniors (Note: While this document focuses on outreach to students, it also can be used in your outreach to parents.)

Primary Messaging Objective: Tell students that filling out the FAFSA form early could make them eligible for more aid from many sources. Advise students on how to make the right financial decisions for college and career school.

Secondary Messaging Objective: Educate students about the importance of borrowing only what they need to pay for their college or career school expenses.

Thought and Conversation Starters

Ensure that students and parents understand the value of the FAFSA form and the immediate need to fill it out.

- Remind students that the FAFSA form is the starting point for many types of student aid, including federal, state, and/or school aid.
 - By completing the FAFSA form, you can see if you're eligible for federal grants and work-study funds (which you don't have to pay back), as well as low-interest loans.

- The FAFSA form isn't just for federal student aid. Many states and schools use your FAFSA data to determine your eligibility for state and school aid.
- You should fill out the FAFSA form as soon as possible because some states and schools have limited funds.
- You can fill out the FAFSA form even before you decide which schools you'll be applying to. You don't have to wait to submit your college or career school application before listing a school on the FAFSA form. You should add every school you're considering to the FAFSA form, even if you haven't applied for admission or been accepted yet.
- Remind them what to expect as they fill out the FAFSA form.
 - You'll find a short list of the types of information to gather for the FAFSA form at [StudentAid.gov/fafsa/help](https://studentaid.gov/fafsa/help) under the "Getting Started" section.
 - The FAFSA form will ask for your and your parents' tax information from the tax year that was two years prior to the start of the school year for which you're applying for aid. For example, the 2023–24 FAFSA form asks for 2021 tax and income information. You may be able to retrieve tax information directly from the IRS as you complete the FAFSA form online.
 - You and your parent will each need your own FSA ID to sign the FAFSA form online.
- Reinforce what happens once they fill out the FAFSA form.
 - After you fill out the FAFSA form, you'll receive a *Student Aid Report* that contains your Expected Family Contribution (EFC), a figure schools use when determining the amount of financial aid for which you're eligible.
 - After a college or career school has decided to offer you admission, you will receive an aid offer from that school. The aid offer will tell you how much and what types of financial aid you may receive at that school. The timing of the aid offer varies from school to school. It depends on when you apply and how the school prefers to schedule aid offers.
- Educate them about the implications of taking out more in loans than they need.
 - You should borrow only what you need after you've exhausted all other aid, including grants and scholarships.
 - You don't have to borrow the maximum amount of federal student loans each year. You can request a lower amount through your school's financial aid office.
 - You will still be required to pay back your loans, even if you don't graduate or can't find a job after graduation.

Suggested Outreach and Resources

The following activities and resources are for your consideration as you work with students and parents. This is intended to serve as a menu of options from which you can choose based on your audience's needs. Remember, you can find the resources below at [FinancialAidToolkit.ed.gov/resources](https://financialaidtoolkit.ed.gov/resources) unless otherwise noted.

- Share information with students about federal student aid and the aid application process.
 - The *Financial Aid Process* infographic explains the steps in filling out the FAFSA form.

- The *FAFSA*® *Process* infographic helps students as they prepare and fill out the FAFSA form.
- The “Types of Financial Aid” page on [StudentAid.gov/understand-aid/types](https://studentaid.gov/understand-aid/types) provides information on the different types of financial aid.
- Explain the EFC to students and parents using [StudentAid.gov/how-calculated](https://studentaid.gov/how-calculated).
- Educate students and their parents about what happens after they fill out the FAFSA form and the implications of taking out loans.
 - The "After the FAFSA: What Happens Next" video explains what students and their parents should expect after they fill out the FAFSA form. It includes information on the SAR, EFC, the role of schools, aid offers, and receiving aid.
 - The "Types of Federal Student Aid" video describes the various types of aid.
 - The *Federal Student Loan Programs* fact sheet describes the different types of loans.
 - The *Federal Student Grant Programs* fact sheet describes the different types of grants.
 - The *College Scorecard* at collegescorecard.ed.gov allows students and parents to compare various colleges and career schools.
 - *Federal Student Loans: Basics for Students* and *Federal Student Loans: Direct PLUS Loan Basics for Parents* are publications that explain the types of federal student loans that are available, eligibility requirements, application process, and repayment.

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