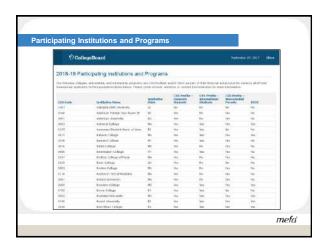
CSS PROFILE™ MASSACHUSETTS EDUCATIONAL FINANCING AUTHORITY Profile is a registered trademark of the College Board, with which MEFA is not associated About MEFA •Not-for-profit state authority created in 1982 •Helping families plan, save, and pay for college •Keeping everyone on track with college planning: -mefa.org: Information, blog, tools, & resources -Facebook, Twitter, & LinkedIn -Emails: Families sign up on mefa.org Counselors sign up on $\underline{\text{mefa.org/counselors}}$ -Seminars: Details at mefa.org/events -Webinars: Register at mefa.org/events -mefapathway.org mefai What is the CSS Profile? •College Board's online financial aid application •Required by ~400 colleges/universities/scholarship programs -Check each college/university's financial aid website •Used to award non-federal financial aid funds •Opens October 1st each year •Updated this year •Available for both domestic and international students

*Collects more detailed information than the FAFSA *Allows schools to ask customized questions *Permits families to provide special circumstances





Application Progress

- Sign in using student's College Board account from SATs/AP tests (or create a new account)
- · Left-hand sidebar will show different sections
- •Sections are added when they become required
- •Users are permitted to jump ahead to a different section
- ·Click Save and Continue to move to next section
- · Each section is checked when completed
- •When logging back in, user will be directed to first incomplete section
- · Answers are automatically saved as you go

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Application General Tips

- •To exit, click Save and Continue and then close the browser
- •Use buttons in application, not web browser, to navigate
- · Click into an answer field and help tips will appear
- Questions with an asterisk are required, but should answer all questions to which you have answers, such as the SSN
- •Can leave an answer blank if it does not apply and is not required

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Parent Information

- •Report all parents and step-parents (up to 4) (include deceased)
- •Legal guardians should be reported as parents (different from the FAFSA)
- Custodial parent, current spouse, and student provide info
 - Provides list of colleges
- •Student supplies email address of noncustodial parent
 - Either after school selection or in dashboard after submission
 - It is student responsibility to follow up with noncustodial parent
- ·Noncustodial parent completes a separate Profile
 - Must create own College Board account
 - $-\operatorname{No}$ student financial info provided, just demographic
 - Does not select colleges but sees them listed
 - Cannot submit application until at least one college selected
 - Can use a fee payment code
- Custodial and noncustodial parents provide same financial info but cannot see one another's application

General Information Requested

- •Colleges where student is applying
- •Parent and student 2016, and projected 2017 & 2018 income
 - Wil refer to lines on 2016 tax return
- Parent and student assets (current)
- •Parent residence: where the parent lives now
- Household information
- •Number of children in college

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More Questions = Better Estimate of Ability to Pay

· Parent Income

-Untaxed Social Security Benefits, Earned Income Cr Child Tax Credit, Foreign Income Exclusion

·Parent Assets

- -Value and debt of primary home
- $-\underline{\text{All}}$ business and farm information
- -Parent assets held in siblings' names
- -Retirement value (asked for, though not often used)

·Parent expenses

- -Medical/dental
- -Private elementary/secondary school tuition
- -Education loan payments

More Questions = Better Estimate of Ability to Pay

- Family data

 Ages of siblings
- -Colleges that siblings attend

Student data

- Private scholarships
- -Employee tuition benefits

• Explanation of special circumstances — After certain questions

- At the end of the application
- Send to college if happen after completing the Profile

· Supplemental Questions

- Added by each college/university
- Sometimes not required but strongly recommended to ans

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- •\$25 for the application and initial school report
- •\$16 for each additional school report
- •Fees are paid by the family
- •Payment options: Credit card or debit card
- •Noncustodial parent's Profile: \$25 one-time fee

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Fee Waivers

- · Automatically granted if family meets one of the following:
 - Family is low income (parental income of approximately \$45,000 or less)
 - Student is an orphan or ward of the court and under 24
 - Student received an SAT fee waiver (must use student's College Board account)
 - Student received an SAT fee waiver (must use student'
 Family receives SNAP or TANF benefits
- · Not available for international students
- Available to first-year undergraduates whose parents live in U.S.
- Notified at time of submission
- Covers reports to 8 institutions
- Same fee waiver rules apply to Noncustodial Profile except SAT fee waiver

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Fee Payment Codes

- Purchased by colleges/universities/organizations for use by students
- •Each code pays for one college submission
- •No limit on use of fee payment codes



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Submitting the Profile

- Will be given a chance to review the application
 - Able to print answers if desired
- · Will need to check box to certify that application is accurate
- Will be asked to pay fee waivers show here
- · Once submitted, cannot make online edits or delete schools



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Dashboard

- ·Can access anytime
- •Tab on top right of application
- ·Includes:
 - Application status
 - $-\operatorname{\sf Each}$ college's submission date, deadline, and additional documents required
 - Next steps required by each school
 - Payment receipt
 - Option to save or print application
 - Opportunity to add a college or program
 - Link to IDOC
 - $-\operatorname{Space}$ to add noncustodial parent's email address (can be sent multiple times)
 - Your CBFinAidID

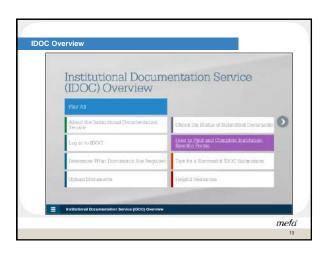
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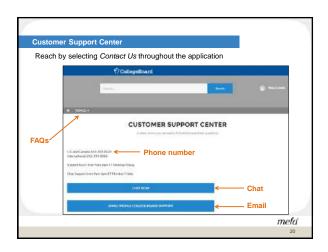
What is IDOC?

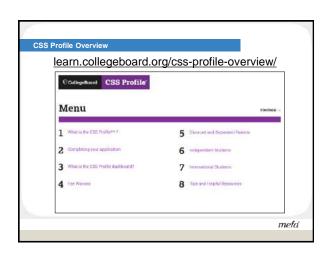
- •College Board's Institutional Documentation Service
- •Collects family documents (such as tax returns) on institution's behalf
- •IDOC student dashboard tells student of required documents
- •Institution-specific forms are under the Get Forms link on the IDOC dashboard
- Documents must be in JPEG, TIFF, or PDF format
- •Sign any documents on signature lines
- •Customer Service: (866) 897-9881
- $\bullet \underline{idoc.collegeboard.com}$

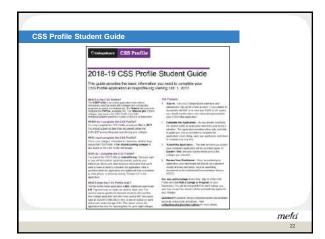


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MEFA Family Webinars

All webinars begin at 12pm. Register online at mefa.org/events.

College Financing: Tuesday, 12/5/17

Understanding the FAFSA: Thursday, 1/4/18

Understanding Your Financial Aid and Paying for College: Friday, 3/2/18

Tuesday, 4/10/18

Comparing College Loan Options: Wednesday, 6/6/18

Tuesday, 7/10/18

Other recorded webinars posted at mefa.org/events

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MEFA Counselor Webinars

All webinars begin at 10am. Register online at mefa.org/events.

Financial Aid: National Landscape & Regulatory Updates: Thursday, 1/18/18

Counseling Families with Unique Circumstances: Tuesday, 1/30/18

Helping Families Understand Financial Aid Award Letters Tuesday, 4/3/18

Other recorded webinars are posted at mefa.org/counselors

