

CSS PROFILE™

Fall 2017

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 mefa.org/counselors
 - Seminars:** Details at mefa.org/events
 - Webinars:** Register at mefa.org/events
 - mefapathway.org

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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



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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
 - 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

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General Information Requested

- Colleges where student is applying
- Parent and student 2016, and projected 2017 & 2018 income
 - Will 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 Credit, Additional Child Tax Credit, Foreign Income Exclusion
- Parent Assets**
 - Value and debt of primary home
 - 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

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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 answer

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Fees

- \$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)
 - 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
 - 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
 - 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
- idoc.collegeboard.com



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IDOC Overview

Institutional Documentation Service (IDOC) Overview

Play All

About the Institutional Documentation Service	Check the Status of Submitted Documents
Log in to IDOC	How to Find and Complete Institution-Specific Forms
Determine What Documents Are Required	Tips for a Successful IDOC Submission
Upload Documents	Helpful Resources

Institutional Documentation Service (IDOC) Overview

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Customer Support Center

Reach by selecting *Contact Us* throughout the application

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SEARCH

WELCOME

TOPICS

CUSTOMER SUPPORT CENTER

A place where you can easily find solutions and ask questions.

U.S. and Canada: 844-392-0524
International: 212-299-0096

Support hours from 9am-5pm ET Monday-Friday
Chat Support from 9am-5pm ET Monday-Friday

CHAT NOW

EMAIL PROFILE COLLEGE BOARD SUPPORT

FAQs

Phone number

Chat

Email

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CSS Profile Overview

learn.collegeboard.org/css-profile-overview/

CollegeBoard CSS Profile

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Thank You

Questions? Comments?

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