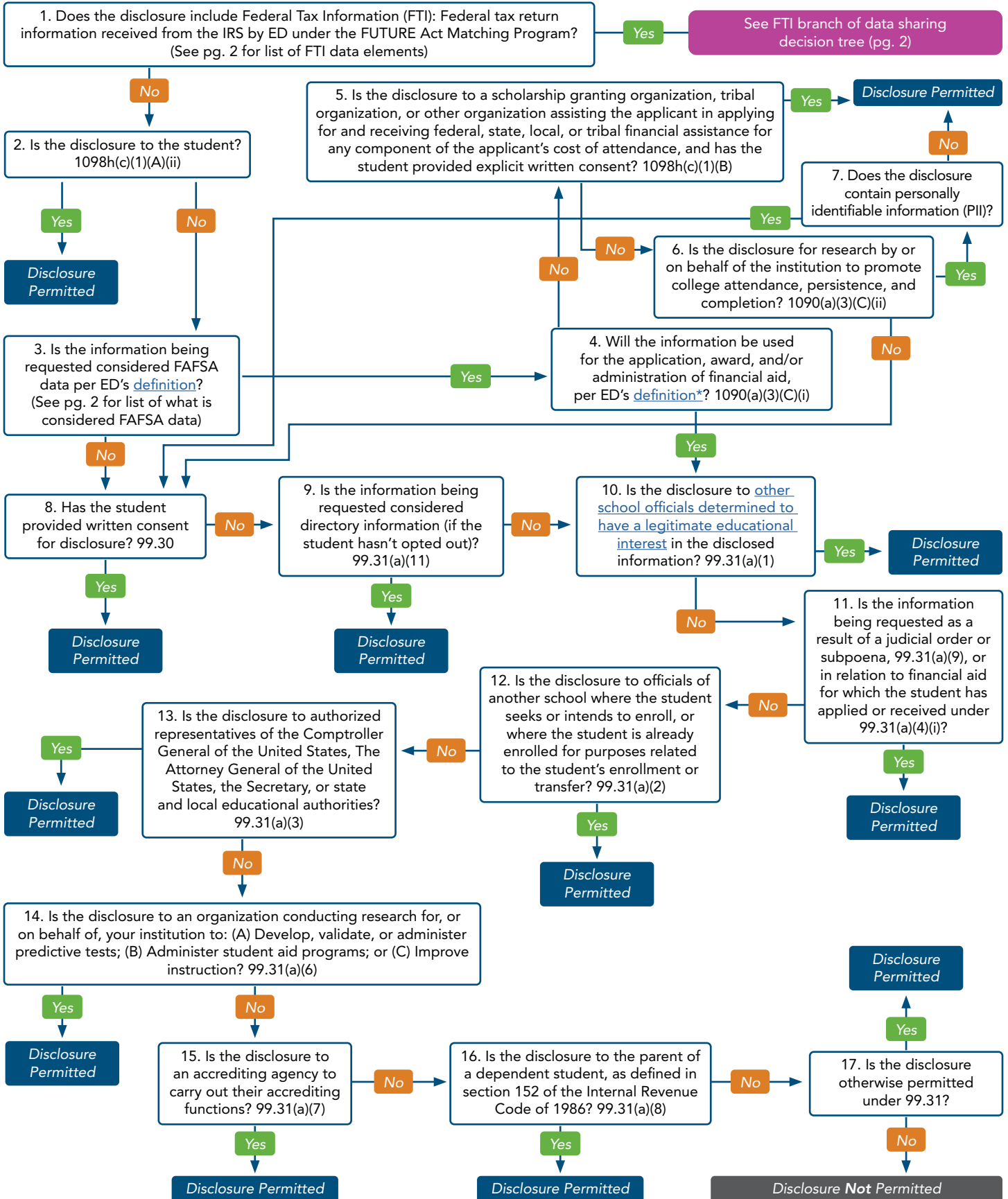


# NASFAA Data Sharing Decision Tree for Postsecondary Institutions

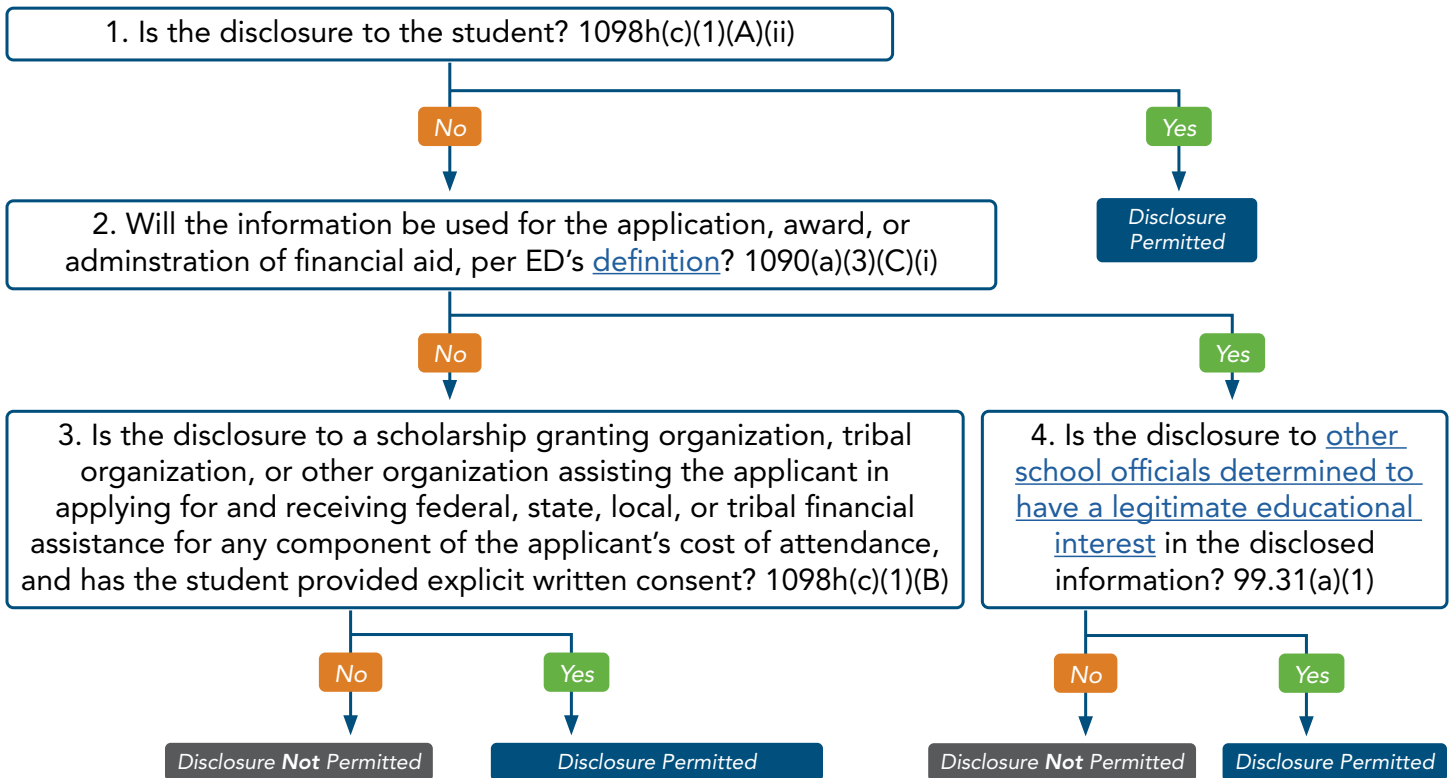


\*Note that ED also considers conducting outreach to students about means-tested benefits as part of the application, award, and administration of financial aid ([GEN-24-93](#))

<sup>1</sup>Users should assume where it is indicated disclosure is permitted, that said disclosure is permitted without the student's consent unless otherwise indicated. Conversely, where it is indicated that disclosure is **not** permitted, users should assume the disclosure is never permitted, even with the student's consent.

# Data Sharing Decision Tree

## Federal Tax Information (FTI) Branch



### FAFSA data includes:

- Information obtained directly from the applicant or contributor on the FAFSA such as:
  - Personal circumstances
  - Dependency status
  - Federal benefits receipt
  - Assets
  - Manually entered tax data
  - Whether FAFSA was filed (Y/N)
  - Demographic information
  - Student eligibility information
- Information on the FAFSA that ED derives from FAFSA data and FTI, including:
  - Pell Grant eligibility status (Y/N)
  - SAI
  - Verification status
  - Total income
  - Adjusted available income
  - Discretionary net worth

### ED does NOT consider the following to be FAFSA data:

- Total aid awarded
- Grant aid and/or loan receipt and amount by source
- Unmet financial need
- Loan disbursement records
- Student admission records and
- Other financial aid data

### FTI includes:

- Tax year
- Tax filing status, including whether a return was or was not filed
- AGI
- Number of exemptions & dependents
- Income earned from work
- Taxes paid
- Education tax credits
- Untaxed IRA distributions
- IRA deductions and payments
- Untaxed pension amounts
- Tax exempt interest
- Schedule C net profit/loss
- Indicators for schedules A, B, D, E, F, and H
- IRS response code

<sup>1</sup>Users should assume where it is indicated disclosure is permitted, that said disclosure is permitted without the student's consent unless otherwise indicated. Conversely, where it is indicated that disclosure is **not** permitted, users should assume the disclosure is never permitted, even with the student's consent.

<sup>2</sup>This document reflects NASFAA's understanding of data sharing rules based on official and unofficial written and verbal ED guidance received to date and is subject to change.