

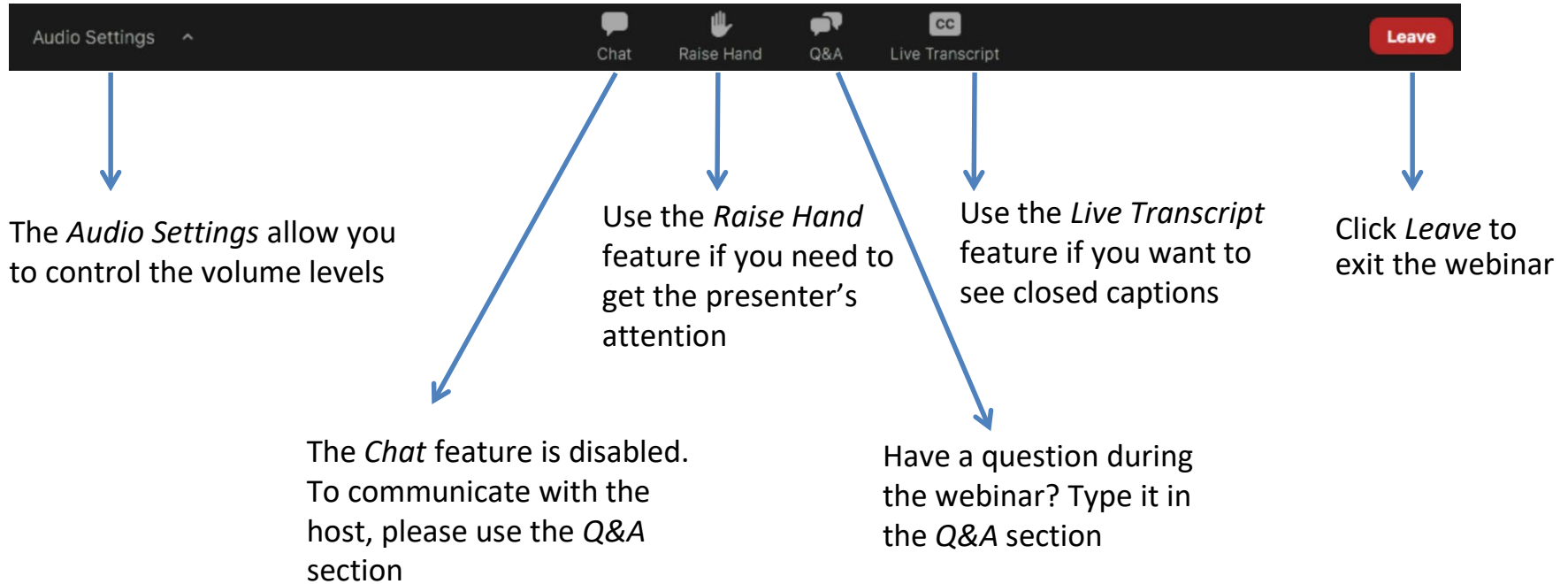


# A Deep Dive Into the CSS Profile™

A MEFA Institute Webinar

CSS Profile is a registered trademark of the College Board, with which MEFA is not associated

# How to Participate in This Webinar



# About MEFA

3



# What is the CSS Profile?

- The College Board's online financial aid application
- Required by ~270 colleges/universities & 30 scholarship programs
  - Check each college/university's financial aid website
- All colleges also require the FAFSA®
- Used to award non-federal financial aid funds
- Opens October 1st each year
- Available for both domestic and international students



# Why Do Institutions Use the Profile?



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



Start Here: [cssprofile.org](https://cssprofile.org)

Links to more info

High school seniors should apply for 2022-23

List of colleges that require the Profile

Links to more info

The screenshot shows the CSS Profile website homepage. At the top is a navigation bar with links: Home, Getting Started, Fee Waivers, Divorced or Separated Families, International Applicants, and en Español. The main banner features a photo of a woman and a young woman sitting and talking. To the right of the photo, the text reads 'Apply with CSS Profile' followed by 'Each year CSS Profile gives access to more than \$9 billion for thousands of undergraduate, graduate and professional students.' Below this are two buttons: 'Sign In to Fall 2022/Spring 2023' (yellow) and 'Sign In to Fall 2021/Spring 2022' (white with a purple border). Below the banner are three circular icons with text: a school icon for 'Check participating Schools and Scholarships', a speech bubble icon for 'Learn how to apply', and a person icon for 'Completing the CSS Profile for the Noncustodial Parent'. At the bottom is a 'Site Topics' section with links and descriptions for 'Getting Started', 'Fee Waivers', 'Divorced or Separated Families', 'International Applicants', and 'en Español'.

Spanish \*NEW\*

Info for noncustodial parents

Overview webinar

# Additional Resources on Homepage

## Resources



**Creating a CSS Profile  
Account for Parent Use**

PDF Document | 69.59 KB



**CSS Profile Waiver Request  
for the Noncustodial Parent**

PDF Document | 186.65 KB



**CSS Profile Fee Waivers**

PDF Document | 135.9 KB



**CSS Profile Student Guide**

PDF Document | 124.11 KB

**For any parent, including all  
noncustodial parents, who is not  
using the student's account to  
complete the CSS Profile**

# Participating Institutions and Programs

## 2022-23 Participating Institutions and Programs

The following colleges, universities, and scholarship programs use CSS Profile and/or IDOC as part of their financial aid process for some or all of their financial aid applicants in the populations listed below. Please check schools' websites or contact the institution for more information.

CSS Code	Institution Name	Institution State	CSS Profile – Domestic Students	CSS Profile – International Students	CSS Profile – Noncustodial Parents	IDOC
Show All ▾	Show All ▾	Show All ▾	Show All ▾	Show All ▾	Show All ▾	Show All ▾
1003	Alabama A&M University	AL	No	No	No	Yes
5007	American University	DC	Yes	No	Yes	No
3003	Amherst College	MA	Yes	Yes	Yes	Yes
0193	Armenian Student Assoc of Amer	RI	Yes	Yes	No	No
3075	Babson College	MA	Yes	Yes	Yes	Yes



# Application Process

- Sign in
  - Use **student's** College Board account from SATs/AP tests
  - OR parents create a new student account using **parent's** information
  - A separate College Board account is needed for each student
- Left-hand sidebar will show different sections
- Sections are added when they become required
- User *is* permitted to jump ahead to a different section
- Click *Save and Continue* to move to next section
- Each section is checked when completed
- Don't have to do the application all in one sitting
- When logging back in, user will be directed to first incomplete section
- Answers are automatically saved as you go

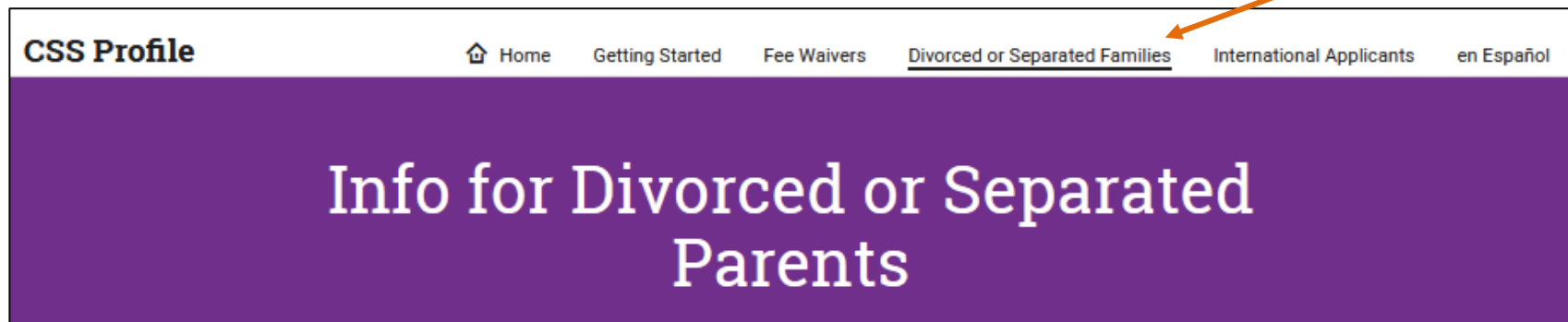
# Application General Tips



- 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 families should answer all questions to which they have answers, such as the SSN
- Can leave an answer blank if it does not apply and is not required

# 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
  - Provide list of colleges
- Some schools require noncustodial parent info (check school's website)
- 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

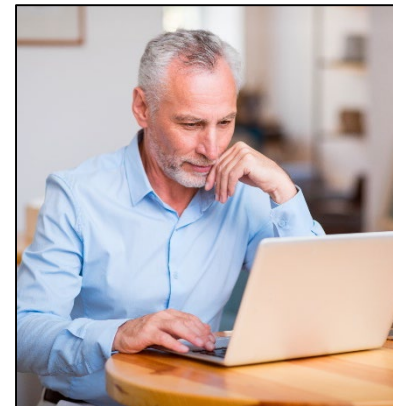


# If Noncustodial Parent Info Not Available

- If no noncustodial parent is listed, student will receive follow-up questions **\*NEW\***
  - Is noncustodial parent:
    - Deceased
    - Unknown
    - Incarcerated
    - Involved with legal order or documented abuse
  - Is student:
    - A child of a single adoptive parent
    - A child conceived by single parent at time of conception
    - Not in contact with noncustodial parent
- Based on the answers provided, noncustodial parent questions may be removed
- If noncustodial parent info required but not available, contact each financial aid office

# Noncustodial Parent Instructions

- Noncustodial parent will receive an email request to submit the Profile
- Noncustodial parent completes a separate Profile
  - Use same website: [cssprofile.org](https://cssprofile.org)
  - Must create own College Board account
  - Will use student's CBFinAid ID (included in email)
  - Will create a **student** account with **parent** information
  - No student financial info provided, just student demographic info
  - Does not select colleges but sees them listed
  - Cannot submit application until at least one college is listed
  - Can use a fee payment code
  - If completing two CSS Profiles, will need to use two email addresses
- Custodial and noncustodial parents cannot see one another's application



# General Information Requested on Profile

- Colleges where student is applying
- Parent & student 2020 income
  - Will refer to tax return lines
- Parent & student projected income
  - 2021 & 2022
- Parent and student assets (current)
- Household member information
- Number of children in college





# 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
  - Required fields if business/farm income reported **\*NEW\***
- 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



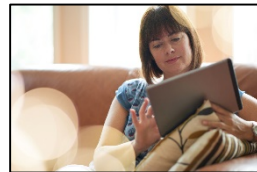
## Explanation of special circumstances

- After certain questions and at the end of the application
- Can check a certain category but must provide details
- Notate change in income, exceptional expenses, etc.
- Send details to college if happens after completing the Profile



## • Supplemental Questions

- Added by each college/university (requesting school will be noted)
- Sometimes not required but strongly recommended to answer





- \$25 for the application and initial school report
- \$16 for each additional school report
- Payment options: Credit card or debit card
- Noncustodial parent's Profile: \$25 one-time
- \*NEW\* expanded fee waiver policy

# Fee Waivers

- Automatically granted if family meets one of the following:
  - Household income (AGI) is \$100,000 or less **\*NEW\***
  - 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)
- Available to freshman/transfer/returning/independent undergraduate students **\*NEW\***
- Available to students whose parents live in U.S.
- Not available for international students
- Use for unlimited # of schools
- Noncustodial parents: fee waiver if meet same income guidelines above

# 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

# Submitting the Profile

- Will be given a chance to review the application
  - Prompts given to review inconsistencies or possible errors
  - 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





# 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)
  - The student's CBFinAid ID

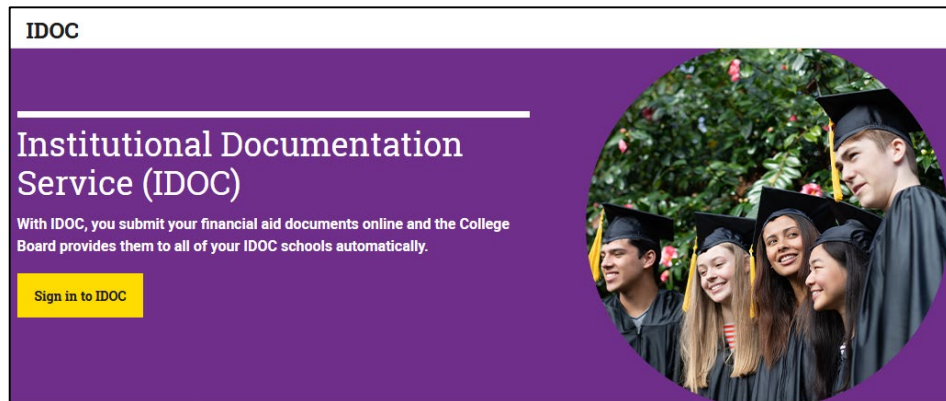
# Corrections

## **\*NEW\***

- Students can submit corrections one time per application for certain situations:
  - Student completed the application as an independent but is actually a dependent
  - Student did not include business or farm information
  - Catch-all drop-down box
    - Options include “made a mistake” and “change in employment”
    - Student can provide a written explanation of the change
- Corrections are permitted only after original application has been delivered (~24 hours)
- Cannot complete a correction and *add college request* at the same time
- No charge to submit corrections

# 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
- IDOC Customer Service: (866) 897-9881
- [idoc.collegeboard.com](https://idoc.collegeboard.com)



# IDOC Overview

24

The screenshot displays the 'Institutional Documentation Service (IDOC) Overview' dashboard. At the top, the title 'Institutional Documentation Service (IDOC) Overview' is shown in a large, blue, serif font. Below the title is a grid of eight interactive buttons arranged in two columns. The first button, 'Play All', is a solid blue rectangle. The subsequent seven buttons are white with colored vertical bars on their left sides: green for 'About the Institutional Documentation Service', purple for 'Log in to IDOC', blue for 'Determine What Documents Are Required', dark blue for 'Upload Documents', grey for 'Check the Status of Submitted Documents', orange for 'How to Find and Complete Institution-Specific Forms', and red for 'Tips for a Successful IDOC Submission'. The final button, 'Helpful Resources', is white with a red vertical bar. A grey circular button with a white right-pointing arrow is positioned to the right of the middle two rows of buttons. At the bottom of the dashboard is a dark blue footer bar containing a white hamburger menu icon on the left and the text 'Institutional Documentation Service (IDOC) Overview' in white.

Institutional Documentation Service  
(IDOC) Overview

Play All

About the Institutional Documentation Service

Log in to IDOC

Determine What Documents Are Required

Upload Documents

Check the Status of Submitted Documents

How to Find and Complete Institution-Specific Forms

Tips for a Successful IDOC Submission

Helpful Resources

☰ Institutional Documentation Service (IDOC) Overview

[slides.collegeboard.org/idoc-student-dashboard](https://slides.collegeboard.org/idoc-student-dashboard)

# Profile Customer Support Center

Find by selecting *Contact Us* throughout the application

The screenshot shows the 'CSS PROFILE CUSTOMER SUPPORT' page. At the top, there are three tabs: 'FAQs', 'CONTACT US (U.S. AND CANADA)', and 'CONTACT US (INTERNATIONAL)'. The 'CONTACT US (U.S. AND CANADA)' tab is selected and highlighted with a blue underline. An orange arrow points from the 'FAQs' tab to the 'FAQ' link below it. Below the tabs, the 'U.S. and Canada: 844-202-0524' is displayed, with an orange arrow pointing to it from the text 'Phone number'. Below this, the 'Support Hours' are listed: 'Phone and Chat: October 1 through March 31 - 9am-10pm ET Monday-Friday' and 'April 1 through September 30 - 9am-6pm ET Monday-Friday'. A note states 'Certain holidays may affect these hours.' At the bottom, there is a blue button labeled 'CHAT AVAILABLE', with an orange arrow pointing to it from the text 'Chat'.

**FAQs**

**CSS PROFILE CUSTOMER SUPPORT**

FAQ CONTACT US (U.S. AND CANADA) CONTACT US (INTERNATIONAL)

U.S. and Canada: 844-202-0524

Support Hours:  
Phone and Chat:  
October 1 through March 31 - 9am-10pm ET Monday-Friday  
April 1 through September 30 - 9am-6pm ET Monday-Friday  
Certain holidays may affect these hours.

CHAT AVAILABLE

Email: [finaidservices@collegeboard.org](mailto:finaidservices@collegeboard.org)

- **\*NEW\*** CSS Profile now has dedicated Spanish-speaking customer service agents

# High School Counselor Support

Finaid.collegeboard.org/hscounselors

## HIGH SCHOOL COUNSELOR CUSTOMER SUPPORT

Phone: 800-626-9795

### Support Hours:

Phone and Chat:

October 1 through March 31 - 9am-10pm ET Monday-Friday

April 1 through September 30 - 9am-6pm ET Monday-Friday

Certain holidays may affect these hours.

CHAT AVAILABLE

### Frequently Asked Questions:

#### What is the CSS Profile™?

- The CSS Profile is a common financial aid application. It is used by almost 400 colleges, universities, professional schools, and scholarship programs to award non-federal institutional funds. The application is available October 1 each year.

#### Why do colleges and universities use the CSS Profile?

- The CSS Profile helps the financial aid officer determine who needs institutional aid and how much. The application also allows families to give a more comprehensive view into their family circumstances. The application can also be completed by international, or undocumented students as well as students living in the U.S.

#### How do students know if they have to complete the CSS Profile?

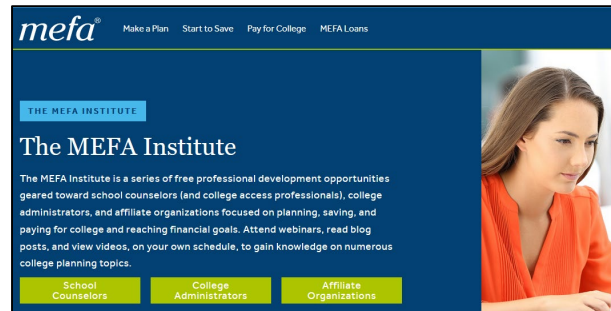
- The best way for a student to determine if the CSS Profile is required is to visit each college's website. A consolidated list of participating institutions is also available on the CSS Profile website.

- [CSS Profile Tutorial](#)
- [Participating Institutions](#)
- [Scholarship Search](#)
- [Higher Ed Trends](#)
- [College Board Counselor Resources](#)
- [CSS Profile Application](#)
- [CSS Profile Waiver Request for the Noncustodial Parent](#)



# Things to Do

- Register for upcoming MEFA Institute webinars and complete lessons to earn PDPs: [mefa.org/mefa-institute](https://mefa.org/mefa-institute)
- Share MEFA resources with families
- Visit [mefa.org/counselors](https://mefa.org/counselors)
- Encourage families to:
  - Register for MEFA webinars at [mefa.org/events](https://mefa.org/events)
  - Research financial aid deadlines and required applications
  - Complete the FAFSA and CSS Profile



# Connect with MEFA on Social Media



The screenshot shows a social media post from MEFA. The post header includes the MEFA logo and the text 'Published by Ajea Nicole [?] · February 22 at 5:30 PM'. The main text of the post reads: 'After you receive your financial aid award from the colleges to which you have been accepted, you may need to gather some additional information. The following are some important questions to ask.' Below this text is a section titled 'QUESTIONS TO ASK IN THE FINANCIAL AID PROCESS #FINAID'. This section contains five numbered questions, each in a colored box: 1. 'What is the college's total cost of attendance?' (blue box), 2. 'What financial aid applications are required and when are they due?' (orange box), 3. 'What are the college's application requirements for divorced or separated parents?' (dark grey box), 4. 'Does the college offer merit-based scholarships? How do students apply?' (green box), and 5. 'Will my financial aid stay the same every year?' (light blue box). The MEFA logo is visible in the bottom right corner of the post.

**QUESTIONS TO ASK IN THE FINANCIAL AID PROCESS #FINAID**

- 1 What is the college's total cost of attendance?
- 2 What financial aid applications are required and when are they due?
- 3 What are the college's application requirements for divorced or separated parents?
- 4 Does the college offer merit-based scholarships? How do students apply?
- 5 Will my financial aid stay the same every year?



[facebook.com/mefaMA](https://facebook.com/mefaMA)



[@MEFAtweets](https://twitter.com/MEFAtweets)



[linkedin.com/company/mefa](https://linkedin.com/company/mefa)



[youtube.com/MEFAcounselor](https://youtube.com/MEFAcounselor)

Thank You

29

# Questions?

(800) 449-MEFA (6332)

[collegeplanning@mefa.org](mailto:collegeplanning@mefa.org)