What to Know about the CSS Profile™
How to Participate

The **Audio Settings** allow you to control the volume levels.

The **Chat** feature is disabled. To communicate with the host, please use the **Q&A** section.

Have a question during the webinar? Type it in the **Q&A** section.

Use the **Raise Hand** feature if you need to get the presenter’s attention.

Use the **Live Transcript** feature if you want to see closed captions.

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Not-for-profit state authority created in 1982 helping families plan, save, and pay for college
What is the CSS Profile?

• The College Board's online financial aid application
• Required by almost 200 colleges/universities & a handful of 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 you to provide special circumstances
High school seniors should apply for 2023-24

List of colleges that require the Profile

Info for noncustodial parents

Overview webinar

Links to more info
For any parent, including all noncustodial parents, who is not using the student’s account to complete the CSS Profile
# 2023-24 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.

<table>
<thead>
<tr>
<th>CSS Code</th>
<th>Institution Name</th>
<th>Institution State</th>
<th>CSS Profile – Domestic Students</th>
<th>CSS Profile – International Students</th>
<th>CSS Profile – Noncustodial Parents</th>
<th>IDOC</th>
</tr>
</thead>
<tbody>
<tr>
<td>1001</td>
<td>Adrian College, MI</td>
<td>MI</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
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<tr>
<td>1003</td>
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<td>American University</td>
<td>DC</td>
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<td>3003</td>
<td>Amherst College</td>
<td>MA</td>
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<td>0193</td>
<td>Armenian Student Assoc of Amer</td>
<td>RI</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>3075</td>
<td>Babson College</td>
<td>MA</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Application Process

• Sign in
  • Use **student’s** College Board account from SATs/AP tests
  • OR 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
• Each section is checked and turns green when it’s completed
• You *are* permitted to jump ahead to a different section
• Questions will be indicated if required
• You don’t have to do the application all in one sitting
• When logging back in, you will be directed to the first incomplete section
• Answers are automatically saved as you go
• Application is mobile-friendly
• Click **Save and Continue** to move to the next section
• To exit, click **Save and Continue** and then close the browser
• Use buttons in application, not web browser, to navigate
• Use hints and notes for question guidance
• Some questions will offer expandable hints you can click to read
• 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
• 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 to submit a Profile (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

Link on homepage to helpful tips
If no noncustodial parent is listed, student will receive follow-up questions

- 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
  – 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
• Colleges where student is applying
• Parent & student 2021 income
  • Will refer to tax return lines
• Parent & student projected income
  • 2022 & 2023
• 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
- Parent assets held in names of children
- Retirement value (asked for, though not often used)

**Parent expenses**
- Medical/dental
- Private elementary/secondary school tuition
- Education loan payments
Family data
— Ages of children in family
— Colleges that children 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
Fees

- $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
- Expanded fee waiver policy
Fee Waivers

- Automatically granted if family meets one of the following:
  - Household income (AGI) is $100,000 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)
- Available to freshman/transfer/returning/independent undergraduate students
- 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
• 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
• 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
• 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
- Not all CSS Profile schools use IDOC; check with each college
- 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
1. IDOC Introduction

- About IDOC
- Log in to IDOC
- Determining What Documents Are Required
- Uploading Documents
- Checking the Status of Documents
- How to Complete Institutional Forms
- Tips for a Successful IDOC Submission
- Helpful Resources
- Survey

IDOC Introduction

IDOC is a service that collects family financial documents and distributes them to institutions on behalf of the student.

In this overview, we are going to discuss what IDOC is and guide you through its use. To begin, use the navigation on the left to select the topic you wish to learn more about or view the video in its entirety by clicking play below.

slides.collegeboard.org/idoc-student-dashboard
Click on **Contact Us** on the top navigation bar

Phone Number

Email Address

Chat
Things To Do

• Reference MEFA’s *Timeline for College Admissions & Financial Aid* on mefa.org

• Research deadlines and required applications

• Attend other MEFA webinars: mefa.org/events

• Start completing applications
  – Remember to do the FAFSA!
QUESTIONS?

Call (800)-449-MEFA (6332)
or email collegeplanning@mefa.org