

January 2016

Dear Colleagues:

Thank you for your continued commitment to college and career readiness for all of our students. Postsecondary planning for seniors is a crucial aspect of this work, and we are continually striving to improve the resources and tools available to support this. The FAFSA Completion Data portal provides our high schools with live data on FAFSA and TAP completion for our graduating seniors. NYCDOE has partnered with the NY State Higher Education Services Corporation (HESC) to develop this data portal. We hope that this real time data will allow you to effectively target and encourage students to complete these financial aid forms, thus helping to ensure a smooth transition to postsecondary education. In this manual you will find detailed instructions on how to complete registration and set up account to retrieve the FAFSA/TAP completion reports.

Students must complete the FAFSA to be eligible for any type of aid for college. The FAFSA opens on January 1 of each year. Many colleges (including CUNY) allocate funds on a rolling, first-come-first-served basis, and so early application is key. Students who complete FAFSA are much more likely to enroll in postsecondary education. One study found that **helping families to complete and submit the FAFSA increased students' postsecondary enrollment by 29%**. Yet, it has been estimated that nearly \$50 million in Pell grant awards alone goes untapped by New York City students each year that would be eligible if they had only filled out their FAFSA forms.

We thank you for working with our students to distribute the FAFSA guide and provided related supports and guidance to your graduating seniors and their families, including utilizing the FAFSA Completion Data Portal. For general questions on financial aid process and/or additional resources please visit: <http://schools.nyc.gov/Offices/OPSR/financialaid>

Thank You,

Office of Postsecondary Readiness

College and Career Planning Team

NYS FAFSA Completion Initiative: Questions and Answers

1. **What is NYS FAFSA Completion Initiative?**

The FAFSA Completion Initiative is a new initiative through which the U.S. Department of Education (US DOE) is partnering with state student grant agencies to allow these agencies to provide secondary schools, school districts, and certain designated entities with limited, yet important, information on student progress in completing the FAFSA form.

2. **I received my ID and password but I am having problems with logon. Who do I call?**

You can call HESC Help Desk at 1-866-433-HESC (1-866-433-4372).

3. **How is this HESC initiative different than the Federal FAFSA Pilot Project that ended this past year?**

This FAFSA Completion Initiative builds and expands on the success of the U.S. Department of Education's FAFSA Completion Pilot Project. But unlike the Pilot project which only provided FAFSA status data, HESC will provide school with web-based reports containing both FAFSA and TAP filing status data.

4. **Will reports only show students who submit or will it have all students coded as seniors?**

The reports will only include students who submitted a FAFSA application with the correct high school.

5. **How often is data uploaded?**

Data is processed daily except for holidays and weekends.

6. **What are schools expected to do to with this data?**

Schools are encouraged to provide FAFSA completion assistance to graduating seniors who have not yet completed financial aid forms or who whose forms have not been submitted successfully.

7. **Why would a student who submitted a FAFSA not appear in a school's customized report?**

A student who has submitted a FAFSA but does not appear on your report may have not listed their high school correctly. You can check this by reviewing the students' SAR (Student Aid Report). A student who has submitted a FAFSA will have received a Student Aid Report ([SAR](#)) as a result of filing the FAFSA. If the correct high school is not listed on the SAR or the high school field is blank, then the student will not be associated with your school and will not appear on the report. The student will need to correct his/her FAFSA online and update their high school to be associated with your school.

8. **If there are errors on a students' SAR, how do we make corrections?**

Neither HESC nor a school official can fix errors on a FAFSA or a Student Aid Report (SAR). School staff should refer students to this [page](#) for assistance on how to make corrections and updates. These updates can be made independently by the student or with school's assistance.

9. **Do schools need to secure written permission from parents/guardians to see the customized reports?**

No. HESC is authorized to share the prescribed FAFSA Filing Status Information with school districts, secondary schools, Local Educational Agencies (LEA), and federally approved designated entities with which it has a written agreement.

10. **Can non-DOE employees working in schools access this data?**

No. NYCDOE obtained data sharing agreements and user permissions on behalf of DOE staff. Community Based Organizations and other institutions can work directly with HESC to obtain data sharing agreement. Additional information on this process can be found [here](#).

I. Completing Your Electronic Financial Aid Network (EFAN) Application

- 1) You will receive an email from HESC welcoming you to the NYS State Higher Education Service Corporation (HESC) Correspondence System. You must complete registration using the time sensitive link the email within twenty four hours or the link will become inactive.

From: HESC

Subject: New EFAN User ID

To complete the processing of your HESC EFAN User ID application, please utilize the following time sensitive link:
[#TEMPORARY_LINK#](#)

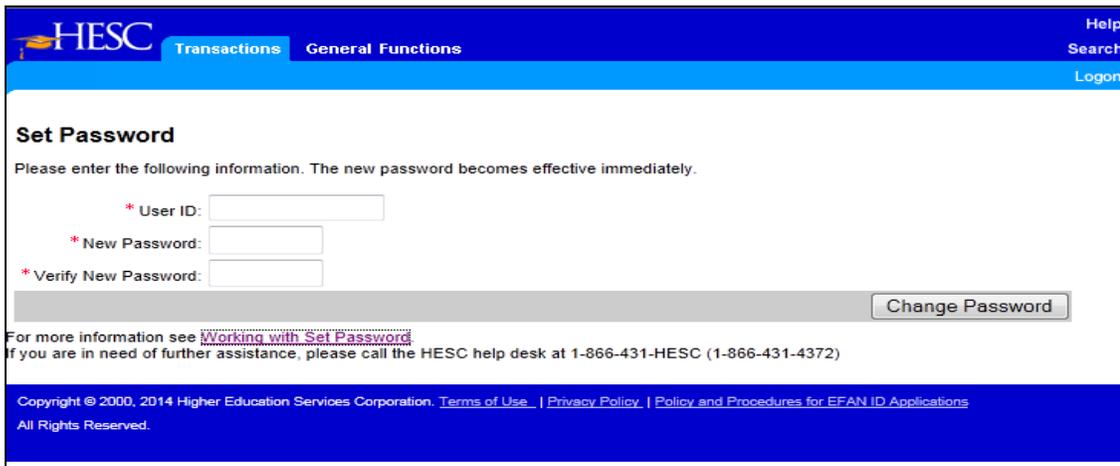
Please logon using your HESC EFAN User ID which was sent to you via a separate communication. Upon login, you will be required to establish a new password known only to you, accept the terms and conditions for HESC EFAN User ID usage, and register your identifying information to enable password resets. Once the registration process is complete, requested accesses will be available immediately.

Registration using this time sensitive link must be completed within 24 hours or the link will become inactive. If the registration process could not be completed within that timeframe, please contact the Helpdesk at 1-866-431-HESC (1-866-431-4372) to request a new temporary password.

The full registration process must be completed within 30 days to complete the processing of your HESC EFAN User ID Application. Again, if a problem is encountered regarding HESC EFAN User ID issuance, registration or usage, please contact the HESC Helpdesk at 1-866-431-HESC (1-866-431-4372).

Thank you for doing business with HESC.

- 2) Enter the User ID you received from HESC in the user field and a new password in the fields provided. If you need help creating a valid password you can click on the “working with set password”, shown by arrow.



The screenshot shows the HESC web application interface. At the top, there is a navigation bar with 'HESC' logo, 'Transactions', 'General Functions', 'Help', 'Search', and 'Logon'. The main content area is titled 'Set Password' and contains the following text: 'Please enter the following information. The new password becomes effective immediately.' Below this text are three input fields: '* User ID:', '* New Password:', and '* Verify New Password:'. A 'Change Password' button is located to the right of the input fields. At the bottom of the form, there is a link for 'Working with Set Password' and a note: 'If you are in need of further assistance, please call the HESC help desk at 1-866-431-HESC (1-866-431-4372)'. The footer contains copyright information: 'Copyright © 2000, 2014 Higher Education Services Corporation. Terms of Use | Privacy Policy | Policy and Procedures for EFAN ID Applications All Rights Reserved.'

3) Once you have successfully updated your password, you will review and accept terms and conditions and click **next**.

HESC

Accept Terms and Conditions
Please review the information below.

Applicant Information

Name Prefix:
First Name: ANDREA
Middle Initial:
Last Name: SMITH
Generation Suffix:
Title Suffix:
Organizational Title:

Applicant Institution Authorizations

Institution Code: 360008500000
Institution: NEW YORK CITY GEOGRAPHIC DISTRICT #8
Role: VICE PRINCIPAL
E-mail Address: ASMITH@SCHOOL.EDU
Requested FAFSA / TAP: REPORTS AND FORMS
Requested Authorization Level: AUTHORIZING OFFICIAL
Effective Date:

Signature

I understand that I am being given access to confidential information, and the reason I am being given access is to use all of this information ONLY in performing the assigned duties of my job, and I agree that I will NEVER ACCESS AND/OR REVEAL any of the information to anyone other than in connection with my employment, and then only as necessary to perform the assigned duties of my employment. I agree to NEVER ACCESS AND/OR REVEAL any information unless the information is connected with my current duties as an employee of this institution. I understand this information is owned by a government agency, and because it is the property of the government, the Privacy Act of 1974 protects this information even though I am not directly employed by the government, and criminal penalties may be imposed for unlawful disclosure, as provided in 5 U.S.C. 552a.

I agree at the termination of my employment to revoke my User ID at the institution or to notify my institution's Authorizing Officer.

I accept the terms and conditions
 I decline the terms and conditions

Next

4) Provide registration information. This information is used by HESC to verify your identity when contacting HESC and to ensure that your credentials are not compromised by others.

HESC

Set My Registration Information

Welcome to HESC's EFAN application registration page.
For enhanced security, we require the registration of confidential identifying information for all EFAN user ID recipients.
This personal identification information will be used to verify your identity when contacting HESC and to ensure that your credentials are not compromised by others.

Personal Identification Information

* Last four digits of your SSN:
* Month of your birth: (MM)
* Day of your birth: (DD)
* Middle Name: (If no Middle Name, enter the word "None")

Automated Password Reset Questions

To activate automated password reset capabilities, please answer two password reset questions.

* Question #1:
* Answer #1:
* Question #2:
* Answer #2:

Contact Information

Please update your contact information if it is not current.

* Address: ADDRESS LANE
Address 2:
* City: ADDRESS CITY
* State: NEW YORK
Foreign Address:
* Zip Code: 12345 +
* Phone Number: 123 - 456 - 7890 Tel. Ext.:
Alternate Phone Number 1: - - Tel. Ext.:
Alternate Phone Number 2: - - Tel. Ext.:
Fax Number: - -
Nickname:

Next

5) Review and verify your information, then click **submit**.

Setting My Registration Information'."/>

HESC

Registration Information Verification

Please review the information you have entered. Click "Submit" to save or "Cancel" to return and make changes.

Personal Identification Information

Last four digits of your SSN: 1234
Month of your birth: 12
Day of your birth: 23
Middle Name: Lawrence

Automated Password Reset Questions

Question #1: What city were you born in?
Answer #1: Hoboken
Question #2: What is your mother's middle name?
Answer #2: Scarlett

Institution Information

Address: 12 Address Lane
City: Address City
State: NEW YORK
Foreign Address:
Zip Code: 12345
Phone Number: (123) 456-7890
Alternate Phone Number 1:
Alternate Phone Number 2:
Fax Number:
Nickname:

For more information see [Setting My Registration Information](#).

6) A confirmation message will appear at the top of your screen.

here.' The form is divided into three sections: 'Personal Identification Information', 'Automated Password Reset Questions', and 'Institution Information'. The 'Personal Identification Information' section contains: Last four digits of your SSN: 1234, Month of your birth: 12, Day of your birth: 23, Middle Name: LAWRENCE. The 'Automated Password Reset Questions' section contains: Question #1: What city were you born in? Answer #1: Hoboken, Question #2: What is your mother's middle name? Answer #2: Scarlett. The 'Institution Information' section contains: Address: 12 ADDRESS LANE, City: ADDRESS CITY, State: NEW YORK, Foreign Address:, Zip Code: 12345, Phone Number: (123) 456-7890, Alternate Phone Number 1:, Alternate Phone Number 2:, Fax Number:, Nickname:. At the bottom right, there is a 'Print' button. At the bottom left, it says 'For more information see [Setting My Registration Information](#)'."/>

HESC Transactions FAFSA/TAP Completion General Functions Help Search Logoff

Registration Information Confirmation

✓ Registration has successfully been completed.

E-mail is critical to our electronic communication. Please verify your e-mail addresses for all your roles [here](#).

Personal Identification Information

Last four digits of your SSN: 1234
Month of your birth: 12
Day of your birth: 23
Middle Name: LAWRENCE

Automated Password Reset Questions

Question #1: What city were you born in?
Answer #1: Hoboken
Question #2: What is your mother's middle name?
Answer #2: Scarlett

Institution Information

Address: 12 ADDRESS LANE
City: ADDRESS CITY
State: NEW YORK
Foreign Address:
Zip Code: 12345
Phone Number: (123) 456-7890
Alternate Phone Number 1:
Alternate Phone Number 2:
Fax Number:
Nickname:

For more information see [Setting My Registration Information](#).

Congratulations! Your HESC EFAN account set up is complete you are now ready to access FAFSA/TAP completion information. Instructions on how to access customized completion report for your students can be found in Section 3 of this manual.

II. Submitting Electronic Financial Aid Network EFAN Applications for Other Staff Members

School Leaders who wish to designate additional staff to access FAFSA/TAP data, have the credentials to submit applications to grant access for additional staff system. School principals may submit multiple applications.

- 1) To Submit EFAN applications for other staff members in your school, click on the “Submit EFAN Application” link in the left side navigation bar.

Please note: all staff designated in Galaxy as “College and Career Point Person” received an email from HESC to complete EFAN application process. To search if your staff has an existing EFAN application type in last name and first name of staff you are searching for and click view button.

HESC Transactions FAFSA/TAP Completion General Functions Help Search Logoff

My HESC

Maintain My Personal Settings

- User Data
- Submit EFAN Application**
- View EFAN Applications
- Staff Verification
- Reassign Staff
- Reclaim Staff
- Permissions Report
- My Account
- Change My Password
- Change My Questions
- Revoke My Access

Submit EFAN Application

Please enter the customer's name and click the "View" button.
Required information is marked with an *.

* Last Name: First Name:

For more information, see [Working with Submit EFAN Application](#).

- 2) System will search for any existing matches. If the match returned is the staff member you are looking for, no further action is needed. If you wish to submit additional applications continue to step 3.

HESC Transactions FAFSA/TAP Completion General Functions Help Search Logoff

My HESC

Maintain My Personal Settings

- User Data
- Submit EFAN Application**
- View EFAN Applications
- Staff Verification
- Reassign Staff
- Reclaim Staff
- Permissions Report
- My Account
- Change My Password
- Change My Questions
- Revoke My Access

Submit EFAN Application

Please enter the customer's name and click the "View" button.
Required information is marked with an *.

* Last Name: First Name:

✓ A total of 1 item(s) met the selection criteria.
✓ Items 1 through 1 are currently displayed.

Please select an employee and click the "Continue" button.

Users				
Name	User ID	Institution Code	Authorizing Official	Status
<input type="radio"/> SMITH, JOHN	JSTEST54	360008505983	ADAMS, MARY	ACTIVE

If the employee does not appear in the list above, click the "New User" button.

For more information, see [Working with Submit EFAN Application](#).

3) If the matches returned do not include the staff member you were looking for, or you wish to grant access to additional staff, “New User” button.

Submit EFAN Application

Please enter the customer's name and click the "View" button.
Required information is marked with an *.

* Last Name: First Name:

✓ A total of 1 item(s) met the selection criteria.
✓ Items 1 through 1 are currently displayed.

Please select an employee and click the "Continue" button.

Users	Name	User ID	Institution Code	Authorizing Official	Status
<input type="radio"/>	SMITH, JOHN	JSTEST54	360008505983	ADAMS, MARY	ACTIVE

If the employee does not appear in the list above, click the "New User" button.

For more information, see [Working with Submit EFAN Application](#).

4) Complete the EFAN Application form. All required fields are denoted with a red asterisk.

Please note: your school’s name and [NCES code](#) will appear under “Institution”. Click the **Add Authorization** button to provide staff with access to your school’s data, then click **continue**.

Submit EFAN Application > Submit EFAN Application For New User

An EFAN application is a request for access to HESC's systems.
Please enter the following information for the employee's EFAN application and click the "Continue" button. You will be asked to confirm the data entered and sign the EFAN application before it is submitted.
Required information is marked with an *.

Applicant Data

Name Prefix:

* First Name:

Middle Initial:

* Last Name: SMITH

Generation Suffix:

Title Suffix:

Nickname:

Organizational Title:

Authorizing Official

Name: MICHAEL JONES
Title: DISTRICT SUPERINTENDANT
Phone: (555) 555-5555

* E-mail Address: MJONES@SCHOOL.EDU MICHAEL.JONES@DISTRICT.EDU

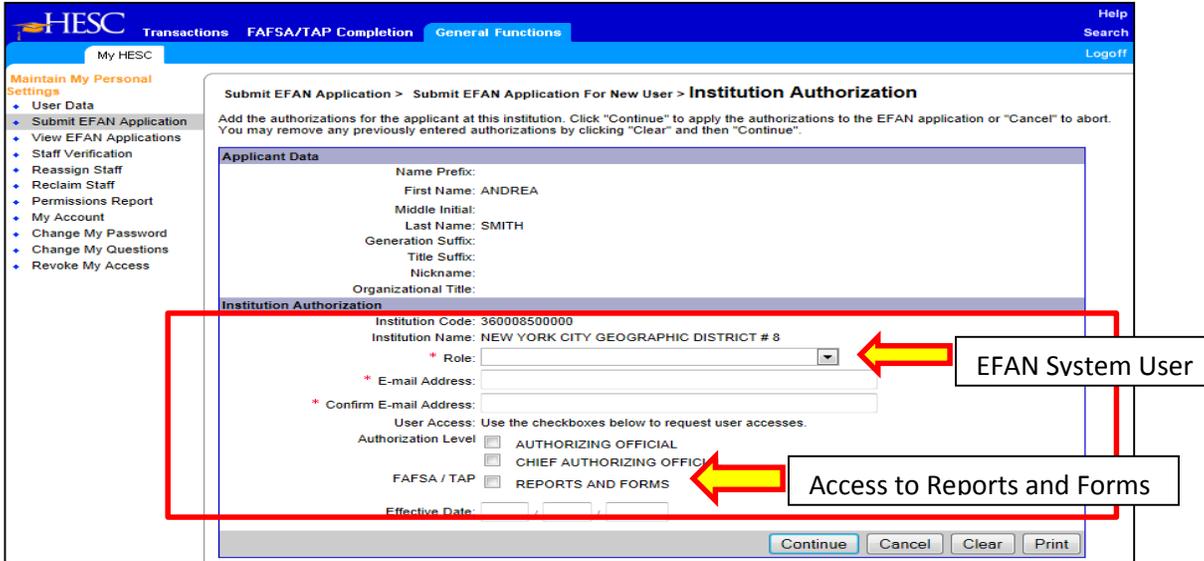
Add Institution Authorization

To add an authorization, select the Institution and click the 'Add Authorization' button:

Institution:

Your High School will appear here.

- 5) Select role of “EFAN system user” from dropdown box and enter email address. Provide your staff with access to “Reports and Forms”. Select the date you authorize the access to begin (i.e. today’s date). Once you have completed fields, click **continue**.



HESC Transactions FAFSA/TAP Completion General Functions Help Search Logoff
 My HESC

Maintain My Personal Settings
 User Data
 Submit EFAN Application
 View EFAN Applications
 Staff Verification
 Reassign Staff
 Reclaim Staff
 Permissions Report
 My Account
 Change My Password
 Change My Questions
 Revoke My Access

Submit EFAN Application > Submit EFAN Application For New User > **Institution Authorization**

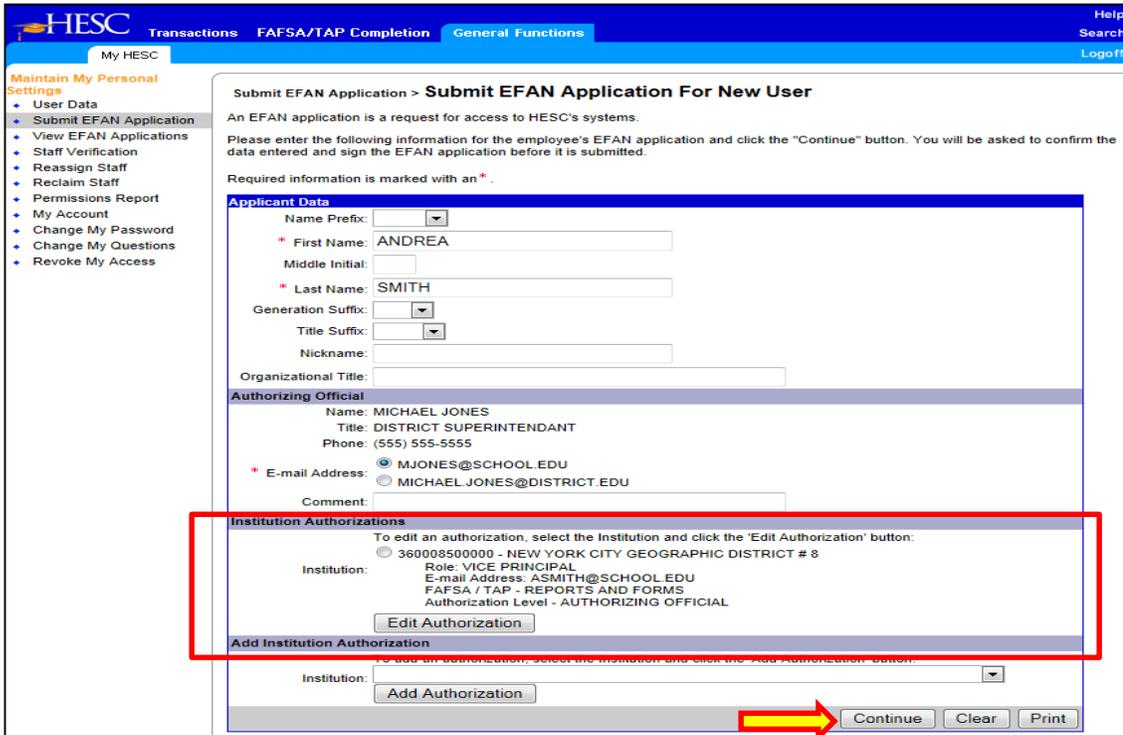
Add the authorizations for the applicant at this institution. Click "Continue" to apply the authorizations to the EFAN application or "Cancel" to abort. You may remove any previously entered authorizations by clicking "Clear" and then "Continue".

Applicant Data
 Name Prefix:
 First Name: ANDREA
 Middle Initial:
 Last Name: SMITH
 Generation Suffix:
 Title Suffix:
 Nickname:
 Organizational Title:

Institution Authorization
 Institution Code: 360008500000
 Institution Name: NEW YORK CITY GEOGRAPHIC DISTRICT # 8
 * Role:
 * E-mail Address:
 * Confirm E-mail Address:
 User Access: Use the checkboxes below to request user accesses.
 Authorization Level AUTHORIZING OFFICIAL
 CHIEF AUTHORIZING OFFICER
 FAFSA / TAP REPORTS AND FORMS
 Effective Date: / /

Continue Cancel Clear Print

- 6) This takes you back to the “Submit EFAN Application for New User” screen. You should see the institution authorizations you selected, click **continue**.



HESC Transactions FAFSA/TAP Completion General Functions Help Search Logoff
 My HESC

Maintain My Personal Settings
 User Data
 Submit EFAN Application
 View EFAN Applications
 Staff Verification
 Reassign Staff
 Reclaim Staff
 Permissions Report
 My Account
 Change My Password
 Change My Questions
 Revoke My Access

Submit EFAN Application > **Submit EFAN Application For New User**

An EFAN application is a request for access to HESC's systems.
 Please enter the following information for the employee's EFAN application and click the "Continue" button. You will be asked to confirm the data entered and sign the EFAN application before it is submitted.
 Required information is marked with an *.

Applicant Data
 Name Prefix:
 * First Name: ANDREA
 Middle Initial:
 * Last Name: SMITH
 Generation Suffix:
 Title Suffix:
 Nickname:
 Organizational Title:

Authorizing Official
 Name: MICHAEL JONES
 Title: DISTRICT SUPERINTENDANT
 Phone: (555) 555-5555
 * E-mail Address: MJONES@SCHOOL.EDU
 MICHAEL.JONES@DISTRICT.EDU
 Comment:

Institution Authorizations
 To edit an authorization, select the Institution and click the 'Edit Authorization' button:
 360008500000 - NEW YORK CITY GEOGRAPHIC DISTRICT # 8
 Institution: Role: VICE PRINCIPAL
 E-mail Address: ASMITH@SCHOOL.EDU
 FAFSA / TAP - REPORTS AND FORMS
 Authorization Level - AUTHORIZING OFFICIAL

Add Institution Authorization
 To use an authorization, select the institution and click the 'Add Authorization' button:
 Institution:

Continue Clear Print

7) Verify and review information you have entered. If information is correct, you will need to read terms of the EFAN agreement, click the check box to indicate your agreement and click **submit**.

Submit EFAN Application > Submit EFAN Application For New User > Verify Application

Please review the information you have entered and check the box in the signature section confirming you have read and accept the terms of this application. Click the "Submit" button to save or the "Cancel" button to return and make changes.

EFAN Application

Applicant Data

Name Prefix:
First Name: ANDREA
Middle Initial:
Last Name: SMITH
Generation Suffix:
Title Suffix:
Nickname:
Organizational Title:

Authorizing Official

Name: MICHAEL JONES
Title: DISTRICT SUPERINTENDANT
Phone: (555) 555-5555
E-mail Address: MJONES@SCHOOL.EDU
Comment:

Institution Authorizations

Institution Code: 360008500000
Institution Name: NEW YORK CITY GEOGRAPHIC DISTRICT # 8
Role: VICE PRINCIPAL
E-mail Address: ASMITH@SCHOOL.EDU
FAFSA / TAP: REPORTS AND FORMS
Authorization Level: AUTHORIZING OFFICIAL

Signature

I am employed by the institution named above and am authorized to request/revoke this access for the employee named above. I have the authority to authorize such access, and I certify I have instructed the employee on the procedures for using, accessing and NEVER disclosing all information obtained from HESC for any reason other than in connection with the employee's performance of the job assignment of processing HESC information. I further certify that the e-mail address provided on behalf of the EFAN User ID applicant has been established for exclusive use by that applicant.

MICHAEL JONES August 26, 2014

Submit Cancel Print

8) Confirmation message will appear at the top of your screen and new application ID will now be displayed. Please be sure to print a copy for our records.

Submit EFAN Application > Submit EFAN Application For New User > Verify Application

✓ The EFAN Application has been successfully submitted.

HESC has received the EFAN application you just submitted. Most accounts are set up within 5 working days. Requests for file transfer accounts may exceed this. Once the account has been established, both you and the applicant will receive e-mail notification.

EFAN Application

Application ID: 5645

Applicant Data

Name Prefix:
First Name: ANDREA
Middle Initial:
Last Name: SMITH
Generation Suffix:
Title Suffix:
Nickname:
Organizational Title:

Authorizing Official

Name: MICHAEL JONES
Title: DISTRICT SUPERINTENDANT
Phone: (555) 555-5555
E-mail Address: MJONES@SCHOOL.EDU
Comment:

Institution Authorizations

Institution Code: 360008500000
Institution Name: NEW YORK CITY GEOGRAPHIC DISTRICT # 8
Role: VICE PRINCIPAL
E-mail Address: ASMITH@SCHOOL.EDU
FAFSA / TAP: REPORTS AND FORMS
Authorization Level: AUTHORIZING OFFICIAL

Signature

I am employed by the institution named above and am authorized to request/revoke this access for the employee named above. I have the authority to authorize such access, and I certify I have instructed the employee on the procedures for using, accessing and NEVER disclosing all information obtained from HESC for any reason other than in connection with the employee's performance of the job assignment of processing HESC information. I further certify that the e-mail address provided on behalf of the EFAN User ID applicant has been established for exclusive use by that applicant.

MICHAEL JONES August 26, 2014

Print

9) Your staff should receive an email from HESC within five (5) business days welcoming them to the system.

What if you don't hear from HESC within 5 business days?

- 1) If you and your staff do not receive welcoming email from HESC within 5 business days, you can call the HESC Help desk at 1-866-431-4372.
- 2) You may also view the application status online at the "View EFAN Applications" and enter criteria to search applications. Once search criteria is entered click **view**.

View EFAN Applications

An EFAN application is a request for access to HESC's systems. This screen lists applications for the search criteria specified. You may search by Application ID, a full or partial name, or application status.

Applicant Last Name: Applicant First Name: Applicant MI:

Authorizing Official Last Name: Authorizing Official First Name: Authorizing Official MI:

Application ID: Status:

Application Type: Order By:

Application ID was generated for you on the confirmation page when you submitted application

- 3) Results and status of application are displayed.

View EFAN Applications

An EFAN application is a request for access to HESC's systems. This screen lists applications for the search criteria specified. You may search by Application ID, a full or partial name, or application status.

Applicant Last Name: Applicant First Name: Applicant MI:

Authorizing Official Last Name: Authorizing Official First Name: Authorizing Official MI:

Application ID: Status:

Application Type: Order By:

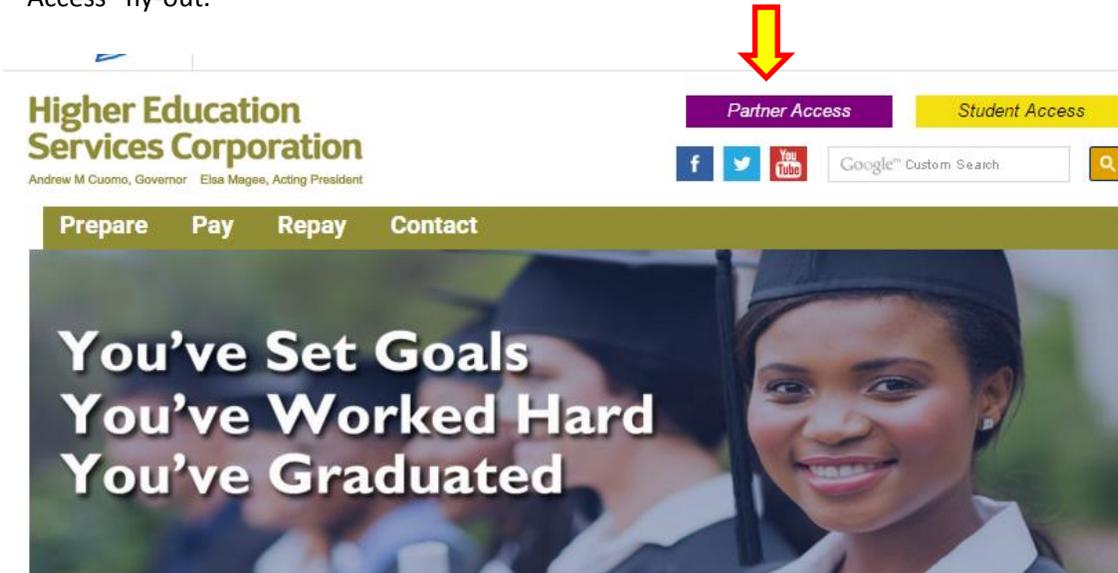
✓ A total of 1 item(s) met the selection criteria.
✓ Items 1 through 1 are currently displayed.

Applicant Name	Authorizing Official	App ID	Status	Date	Type	Form
<input type="radio"/> SMITH, ANDREA	JONES, MICHAEL	5645	PENDING USER SIGNATURE	8/26/14	NEW	E

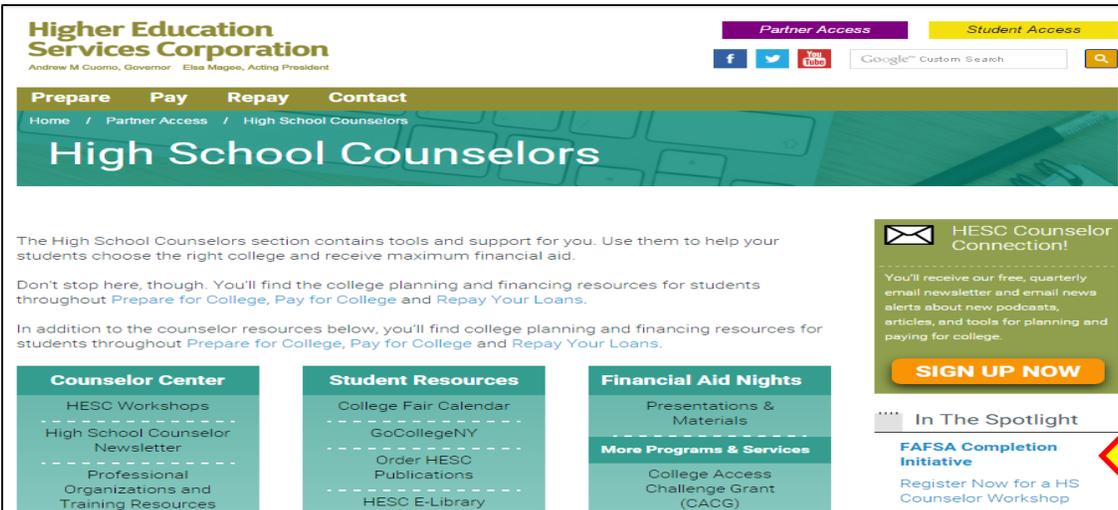
III. FAFSA/TAP Customized Report

A. Accessing NYS FAFSA Completion Initiative Website

- 1) EFAN users can access reports from the HESC secure system in a number of ways. Your HESC welcoming email will instruct you to visit HESC.NY.GOV. From the home page you can click 'HS Counselors' link under 'Partner Access' fly-out.



- 2) Fly-out will bring you to High School Counselors Page, click "FAFSA Completion Initiative."



3) Once at the FAFSA Completion Initiative page clicking on the “Log in for Customized Report” link.

Tip: You may access this page directly [here](#).

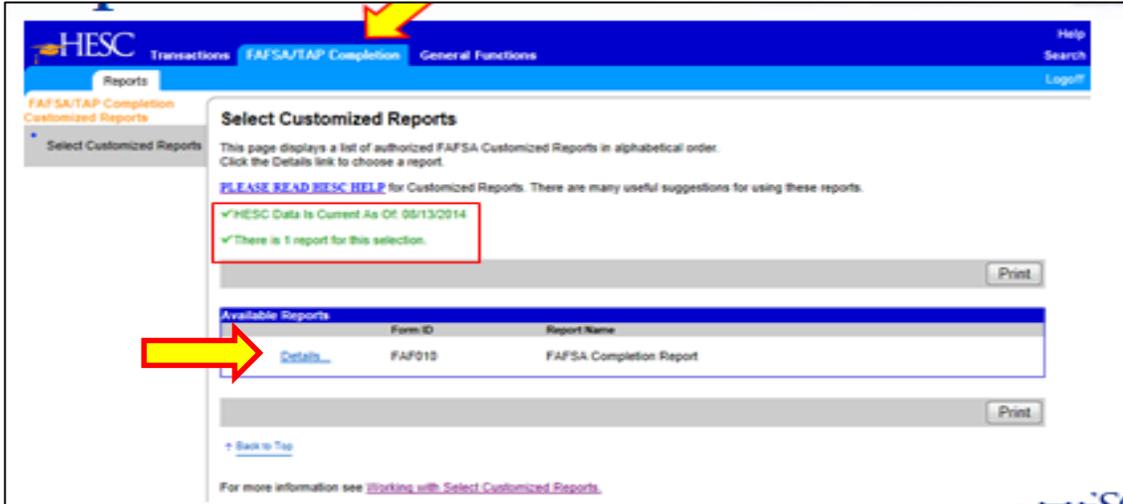
The screenshot shows the Higher Education Services Corporation website. At the top, there are links for 'Partner Access' and 'My HESC Account Access'. Below that is a navigation menu with 'Prepare', 'Pay', 'Repay', and 'Contact'. The main heading is 'NYS FAFSA Completion Initiative'. There is a banner image of three students looking at a computer. Below the banner is a section titled 'Reach Higher: FAFSA Completion Challenge'. On the right side, there is a 'Need help? CHAT NOW' button and a 'Related Resources' list. A red arrow points to the 'Log In For Customized Report' link in the list.

4) Your browser will open this logon screen where you must enter the User ID and password, once you complete required information click **logon**.

The screenshot shows the HESC web portal logon screen. At the top, there is a blue header with the HESC logo and navigation links for 'Transactions' and 'General Functions'. Below the header, there is a 'Logon' section with the following text: 'Required information is marked with a *'. 'Enter your User ID and password to logon. [Forgot Your Password?](#)'. There are two input fields: '* User ID: []' and '* Password: []'. Below that, there is a section for changing the password: 'Enter the following information only if you wish to change your current password. The new password becomes effective immediately.' with 'New Password: []' and 'Verify New Password: []'. At the bottom, there is a red note: 'Note: By clicking the Logon button you agree to the [Terms and Conditions](#) dated 6/11/12 stated below.' and two buttons: 'Logon' and 'Cancel'. A red arrow points to the 'Logon' button. Below the buttons, there is a section for 'Terms and Conditions of Use of HESC Web (last revised 6/11/12)' and a small logo in the bottom right corner.

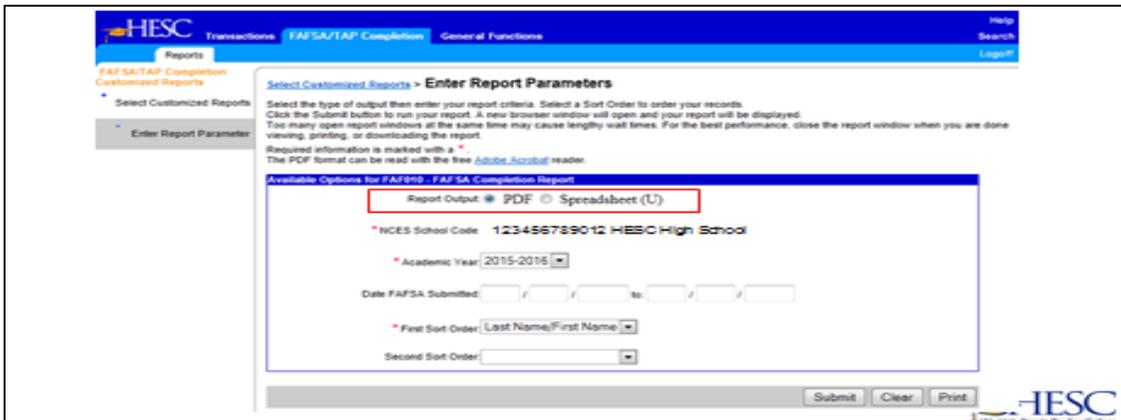
B. FAFSA/TAP Customized Report Tab

- 1) Once you've logged in, you will be on the FAFSA/Tap Completion screen. On this screen, you'll see the date as of which the data was last updated. Data is processed daily except for holidays and weekends. You can access the report by clicking **details**.



- 2) Select the report format – either a PDF or a Spreadsheet.

Tip: You may want to select the spreadsheet format if you want to add comments on each student, reminders or combine the report with other school-collected data.



- 3) Select the academic year. The Academic Year is based on when the student will be attending college and runs from July 1 through June 30th. So high school students graduating in June 2016, will be enrolling in college for the 2016-17 academic year.

The screenshot shows the HESC FAFSA/TAP Completion system interface. The main heading is "Enter Report Parameters". Below this, there are instructions and a form for selecting report criteria. The form includes the following fields:

- Report Output: PDF Spreadsheet (U)
- *NCES School Code: 123456789012 HESC High School
- *Academic Year: 2015-2016 (highlighted with a red box and a yellow arrow)
- Date FAFSA Submitted: [/ /] to: [/ /]
- *First Sort Order: Last Name/First Name
- Second Sort Order: []

Buttons for "Submit", "Clear", and "Print" are visible at the bottom right of the form area.

- 4) Enter a desired date range for the report, based on the FAFSA Submittal Date (MM/DD/CCYY). If this parameter is left blank, the report will show all records for the academic year selected. However, you may want to generate data showing statuses for the month or from the date you last generated a report.

This screenshot is similar to the previous one, showing the "Enter Report Parameters" form. The "Academic Year" dropdown is still set to "2015-2016". The "Date FAFSA Submitted" field is now highlighted with a red box and a yellow arrow, indicating it is the next step in the process. The field is currently empty, showing the format [/ /] to: [/ /].

5) You will be able to choose the desired sort order. Select a primary sort field and a secondary sort field. Once you sort select data elements click **submit** to generate your report.

You can sort by any of the following data elements:

- Last Name/First name
- NCES School Code
- Date FAFSA Submitted
- Date FAFSA Processed
- FAFSA Completion Status
- Date TAP Application
- TAP Application Submitted
- TAP Application Status

6) A new browser tab is opened that will display a message that your information is being retrieved.



C. FAFSA/TAP Completion Report - PDF Format

- 1) If you selected pdf format, report will display the parameters you entered along with a key for the FAFSA and TAP filing status codes. Please note: Errors cannot be corrected by HESC, students must go back in to correct their form.

New York Higher Education Service Corporation
99 Washington Avenue Albany, New York 12255
1-866-431-HESC (1-866-431-4372)
www.hesc.ny.gov

FAFSA/TAP Completion Report

The following parameters were used to generate this report

Parameter Name	Value
NCES School Code	362475003362
Academic Year	2015-16
FAFSA Submitted Date Begin	All
FAFSA Submitted Date End	All
First Sort Order	Last Name/First name
Second Sort	NCES School Code

KEY:

FAFSA Completion Status:

- 1 = FAFSA submitted but not processed due to missing signature(s)
- 2 = FAFSA processed with an EFC calculated
- 3 = FAFSA processed with errors

TAP Application Status:

- 1 = TAP Application submitted but not processed due to missing signature(s)
- 2 = TAP Application processed and eligibility determined
- 3 = TAP Application processed with errors

- 2) Customized report will be displayed on the second page of the PDF document. Below is a sample high school, [NCES code](#) is 362475003362 and sorted by "Student Name" as primary sort field.

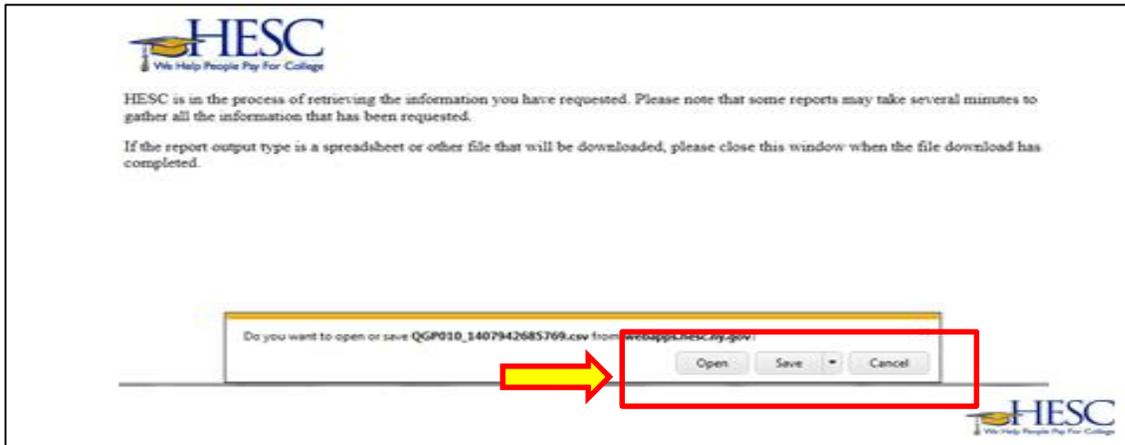
New York Higher Education Service Corporation
99 Washington Avenue Albany, New York 12255
1-866-431-HESC (1-866-431-4372)
www.hesc.ny.gov

FAFSA/TAP Completion Report

Student Last Name	Student First Name	MI	Date of Birth	Zip Code	NCES School Code	Date FAFSA Submitted	Date FAFSA Processed	FAFSA Completion Status	TAP Application Submitted	TAP Application Status
Anderson	Thomas	T	12/1/1993	12345	362475003362	7/1/2015	7/18/2015	2	7/2/2015	1
Abbott	Jessica	A	11/1/1993	12345	362475003362	7/1/2015	7/18/2015	2	7/10/2015	3
Doe	Jane	M	6/25/1993	67890	362475003362	7/1/2015		1		
Franklin	Laurie	J	12/1/1993	12345	362475003362	7/1/2015	7/18/2015	3	7/10/2015	3
Greco	John	T	7/2/1993	12345	362475003362	7/1/2015	7/18/2015	3		
Shellac	Meghan	M	4/24/1993	67890	362475003362	7/1/2015	7/18/2015	3	7/2/2015	2
Smith	Douglas		12/22/1993	12345	362475003362	7/1/2015		1		
Smith	Mary	J	4/28/1993	12345	362475003362	7/1/2015		1		
Tennant	Alex	J	5/19/1993	67890	362475003362	7/1/2015	7/18/2015	3		
Victor	Anthony	M	3/25/1993	67890	362475003362	7/1/2015		1		
Zinnger	Anne	L	1/25/1993	67890	362475003362	7/1/2015	7/18/2015	3	7/2/2015	2

FAFSA/TAP Completion Report - Spreadsheet Format

- 1) If you selected a Spreadsheet output format, the following will be displayed, in a new tab, after hitting submit. You will be asked if you would like to Open or Save the generated file. (The message may vary slightly depending on browser being used.)



- 2) Upon opening the spreadsheet, you will again see the parameters entered, the filing status key code, and the report itself.

The following parameters were used to generate this report

Parameter Name	Value
NCES School Code	362475003362
Academic Year	2015-16
FAFSA Submitted Date Begin	All
FAFSA Submitted Date End	All
First Sort Order	Last Name/First name
Second Sort	NCES School Code

KEY:

FAFSA Completion Status:

- 1 = FAFSA submitted but not processed due to missing signature(s)
- 2 = FAFSA processed with an EFC calculated
- 3 = FAFSA processed with errors

TAP Application Status:

- 1 = TAP Application submitted but not processed due to missing signature(s)
- 2 = TAP Application processed and eligibility determined
- 3 = TAP Application processed with errors

Status Key Code

Student	First Name	MI	Date of Birth	Zip Code	NCES School Code	Date FAFSA Submitted	Date FAFSA Processed	FAFSA Completion Status	TAP Application Submitted	TAP Application Status
Anderson	Thomas	T	12/1/1993	12345	362475003362	7/1/2015	7/18/2015	2	7/2/2015	1
Abbott	Jessica	A	11/1/1993	12345	362475003362	7/1/2015	7/18/2015	2	7/10/2015	3
Doe	Jane	M	6/25/1993	67890	362475003362	7/1/2015		1		
Franklin	Laurie	J	12/1/1993	12345	362475003362	7/1/2015	7/18/2015	3	7/10/2015	3
Greco	John	T	7/2/1993	12345	362475003362	7/1/2015	7/18/2015	3		
Shellac	Meghan	M	4/24/1993	67890	362475003362	7/1/2015	7/18/2015	3	7/2/2015	2
Smith	Douglas		12/22/1993	12345	362475003362	7/1/2015		1		
Smith	Mary	J	4/28/1993	12345	362475003362	7/1/2015		1		
Tennant	Alex	J	5/19/1993	67890	362475003362	7/1/2015	7/18/2015	3		
Victor	Anthony	M	3/25/1993	67890	362475003362	7/1/2015		1		

3) After you have finished viewing, printing, or saving the generated report, you may switch back to your original tab, which will still have the 'Enter Report Parameters' screen open. You may now generate additional customized reports if desired. When you are done generating reports click **Logoff** button.

The screenshot shows the HESC (Higher Education Services Corporation) interface for FAFSA/TAP Completion Customized Reports. The page is titled "Enter Report Parameters" and is part of the "FAFSA/TAP Completion Customized Reports" section. The interface includes a sidebar on the left with "Enter Report Parameter" selected, and a main content area with instructions and a form for report criteria. The form includes fields for "Report Output" (PDF or Spreadsheet), "NCES School Code" (123456789012), "Academic Year" (2014-2015), "Date FAFSA Submitted" (with date pickers), "First Sort Order" (Last Name/First Name), and "Second Sort Order". A "Logoff" button is highlighted in the top right corner of the page.