

# Memorandum

## United States Department of Education Institute of Education Sciences National Center for Education Statistics

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DATE: April 25, 2017

TO: Robert Sivinski and E. Ann Carson, OMB

THROUGH: Kashka Kubzdela, OMB Liaison, NCES

FROM: Tracy Hunt-White, NPSAS:16 Project Officer, NCES

SUBJECT: NCER-NPSAS Grant Study - Financial Aid Nudges 2017: A National Experiment to Increase Retention of Financial Aid and College Persistence Intervention Messages Change Request (OMB# 1850-0932 v.4)

NCER-NPSAS Grant Study - Financial Aid Nudges 2017: A National Experiment to Increase Retention of Financial Aid and College Persistence request was approved by OMB in January 2017 with the latest revision in March 2017 (OMB# 1850-0932 v.1-3). In light of low FAFSA filing rates observed in the study sample and outside reports of reduced FAFSA filing, and in light of the Internal Revenue Service (IRS) announcement that the Data Retrieval Tool (DRT) will be unavailable until the next FAFSA season, this request is to remove a previously added message that would have been used had the DRT been made available this spring, and to add one different text message to the approved intervention communication materials to encourage filing.

Student data from the study sample shows low FAFSA completion rates across all experimental groups, including the control group. Approximately, one-quarter of sample members have applied for FAFSA at this stage of the intervention. We are concerned that low filing rates are attributable to the unexpected shutdown of the IRS (DRT) for FAFSA completion and reports that hackers used the FAFSA application to steal tax information (<https://www.ed.gov/news/press-releases/update-internal-revenue-service-irs-and-federal-student-aid-fsa-statement-irs-data-retrieval-tool-drt>). We are requesting to send an additional text message to help students understand that there is still time to complete the FAFSA and that they can complete the FAFSA without the DRT.

The following new text messages have been added as 8a in the attached Appendix A:

### **Groups 1a-1c (Message 8a):**

Hi (name). If you haven't already, the time is now to focus on your FAFSA so you have financial aid for next year. Filed your FAFSA yet? Reply **YES/NO**

**Response to YES:** Way to go! Finishing FAFSA is a major step to securing the financial aid you need for your next year in college. [GIF: <http://giphy.com/gifs/Y8QPqewH0NFu>]

**Response to NO:** Okay, try to make time for FAFSA this week. If you need help, contact your school's financial aid office or check out these resources: [ATTACH: FAFSAimage]

### **Group 2 (Message 8a):**

Hi (name), it's Lara. If you haven't already, the time is now to focus on FAFSA so you have financial aid for next year. Filed FAFSA yet? Reply **YES/NO**

**Response to YES:** Way to go! Finishing FAFSA is a major step to securing the financial aid you need for your next year in college. [GIF: <http://giphy.com/gifs/Y8QPqewH0NFu>]

**Response to NO:** Okay, I'm here to support you. Let's try to make time for FAFSA this week. Please text me for help.

In addition, we would like to request that message 9a be removed from the text message scripts. This message was added as part of OMB# 1850-0932 v.3 to alert students when the DRT was made available. Now that the IRS has announced that the DRT will not be operational until the next FAFSA season, message 9a is no longer necessary.

These additional messages do not change the estimated respondent burden or the cost to the federal government.