

August 5, 2002

TO: Erik Melis  
FROM: Howard W. Bell, Jr.  
RE: Interview notes

The following are excerpts from the notes that I took during our telephone interview in May. I have incorporated these excerpts in a draft Best Practices report that I am writing. Please verify that the following excerpts capture the essence of your practices at George Mason University.

Erik Melis of George Mason University:<sup>1</sup>

1) Stated that:

- a) Estimated tax filers have a high error rate.
- b) Marital status changes tend to cause people to misreport their marital status and divorced and separated filers sometimes do not know what to report.
- c) The Schedule A for an applicant's tax return is sometimes confused with Worksheet A for the FAFSA.
- d) 401(k)s are often reported incorrectly.
- e) An applicant's dependency status other than an age-based attribute (household size) can sometimes cause errors.

2) Reported that the University uses:

- a) Its Web site to provide students with answers to Frequently Asked Questions and alerts about [changes in aid programs](#).
- b) High school tours/presentations to inform students, parents, and counselors how to complete the FAFSA form and how to avoid making errors.

Deleted: the Pell Grant

3) Said that taxes paid is a source of error for a number of applicants and that:

- a) The parents of dependent applicants sometimes report untaxed income incorrectly and the University uses an applicant's parents' W-2 form to verify parental untaxed income.
- b) When taxes paid are greater than 50% of AGI it is a trigger for George Mason to verify a FAFSA.

4) Pays particular attention to persons who are wards of the court because of the confusion that can arise due to an applicant not accurately identifying his/her custodial status.

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<sup>1</sup> Information identified in a May 7, 2002 telephone discussion with Erik Melis of George Mason University.