

# 2020 ISFAA-ICHE Webinar Series

## *Applying, Claiming, and Disbursing State Financial Aid*

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APPLYING, CLAIMING, AND DISBURSING STATE FINANCIAL AID

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# APPLYING STATE FINANCIAL AID



# ORDER OF AID APPLICATION

1. Private/Institutional Grant Aid or Scholarships Specifically for Tuition and Fees
2. Tuition Assistance (TA) from U.S. Army and Other Branches
3. Frank O'Bannon Grant, 21<sup>st</sup> Century Scholarship, Adult Student Grant
4. Post 9/11 GI Bill Benefits (Chapter 33)
5. National Guard Supplemental Grant/Extension Scholarship
6. Tuition and Fee Exemptions for Children of Disabled Veterans and Public Safety Officers (CVO)
7. William A. Crawford Minority Teacher Scholarship
8. Next Generation Hoosier Educators Scholarship
9. Mitch Daniels Early Graduation Scholarship
10. Other Grant Aid or Scholarships
11. Workforce Ready Grant
12. Student Loans

# AWARD STRUCTURE

## Award Start and Expiration Dates:

- ▶ If the student has never previously used state aid, or used state aid more than one award year ago:
  - ▶ Initially set as 7/1 – 6/30
  - ▶ Will adjust to (term start date of first term claimed) – (1 year – 1 day) once claimed
- ▶ If student used state aid last award year:
  - ▶ Initially set as (last award year's award expiration date + 1 day) – 6/30
  - ▶ Will adjust to (term start date of first term claimed) – (1 year – 1 day) once claimed
- ▶ Exception: CVO and William A. Crawford Minority Teacher Scholarship always run 7/1 – 6/30
- ▶ Exception: Mitch Daniels Early Graduation Scholarship always runs 7/1 – 12/31

# ALLOWABLE EXPENSES

- ▶ State financial aid may be applied toward a student's Title IV aid eligible courses.
  - ▶ CVO may be used toward dual credit courses.
- ▶ Out-of-state or overseas study will only be covered when the student is enrolled for credit at the eligible institution, and the bills are charged from and paid to the eligible institution.
- ▶ State financial aid may be applied toward graduate or professional degree courses which require a student to enroll before receipt of a Bachelor's Degree.

## ALLOWABLE EXPENSES

- ▶ Most state financial aid programs may only be applied toward tuition and regularly assessed fees.
- ▶ The William A. Crawford Minority Teacher Scholarship and the Next Generation Hoosier Educators Scholarship can be used toward cost of attendance.
- ▶ The Mitch Daniels Early Graduation Scholarship must first be used toward student's educational costs, and any remaining funds shall be remitted to the student. The award is not limited to cost of attendance.

# ALLOWABLE EXPENSES

- ▶ The Student Teaching Stipend for High-Need Fields and the Earline S. Rogers Student Teaching Stipend for Minorities are remitted directly to the student via direct deposit.
- ▶ The Workforce Ready Grant covers tuition, mandatory fees and select consumables for approved certificate programs.
  - ▶ “Consumables” are typically raw materials needed for a course which include items such as welding rods, lubricants, cleaning materials, etc.
- ▶ The Workforce Ready Grant can be used in conjunction with the Frank O’Bannon Grant, 21st Century Scholarship, Adult Student Grant, and National Guard Supplemental Grant.

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# CLAIMING STATE FINANCIAL AID



# CLAIMING RULES

- ▶ Institutions should verify a student meets the eligibility requirements of the specific award prior to claiming.
- ▶ A student must meet the enrollment status requirements for the award at the “state financial aid census date” for given academic term.
- ▶ If student does not meet requirement on that date, treat the last day of the academic term as a second census date.
- ▶ Student must be degree-seeking or certificate-seeking in a Title IV-eligible program during academic term.
  - ▶ Except students using CVO for dual credit courses in High School.

## CLAIMING RULES

- ▶ In most instances, a student must maintain Satisfactory Academic Progress (SAP) as determined by the postsecondary educational institution.
- ▶ However, a student who has not maintained SAP may still receive the Adult Student Grant or the Workforce Ready Grant if either of the two circumstances apply:
  - ▶ The applicant has not attended the eligible institution for the previous two academic years.
  - ▶ The applicant attended the eligible institution at any time during the previous two academic years and maintained Satisfactory Academic Progress during that time.
- ▶ Starting this award year (2020-2021), SAP does apply to individuals receiving CVO.

## CLAIMING RULES

- ▶ Claims may be made on or after the reconciliation start date but no later than the reconciliation deadline for a given academic term.
- ▶ Reconciliation start dates are typically set three weeks before the first day of the academic term. Reconciliation deadlines are typically set as the last day of the month following the month containing the last day of the academic term.
- ▶ If you fail to claim an award before the reconciliation deadline, you have up to 365 days to claim. The claim will be put on hold for a manual review by a CHE staff member, and will be released shortly. On-hold claims are reviewed on a daily basis.

## CLAIMING RULES

- ▶ The award status in ScholarTrack must be “Ready to Claim” or Award Offered” prior to an institution claiming an award.
- ▶ The award offer must start before the academic term ends and the academic term must start before the award expires.
- ▶ The amount of the claim must be disbursed or scheduled to be disbursed to the student before an institutions claims an award.

## CLAIMING RULES

- ▶ Institutions may claim or disburse no more than the balance of eligible charges for the award offer for a given academic term.
- ▶ The Mitch Daniels Early Graduation Scholarship must be fully claimed and disbursed in the Fall term.
- ▶ The Student Teaching Stipends are remitted directly to students and do not require institutional intervention.

## CLAIMING RULES

- ▶ Institutions may claim 50% of the award balance for the following programs during the first term of an award year:
  - ▶ Frank O'Bannon Grant
  - ▶ 21st Century Scholarship
  - ▶ Adult Student Grant
  - ▶ William A. Crawford Minority Teacher Scholarship
  - ▶ Next Generation Hoosier Educators Scholarship
- ▶ Institutions may claim the remaining balance of the award offer in subsequent terms.
- ▶ Institutions may claim up to the remaining balance of the award offer in the first term of the award year if the student is in the final term of their academic degree program.

# CLAIMING RULES - SUMMER

Fall Term	Spring Term	Can attend part-time and use FOB, 21st, Next Gen, ASG, or WRG in the Summer?
<b>Full-Time / Used State Aid</b>	Full-Time / Used State Aid	Yes
	Full-Time / Did Not Use State Aid	Yes
	Part-Time	Yes
	Did Not Attend	Yes
<b>Full-Time / Did Not Use State Aid</b>	Full-Time / Used State Aid	Yes
	Full-Time / Did Not Use State Aid	Yes <sup>1</sup>
	Part-Time	No
	Did Not Attend	No
<b>Part-Time</b>	Full-Time / Used State Aid	Yes
	Full-Time / Did Not Use State Aid	No
	Part-Time	No
	Did Not Attend	No
<b>Did Not Attend</b>	Full-Time / Used State Aid	Yes
	Full-Time / Did Not Use State Aid	No
	Part-Time	No
	Did Not Attend	No

- ▶ Institutions may claim up to 100% of a student's 21st Century Scholarship or Frank O'Bannon Grant during the summer if the student was enrolled full time during all prior terms of the award year.
- ▶ If the student was not enrolled in prior terms of the award year, and they wish to use their award starting with summer, they must meet the enrollment requirements.



## CONSORTIUM AGREEMENTS

- ▶ Student must be meeting an award offer's enrollment status requirement based on enrollment between all institutions participating in the consortium agreement.
- ▶ Student must be enrolled in an eligible degree or certificate program at one or more of the institutions participating in the consortium agreement.
- ▶ Student must be meeting Satisfactory Academic Progress at your institution to claim an award offer.
- ▶ Institutions collectively may claim beyond 50% of the students award offer in the first term of the student's award year.

## CONSORTIUM AGREEMENTS

- ▶ Student must list all institutions participating in consortium agreement on the FAFSA.
- ▶ For 21st, FOB, and NGSG: the award offer must first be applied to eligible tuition and regularly assessed fee charges at the institution participating in the consortium agreement with greatest tuition and regularly assessed fees. The remaining amount of the award offer then must be applied to eligible tuition and regularly assessed fee charges at the institution participating in the consortium agreement with the next greatest tuition and regularly assessed fees.
- ▶ Any changes in enrollment status or academic program at any institution participating in the consortium agreement must be communicated to the other institutions, as the change may impact award eligibility at one or all participating institutions.
- ▶ The host institution is responsible for coordinating the consortium agreement between institutions.

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# DISBURSING STATE FINANCIAL AID



## DISBURSING STATE FINANCIAL AID

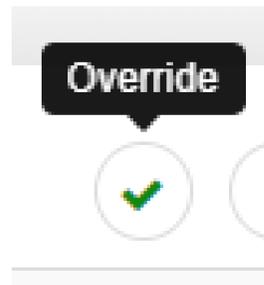
- ▶ Before disbursing state aid, if a student is selected for verification (and they are offered an award that is determined in part by EFC or dependency status), verification must be completed.
- ▶ **Award offers determined in part by EFC or dependency status include:** Frank O'Bannon Grant, 21<sup>st</sup> Century Scholarship, Adult Student Grant, and the William A. Crawford Minority Teacher Scholarship. Institutions cannot claim or disburse these award offers if verification is pending.
- ▶ **Award offers not determined in part by EFC or dependency status include:** the Tuition and Fee Exemption programs, National Guard Supplemental Grant, National Guard Extension Scholarship, Mitch Daniels Early Graduation Scholarship, the Workforce Ready Grant, the Student Teaching Stipends, and the Next Generation Hoosier Educators Scholarship. Institutions may claim and disburse these award offers regardless of verification status.

# DISBURSING STATE FINANCIAL AID

- ▶ Certain edits must be resolved prior to disbursing state aid. Those resolutions should be in line with federal guidelines for resolving these issues. Once they are resolved, the edits can be overridden in ScholarTrack so that an award is created.
- ▶ Which Edits can a college user override?
  - ▶ Edit 03: Not a first-time undergraduate.
  - ▶ Edit 07: Unusual Enrollment History.
  - ▶ Edit 11: Not a U.S. Citizen or Eligible Non-citizen.
  - ▶ Edit 15: Drug Conviction (can be overridden if Reject 19 is not present)
  - ▶ Edit 16: Selective Service Match.
  - ▶ Edit 17: Default on federal student loan and/or overpayment of federal grant.
  - ▶ Edit 22: Mailing address not IN and no edit 02.
  - ▶ Edit 28: Independent status caused by Emancipated Minor or In Legal Guardianship status.

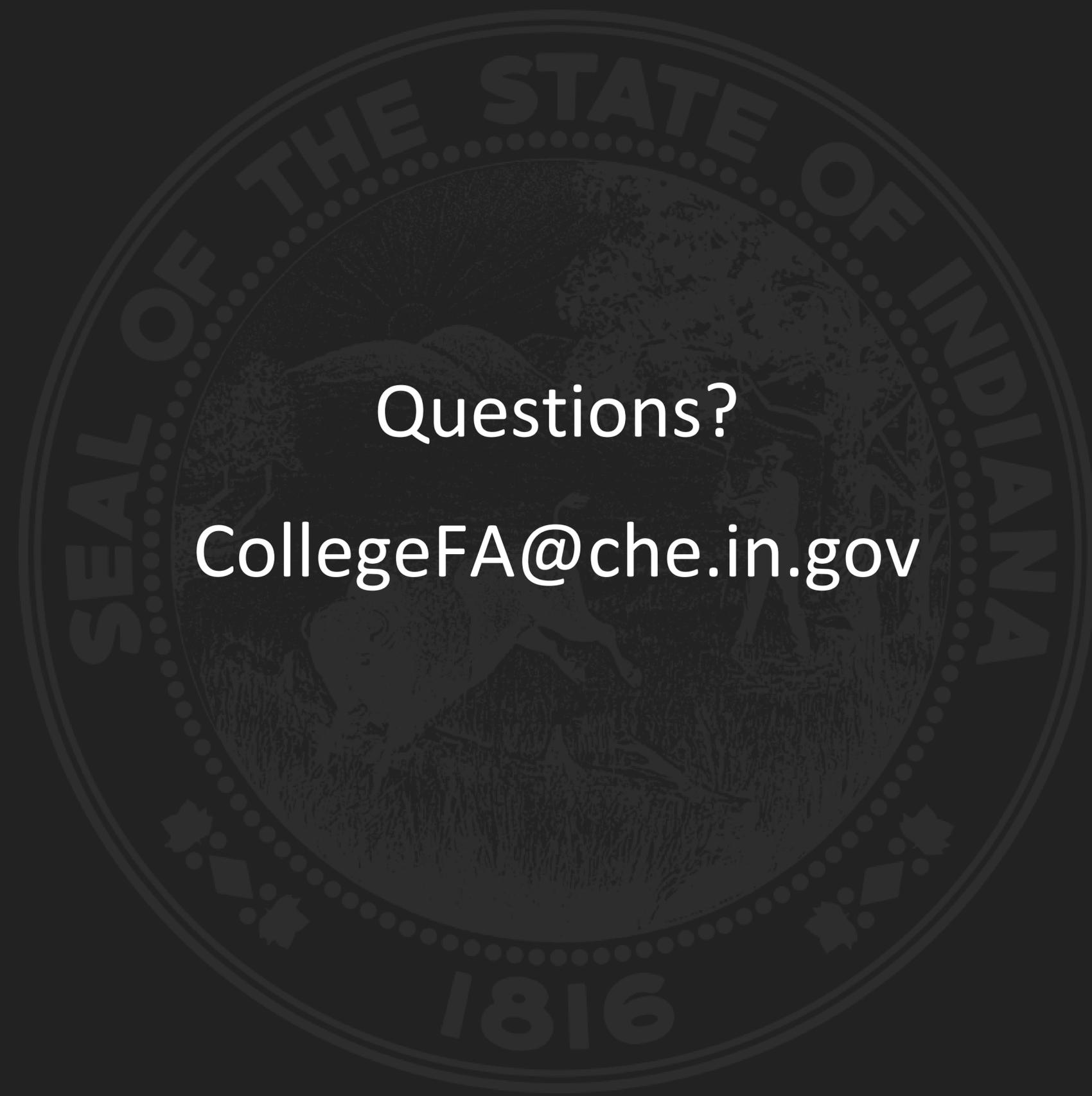
# DISBURSING STATE FINANCIAL AID

- ▶ Ways to override Edits in ScholarTrack:
  - ▶ Via the Edits Widget - Green checkmark



- ▶ Via the Overrides file in ScholarTrack





Questions?

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