Oklahoma Tuition Aid Grant: "Nuts and Bolts"

Scholarships and Grants Workshop: July 7, 2022
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Reminders

- Access the OSRHE website for program information, such as the Authorized Representative form: (www.okhighered.org).

- Please use O-Safe for submitting any information containing PII: (www.okhighered.org/O-SAFE).

- Join the OASFAA Listserv for important OTAG information, legislative updates, and more: (www.oasfaaok.org/listserv).

- Access more program details and student oriented information: (https://okcollegestart.org).

2021-2022 OTAG Award Data

- Over $14.5M disbursed*

- Nearly 16,500 OTAG recipients*

*Data not finalized

2022-2023 OTAG Appropriation

- $17M program appropriation from the State Regents

- Institutional allocations calculated using the 2019-2020 OTAG expenditures

Allocation Tracking

- Our office will be internally monitoring institutional spending to ensure no one exceeds their allocation.

- We encourage you to spend 50% in fall/50% in spring.
  - Reminder: transfer and summer awards are possible, but not required.

- All claims must be submitted prior to June 30th for processing.

- We encourage you to spend your full allocation by June 30th, as remaining monies will not carryover into the next fiscal year.

- Oklahoma Resident
  - Qualifying active duty military student or dependent

- Pell Eligible (Must be eligible to receive Pell disbursement for the payment period in question)
  - Alternative OTAG recipients are currently the only exception

- Some level of unmet financial need

- Must meet institutional criteria

OTAG 2022-2023:

Eligibility Criteria

In order to provide greater flexibility, we will not have any claim submission deadlines for 2022-2023.
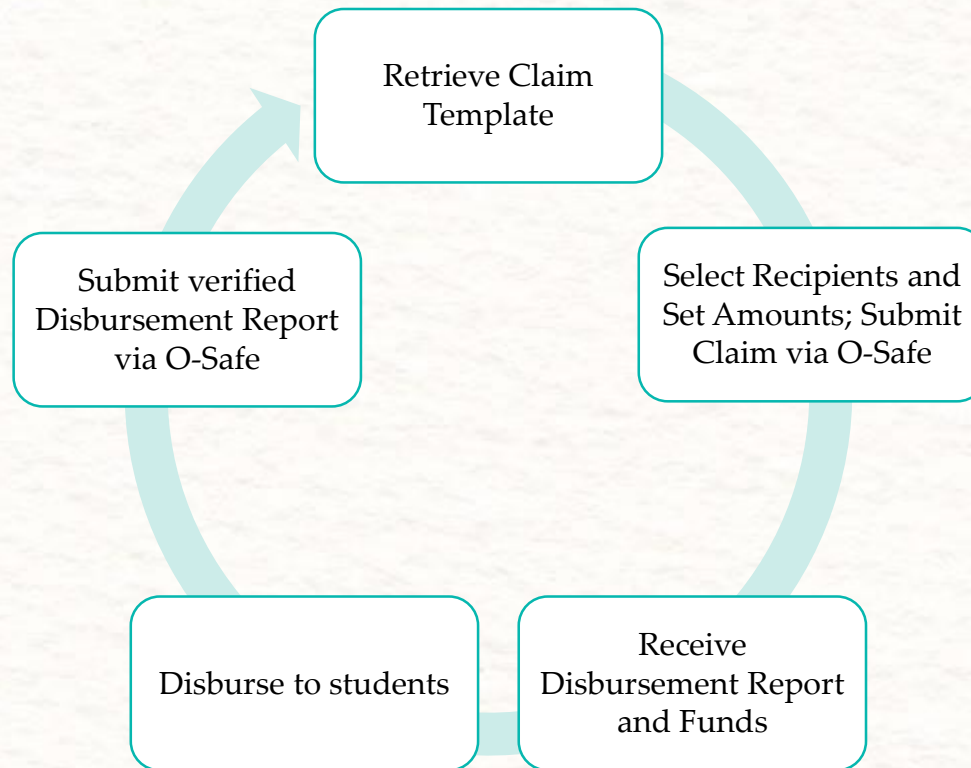
Award Amounts

- Statutory limit of 75% of tuition and fees

- Previous Private/Independent award amounts: $200-$1,300

Tier	Old Award Amounts	2022-23 Award Amounts
2-Year Colleges and Career Tech	$200-$1,000	$200-$1,500
Regional Universities	$200-$1,000	$200-$2,000
Research Institutions	$200-$1,000	$200-$3,000

OTAG Process Overview

- Reconciliation will be required

- Institutions will be responsible for selecting, packaging, and notifying student recipients

Claim Processing

- Claims must be submitted by an Authorized Institutional Representative.

- No pre-populated claim forms will be available for the fall semester.

- Claims will be submitted using the template available on the Resources page or as a .txt file.
  - There are separate claim forms for standard and non-standard term institutions.

- A new enrollment category has been added to reflect students enrolled in less than 6 hours (LT).

- All institutions will be required to list an award amount for each student on the claim.

Claim Processing:

Important Notes

- There is no longer a supplemental award column.
  - In order to request a supplemental award for a student, you will put the additional award amount in the "Payment Period Disbursement" column (column H) on a new claim.

- You can submit multiple claims each semester as needed.

- For any students with conflicting eligibility information, our office will contact you directly to resolve before processing the claim.

- Students cannot be awarded at more than one institution per semester.

Claim Processing Instructions: Excel

- Fill out the top portion of the claim, especially the "Completed By" fields.

- List the students you want to be awarded on the claim.
  - Do not adjust the template formatting in any way.
  - List the ISIR transaction # and EFC you are using to package the student.
  - Include the student's enrollment/attendance level and disbursement amount.
  - Report military students with a "Y" in "Award due to Military Status" column (Column J).
  - Student IDs can be included, but are not required.

- Once all students you wish to award are added to the claim, submit it to our office through O-Safe.

Claim Processing: Text Files

- Claims can still be submitted using .txt files.
  - Location fields will be adjusted to include space for you to report the payment period disbursement.
    - The new locations have not been finalized, but we will notify you as soon as we have that information.

- You will need to retrieve, complete, and submit the "Text File Transmittal Form" when submitting your claim, as you have done in the past.
  - The transmittal form will continue to be located on the Resources pages and can be submitted to us via fax or email, whichever you prefer.

Disbursement Processing

- A signed disbursement report will still be required within 30 days of receiving the disbursement.

- Returns will be recorded on the disbursement report as they have been previously.
  - To report a return:
    - Y in Update column (column A)
    - Adjusted award amount in Adj Disb Amt column (column H)
    - Reason Code in Adj Reason Codes column (column I)

- As in the past, you cannot add new students to a disbursement report. You will have to submit a supplemental claim for any new students.

Disbursement Processing:

Important Notes

- New Adjustment Reason Codes will likely be added to the list on the Resources page.

- Please be sure to make adjustments for changes in enrollment levels on the disbursement report.

- Once you have submitted a disbursement report, you do not need to re-submit it to report late returns.
  - Email us the information regarding the late return and we will process once funds are received.

- In order to maximize the institutional allocation, return funds in a timely manner.

Reconciliation Report

- Available upon request at any time.

- Options for semester only or annual report.

- We recommend reconciling at the end of each semester to resolve any possible issues before awarding begins for the next term.

Questions?

Contact us!

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