


OKLAHOMA STATE REGENTS
FOR HIGHER EDUCATION

Improving our future by degrees

Oklahoma Tuition Equalization Grant
(OTEG)
July 7, 2022





Oklahoma Tuition Equalization Grant

- ▶ In 2003, the Oklahoma Legislature enacted the Oklahoma Tuition Equalization Grant (OTEG) Act to provide grants to Oklahoma residents attending not-for-profit, independent institutions in Oklahoma.
- ▶ Last year almost \$2.63 million was awarded to 1,550 students.



Oklahoma Tuition Equalization Grant

- ▶ OTEG is a decentralized program. Institutions select recipients according to some basic eligibility guidelines; however, within those guidelines the institution can develop and implement their own priorities in the selection process.
- ▶ Choosing recipients based on a couple of factors may help. First, it is good to select recipients that received it previously and are still eligible. Like Oklahoma's Promise, the clock on the five years begins with the first disbursement of OTEG. Next, it is good to select recipients with the highest unmet need.



Oklahoma Tuition Equalization Grant Eligibility

- File a Free Application for Federal Student Aid (FAFSA) and report Oklahoma as the state of legal residence. A FAFSA must be filed each year in order to be considered for an award.
- Be enrolled full time in the fall and/or spring semester(s) at a school that is eligible to offer OTEG awards.
- Have a family income of \$50,000 or less.
- Have sufficient unmet financial need in meeting the cost of attendance as determined by the campus financial aid office.
- Be an Oklahoma resident according to the State Regents' Policy on In-State/Out-of-State Status of Enrolled Students in the Oklahoma State System of Higher Education



Oklahoma Tuition Equalization Grant Eligibility Cont.

- Meet the institution's Satisfactory Academic Progress requirements.
- Not already have received a grant for a period of five consecutive years of study. The eligibility period begins when the student first receives the grant.
- Not already have earned their first bachelor's degree.
- *Pay more tuition than is required at a comparable public institution of higher education*



Oklahoma Tuition Equalization Grant Notes

- Oklahoma residency is required. See OSRHE policy at: <https://www.okhighered.org/state-system/policy-procedures/part3.shtml> (see 3.18) Please note that self-reported Oklahoma residency on the FAFSA is not verification of Oklahoma residency.
- Use O-SAFE for all claims processing.
- The FAFSA must be valid and the student must be eligible for Title IV aid.
- Must be enrolled full-time and eligible for the full amount of the need based semester amount (no partial grants).
There are no amounts on the claim form because all eligible students receive \$1,000 for the semester.



Oklahoma Tuition Equalization Grant Notes Cont.

- Must meet OTEG income requirements:
- Independent (per Title IV definition): total of student/spouse AGI (use income earned from work-for non-filers) + untaxed income (per FAFSA) equals \$50,000 or less.
 - *Independent student untaxed income is Student's Untaxed Income Total Calculated by CPS (2022-23 ISIR Data Field #250 ; FAFSA Question 44a-i)*
- Dependent (per Title IV definition): total of student's parents' AGI (use income earned from work-for non-filers) + untaxed income (per FAFSA) equals \$50,000 or less .
 - *Dependent student's parental untaxed income is Parents' Untaxed Income Total Calculated by CPS (2022-23 ISIR Data Field #252; FAFSA Question 92a-h)*
- OTEG statutes specify only parental income is counted for dependent students.



Oklahoma Tuition Equalization Grant Notes Cont.

- Must have sufficient unmet need before the grant is applied.
- Students who have previously received OTEG funds and who continue to meet the requirements for eligibility shall have absolute priority for continued financial support superior to any student who is applying for a grant for the first time.
- **Cannot receive awards for more than five years from the time the first OTEG award was received.**
- DACA students filing a FAFSA are not eligible for OTEG at this time unless the specific requirements outlined in the Regent's residency policy are met (See 3.18.6 (C)(4)).



Oklahoma Tuition Equalization Grant Procedures

- ▶ In July, presidents receive a letter from the Chancellor and an allocation worksheet showing the amount allocated to each institution.
- ▶ Institutions select eligible recipients based on OTEG program and institutional eligibility requirements.
- ▶ Template is retrieved from the OTEG resources page and selected recipients are placed on the blank claim form.
- ▶ Each school is responsible for determining eligibility, packaging the award, and notifying the student that he/she is eligible to receive OTEG.
- ▶ Claim form is submitted (via O-SAFE) on or before October 15 in fall and March 15 in spring. You can submit partial/multiple claims as long as you do not exceed your allocation.
- ▶ Each recipient is verified by OSRHE and checked for expiration.
- ▶ Payment is made to institutions on student's behalf.
- ▶ In January, each institution is supplied with a pre-populated claim form that lists each student submitted by the institution for payment (and paid) in the fall semester.



Oklahoma Tuition Equalization Grant Procedures Cont.

- Institutions verify the continued eligibility of those students. Ineligible students are left on the claim with notations indicating the reason for ineligibility. New or transfer students are added at the bottom of the worksheet to replace fall recipients that are no longer eligible.
- Claims are submitted, eligibility of new students are verified and payment is made to the institution on the student's behalf.
- Annual reconciliation reports are placed on O-SAFE after the spring deadline. Cumulative GPA's are required to complete a statutory report.
- Generally, new allocations are calculated for the next year based on percentage of funds used.



Oklahoma Tuition Equalization Grant Procedures Cont.

ALTERNATES

1. Submission of alternates on both the fall and spring claims allows institutions to retain funds if a recipient is found to be ineligible after the claim submission deadline.
2. Unused program funds may be paid to alternates based on highest unmet need.



Oklahoma Tuition Equalization Grant O-SAFE

https://www.okhighered.org/O-SAFE/default.aspx 150%

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O-Safe: Login

Welcome to the new O-Safe.

For all technical issues, please contact your program administrator.

Input your user name and password to login to O-Safe.

* **User Name:**  *Input your user name.*

* **Password:**  *Input your login password.*


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655 Research Parkway, Suite 200, Oklahoma City, OK 73104 - 405.225.9100

Oklahoma Tuition Equalization Grant O-SAFE Cont.

red.org/O-SAFE/O-Safe.aspx?JS=v-107-217+wsCxywGWbLMQJP5kPcdJlr6tfJdezzfJYs/TgE9xxCE= +



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OSRHE Secure Access File Exchange
Current User: imagee@osrhe.edu

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For all technical issues, please contact your program administrator.
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Upload File

Permissions: (Program Admin)

File Location: Oklahoma Tuition Equalization Grant [OTEG] / Mid-America Christian University

- [Oklahoma Tuition Equalization Grant \[OTEG\]](#)
- [Mid-America Christian University](#)

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	A	B	C	D	E	F	G	H	I	J				
1		Oklahoma Tuition Equalization Grant (OTEG) Program Award Claim Form						Date Completed by Institution:						
3		Name of Institution:				Must be received by Oklahoma State Regents for Higher Education								
4		Institution Code:												
5		Semester:									FALL Deadline: October 15th		Spring Deadline: March 15th	
6		Academic Year:												
7		Name of Person Accountable for Data Submitted:												
8		Title:				Date:								
9		Institution's Certification:												
10		By entering my name, title, and date completed above, I certify that:												
11		1. Oklahoma Tuition Equalization Grant award status and payment of funds is requested for the students listed in this Award Claim Form.												
12		2. Each student included in this Award Claim Form meets all Oklahoma Tuition Equalization Grant Program eligibility requirements, including residency per OSRHE Policy on Residence Status of Enrolled Students, as well as general federal Title IV Eligibility Requirements.												
13		3. Funds are being requested only for students who have been CONFIRMED TO BE ELIGIBLE AS OF THE DATE OF THIS CLAIM FORM.												
14														
16		I confirm that each student listed below:												
17		1. Completed a current award year FAFSA.												
18		2. Is currently enrolled and attending my institution as a full-time undergraduate.												
19		3. Is not taking courses or other postsecondary units in excess of the requirements for completion of a baccalaureate program.												
20		4. Has not received OTEG awards for a total of five years.												
21		5. Meets my institution's satisfactory academic progress requirements for financial aid recipients.												
22		6. Meets the OTEG family income limit of \$50,000 including both taxed and untaxed sources.												
23		7. Has higher unmet need than other eligible students attending my institution (at least \$2,000/yr.).												
24		8. If listed on a pre-populated spring claim as a fall recipient, he/she continues to meet all eligibility requirements unless specified in Column I.												
25		Last Name	First Name	Middle Initial (only)	SSN 9 Digits (NO DASHES)	ISIR TRANSACTION Number Used to Determine Elig.	complete ONE Appropriate Column		Student's Total UNMET Need Excluding OTEG Award	SPRING FUNDS Requested Unless Ineligibility Reported in this Column				
26							INDEPENDENT Total STUDENT AGI & UNTAXED Income	DEPENDENT Total PARENT AGI & UNTAXED Income						
27														
28														
29														
30														
31														
32														
33														
34														
35														



Financial Aid Resources for Institutions

- <http://www.okhighered.org/admin-fac/FinAidResources/>
- One location for up-to-date information including:
 - Administrative rules and statutes
 - Report form templates
 - Eligibility requirements
 - Claim form instructions
 - Allocation information for OTEG
 - Other information related to OSRHE financial aid programs




The screenshot shows the Oklahoma State Regents for Higher Education website. The header includes the organization's name, logo, and navigation links for Students, Parents, Higher Ed Admin/Faculty/Staff, K-12 Teachers/Staff, and Media. A search bar and a 'Quick Links' dropdown are also present. The main content area is titled 'OKLAHOMA TUITION EQUALIZATION GRANT (OTEG)' and lists various resources such as 'OSRHE O-SAFE', 'Oklahoma Tuition Equalization Grant (OTEG) General Information', 'Administrative Rules', 'OSRHE Residency Policy', 'OTEG Award Procedures for Institutions', 'OTEG Student Eligibility Requirements', and '2022-23 Allocation of Funds'. It also provides links to 'OTEG Forms' and 'Statutes (Oklahoma Tuition Equalization Grant Act)'. A sidebar on the left contains a navigation menu with categories like 'About / Contact Us', 'College Assistance Program', 'Colleges and Universities', 'Economic Development', 'Financial Aid', 'GEAR UP', 'Higher Education CIO', 'Job Opportunities', 'Legislative Information', 'News Center', 'OKcollegestart.org', 'Oklahoma's Promise', 'OneNet', 'Reach Higher', 'Research', 'Show What You Know', and 'Studies, Reports and Data'. A 'REACH HIGHER' logo is visible at the bottom of the sidebar. On the right side, there is a section for 'FINANCIAL AID RESOURCES FOR INSTITUTIONS' with links to 'Academic Scholars Program', 'Oklahoma College Assistance Program', 'Oklahoma Tuition Aid Grant (OTAG)', 'Oklahoma Tuition Equalization Grant (OTEG)', 'Oklahoma's Promise', 'Regional University Baccalaureate Scholarship Program', and 'Scholars for Excellence in Child Care'. A photo of two men working at a computer is included, with a caption: 'Photo courtesy of the University of Science and Arts of Oklahoma.'



Oklahoma Tuition Equalization Grant Issues

- O-SAFE sign-up
- Program differences
(OTAG/OTEG/Oklahoma's Promise/
Academic Scholars)
- Timelines-statutory deadlines
- New institutional employees





Oklahoma Tuition Equalization Grant Contact Information

Irala K. Magee

imagee@osrhe.edu

(405) 225-9378

Assistant Vice Chancellor for Scholarships and Grants



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