

Oklahoma Tuition Equalization Grant (OTEG) Program Award Procedures for Institutions

OTEG funds are allocated to institutions by the State Regents on an annual basis, and each institution identifies their own eligible applicant pool. A complete list of OTEG eligibility requirements can be viewed at <https://okhighered.org/admin-fac/finaidresources/oteg/>

Awarding Priorities:

- **Eligible renewal applicants, according to statute, must receive absolute priority for continued awards superior to any student being selected for the award for the first time.** Renewal applicants are defined as students who have previously received a tuition equalization grant and who continue to meet the requirements for eligibility.
- After all eligible renewal applicants have been awarded, the institution may award their remaining funds to their eligible non-renewal students.
- In the event an institution's allocation of OTEG funds is insufficient to award all eligible non-renewal students at the institution, the statutes call for the awarding of grants on the basis of financial need. Students with the highest unmet need, after consideration for all other grants and scholarships received by the eligible applicant, would be awarded first.
- **Institutions are responsible for informing students of their OTEG award status.**

Claiming Awards:

- In order to receive OTEG funds for their awarded students, institutions must submit Award Claim Forms to OSRHE in the fall and spring semesters. Award Claim Forms must be delivered to OTEG using the [OSRHE Secure Access File Exchange \(O-SAFE\)](https://okhighered.org/admin-fac/finaidresources/oteg/) site. Please e-mail the OTAG/OTEG office for O-SAFE instructions.
- An Award Claim Form template will be provided by OSRHE, and all institutions must use the template in the format specified by OSRHE.
 - The Award Claim Form template can be downloaded from the OTEG section of the OSRHE Financial Aid Resources for Institutions site at the institution's convenience. <https://okhighered.org/admin-fac/finaidresources/oteg/>
 - Spring semester Award Claim Forms that are pre-populated with the institution's final fall awarded students will be provided to each institution at the beginning of the spring semester. The institution will be asked to identify students who received fall funds and who are not eligible to receive the second half of their award in the spring semester. Newly awarded students (for spring only) who have been awarded with funds formerly reserved for any fall awardees who are cancelled for spring can be added to the fall recipients listed on the pre-populated claim form.
- Deadlines for fall and spring Award Claim Forms are set in statute.
 - **October 15 is the deadline for receipt of award claims by OSRHE in fall.**
 - **March 15 is the deadline for receipt of award claims by OSRHE in spring.**
 - Institutions may set their own OTEG application deadlines for their students to be included in the institution's eligible applicant pool.

- ◆ The institution's OTEG application deadline cannot exceed the statutory deadlines for the fall and spring semesters.
- ◆ The institution's deadline must be consistently applied to all students, and appropriate efforts must be made to ensure that students, including those who would qualify for renewal status, are informed of the institution's deadline.
- ◆ Award Claim Forms must include:
 - Institution Code FICE (6 digits)
 - Dates in proper format (mm/dd/yyyy)
 - Semester - Fall or Spring (do not include year)
 - Academic year (2024-2025)
 - Student's Last Name, First Name and Middle Initial (please do **not** include a period or the full middle name)
 - ISIR transaction number student's award eligibility is based on
 - Applicable income data student's award eligibility is based on (do not type in commas or dollar signs)
 - Student's unmet need as determined by the financial aid administrator (do not type in commas or dollar signs)
 - The student's unmet need must be at least the amount of the OTEG award (2000 in fall for full year award and 1000 in spring for spring-only award)
 - Name of Person Accountable for Data Submitted, Title and Date
 - Please use the worksheet marked "Alternates" to submit alternate recipient names and information.

Upon Receipt of an Institution's Award Claim Form, OSRHE will:

- Confirm that students for whom funds have been requested on the Award Claim Form meet certain eligibility requirements and work with institutions to clear up any discrepancies
- Confirm that the request for funds when added to any earlier requests does not exceed institution's total allocation
- Issue payments to institutions

Reconciliation/Accounting of Funds:

- Funds awarded to a student who is subsequently found by the institution to be ineligible can be retained by the institution and awarded to another eligible student in the same semester as long as the institution submits the new student's information on an award claim before the statutory deadline for that semester.
 - New awards issued in the spring semester will be for spring only (no retroactive fall awards)

- At the end of each award year, OSRHE will provide institutions with an OTEG Award Reconciliation Report that identifies all students reported as receiving OTEG funds at the institution.
- The institution must report to OSRHE in the event it has been determined that a student listed on the Award Reconciliation Report is ineligible to receive the funds issued to them, and the funds must be returned to OSRHE.

Transfer Students:

The statutes require that students who have previously received OTEG awards and who continue to meet the requirements for eligibility shall have absolute priority for continued funding superior to any student who is being selected for the award for the first time. Students who are awarded OTEG at one institution and then transfer during the same academic year to another eligible institution can transfer their priority award status to their new institution as long as they remain otherwise eligible. Institutions should accommodate transfer awards with their existing OTEG allocation.

Other Issues:

It is a requirement of the Oklahoma State Regents for Higher Education that all institutions participating in the OTEG program must also participate in the OSRHE Annual Financial Aid Survey as well as the Unitized Data System (UDS), including the financial aid reporting element of UDS.

The statutes require an annual report of OTEG recipients, and institutions are required to submit data to OSRHE to assist with the compilation of this required annual report.