

Oklahoma Tuition Aid Grant (OTAG) Program

Instructions for Completing the Excel Award Claim Form

2026-27 | One Award Claim Form for all terms (standard and non-standard)

Note: Additional information on reporting requirements follows the table below.

Column	Column Name	Allowable Values	Instructions
A	SSN	Numbers	9-digit SSN, including leading zeroes if applicable Do not enter dashes
B	Last Name	Alphabetic	Alpha characters only
C	First Name	Alphabetic	Alpha characters only
D	Middle Initial	Alphabetic	Alpha characters only
E	ISIR Transaction Number	01–99	ISIR transaction number that corresponds with the data used to determine the student's 2026-27 financial aid eligibility Use a leading zero if the transaction number is less than 10
F	SAI	Number	SAI (Student Aid Index) used to determine the student's 2026-27 financial aid eligibility Up to 6 digits
G	Enrollment/Attendance Status	FT = Full-time PT = At least half-time LT = Less than half-time	Enter the student's current enrollment/attendance status for this disbursement
H	Payment Period Disbursement Amount	Whole dollar amount Must be filled in Cannot be less than \$100	Enter the amount to be awarded for the payment period Whole dollar amounts only At least \$100 per payment period
J	Indicator for Resident Due to Military Status	Blank for most students	Enter "Y" only for an eligible military student who qualifies for in-state status and state financial aid and did not list Oklahoma as the "state of legal residence" on the FAFSA The student must be enrolled and meet all OTAG eligibility criteria when the claim is submitted and when funds are disbursed
K	Student ID	Text, up to 9 characters	Optional Enter the school-assigned student identifier if you want it shown on the related disbursement roster

Award Claim Form Instructions for Completion (Excel)

To request OTAG funds for students at your institution, submit the students' names and information to OTAG on an Award Claim Form. One Excel Award Claim Form is used for all terms, including standard and non-standard (non-term) programs. A complete list of eligibility requirements is available at <https://okhighered.org/admin-fac/finaidresources/otag/>.

1. Begin with a blank OTAG Award Claim Form template.

- Blank templates are available from the OSRHE Financial Aid Resources for Institutions page at <https://okhighered.org/admin-fac/finaidresources/otag/>.

2. **Save and rename the file.**

- Rename the file using the format schoolabbrMMDDYYYYacfi.xlsx, where the school abbreviation comes from the OTAG School Codes and Abbreviations list, MMDDYYYY is the date, and acfi indicates the Award Claim Form is inbound (sent from the institution to OTAG). Example: occ07172026acfi.xlsx
- Using this naming format helps OTAG staff process your file.

3. **Enter student data.**

By including a student on an Award Claim Form submitted to OTAG, the institution certifies that the student meets all eligibility requirements to receive an OTAG award and requests immediate disbursement of funds for that student.

- Allowable values: Values for each column must be followed exactly. If a column contains a value not listed in the Allowable Values table, OTAG's automated system cannot read it and the institution will be asked to submit a corrected report.
- Transaction Number (Column E): Institutions may be asked to help resolve ISIR transaction number and SAI mismatches found when an inbound Award Claim Form is processed against the current OTAG database.
- SAI (Column F): The SAI used to determine the student's 2026-27 financial aid eligibility.
- Enrollment/Attendance Status (Column G): Enter the current status for this disbursement. Full-time, half-time, and less-than-half-time are defined per the current federal Title IV definitions. Funds are issued according to your FT, PT, or LT confirmation. If the amount claimed exceeds 75% of tuition and fees as reported to OSRHE, the claim will not process and you will be contacted. Only FT, PT, or LT are allowed. Report status accurately even if the award amount is the same across statuses; OTAG is required to track enrollment/attendance status. For an additional amount in the same payment period, enter the status that is accurate at the time of the additional request.
- Payment Period Disbursement Amount (Column H): Enter the amount to be paid for the payment period. The minimum is \$100 per payment period; a request below \$100 will be denied. The award is limited to the lesser of 75% of enrollment costs or your sector's maximum; use the posted maximum award schedule.
- Award due to Military Status (Column J): A "Y" indicates the student qualifies for in-state status and financial aid as a full-time active duty member of the armed forces or a dependent of one. In-state status also extends to certain veterans, spouses, and dependent children, and to ROTC participants. This entry is necessary only for students who listed a state other than Oklahoma on the FAFSA. The student must meet all other OTAG eligibility criteria.
- Student ID (Column K): Optional. Enter the school-assigned identifier if you want it to appear on the related disbursement roster. OTAG does not maintain or track this number after it appears on the disbursement report. This column may be left blank.

4. **Complete the heading.**

The spreadsheet heading must include:

- Institution name
- Institution 6-digit Title IV code
- Semester (Fall, Spring, or Summer) and award year (2026-27)
- Name and title of the authorized institutional representative completing the form and responsible for the accuracy of the award eligibility data
- Date the Award Claim Form was completed

Award Claim Forms without this information will not be accepted. The form must be submitted by an authorized institutional representative designated by the president or chief executive officer of the institution. Multiple

Award Claim Forms may be submitted each semester. Please submit fall payment period claims by December 15, spring by May 30, and summer by June 15. Contact the OTAG office about any eligible students who cannot be disbursed within these timelines.

5. **Upload the report to O-SAFE (OSRHE Secure Access File Exchange).**

- O-SAFE instructions can be requested by email at reports@osrhe.edu.
- Files submitted through O-SAFE are automatically deleted after 20 days.

If you have questions about the Excel Award Claim Form or general OTAG inquiries, contact the OTAG office at 405.225.9456 or toll-free at 800.858.1840, or email reports@osrhe.edu.

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