



NUTS & BOLTS FOR THE FINANCIAL AID OFFICE

Oklahoma State Regents for Higher Education

Kanika Brown

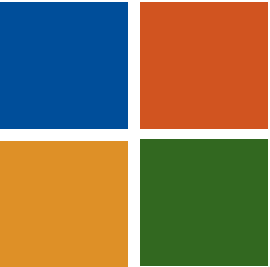
Director, Scholarship and Grants

Alan Hernandez

Scholarship Specialist III



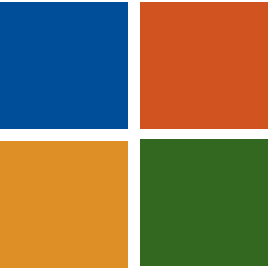
Oklahoma's Promise allows 8th-, 9th-, 10th-, 11th- and 12th-grade students from families meeting certain income requirements to earn a college or technology center tuition scholarship. Students must also meet academic and conduct requirements in high school.



OK PROMISE SCHOLARSHIP LIMITS

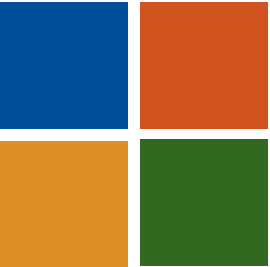
Program eligibility expires when one of the following occurs – whichever comes first:

- ☐ 5 years
- ☐ Bachelor's degree
- ☐ 129 credit hours paid by OK Promise
- ☐ Not available until the first fall term after HS graduation



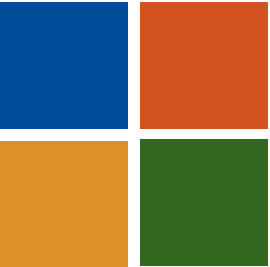
129 CREDIT HOUR REVIEW

- Applies to students with HS GY 2018 and thereafter
- Total award payments may not exceed 129 credit hours
- Based on hours PAID with OKPromise funds (no concurrent, AP credits, hours transferred in from out of state or remedial)
- Allowances for degree programs that require > 129 credit hours (more info → next slide)



ALLOWANCES FOR DEGREE PROGRAMS THAT REQUIRE > 129 CREDIT HOURS

- 1st Professional degrees are limited to 150 credit hours (i.e. pharmacy)
- Other degree programs (not 1st prof) that are more than the 129 (i.e. architecture) have a limit of the minimum # of hrs required for that program
- For major/minor or dual majors use the primary degree



THE HIGHER LIMIT WILL NEED TO BE REPORTED TO THE OKP OFFICE BY THE INSTITUTION

Oklahoma's Promise 129 CAP Exception Form

Please use this form to report the requirements for a student's degree program that is in excess of 129 credit hours for OK Promise award eligibility. Submit when the student reaches 90 or more hours.

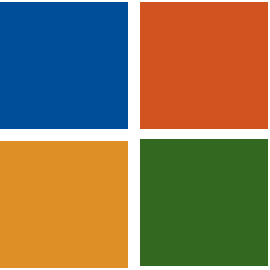
*Only the required credit hours for a single degree will be considered. The 129-credit-hour limit will not be extended due to the student changing degree programs, seeking an additional major or minor, pursuing more than one bachelor's degree, etc. For dual degrees use the primary major.

Institution: _____

Submitted By: _____

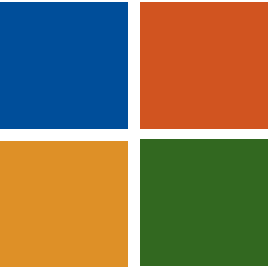
				Required
Last Name	First Name	SSN	Degree Program	Hours

***Email Alan for this form**



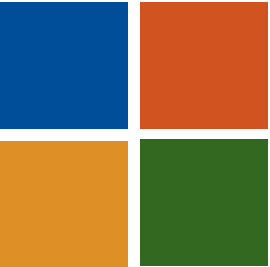
129 COMMUNICATION TO THE STUDENTS

- ❑ Notification is by email (end of July)
- ❑ Students at the 129 limit and ineligible
- ❑ Students who will likely meet or exceed the limit during 2026-27:
 - ❑ Email to students at 90+ hours



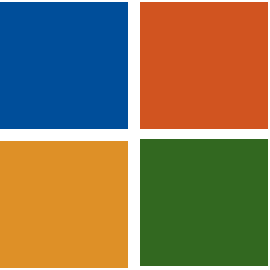
REMINDERS

- 129 total includes hours PAID by OKPromise at any institution
- Run the Eligibility Report for the students listed on the claim right before you submit the claim.
- Late claims (from previous term/year) may create a problem. Check the eligibility report first!
- Important for 2-yr colleges and career techs to watch out for these students as well.



OK PROMISE ELIGIBILITY REPORT

- <https://www.okhighered.org/ohlap/ohlapelig/Login.aspx>
- Same username and password as O-SAFE
- Multiple Report Options:
 - ☐ 2025-26 Eligibility for last year
 - ☐ 2025-26 Eligibility (Career Tech only) for last year
 - ☐ 2026-27 Eligibility (frequent updating) (*next slide)
 - ☐ 2026-27 Eligibility (Career Tech only) (*next slide)
 - ☐ Potential Eligibility - 2026 HS grads
 - ☐ Potential Eligibility - 2027 HS grads (After Oct. 1)
- Two Processing Options: Individual student or batch file



WHAT ELIGIBILITY REPORT DO I USE?

- ❑ 2025-26 Eligibility & 2025-26 Eligibility (Career Tech only) for last year
- ❑ 2026-27 Eligibility (frequent updating)
 - All institutions/career techs – students have completed college admission requirements
 - Scholarship is transferable
- ❑ 2026-27 Eligibility (Career Tech only) (frequent updating)
 - Student completed the Core pathway (HS graduation requirements)
 - Career tech only
 - Scholarship is not transferable to a college/university



Oklahoma's Promise Eligibility

vita.okhighered.org/ohlap/ohlapelig/Login.aspx

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Oklahoma's Promise Eligibility Check

Please enter your Username and Password

Username

Password

Login

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







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Oklahoma's Promise Eligibility Check

Please select one of the following options:

Eligibility Check by SSN

Submit File for Eligibility Check

Eligibility Check Admin

Logout

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655 Research Parkway, Su

ELIGIBILITY CHECK – SSN ENTRY

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Oklahoma's Promise
Eligibility Check

Enter 1 or more SSNs (###-##-####)

Type of Eligibility Check

2026-27 Eligibility

Check Eligibility

Back to Menu

2026-27 Eligibility

26-27 Eligibility Career Tech only

2025-26 Eligibility

25-26 Eligibility Career Tech only

Potentially Eligible 2026 grad

Logout

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Enter 1 or more SSNs (###-##-####)

xxxxxxxx	Eligible : No expiration date found. Abbott HS Grad - 2023 Allowed Hours - 129 Paid Hours - 0 Remaining Hours - 129
xxxxxxxx	Eligible : Expiration Date - 12/31/2024 Dallis HS Grad - 2019 Allowed Hours - 129 Paid Hours - 84 Remaining Hours - 45
xxxxxxxx	Eligible : Expiration Date - 07/31/2024 Luevano HS Grad - 2017

Type of Eligibility Check 2023-24 Eligibility ▾

Check Eligibility Eligibility check complete.



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Oklahoma's Promise
Eligibility Check

Enter 1 or more SSNs (###-##-####)

xxx-xx-xxxx

Not an OK Promise Student

xxx-xx-xxxx

Potentially Eligible Aaron HS Grad - 2024

xxx-xx-xxxx

Not an OK Promise Student

Type of Eligibility Check

Potentially Eligible 2024 grad ▾

Check Eligibility

Eligibility check complete.

Back to Menu

Clear Form

Logout

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655 Research Parkway, Suite



Oklahoma's Promise Eligibility Check

Process file

No file chosen

Type of Eligibility Check

Processing Instructions

1. Click "Browse" to select a file to process. (file should be either an ".xls", ".xlsx" or ".txt" type)
2. Select the Type of Eligibility Check to perform.
3. Click "Start Process" to Process the file.

Maximum file size may NOT EXCEED 25 MB. Please verify file size before submitting.



OK PROMISE

FILE CREATED BY INSTITUTION

	A	B	C	D
1	SSN - 9 digits	1111		
2	SSN	2222		
3	SSN	3333		
4	SSN	4444		
5	SSN	5555		
6	SSN	6666		
7	SSN	7777		
8	SSN	8888		
9	SSN	9999		
10	SSN	1212		
11	SSN	1313		
12	SSN	1414		
13	SSN	1515		
14				

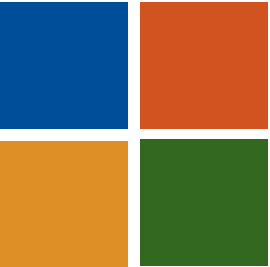
**Column A:
SSN (no dashes)**

**Column B:
Student ID**

**Must be Text format
and no missing
leading zeros, SSNs,
or blank cells**

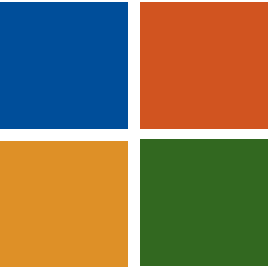
OKP ELIGIBILITY FILE RETURNED TO THE INSTITUTION

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	106262	Not Eligible	N											
2	104747	Eligible	E	Date Expires:	7/31/2027	Jones	HS Grad :	2022	Allowed :	129	Paid :	39	Remaining :	90
3	105959	Not Eligible	N											
4	104646	Eligible	E	Date Expires:		Phillips	HS Grad :	2021	Allowed :	129	Paid :	0	Remaining :	129
5	106262	Eligible	E	Date Expires:	7/31/2024	Booth	HS Grad :	2019	Allowed :	129	Paid :	124	Remaining :	5
6	105656	Eligible	E	Date Expires:	7/31/2025	Alexander	HS Grad :	2020	Allowed :	129	Paid :	100	Remaining :	29
7	103535	Eligible	E	Date Expires:	7/31/2028	Flores	HS Grad :	2023	Allowed :	129	Paid :	26	Remaining :	103
8														
9														



TROUBLESHOOTING ELIGIBILITY REPORT

- Error: the # of columns does not match ...
Answer: too many columns in your spreadsheet;
check for blank SSN fields or SSNs without the
leading zero
- Problem: Found a student in May; the following
September, the student is not on the list...
 - Student's eligibility may have expired –
Bachelor's degree, 129 hours paid, 5 year or 3
year expiration.
 - FAFSA – income check, C code, over income.

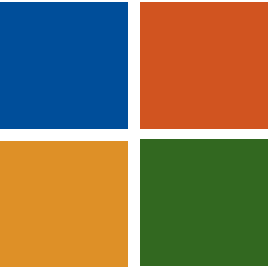


TROUBLESHOOTING ELIGIBILITY REPORT CONT

- Problem: Student is coming up as “not eligible”
 - Student did not complete the HS requirements.
 - Possible incorrect SSN or no SSN on record, causes no FAFSA match

- Question: Why does one OK Promise student have an expiration date and another does not?

The 1st student has a disbursement on record with OK Promise; the 2nd does not (yet).



NEW TEACHER ELIGIBILITY TRACK

- Question: What about the new teacher eligibility track? Is there a way for the school to identify if a student is eligible for Oklahoma's Promise via the normal eligibility track vs. the teacher eligibility track?
 - Teacher-track students have a higher income limit. We must verify the parent's teaching position, so eligibility isn't based on income alone and may take longer to confirm each year for students in this teacher track.
 - At this time, we won't be able to add a separate indicator on the Potential Eligibility Report for the current scholarship cycle.

CLAIM FORM – AREAS TO EDIT

	A	B	C	D	E	F	G	H	I	J	K	LM	N	O	PC	R	S
1		OKLAHOMA'S PROMISE															
2		2026-27 Scholarship Claim Form															
3																	
4		<u>Institution:</u>					<u>School Code:</u>										
5		University					U 645										
6																	
7		Person to whom check should be mailed or email notice given:															
8																	
9		suesmith@stateuniv.edu															
10		(Please provide email address if applicable)															
11																	
12		I certify that the Oklahoma's Promise awards for students listed below have been awarded within the student's federal															
13		cost of attendance limit and do not include any noncredit remedial courses. All listed students selected for Verification															
14		have completed that process. (Must provide name and title below or claims will not be paid.)															
15																	
16		Sue Smith					Financial Aid Director										
17		Name					Title										
18																	
19		I. Claims for students receiving Oklahoma's Promise scholarship funds															
20																	
21																	
22		Last		First		SSN		Total		OKPromise		OKPromise		Adjusted			
23		Name		Name				Hours		Rate		Award		Award			
24										\$ 180.50		\$ -					
25										\$ 180.50		\$ -					
26										\$ 180.50		\$ -					
27										\$ 180.50		\$ -					
28										\$ 180.50		\$ -					
29										\$ 180.50		\$ -					
30										\$ 180.50		\$ -					
31										\$ 180.50		\$ -					



OKLAHOMA'S PROMISE
2026-27 Scholarship Claim Form

Institution:

University

School Code:

U645

Semester

X

Fall

Spring

Summer

Other

Year: 2026

Person to whom check should be mailed or email notice given:

suesmith@stateuniv.edu

(please provide email address if applicable)

I certify that the Oklahoma's Promise awards for students listed below have been awarded within the student's federal cost of attendance limit and do not include any noncredit remedial courses. All listed students selected for Verification have completed that process. (Must provide name and title below or claims will not be paid.)

Sue Smith

Financial Aid Director

Name

Title

I. Claims for students receiving Oklahoma's Promise scholarship funds

Last Name	First Name	SSN	Total Hours	OKPromise Rate	OKPromise Award	Adjusted Award
Smith	Joe	xxxxx2121	15	\$ 160.00	\$ 2,400.00	
Jones	Bob	xxxxx1313	12	\$ 160.00	\$ 1,920.00	
(No middle name or initial or suffix such as Jr.)						
(Adjusted Awards & Hours)						
Parra	Ann	xxxxx3113	16	\$ 160.00	\$ 2,560.00	\$ 2,200.00
The student below is in 16 hours but has a reduced award. The reduced amount is closer to the 15 hours so change hours to 15.						
Birch	Molly	xxxxx1211	16	\$ 160.00	\$ 2,560.00	\$ 2,460.00
Birch	Molly	xxxxx1211	15	\$ 160.00	\$ 2,400.00	\$ 2,460.00
reduced award & hours						
(Returns/Subsequent claim)						
Davis	Frank	xxxxx2112	-12	\$ 160.00	\$ (1,920.00)	
Smith	Joe	xxxxx3121	-4	\$ 160.00	\$ (640.00)	
Jones	Bob	xxxxx2313	3	\$ 160.00	\$ 480.00	



OKLAHOMA'S PROMISE
2026-27 Scholarship Claim Form

Institution:
Type name of school-branch

School Code:
V

Semester	Year: 2026
x	Fall
	Spring
	Summer
	Other

Person to whom check should be mailed or email notice given:

(please provide email address)

I have billed the tuition rate for my school by payment period for the clock hours associated with that payment period not to exceed \$4.00 per clock hour. I certify that the Oklahoma's Promise students listed below are enrolled in a postsecondary career technology program that meets the requirements to be eligible for federal student financial and further certify the funds have been awarded within the student's federal cost of attendance limit and do not include any noncredit remedial courses. All listed students selected for Verification have completed that process. (Must provide name and title below for claim to be paid.)

		Max. rate	\$4.00
Name	Title		

I. Claims for students receiving Oklahoma's Promise scholarship funds

Last Name	First Name	SSN	PROGRAM NAME	Total program clock hrs	Clock hrs per pmt. period	Tuition rate per clock hr	OKPromise Award	Adjusted Award
Newton	James	111111111	Aircrat Maint	1500	450	\$ 2.00	\$ 900.00	
Smiles	Sara	222121212	Dental Assist	1050	300	\$ 4.00	\$ 1,200.00	

Clock hour conversion to credit hour is 30:1





<https://www.okhighered.org/O-SAFE/Login.aspx>

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OSRHE Secure Access File Exchange

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.*

Login

Forgot Password

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O-Safe: File Exchange

[File Exchange](#)

[Programs](#)

[Organizations](#)

[Manage Users](#)

[Change Password](#)

[Logout](#)

For all technical issues, please contact your program administrator.
Browse to desired location and choose from the available options below.

Upload File

Permissions: (Program Admin)

File Location: Oklahoma's Promise / Murray State College

[Oklahoma's Promise](#)

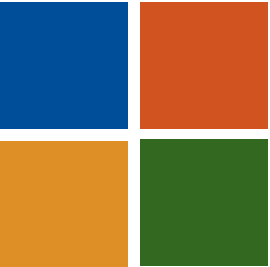
[Murray State College](#)

	Murray_2122 Claim Spr22 Claim #5.xlsx		Incoming	Delete
	Murray_2122 Claim Sum22 Claim #1.xlsx			
	Murray_su22.xlsx		Outgoing (New)	
	Murray4_sp22.xlsx		Outgoing (New)	
	Murray5_sp22.xlsx		Outgoing (New)	Delete

File Uploaded By: Holman, Raegin at 6/22/2022 2:53:54 PM
File Downloaded By: Norris, Kelley at 6/22/2022 4:09:24 PM
Auto Delete Date: 7/2/2022

Note: All files are transferred through a secure channel, encrypted on the server and are automatically deleted after 10 days. Please save files to a secured location before editing file contents.



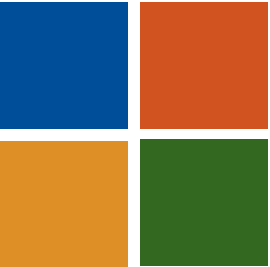


CLAIM FORM SUBMISSION

- New staff will need permissions to check eligibility and/or submit claims. For login info – email Alan (ahernandez@osrhe.edu)

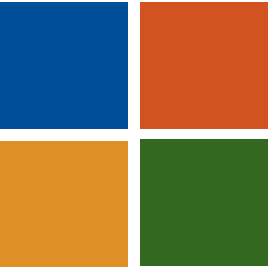
Please do not share logins!

- Upload claims to OSAFE – OK Promise folder
- OKP receives immediate email notice when you upload a claim.



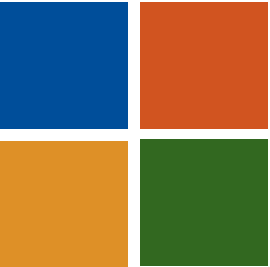
OK PROMISE REFUNDS

- EFT, Check, or subsequent claim
- Form of notification:
 - ☐ Submit a claim form via OSAFE (**PREFERRED**)
and
 - ☐ Identify OKPromise, student name and the term in the Payment Message on the funds transfer (no SSNs please)
 - ☐ List on the check stub –for OK Promise with student name and term



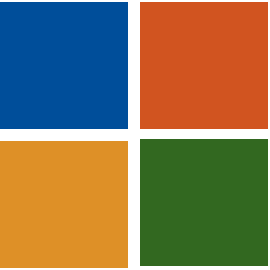
EFT / CHECK INFORMATION

- Claims may take 1-5 weeks. Checks will be mailed out as soon as our office receives it.
- To set up your institution with EFT your Business Office should contact:
OMES Vendor Registration team via
the OMES Service Desk at
servicedesk@omes.ok.gov
or call 405-521-2444.



OTHER INFO

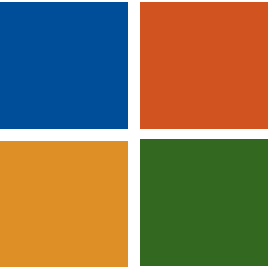
- Automating your OK Promise claim form
 - Pull data from your FA Management System into your claim form (keep formatting of claim form!)
- Do not submit hours OK Promise does not pay for or if student is in Verification *per DOE changes
- Create a new file for each claim
- Email & PII – no SSNs; send month/day only of birth
- Notify OKP of Bachelor's degree grads – upload SSN & name to OSAFE



ADDITIONAL SCHOLARSHIPS

- ❑ Oklahoma Access and Achievement Program (OAAP)
 - ❑ The OAAP was designed to support students with intellectual disabilities enrolled in comprehensive transition and postsecondary education programs (CTP), preparing for gainful employment.

- ❑ Hero's Promise
 - ❑ The Heroes Promise program is available to children of individuals killed or who died due to an injury sustained in the line of duty in any branch of the United States Armed Forces after January 1, 2000.



CONTACT INFORMATION

Alan Hernandez ahernandez@osrhe.edu
405-225-9147

Kanika Brown: kbrown@osrhe.edu
405-225-9160
okpromise@osrhe.edu



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QUESTIONS?