

**OKLAHOMA STATE REGENTS FOR HIGHER EDUCATION  
OKLAHOMA TUITION AID GRANT PROGRAM  
AWARD CLAIM FORM  
EXCEL SPREADSHEET LAYOUT AND INSTRUCTIONS  
2017-2018**

Note: Additional Information Regarding Reporting Requirements Is Presented Following This Table.

Column	Column Name	Allowable Values	Instructions
A	SSN	Numbers	<ul style="list-style-type: none"> <li>◆ 9-digit SSN, <b><u>including lead zeroes if applicable</u></b></li> <li>◆ Do not enter dashes</li> </ul>
B	Last Name	Alphabetic Name	<ul style="list-style-type: none"> <li>◆ Alpha Characters Only</li> </ul>
C	First Name	Alphabetic Name	<ul style="list-style-type: none"> <li>◆ Alpha Characters Only</li> </ul>
D	Middle Initial	Alphabetic Name	<ul style="list-style-type: none"> <li>◆ <b><u>One Alpha Character Only</u></b></li> <li>◆ <b>No Punctuation</b></li> </ul>
E	ISIR Transaction Number	01.....99	<ul style="list-style-type: none"> <li>◆ ISIR transaction number that corresponds with the data used to determine the student's 2017-2018 financial aid eligibility</li> <li>◆ Use a leading zero if the transaction number is less than 10</li> </ul>
F	EFC	Number  <b>CANNOT EXCEED 1700</b>	<ul style="list-style-type: none"> <li>◆ <b>Primary</b> EFC that determined the student's 2017-2018 financial aid eligibility</li> <li>◆ Up to 5 digits can be used; however, <b>if a student's EFC is greater than 1700, they are not eligible to receive an OTAG award AND should <u>not</u> be reported on the Award Claim Form</b></li> </ul>
G	Semester Enrollment Status	FT = Full-time PT = Part-time	<ul style="list-style-type: none"> <li>◆ <b>Update or enter student's current enrollment status for <u>this</u> disbursement</b></li> </ul>
H	<b>Overaward</b> Disbursement Amount	<b>Blank - if no overaward</b>  Dollars – if reduced for overaward  <b>CANNOT BE LESS THAN \$100 IN A SEMESTER</b>	<ul style="list-style-type: none"> <li>◆ For most students this column should be blank</li> <li>◆ Enter the <u>whole dollar</u> amount being requested for the student <u>for this disbursement only</u>, <b>if you have reduced their standard amount due to an overaward situation</b></li> <li>◆ <b>Must be at least \$100 per semester</b></li> <li>◆ See note on page 4 regarding <b>spring</b> semester overaward reporting</li> </ul>

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I	Supplemental Disbursement Amount	<b>Blank – if not a supplement</b>  Dollars if a supplemental disbursement is being requested	<ul style="list-style-type: none"> <li>◆ Leave blank <b>unless</b> this request is for a supplement</li> <li>◆ Enter the whole dollar amount that is being requested to supplement an amount that was disbursed to the student earlier in the <b>same</b> semester</li> <li>◆ A supplemental request cannot be honored if the Disbursement Report reflecting the student’s initial disbursement record for the same semester has not been completed, returned to OTAG, and finalized</li> </ul>
J	OTAG Award Status Indicator	Informational Only -- <b>DO NOT UPDATE THIS FIELD.</b>  In spring, indicates student’s OTAG status at end of previous fall semester	<ul style="list-style-type: none"> <li>◆ <b>Always blank on a fall semester Award Claim Form</b></li> <li>◆ A=Awarded and Paid in fall</li> <li>◆ C=Awarded and Cancelled in fall</li> <li>◆ P= Not Awarded but meets selection criteria</li> </ul>
K	Indicator for Resident Due to Military Status	<b>Blank for most students</b> Put a “Y” in this field when you have <b>added</b> an eligible student that qualifies for in-state status and financial aid.	<ul style="list-style-type: none"> <li>◆ <b>Leave blank unless the student qualifies for in-state status and financial aid AND did not list Oklahoma as the “state of legal residence” on the FAFSA. These students must be enrolled and meet <u>all</u> of the OTAG eligibility criteria at the time the claim is submitted</b></li> </ul>
L	Student ID	<b>Text</b> Enter the school-assigned student identifier. Up to nine characters and/or numbers are allowed.	<p><b>Optional</b></p> <ul style="list-style-type: none"> <li>◆ Institutions must provide the school-assigned student identifier in order for the value to be displayed on the related disbursement roster.</li> </ul>

**Pre-Populated Award Claim Form**

Students listed in the pre-populated Award Claim Form reported your institution on their FAFSA and meet the basic OTAG awarding criteria listed below.

- ◆ FAFSA receipt date is **December 1, 2016** or earlier
- ◆ On the current ISIR transaction in the OTAG database on the date the pre-populated Award Claim Form was created, the student’s information reflected:
  - EFC 1700 or lower
  - OK is state of legal residence self-reported by the student
  - No federal reject codes or OTAG reject codes active

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- Enrollment level is undergraduate
- No bachelor's degree received is indicated on the transaction
- Student has not reached Pell lifetime limit

The pre-populated report will likely include students who, while they meet the above criteria, cannot be awarded. It is the institution's responsibility to ensure that any student submitted on their completed Award Claim Form is **currently enrolled and meets all of the OTAG eligibility criteria at the time the claim is submitted**. A complete list of eligibility requirements is provided at <http://www.okhighered.org/admin-fac/FinAidResources/docs/otag-student-eligibility.pdf>.

### **Award Claim Form Instructions for Completion (Excel)**

To request OTAG funds for students at your institution, the students' names and information must be submitted to OTAG on an Award Claim Form.

**1. Begin with blank OTAG Award Claim Form Template or OTAG Pre-Populated Award Claim Form.** Blank ACF templates are available from OSRHE Financial Aid Resource for Institutions ([www.okhighered.org/admin-fac/FinAidResources/otag.shtml](http://www.okhighered.org/admin-fac/FinAidResources/otag.shtml)). Pre-populated forms are available from OTAG upon request.

### **2. Save and rename file on your computer.**

Before you begin working on your Award Claim Form, be sure to save it in your computer network directory. The pre-populated report OTAG provides will always be named xxxMMDDYYYY.acf○.xlsx where:

- ◆ **xxx** is your institution's three-letter OTAG reports code,
- ◆ **MMDDYYYY** is the date OTAG created the pre-populated report, and
- ◆ **acf○** represents Award Claim Form "outbound" (sent from OTAG to an institution).

When you save the file to your computer, whether you are using a blank template or a pre-populated form, please:

- ◆ rename the file using the format **xxxMMDDYYYYacfi.xlsx** where **acfi** represents "inbound" (to be sent from an institution to OTAG) Simply change the last part of the filename from "acfo" to "acfi".
- ◆ Adhering to this specific naming format will assist OTAG staff and will be appreciated.

### **3. Review 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:** Allowable values for each column must be strictly adhered to. If a column is updated with a value not specified in the Allowable Values table for that column, OTAG's automated processing system will not be able to read it correctly, and the institution will be asked to submit a corrected report.
- ◆ **Transaction Number (Column E):** Institutions may be asked to assist OTAG staff in resolving ISIR transaction number and EFC mismatches if found when an inbound Award Claim Form is processed with the current OTAG database. If you are using a pre-populated form and you have awarded a student based on an ISIR transaction other than the transaction number pre-filled in Column E, **you should enter the correct ISIR transaction number as well as the correct EFC in Column F.**
- ◆ **Enrollment Status (Column G):** Please pay close attention to the current enrollment status in Column G and make any appropriate adjustments to FT status.

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- **Full-time** status will be assumed. Please update for part-time enrollment. Full-time and part-time statuses are defined in accordance with the current definition for full-time and half-time enrollment status for federal Title IV student financial aid eligibility.
  - Funds will be issued according to your confirmation of the student's FT or PT status
  - No values other than FT and PT are allowed in this column, and reports containing any other values in this column will not be accepted for processing.
  - It is important that institutions accurately report each student's FT or PT status **EVEN IF YOUR STUDENTS RECEIVE THE SAME AWARD AMOUNT FOR BOTH FT AND PT STATUS**. OTAG is required to track full-time and part-time awards. If the request for funds for a student is for a supplemental amount, the enrollment status that is accurate for the student at the time of the supplemental request must be entered in this field.
- ◆ **Overaward Disbursement Amount (Column H):** An entry in this column indicates that a reduced amount of funds is being requested for the semester due to an overaward situation.
- **If there is no overaward, this column must be left blank.**
  - The minimum award amount is \$200 (\$100 per semester). If an amount less than \$100 is requested in this column, the request for funds will be denied by OTAG.

**Note - Spring Overawards:** In the spring semester, pre-populated award claim forms will automatically display overaward amounts in this column for any students who received a reduced OTAG award in the fall semester due to an overaward.

- If the overaward amount has changed for spring, institutions must enter the new overaward amount in this column.
  - If the overaward does not exist in the spring semester, this column must be blank (right mouse click and select "clear contents")
- ◆ **Supplemental Disbursement Amount (Column I):** An entry in this column indicates that the student has **already been disbursed** at a reduced or part time amount in the current semester and has now become eligible for additional OTAG funds in the same semester (e.g. has now reached full time enrollment or overaward reduction has changed). An institution should **ONLY** use this column if the disbursement report on which this student originally appeared for the current semester has been returned to OTAG and finalized.
- ◆ **Award due to Military Status (Column K):** (The entire record will have to be manually entered on the fall claim and a "Y" placed in this field.) An entry in this column indicates that the student qualifies for in-state status and financial aid as a full-time active duty member of the armed forces or dependent of a full-time active duty member of the armed forces. Legislation now extends in-state status to certain veterans, spouses and dependent children as well. ROTC participants are also now eligible for in-state status. This entry is necessary only for students that have indicated a "state of legal residence" other than Oklahoma on the FAFSA. **The student must meet all other OTAG eligibility criteria.**
- ◆ **Student ID (Column L):** Optional. If institutions wish to list the school-assigned student identifier on the related disbursement roster, these identifiers must be entered into this column by the school. OTAG will not maintain or track this number after its appearance on the disbursement report. This column may be left blank.

**4. Complete Heading.**

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- ◆ **Heading:** The spreadsheet heading must be filled out with the following information:
  - Institution Name (pre-filled if using a pre-populated report provided by OTAG)
  - Institution 6-digit Title IV code number (pre-filled on pre-populated reports)
  - Semester and Award Year (Fall or Spring and 2017-2018) (pre-filled if using a pre-populated reports)
  - Name and Title of the Authorized Institutional Representative completing the Award Claim Form and responsible for the accuracy of the award eligibility data (all institutions must complete)
  - Date the Award Claim Form was completed (all institutions must complete)
- Award Claim Forms without this information completed will not be accepted.**
- ◆ **Authorized Institutional Representative:** The Award Claim Form must be submitted by an authorized institutional representative for the OTAG program as designated by the president or chief executive officer of the institution.
- ◆ **Multiple Award Claim Forms** can be submitted in each semester. Fall funds must be requested during the fall semester (no later than November 10, 2017 for students enrolled in standard term programs) and only spring funds can be requested during the spring semester (no later than April 6, 2018 for students enrolled in standard term programs).

5. Upload Report to O-SAFE (OSRHE Secure Access File Exchange). O-SAFE instructions can be requested by e-mail at [reports@otag.org](mailto:reports@otag.org) .

If you have questions concerning the Award Claim Form Excel Spreadsheet or for general OTAG inquires, contact the OTAG office at 405.225.9456 or toll-free at 800.858.1840 (option 6) or send e-mail to [reports@otag.org](mailto:reports@otag.org)