Resource Page
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
  - Reporting instructions
  - Other information related to OSRHE financial aid programs
• Go to okhighered.org, click Higher Ed Admin/Faculty/Staff.

• Scroll down & click Financial Aid Resources for Institutions
Click the Oklahoma’s Promise link for specific information and forms.
OKLAHOMA'S PROMISE

OSRHE O-SAFE
OSRHE O-SAFE Instructions

Oklahoma's Promise General Information
Oklahoma's Promise Website
Financial Aid Officers Handbook for Oklahoma's Promise (PDF, 250k)
Administrative Rules
Statutes (Oklahoma Higher Learning Access Act)
2018-19 Oklahoma's Promise Scholarship Rates (PDF, 19k)
2.0 Verification Form (XLS, 14k)

Oklahoma's Promise Instructions and Presentations
Eligibility Verification Check Instructions (PDF, 299k)

Oklahoma's Promise Award Claim Forms (select institution’s Excel file from options below)
Institution Award Claim Forms
Select Institution
Get Form

Claim Form Instructions (PDF, 52k)
### OKLAHOMA'S PROMISE

**OSRHE O-SAFE**

<table>
<thead>
<tr>
<th>Research Universities - Public</th>
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<tbody>
<tr>
<td>Oklahoma State University - Stillwater (108k)</td>
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<tr>
<td>OSU Institute of Technology, Okmulgee (62k)</td>
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<td>OSU - Oklahoma City (83k)</td>
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<td>University of Oklahoma (109k)</td>
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<td>OU Health Sciences Center (36k)</td>
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<td>Research Universities - Independent</td>
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<td>Regional Universities - Public</td>
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<td>University of Science and Arts of Oklahoma (75k)</td>
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<td>Community Colleges - Public</td>
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<td>Carl Albert State College (53k)</td>
</tr>
<tr>
<td>Cashion State College (50k)</td>
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</table>
OK Promise Claim Form

OKLAHOMA'S PROMISE  
2019-20 Scholarship Claim Form

Institution: OK Panhandle State University  
School Code: U 133  
Semester: Fall  
Year: 20__

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

(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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
</tr>
</thead>
</table>

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

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>SSN</th>
<th>Total Hours</th>
<th>OKPromise Rate</th>
<th>OKPromise Award</th>
<th>Adjusted Award</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>$ 100.00</td>
<td>$ -</td>
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<td>0</td>
<td>$ 100.00</td>
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</tr>
</tbody>
</table>
OK Promise
Eligibility Report

- https://www.okhighered.org/ohlap/ohlapelig/Login.aspx
- Same username and password as O-SAFE
- Multiple Report Options:
  - Current Eligibility (2018-19)
  - Current Eligibility (2019-20) (constant updating)
  - Potential Eligibility (2019 grads only)
  - Potential Eligibility (2020 grads only – Available around Oct. 1)
- Two Processing Options:
  - Individual
  - Batch
Please select one of the following options:

- Eligibility Check by SSN
- Submit File for Eligibility Check

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

Type of Eligibility Check

- 2019-20 Eligibility
- 2018-19 Eligibility
- Potentially Eligible 2019 grad

Check Eligibility

No valid SSNs were entered. Please review and try again.

Back to Menu  Clear Form  Logout
Oklahoma's Promise Eligibility Check

Process file

Type of Eligibility Check
- 2019-20 Eligibility
- 2018-19 Eligibility
- Potentially Eligible 2019 grad

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.

[Buttons: Back to Menu, Logout]
OK Promise
Eligibility Report

■ 2018-19 Eligibility
  □ Reflects verification of students for 18-19 school year (Fall 18, Spring 19, Summer 19)

■ 2019-20 Eligibility
  □ Reflects verification of students for 19-20 school year (Fall 19, Spring 20, Summer 20)
OK Promise
Eligibility Report

- Potential Eligibility – contains current seniors who are enrolled in the program and potentially eligible to receive the scholarship in the fall.
  - Potentially Eligible – still processing
  - Not an OKPromise Student – processing completed and have been moved off of the potential list (check the Elig. List)
OK Promise
Eligibility Report

- Tracking of credit hours enrolled/paid began with 2018 graduates and those who began post-secondary education

- Column will be added to the report

- Work in Progress
OKPromise
File created by institution

Column A
SSN

Column B
Student ID

Make sure it is text and there are no missing SSNs
OKPromise
File returned to the institution

- Eligible – student has passed the HS paperwork and the 2nd income check
- Not eligible – student did not complete the program requirements
- Potentially Eligible – Current/Recent HS grad; not completely processed (we may be waiting on the HS paperwork or the 2nd income check.)
- Not an OKPromise student – student does not show on Potential Eligibility

- Column A = ID
- Column B = Elig/Not
- Column C = Elig. code for text file
- Column D/E = Expiration Date
- Column F = Student last name
- Column G/H = Date enrolled in OKP
- Column I/J = HS Grad Year
Troubleshooting Eligibility Report Errors

- **Error:** the # of columns does not match …
  Answer: too many columns in your spreadsheet or SSN field may be blank

- **Error:** Website requires you to login to use … or “the specified request cannot be executed from current application pool.”
  Answer: Save the file to a lower version (Microsoft Office Excel Workbook.xls or .txt type file)
Troubleshooting (cont.)

Problem: Found a student in May; the following September, the student is not on the list.

Answer:

- Student’s eligibility may have expired.
  * 5 year (or bachelor’s degree earned) expiration or *3 year expiration – if the student is attending college for the first time, you might suggest they contact us.

- FAFSA – income check
Troubleshooting (cont.)

- **Problem:** Student is coming up as “not eligible”

  **Answer:**
  - Student did not complete the requirements.
  - Possible incorrect SSN or no SSN on record
  - FAFSA issue

- **Question:** Why does one OKPromise student have an expiration date and another does not?

  **Answer:** The 1<sup>st</sup> student has a disbursement on record with OKPromise; the 2<sup>nd</sup> does not (yet).
**Troubleshooting (cont.)**

- **Problem:** you click ‘start process’ and nothing happens.

  **Answer:** this is an Internet Explorer issue; you’ll need to get an instruction doc. from us that will show you how to adjust a security setting.
Automating your OKPromise claim

- Do as much as you can electronically
- Pull data from your FA Management System into your claim form (keep formatting of claim form!)
- Please share your practices or ideas
Returning funds to OKPromise

- Electronic funds transfer – communicate to your business office the importance of identifying the payment as OKPromise
- Paper check
- Combine it with another request for funds – be sure to indicate request as a positive amount and the return as a negative amount (-0)
OKPromise Refunds

- Notification to OKP is very important!
- Indicate the name and SSN of student(s), the amount and the semester
- Choose a form of notification:
  - Submit a claim form thru OSAFE (preferred) or
  - Submit a plain sheet identifying student or
  - Identify student in the Payment Message on the funds transfer (no SSNs please) or
  - List on the check stub
Contact Information

okpromise@osrhe.edu
OR
1.800.858.1840 (option 2)

Kelley Norris: knorris@osrhe.edu 405-225-9147
Carol Alexander: calexander@osrhe.edu 225-9160