Oklahoma’s Promise

Nuts & Bolts for the Financial Aid Office
July 2020

Oklahoma State Regents for Higher Education
Housekeeping

- Participants are muted except host and moderator
- Questions fielded through Zoom Q & A
- Presentation being recorded and will be made available
- Please complete short survey
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)

FINANCIAL AID RESOURCES FOR INSTITUTIONS

Academic Scholars Program
Future Teachers Scholarship Program
Oklahoma College Assistance Program (external link)
Oklahoma Tuition Aid Grant (OTAG)
Oklahoma Tuition Equalization Grant (OTEQ)
Oklahoma's Promise
Regional University Baccalaureate Scholarship Program
Scholars for Excellence in Child Care
Other Programs
OKLAHOMA'S PROMISE

OSRHE O-SAFE

Research Universities - Public
- Oklahoma State University - Stillwater (108k)
- OSU Institute of Technology, Okmulgee (82k)
- OSU - Oklahoma City (93k)
- University of Oklahoma (109k)
- OU Health Sciences Center (36k)

Research Universities - Independent
- The University of Tulsa (75k)

Regional Universities - Public
- Cameron University (76k)
- East Central University - Ada (78k)
- East Central University - Ardmore (69k)
- Langston University (76k)
- Northeastern State University (108k)
- Northwestern Oklahoma State University (62k)

Regional Universities - Independent
- Regional Universities - Independent (40k)

Public Liberal Arts University
- University of Science and Arts of Oklahoma (75k)

Community Colleges - Public
- Carl Albert State College (53k)
- Comanche State College (52k)
OK Panhandle State University U 133 Semester

Fall Year: 20__

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 and do not include any non credit remedial courses. *All listed students selected for Verification have completed that process.

<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>OK Promise Rate</th>
<th>OK Promise Award</th>
<th>Adjusted Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>$ 100.00</td>
<td></td>
<td></td>
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<td>$ -</td>
<td></td>
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<tr>
<td>0</td>
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</tbody>
</table>
OK Promise
Eligibility Report

- [link](https://www.okhighered.org/ohlap/ohlapelig/Login.aspx)
- Same username and password as O-SAFE
- Multiple Report Options:
  - Current Eligibility 2019-20
  - Current Eligibility 2020-2021 (constant updating)
  - Potential Eligibility - 2020 grads only
  - Potential Eligibility - 2021 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
Process file

Browse... No file selected.

Type of Eligibility Check

- 2020-21 Eligibility
- 2019-20 Eligibility
- Potentially Eligible 2020 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.

Back to Menu

Logout
OK Promise
Eligibility Report

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

■ 2020-21 Eligibility
   □ Reflects verification of students for 20-21 school year (Fall 20, Spring 21, Summer 21)
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 in the future
- Work in Progress
- Anticipated to affect students in next 1-2 years
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

- 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

- 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
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; C-Code/citizenship issue – let us know type of documentation used to verify
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 1st student has a disbursement on record with OKPromise; the 2nd does not (yet).
Troubleshooting (cont.)

Problem: you click ‘start process’ and nothing happens.
Answer: this may be an Internet Explorer issue; you’ll need to get an instruction doc. from us that will show you how to adjust a security setting.
Claim Form Submission

- New staff will need permissions (to check eligibility and/or submit claims) and login info – email Carol calexander@osrhe.edu
- Upload claims to OSAFE – OK Promise folder
- OKP receives immediate email notice your school has a claim for us to download
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 on claim form – be sure to indicate return as a negative amount (use -hours and -$$)
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
  - Identify student in the Payment Message on the funds transfer (no SSNs please) or
  - List on the check stub
EFT / Check Information

- Claims may take 1-4 weeks to be processed by the business office. Check 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 405-521-2444.
Other Info

- Automating your OKP claim form
  - Do as much as you can electronically
  - 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 is student is in Verification
- When emailing us be aware of PII – no SSNs by email (may send month/day of birth)
Questions?
Contact Information

okpromise@osrhe.edu

OR

1.800.858.1840 (option 2)

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