

Oklahoma's Promise

Claim Form Instructions

In order to expedite the process of your claims and better serve you, we ask that you make the following checks to your claim before uploading to OSAFE. The format of the claim form provided to you should not be rearranged. These checks are important because the claim processing program on our database is looking for these particular cells, columns, rows, etc. for particular information. If it doesn't find what it expects to find, it will error out which results in slower processing of the claim and possibly more time to get your funds.

- a. Cell B5 = Name of Institution
- b. Cell G5 = U (universities/colleges) or V (career techs)
Cell H5 = UDS code
- c. Cell R6 = Year: 2020 (for Fall term, not 2019/2020. Use 2021 for Spring or Summer terms.)
- d. Cell B10 = email address of contact person(s)
- e. Cell B16 = Name of Person Authorizing Claim – Do not leave blank!
- f. Cell G16 = Title/Position at Institution (serves as electronic signature for us)
- g. Column N = place for the X marking what semester. Some programs do not go by semesters, but if you can break it into semesters as closely as possible, we would appreciate it. Do not put multiple terms on one claim form.
- h. Column A = should not be deleted and should be blank.
- i. Column B = last name. Please do not put Jr or III.
- j. Column C = first name. Please do not put middle initial.
- k. Column E = SSN #. Please note some claims have been coming in with duplicate SSN which will prevent the processing of the claim.
- l. Column N starting at Cell 24 = OKPromise award. The formula in this column should not be removed or overwritten. If any adjustment or different amount is to be made, it should be done in Column O for Adjusted Award.
- m. Column O = Adjusted award. Column O should be blank unless a school has indicated an award that is different than the calculated award. Note: The scholarship cannot be awarded if it creates an overaward of the student's financial aid budget.
At this time please put students on the claim form even if they have a zero adjusted award so we may count them. If the Award is adjusted due to cost of attendance budget limit you may adjust the *hours* by using the rules of rounding (see claim form example).
- n. Row # 24 = first student's information

- o. Columns F, G, H, and L should be empty. (except for schools with approved multiple rates & Career Tech)

If you realize that you have left a student off of a claim and already uploaded it to OSAFE, please just submit another claim with that student or additional students on it, instead of emailing us the student's information to be added. This way less mistakes or misunderstandings will occur. However, if you need to remove a student from a recently submitted claim you can email us to see if the claim has already been processed. If it has not already been processed we can delete the student from the claim. If it has been processed, you will need to submit an additional claim form with the return information.

For Tech Centers and Proprietary Schools:

The updated claim forms have a few differences such as columns for program name, two rates, clock hours, etc., and will be sent to each school and available on the OSRHE website.

(<http://www.okhighered.org/admin-fac/FinAidResources/okpromise.shtml>)