

Oklahoma's Promise

Information for Financial Aid Officers

General Description of Program: Oklahoma's Promise (Oklahoma Higher Learning Access Program) provides awards equivalent to all or part of tuition expenses for students who complete the program's high school requirements and meet the eligibility requirements in college. The award may be used at Oklahoma accredited public and private colleges and for programs that qualify for federal student aid at public career technology centers (the award amount at private colleges and technology centers is limited to the amount the student would have received at a comparable public college). Students enrolled in the eighth, ninth, tenth and eleventh grade, whose parents' federal adjusted gross income (AGI) does not exceed \$60,000, may enroll in the program. Once enrolled, the student must complete a specified 17-unit high school core curriculum, achieve a minimum 2.50 cumulative GPA in both the required core curriculum and for all high school coursework, attend school regularly, and refrain from substance abuse and criminal/delinquent acts. The income of the student's parent(s) must also not exceed \$100,000 AGI while the student is enrolled in postsecondary education.

Who is eligible for an Oklahoma's Promise award?

- Only students certified by the Oklahoma State Regents for Higher Education (OSRHE) as having completed the high school requirements for Oklahoma's Promise are eligible for the Oklahoma's Promise award. High school officials are responsible for documenting to the OSRHE that students have completed the high school requirements. Eligibility is ultimately determined by the OSRHE.
- Students must be United States citizens or lawfully present in the United States to receive the award in college. However, undocumented immigrant students who are not lawfully present in the United States may still enroll in the program in the 8th-11th grade in anticipation of potentially attaining lawful status by the time they graduate high school. *Please note in "College Requirements for Oklahoma's Promise students" the information related to undocumented students.*
- Students must be Oklahoma residents per OSRHE policy (*Chapter 3.18 In-State/Out-of-State Status of Enrolled Students*). Generally, students with non-immigrant VISAs are not considered Oklahoma residents based on their declared intent to return to their country of origin.
- Students with C codes related to citizenship will not appear on the Eligibility List. The institution should notify OKPromise by email when the C code has been resolved so that the student's record can be updated and the student added to the Eligibility List. If the student has a resolved C code from a previous year and has been continuously paid by OKPromise, no documentation from the institution will be required. If there are questions regarding a student's status, please contact the OKPromise office.

College Requirements and Award Limitations for Oklahoma's Promise students

- The income of a student's parent(s) may not exceed \$100,000 AGI while the student is enrolled in postsecondary education. Each year Oklahoma's Promise students are required to complete a Free Application for Federal Student Aid (FAFSA) which will be used to determine whether the income exceeds \$100,000 AGI. If the student is independent for federal financial aid purposes, the \$100,000 AGI limit applies to the student's income (including spouse if applicable), not the parents. For any year that the income exceeds \$100,000, the student will not be eligible to receive the program benefit that year. Any year that the student does not

receive the award because their income exceeds the income limit will count toward the student's five-year period of scholarship eligibility.

A student who was adopted while in the permanent custody of the Oklahoma Department of Human Services, in the court-ordered custody of a licensed private nonprofit child-placing agency, or federally recognized Indian tribe, as defined by the federal Indian Child Welfare Act, shall be subject to the following income limit at the time the student begins postsecondary education and prior to receiving any program benefit award:

- For a student adopted between birth and twelve (12) years of age, the federal adjusted gross income of the student's parent(s) may not exceed \$150,000 per year.
- For a student adopted between thirteen (13) and seventeen (17) years of age, the federal adjusted gross income of the student's parent(s) may not exceed \$200,000 per year.
- If the adopted student is determined to be independent of the student's parents for federal financial aid purposes, the determination of the income limit shall be based on the income of the student (including spouse if applicable), not the income of the parent(s).

In extraordinary circumstances, the requirement to file the FAFSA for this purpose may be waived on a case by case basis; however, alternative verifiable documentation of compliance will be required.

- Students must begin postsecondary education within three years of graduating from high school. The Oklahoma State Regents for Higher Education may award the Oklahoma's Promise benefits for a student's first semester or other academic unit of postsecondary enrollment taken more than three (3) years after the student graduates from high school or completes an educational program equivalent to high school graduation if the student is a member of the Armed Forces of the United States, the Reserve Corps of the Armed Forces of the United States, or the Oklahoma National Guard, and is ordered to active duty or active duty for special work or training and due to the duty commitment the student is unable to enroll prior to the end of the three-year period. Such three-year period shall be extended by the length of the term of duty.
- Once a student begins postsecondary education, he/she is eligible for benefits for a maximum of five consecutive years or the completion of a bachelor degree, **whichever comes first**. When a student earns a bachelor degree at your institution, please notify the OKPromise office so that we can update the eligibility list. Additionally, beginning with 2018 high school graduates, students will also be subject to a limitation on paid hours of 129. See additional details below.

The student's five-year expiration date is noted on the eligibility list. Access to the eligibility list is available at: <https://www.okhighered.org/ohlap/ohlapelig/Login.aspx>. (Office personnel that require access to this site must have a username and password for the OSRHE Secure Access File Exchange (O-SAFE) site. Please contact the OKPromise office for additional details.) If the student receives his/her bachelor degree prior to the expiration date, their eligibility ends upon completion of the degree requirements. Missing expiration dates generally indicate that the student's initial start date has not been determined. Once a student has received his/her first disbursement or attendance is confirmed, an expiration date will appear on the eligibility record. The Oklahoma State Regents for Higher Education may award the Oklahoma's Promise benefits for courses of postsecondary units taken more than five (5) years after the student's first semester of postsecondary enrollment only in hardship circumstances; provided, however, no Oklahoma's Promise participant may receive benefits beyond a cumulative time period of five (5) years.

- **Students graduating from high school in 2018 and after will be able to receive payment for no more than 129 credit hours; however, exceptions for degree programs that require more than 129 hours may be granted.** Students enrolled in a baccalaureate degree program that requires in excess of 129 semester credit hours, may receive payment for the number of

semester credit hours required by the degree program. Students without a baccalaureate degree who are enrolled in a first professional degree program that does not require completion of a baccalaureate degree and that requires in excess of 129 semester credit hours, may receive payment for the number of semester credit hours required by the degree program up to a maximum of 150 semester credit hours or the equivalent.

- If the university allows students to enroll in graduate-level courses prior to completion of a baccalaureate degree **and** within both the credit hour and five year eligibility limitations, students can use Oklahoma's Promise to help pay for the tuition. However, Oklahoma's Promise will only pay at the undergraduate tuition rate; it will not pay at the graduate-level tuition rate.
- Oklahoma's Promise students must meet the regular admission requirements for the institution they plan to attend. Oklahoma's Promise students admitted to an institution by special admission standards are not eligible for the Oklahoma's Promise award their first semester of enrollment. Completion of the Oklahoma's Promise requirements does not guarantee admission to an institution of higher education.
- The Oklahoma's Promise award will NOT be available for the summer semester immediately following high school graduation. Since official eligibility for the OKPromise award is not determined until high school graduation, eligibility cannot be determined in time to process awards for the first summer semester. The first awards will be available for the fall semester. However, once the student is officially verified in our system, he/she may use the award in summer semesters of later years.
- **Beginning with the fall of 2018**, Oklahoma's Promise will no longer pay for remedial courses for which the student does not receive college academic credit (usually referred to as zero-level courses).
- Oklahoma's Promise students must maintain good academic standing in college to remain eligible for benefits. "Good academic standing" at public colleges and universities is defined by the OSRHE retention standards policy (OSRHE Admission Policy). In short, the policy requires students to achieve at least a 1.70 GPA during his/her first 30 semester credit hours and maintain a minimum 2.00 cumulative GPA after 30 semester credit hours are completed. Students attending a private institution or public career technology center shall maintain good academic standing according to the standards of the institution or school in which they are enrolled.
- All Oklahoma's Promise recipients are subject to the institution's Satisfactory Academic Progress (SAP) policy. If any Oklahoma's Promise student recipient is not eligible to receive Title IV aid as defined by the institution's SAP policy, the student is not eligible to receive Oklahoma's Promise.
- Oklahoma's Promise can be used for distance learning courses (correspondence, online, interactive video, etc.) offered for college credit by an eligible Oklahoma institution and for college-credit courses taken through an institution's continuing education/extension divisions. However, all students must go through the financial aid and/or bursar's office for payment processing. Award payments for these courses will be limited to the tuition rate of the institution's regular on-campus undergraduate courses.
- Undocumented immigrant students may enroll in Oklahoma's Promise in the 8th, 9th, 10th or 11th grade. **However, the student must be a United States citizen or lawfully present in the United States at the time they enter college to receive the program award.**

The student's eligibility for the Deferred Action for Childhood Arrivals (DACA, administered by the U.S. Department of Homeland Security; see <https://www.dhs.gov/deferred-action-childhood-arrivals-daca>) does not affect state aid eligibility at this time according to the OSRHE General Counsel's office. Many DACA eligible students receive a valid social security number for work purposes only and may believe they are eligible for aid. Students

with temporary DACA immigration status are not eligible to receive the Oklahoma's Promise scholarship.

How will the college/university know that a student is eligible to receive Oklahoma's Promise?

- The Oklahoma's Promise office makes available a list of eligible students on the Oklahoma's Promise eligibility verification website. A list of potentially eligible high school seniors will be available prior to high school graduation. **Please remember that this list is all students that have enrolled in Oklahoma's Promise indicating the specific graduation year. All the students on this list have NOT had their high school and/or FAFSA/income requirements checked.** Graduating seniors are removed from the potentially eligible list and are placed on the eligibility list after he/she is confirmed as meeting the program's high school requirements **and** the FAFSA has been checked and the family AGI is no more than \$100,000. Because FAFSA update, correction and professional judgment transactions can change this information, this data will be monitored for the full FAFSA eligibility time period each academic year (for example, October 1, 2020-June 30, 2022). Students may be added and/or removed from the eligibility list during this time. The eligibility list should be checked before each claim is submitted. Expiration dates are added after the Oklahoma's Promise office receives the first claim for payment indicating that the student has begun attendance. For students that begin attendance out-of-state or begin attendance and are initially ineligible due to an over-award etc., the expiration date will be based on transcripts or other sources of attendance information. **The lists are designed to assist you in determining eligibility; however, occasionally there are eligible students that do not appear or possibly even students that appear to be eligible but are later found to not be eligible. Please call to resolve any question of eligibility.**
- Note beginning with the 2019-20 year, eligibility checking will be year specific. In order to check eligibility for fall 2020, spring 2021 or summer 2021, the year will need to be changed to 2020-21 from 2021-22 to check for past eligibility. Please note that when checking past year eligibility, FAFSA updates made to that year's applications after April 1st may not be reflected in the student's eligibility status. Please contact the Oklahoma's Promise office for assistance with eligibility issues involving recent changes made to a past year's FAFSA.

What Does the Eligibility Website Tell Users?

1. Eligible/Not eligible: Using the student's social security number on the eligibility site (whether one at a time or a batch file of numbers) tells the administrative user that the student is eligible if he/she is. It will show Not eligible for any social security number that does not match our list of eligible students. Please keep in mind that a designation of "Not eligible" might also indicate various issues exist such as a social security mismatch, the high school has not yet submitted the necessary paperwork to verify the high school completion requirements, the student's family income as reported on the FAFSA has not been confirmed.
2. Expiration Date: This date will appear on the report only after the student has had his/her first Oklahoma's Promise disbursement or we have confirmed post-secondary attendance. This date will be five years after the student begins college. You should use this date to discontinue the student's award once the expiration date has been reached.
3. Last Name: This is the student's last name in the OKPromise records. If the name is different than what you have, please take note of it. It could be a name change due to marriage, etc., but it could also indicate that we have a different student on file with the SSN for which you are searching. If you believe the OKPromise information is incorrect, please contact the OKPromise office.
4. HS Grad: All students graduating in 2018 and thereafter will be subject to the limit on number of credit hours that can be paid by the Oklahoma's Promise program.

5. Hours Allowed, Paid, Remaining: For all students graduating from high school in 2018 and thereafter, information will appear indicating the allowed hours (generally 129), the hours paid to date and the remaining number of hours that can be paid. If information has been received indicating the student's program requires additional hours, the "allowed" hours will indicate the number approved.
- It is the responsibility of the student to notify the institution's financial aid office that he/she is eligible for the Oklahoma's Promise award. Students will receive an award letter from the State Regents' office after their final paperwork has been evaluated and approved. Note: In the eligibility letter we will send to each Oklahoma's Promise graduating senior certifying their completion of the high school requirements, we will also remind the student of the requirement to be a United States citizen or lawfully present and that the income of the student's parents may not exceed \$100,000 at the time the student begins postsecondary education. The eligibility letter is not sufficient evidence in itself that the student is entitled to receive the Oklahoma's Promise award.
 - It is the responsibility of the school to complete the verification process according to federal Title IV requirements for each student that is flagged for verification if required. **Since income is required to be checked each academic year, it is important to verify that income prior to payment. Refunds may be required for students that are verified after payment and found to be ineligible.**

Generally, verification is required to be completed before the student can be submitted for payment. Some discretion by the individual institutions can be exercised in cases where experience, documentation and/or historical evidence exists that the household income does not exceed the \$100,000 income limit for continued participation. However, when funds are claimed prior to completing the verification process, the school should be aware that the funds will have to be returned to the Oklahoma's Promise program if the household income is later found to be over the limit. Caution should be used to avoid intentional unreported or underreported income.

What is Heroes Promise and how does it work?

- HB 1343 of the 2011 Oklahoma legislative session amended the Oklahoma Higher Learning Access Act to authorize certain persons to participate in the Oklahoma Higher Learning Access Program and to qualify for the program benefits. This category of program participation is referred to as the "Heroes Promise" program.
- The program is available to certain students who are a child of any person killed after January 1, 2000, in the line of duty in any branch of the United States Armed Forces or who died after January 1, 2000, as a result of an injury sustained while in the line of duty in any branch of the United States Armed Forces and the person who was killed or died filed an individual or joint Oklahoma income tax return for the tax year prior to the year during which the person was killed or died.
- Students must be Oklahoma residents and can sign up for the program up to the age of 21. The student must also begin postsecondary education by age 21. Heroes Promise students are not subject to the Oklahoma's Promise high school academic requirements or the family income requirements. The student must be approved for admission to an Oklahoma college or university.
- The student must provide the required documentation to the Oklahoma State Regents for Higher Education.
- Once eligibility is established and the student begins postsecondary education, the award is the same as Oklahoma's Promise and the continuing eligibility requirements and limits are also the same. This includes the payment limit of 129 credit hours for students graduating in 2018 and after and the exclusion of payment for zero-level college remedial courses. Heroes Promise students will appear on the Oklahoma's Promise eligibility list. A separate claim will not be required.

Please note that because these students are not subject to the high school requirements, they will not appear on the “potential” eligibility list. For early confirmation of a student’s eligibility please contact the Oklahoma’s Promise office.

How is the award amount determined?

- The Oklahoma’s Promise award is not a pre-set amount; the amount depends upon the type of institution attended and the number of hours in which the student enrolls. The Oklahoma’s Promise award is calculated on the resident tuition cost only; it does not include the cost of other required fees, room and board expenses, books, or other costs related to college attendance.
- Oklahoma Public Colleges and Universities: The Oklahoma’s Promise award will equal the resident tuition at Oklahoma public colleges and universities. It does not include the cost of other required fees such as student activity fees, facility fees, library fees, special or remedial course fees, parking fees, etc. The final amount awarded to each student will vary depending on the tuition rates in effect at the time, the type of institution attended, and the number of credit hours in which the student is enrolled.

Examples of a semester award at public institutions:

<u>Type of Public Institution</u>	<u>2021-22 Tuition Rate⁽¹⁾</u>	X	<u>Hours Enrolled⁽²⁾</u>	=	<u>Oklahoma’s Promise Semester Award</u>
Research University	\$173.00 per credit hr.	X	15	=	\$2,595.00
Regional University	\$191.00 per credit hr.	X	15	=	\$2,865.00
Community College	\$117.00 per credit hr.	X	15	=	\$1,755.00
Technical Branch (2 yr.)	\$140.00 per credit hr.	X	15	=	\$2,100.00

⁽¹⁾ Tuition rates are subject to change and may be higher or lower at different institutions; an average rate is shown. At the four-year public universities, the award is based on the non-guaranteed resident tuition rate. If the student opts for the guaranteed rate of tuition, he/she will be responsible for the cost difference.

⁽²⁾ Enrollment in 12-15 semester credit hours per fall or spring semester is considered full-time enrollment. While students are not required to take a certain number of credit hours each semester, students will need to take 12-15 credit hours per semester to complete a bachelor’s degree within the five-year time period allowed.

- Oklahoma Independent/Private Colleges and Universities: The Oklahoma’s Promise award will cover a portion of the tuition at accredited independent/private colleges or universities in Oklahoma. The amount awarded to a student attending an independent/private institution will be equivalent to the amount the student would have received if the student had attended a comparable public institution. Comparability is determined by the Oklahoma State Regents for Higher Education.

Examples of a semester award at independent/private institutions:

<u>Type of Independent Institution</u>	<u>Independent Tuition Rate¹</u>	<u>Oklahoma’s Promise Award Rate²</u>	X	<u>Hours Enrolled³</u>	=	<u>Oklahoma’s Promise Semester Award</u>
Research Univ.	\$600 / hr.	\$173.00 / hr.	X	15	=	\$2,595.00
Regional Univ.	\$600 / hr.	\$191.00 / hr.	X	15	=	\$2,865.00
Assoc. degree inst.	\$600 / hr.	\$117.00 / hr.	X	15	=	\$1,755.00

¹The tuition rates shown here are for example only. Actual tuition rates may be higher or lower, and will vary by institution.

²At independent/private research and regional universities, the Oklahoma's Promise award is the average of the rates at public institutions.

³Enrollment in 12-15 semester credit hours per fall or spring semester is considered full-time enrollment. While students are not required to take a certain number of credit hours each semester, students will need to take 12-15 credit hours per semester to complete a bachelor's degree within the five-year time period allowed.

- **Public Career Technology Programs:** The OKPromise award will cover at least a portion of the tuition cost for enrollment in certain programs at public career technology centers supervised by the Oklahoma State Board of Career and Technology Education. Programs must meet the requirements to be eligible for federal student financial aid. [The award is limited to an amount similar to tuition at a public two-year college.]

You should bill OKPromise by the payment period for the clock hours associated with that payment period. You will need to enter the total program clock hours, and clock hours per payment period on the claim form. Enter the clock hour rate for your school/program in the OK Promise Rate column N. The amount cannot exceed the per clock hour amount listed on the current claim form. Please wait to bill us after the first drop/add period so that the students are settled in their courses since the amount of the award is based on tuition. If you do not have such a date, please wait until the first day of enrollment to be sure the student is attending.

- **Other Oklahoma degree granting institutions that are accredited by a national accrediting body:** The Oklahoma's Promise award will be paid at a rate comparable to the rate paid to public institutions.

How does an institutional flat-rate tuition policy affect the Oklahoma's Promise award?

Institutions have implemented flat-rate tuition policies with regard to Oklahoma's Promise in two ways.

1. The institution "exempts" Oklahoma's Promise students and processes the tuition on a per credit hour basis.
2. The State Regents for Higher Education have a written agreement with the institution that if the total dollar amount of OKPromise awards paid to the university for OKPromise students exceeds the amount that would have been paid on a straight per credit hour basis (as under the previous policy), then the university will refund the difference to the OKPromise program. This agreement "holds harmless" the OKPromise program as the flat-rate tuition policy is implemented.

How is the Oklahoma's Promise award applied?

Oklahoma's Promise is a cash award. While the award level is calculated based on the amount of tuition, the award does not have to be applied only to tuition costs if the student has another tuition-only award or waiver. Oklahoma's Promise can be used with other forms of financial aid.

Over award Policy. An Oklahoma's Promise student may not receive more financial aid than his/her cost of attending an Oklahoma postsecondary education program, as determined by the institution in which the student is enrolled. The cost of attendance should be consistent with regulations for federal Title IV student financial aid programs. If necessary, a student's Oklahoma's Promise award will be reduced or cancelled for that academic period so that the student's total financial aid does not exceed the cost of attendance. Although Oklahoma's Promise can be received up to cost of attendance, it is not designed to replace EFC or to be "packaged" last. Other need-based aid may have to be cancelled in order for the Oklahoma's Promise award to exceed need. It should be packaged as you would an external scholarship that is limited to total cost of attendance.

Availability of Funds

During the 2007 legislative session, the Oklahoma Legislature passed Senate Bill 820 that authorized a dedicated funding source for the Oklahoma's Promise program. This law ensures that the program is fully funded each year from a stable source of revenue.

How will Oklahoma's Promise funds be paid to institutions?

At the completion of the drop/add period each semester, institutions must submit a claim to the OSRHE which contains the name, social security number, number of hours enrolled for the term, the tuition rate and the total amount claimed for the student (hours X tuition rate unless there is an over-award situation).

Please note beginning in 2018-19, if a student withdraws from a class in which he or she has received an award from the Oklahoma's Promise Program, the awarded funds shall be returned to the Oklahoma's Promise Program. This provision shall only apply to awarded funds when the student withdraws prior to the end of the add/drop period for the session in which the student is enrolled. For schools that do not utilize an "add/drop" period to determine refunded tuition, return of funds will be required for students withdrawing before the "census" date or similar record keeping date.

Generally, if a student is enrolled at more than one institution during a semester, each institution is responsible for submitting a claim for payment of the tuition the student is being charged by that institution. Due to unique billing situations, exceptions to this policy may be granted on a case by case basis.

Upon receipt of the claim from the institution, the OSRHE will verify the claim and make payment to the institution.

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