

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 and landscape of the claim form provided 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.

- a. Cell B5 = Name of Institution
- b. Cell G5 = U (universities/colleges) or V (career techs)
Cell H5 = UDS code - prepopulated
- c. Cell R6 = Year: 2023 (use 2023 for Fall term; use 2024 for Spring or Summer term)
- d. Cell B10 = email address of contact person(s) – Do not leave blank!
- 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 = do not delete and should be blank.
- i. Column B = last name. Please do not use Jr or III.
- j. Column C = first name. Please do not use middle initial or name.
- 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 = OK Promise 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 the award is different than the calculated award. Note: The scholarship must be adjusted or eliminated if it creates an over-award of the student's financial aid budget. You will also adjust the hours to that which most closely matches the new award amount. If the difference between the calculated and adjusted amount is less than 50% of the hourly rate, you do not change the hours. If the adjusted amount is more than 50% of the hourly rate over the OKP award then round up to the next hour.
- n. Row # 24 = first student's information (database begins process at row 24).
- 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>)