

# Oklahoma Tuition Aid Grant: “Nuts and Bolts”

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OKLAHOMA STATE REGENTS  
FOR HIGHER EDUCATION

*Improving our future by degrees*



# Reminders

- Access the OSRHE website for program information, such as the Authorized Representative form: (<https://www.okhighered.org/admin-fac/FinAidResources/otag.shtml>).
- Please use O-Safe for submitting any information containing PII: ([www.okhighered.org/O-SAFE](http://www.okhighered.org/O-SAFE)).
- Join the OASFAA Listserv for important OTAG information, legislative updates, and more: ([www.oasfaaok.org/listserv](http://www.oasfaaok.org/listserv)).
- Access more program details and student oriented information: (<https://okcollegestart.org/>)

# 2022-2023 OTAG Award Data

- Total allocation: \$17M
- Over \$16M disbursed\*
- More than 17,000 OTAG recipients\*

\*Data not finalized



# 2023-2024 OTAG Appropriation

- \$17M program appropriation from the State Regents
- Institutional allocations calculated using the 2019-2020 OTAG expenditures

# Allocation Tracking

- Our office will be internally monitoring institutional spending to ensure no one exceeds their allocation.
- We encourage you to spend 50% in fall 50% in spring.
  - Reminder: summer awards are possible, but not required.
- All claims should be submitted prior to **June 30<sup>th</sup>** for processing.
- We encourage you to spend your full allocation, as remaining monies will not carryover into the next fiscal year.

# Eligibility Criteria

1. Oklahoma Resident (per Regents policy)
2. Pell Eligible (Must be eligible to receive a Pell grant in the **current** academic term)
3. Unmet financial need
4. Each institution makes the **final selection** of recipients on school-determined eligibility requirements

# Proposed Guidelines for Preference

- Students with most unmet need.
- Students that maintain continuous enrollment.
- Students close to graduation.
- Students in programs meeting high demand employment needs.
- Students at risk of dropping out.
- Students not receiving other forms of state funded financial aid.

# Award Amounts

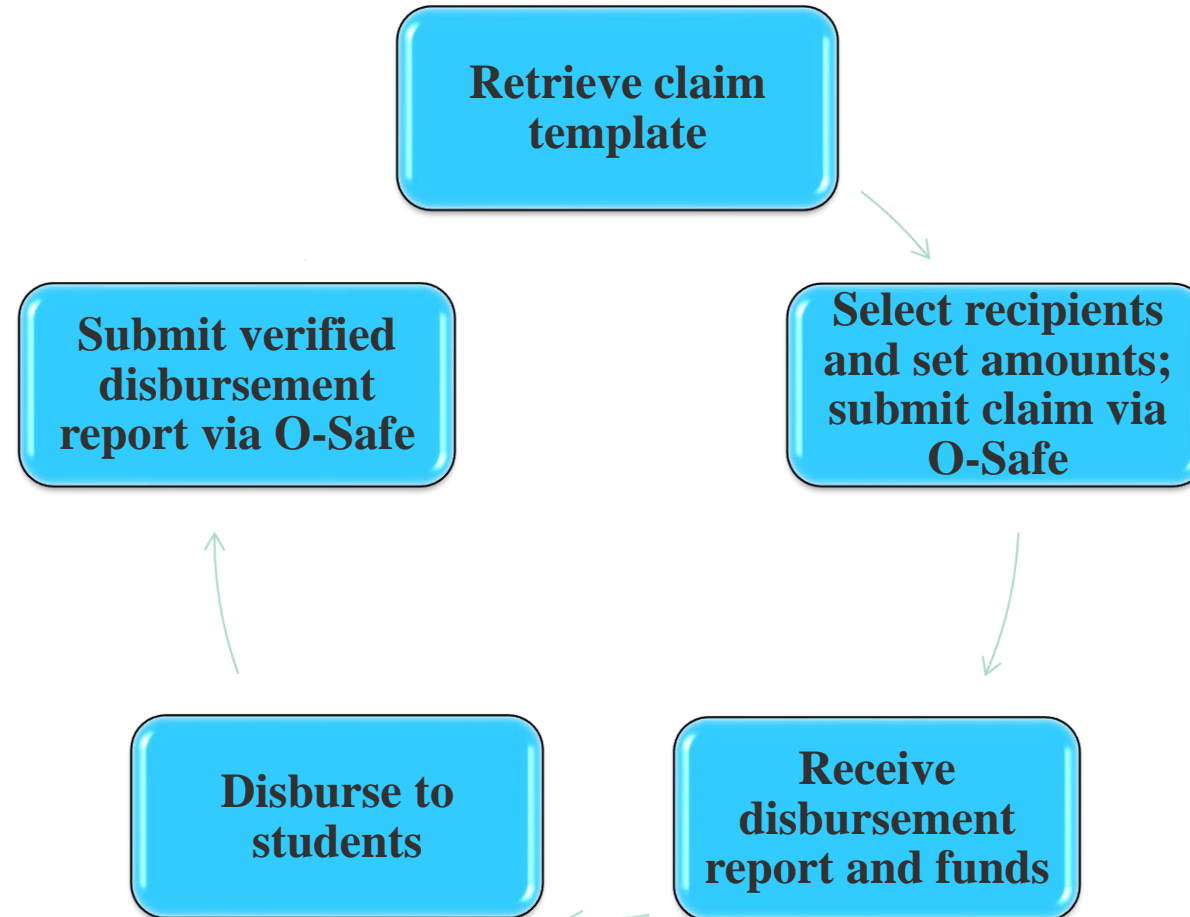
- Up to \$1,500 annually at eligible community college and career technology centers
- Up to \$2,000 annually at regional universities
- Up to \$3,000 annually at research universities

(Please note: The max annual award cannot exceed 75% of enrollment costs.)

- The minimum award is \$100 per student per payment period.



# OTAG Process Overview



# Award Claim Instructions

1. Claims must be submitted by an Authorized Institutional Representative.
2. Claims will be submitted using the template on the Resources page.
  - There are separate claim forms for *standard* and *non-standard* term (career tech) institutions.
3. Fill out the top portion of the claim, especially the “**Completed By**” fields.

File Home Insert Page Layout Formulas Data Review View Help DYMO Label Acrobat Tell me what you want to do

Cut Copy Paste Format Painter

Arial 10 A A

B I U

Wrap Text

Text

Conditional Formatting Format as Table

Normal Bad Explanatory ...

Clipboard Font Alignment Number

K42 123456

	A	B	C	D	E	F	G	H	J	K	L	M
1	<b>OTAG Award Claim Form</b>						Date Created By OTAG:					
3	Institution Name:	ABC College					Semester:		Fall			
4	Institution Title IV Code:	003100			Year:		2023					
5	Date Completed:	7/20/2023										
6	Completed By: Name	Wei-Ju Gange			Title	Financial Aid Officer						
7												
8	<b>INSTITUTION'S CERTIFICATION:</b>											
9	By entering my name, title, and date completed above, I certify that:											
10	1. Payment of Oklahoma Tuition Aid Grant funds is requested for the students listed in this Award Claim Form.											
11	2. Each student included in this Award Claim Form meets all Oklahoma Tuition Aid Grant Program eligibility requirements as well as general Title IV student aid eligibility requirements as of the date of this claim.											
12	3. Oklahoma residency eligibility per the OSRHE Policy and Procedures Manual (3.18 In-State / Out-of-State Status of Enrolled Students) has been confirmed by the requesting institution.											
13												
14												
15	Student Name											
16	SSN (No Dashes)	Last	First	Middle Initial	ISIR Tran#	EFC	Enrollment Status (FT/PT/LT)	Payment Period Disbursement	Award due to Military Status (Mark Y if applicable)	Student ID		
41	000112222	Doe	Johnny	A	02	4205	FT	1000		654321		
42	333445555	DoeDoe	Jane	E	01	0	PT	650		123456		
43												
44												
45												
46												
47												

# Award Claim Instructions (Excel)

1. List the students you want to be awarded on the claim.
  - a. Do not adjust the template formatting in any way.
  - b. List the ISIR transaction # and EFC.
  - c. Include the student's enrollment/attendance level and disbursement amount.  
  
FT, PT, and LT (in less than 6 hours)
  - d. Report eligible military students with a "Y" in "Award due to **Military Status**" column (Column J) if the student reported residency other than Oklahoma.
  - e. Student IDs can be included, but are not required.

## Claim Processing:

- Once the claim is completed, submit it to our office through **O-Safe**.
- You can submit multiple claims each semester as needed.
- For any students with eligibility issues, our office will contact you directly to resolve before processing the claim.
- Students cannot be awarded at more than one institution per semester.

# Claim Processing: Text Files

1. Claims can also be submitted using .txt files.
2. You will need to submit the “Text File Transmittal Form” when submitting your claim.
  - a. The transmittal form will continue to be located on the Resources pages and can be submitted to us via fax or email, whichever you prefer.

# What is wrong with this picture?



	A	B	C	D	E	F	G	H	J	K	L	M	I
1	<b>OTAG Award Claim Form</b>			Date Created By OTAG:									
3	Institution Name:							Semester:		Spring 2023			
4	Institution Title IV Code:							Year:		2023-2024			
5	Date Completed:							9/2/2023					
6	Completed By: Name			Jane Doe		Title		Financial Aid Officer					
7													
8	<b>INSTITUTION'S CERTIFICATION:</b>												
9	By entering my name, title, and date completed above, I certify that:												
10	1. Payment of Oklahoma Tuition Aid Grant funds is requested for the students listed in this Award Claim Form.												
11	2. Each student included in this Award Claim Form meets all Oklahoma Tuition Aid Grant Program eligibility requirements												
12	as well as general Title IV student aid eligibility requirements as of the date of this claim.												
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14													
15	Student Name												
16	SSN (No Dashes)	Last	First	Middle Initial	ISIR Tran#	EFC	Enrollment Status (FT/PT/LT)	Payment Period Disbursement	Award due to Military Status (Mark Y if applicable)	Student ID			
17	000-11-2222	Doe	John			1234	HT	\$1,000		654321			
18													
19													
20													

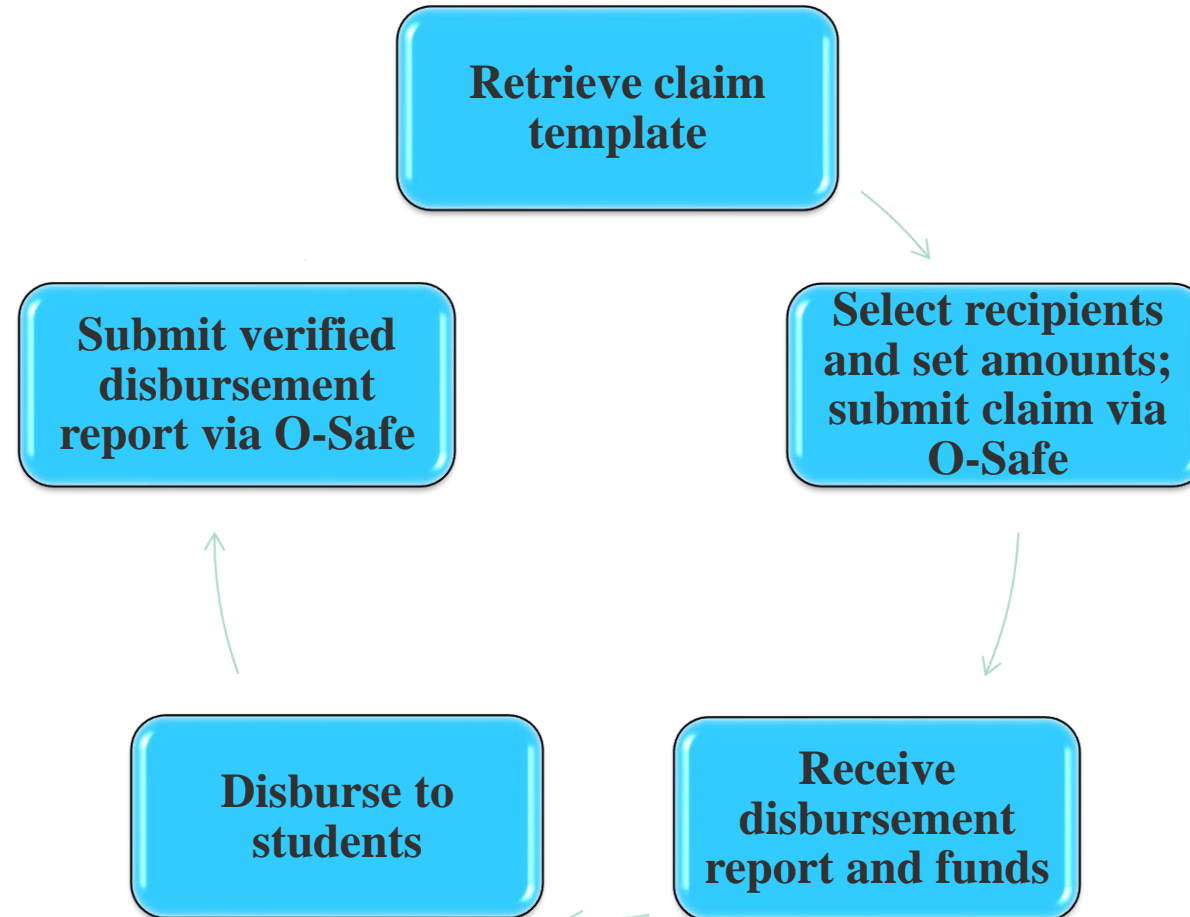


# What is wrong with this picture?

	A	B	C	D	E	F	G	H	J	K	L	M	I
1	<b>OTAG Award Claim Form</b>						Date Created By OTAG:						
3	Institution Name:	<input type="text"/>					Semester:			Spring 2023			
4	Institution Title IV Code:	<input type="text"/>					Year:			2023-2024			
5	Date Completed:	9/2/2023											
6	Completed By: Name	Jane Doe			Title	Financial Aid Officer							
7													
8	<b>INSTITUTION'S CERTIFICATION:</b>												
9	By entering my name, title, and date completed above, I certify that:												
10	1. Payment of Oklahoma Tuition Aid Grant funds is requested for the students listed in this Award Claim Form.												
11	2. Each student included in this Award Claim Form meets all Oklahoma Tuition Aid Grant Program eligibility requirements												
12	as well as general Title IV student aid eligibility requirements as of the date of this claim.												
13	3. Oklahoma residency eligibility per the OSRHE Policy and Procedures Manual (3.18 In-State / Out-of-State Status of Enrolled Students) has been confirmed by the requesting institution.												
14													
15	<b>Student Name</b>												
16	<b>SSN</b> (No Dashes)	<b>Last</b>	<b>First</b>	<b>Middle Initial</b>	<b>ISIR Tran#</b>	<b>EFC</b>	<b>Enrollment Status</b> (FT/PT/LT)	<b>Payment Period Disbursement</b>	<b>Award due to Military Status</b> (Mark Y if applicable)	<b>Student ID</b>			
17	000-11-2222	Doe	John			1234	HT	\$1,000		654321			
18													
19													
20													



# OTAG Process Overview



# Disbursement Processing

1. A signed disbursement report will still be required within 30 days of receiving the disbursement.
2. As in the past, you cannot add new students to a disbursement report. You will have to submit a supplemental claim for any new students.
3. Returns will continue to be recorded on the disbursement report as they have been previously.

**- To report a return:**

Y in Update column (column A)

Adjusted award amount in “Adj Disb Amt” column (column G)

Reason Code in “Adj Reason Codes” column (column H)



# Enrollment Status Change Disbursement Report

A	B	C	D	E	F	G	H	I	J	K	L	M
<b>OTAG Disbursement Report</b>			* Indicates data field cannot be updated by the school									Awd Yr: 2022-2023
Run Date		School				<b>Total Adj Disb Amt</b>	<b>\$2,500</b>		<b>Student Count</b>	5	Sem:	SPRING
01/10/23		023456	ABC University								Fund:	1
	*				*	<b>Adj Disb Amt</b>	<b>Adj Reason Codes</b>	*		*		<b>School's StudentID</b>
<b>Update</b>	<b>SSN</b>	<b>Student Name Last</b>	<b>First</b>	<b>Mi</b>	<b>Disb Amt</b>			<b>Enroll Status</b>	<b>EFC</b>			
	000000000	DOE	JOHN	A	500			FT	0			
Y	000000000	DOE	JANE	N	500	500	03	PT	0			
	000000000	JONES	SARAH		500			FT	252			
Y	000000000	MARINEZ	ANA	M	500	500	02	FT	0			
	000000000	LEE	MYRA	D	500			FT	800			

**Allowable Values for updating Column H in your OTAG Excel**

**Disbursement Report:**

- Blank
- 01 = Not Enrolled At Least Part-time
- 02 = Recalculated for Part-time
- 03 = Recalculated for Full-time
- 04 = Already Received 1<sup>st</sup> Bachelor's Degree
- 05 = Change UG to GR Status (**GR students cannot receive OTAG funds**)
- 06 = Withdrew/Not Attending
- 07 = Not Making SAP
- 08 = Not an OK Resident or not eligible for in-state status due to military affiliation
- 09 = Not Enrolled in a Title IV Eligible Program
- 10 = Overaward Adjustment

# Refund Disbursement Report

A	B	C	D	E	F	G	H	I	J	K	L	M
<b>OTAG Disbursement Report</b>			* Indicates data field cannot be updated by the school									Awd Yr: 2022-2023
Run Date		School				<b>Total Adj Disb Amt</b>	<b>\$1,750</b>		<b>Student Count</b>	5	Sem: SPRING	
01/10/23		023456	ABC University								Fund: 1	
	*				*	<b>Adj Disb Amt</b>	<b>Adj Reason Codes</b>	*		*	<b>School's StudentID</b>	
<b>Update</b>	<b>SSN</b>	<b>Last</b>	<b>First</b>	<b>Mi</b>	<b>Disb Amt</b>			<b>Enroll Status</b>	<b>EFC</b>			
	000000000	DOE	JOHN	A	500			FT	0			
Y	000000000	DOE	JANE	N	500	0	06	PT	0			
	000000000	JONES	SARAH		500			FT	252			
Y	000000000	MARINEZ	ANA	M	500	250	10	FT	0			
	000000000	LEE	MYRA	D	500			FT	800			

**Allowable Values for updating Column H in your OTAG Excel Disbursement Report:**

Blank

01 = Not Enrolled At Least Part-time

02 = Recalculated for Part-time

03 = Recalculated for Full-time

04 = Already Received 1<sup>st</sup> Bachelor's Degree

05 = Change UG to GR Status (**GR students cannot receive OTAG funds**)

06 = Withdrew/Not Attending

07 = Not Making SAP

08 = Not an OK Resident or not eligible for in-state status due to military affiliation

09 = Not Enrolled in a Title IV Eligible Program

10 = Overaward Adjustment

11 = Ineligible due to Pell LEU

12 = This code number not currently in use

13 = This code number not currently in use

14 = Title IV Loan Default Status

15 = Title IV Grant Payback Status

16 = Change in EFC

17 = Compliance With General Title IV Requirements Not Met

18 = School Scholarship Conflict

19 = Funds Not Claimed By Student

20 = Refund for a reason **NOT** listed above (**written explanation required**)

**\*You are unable to transfer an ineligible student's award to an eligible student, you will have to provide us with the ineligible's student's refund and submit an additional claim for the eligible student.**

# Late Refunds

If a student becomes ineligible after you have submitted your disbursement roster for an award claim, you do not have to submit an additional disbursement report.

- Please contact Lizeth Torres at [litorres@osrhe.edu](mailto:litorres@osrhe.edu) with the information regarding the late return and we will process it once funds are received.

# Award Increase Disbursement Report

We cannot process a disbursement roster as a claim.

- If there is an award increase, please submit another/supplemental claim and we will disburse funds for the additional amount.

# Disbursement Processing:

## Important notes

- Disbursement report instructions and the disbursement adjustment reason codes information can be found on the Resources page.
- Please be sure to make adjustments for EFC changes on the disbursement report.
- In order to maximize use of your institutional allocation, please return funds in a **timely manner**.





# Reconciliation Report

- You can request a reconciliation report at any time.
- Options are for semester only (Fall, Spring, or Summer) or annual reports.
- We recommend reconciling at the end of each semester to resolve any possible issues before awarding begins for the next term.

# Questions?

Contact us!

- **Irala Magee**, *Assistant Vice Chancellor for Scholarships and Grants*  
[imagee@osrhe.edu](mailto:imagee@osrhe.edu)  
(405) 225-9378
- **Wei-Ju Gange**, *Scholarship Specialist II*  
[wgange@osrhe.edu](mailto:wgange@osrhe.edu)  
(405) 225-9488
- **Lizeth Torres**, *Scholarship Specialist I*  
[litorres@osrhe.edu](mailto:litorres@osrhe.edu)  
(405) 225-9390