



OKLAHOMA STATE REGENTS
FOR HIGHER EDUCATION

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Oklahoma Tuition Equalization Grant (OTEG)

July 20, 2023

Oklahoma Tuition Equalization Grant

- In 2003, the Oklahoma Legislature enacted the Oklahoma Tuition Equalization Grant (OTEG) Act to provide grants to Oklahoma residents attending not-for-profit, independent institutions in Oklahoma.
- Last year over \$2.85 million was awarded to 1,742 students.

Oklahoma Tuition Equalization Grant

- OTEG is a decentralized program. Institutions select recipients according to some basic eligibility guidelines; however, within those guidelines the institution can develop and implement their own priorities in the selection process.
- Choosing recipients based on a couple of factors may help. First, it is good to select recipients that received it previously and are still eligible. Like Oklahoma's Promise, the clock on the five years begins with the first disbursement of OTEG. Next, it is good to select recipients with the highest unmet need.

Oklahoma Tuition Equalization Grant Eligibility

- File a Free Application for Federal Student Aid (FAFSA) and report Oklahoma as the state of legal residence. A FAFSA must be filed each year in order to be considered for an award.
- Be enrolled full time in the fall and/or spring semester(s) at a school that is eligible to offer OTEG awards.
- Have a family income of \$50,000 or less.
- Have sufficient unmet financial need in meeting the cost of attendance as determined by the campus financial aid office.
- Be an Oklahoma resident according to the State Regents' Policy on In-State/Out-of-State Status of Enrolled Students in the Oklahoma State System of Higher Education.

Oklahoma Tuition Equalization Grant Eligibility

- Meet the institution's Satisfactory Academic Progress requirements.
- Not already have received a grant for a period of five consecutive years of study. The eligibility period begins when the student first receives the grant.
- Not already have earned their first bachelor's degree.
- *Pay more tuition than is required at a comparable public institution of higher education*

Oklahoma Tuition Equalization Grant Notes

- Oklahoma residency is required. See OSRHE policy at: <https://www.okhighered.org/state-system/policy-procedures/part3.shtml> (see 3.18) Please note that self-reported Oklahoma residency on the FAFSA is not verification of Oklahoma residency.
- Use O-SAFE for all claims processing.
- The FAFSA must be valid and the student must be eligible for Title IV aid.
- Must be enrolled full-time and eligible for the full amount of the need based semester amount (no partial grants). ***There are no amounts on the claim form because all eligible students receive \$1,000 for the semester.***

Oklahoma Tuition Equalization Grant

Notes cont.

- Must meet OTEG income requirements:
- Independent (per Title IV definition): total of student/spouse AGI (use income earned from work-for non-filers) + untaxed income (per FAFSA) equals \$50,000 or less.
 - *Independent student untaxed income is Student's Untaxed Income Total Calculated by CPS (2023-24 ISIR Data Field #248 ; FAFSA Question 41a-i)*
- Dependent (per Title IV definition): total of student's parents' AGI (use income earned from work-for non-filers) + untaxed income (per FAFSA) equals \$50,000 or less .
 - *Dependent student's parental untaxed income is Parents' Untaxed Income Total Calculated by CPS (2023-24 ISIR Data Field #250; FAFSA Question 89 a-h)*
- OTEG statutes specify only parental income is counted for dependent students.

Oklahoma Tuition Equalization Grant

Notes cont.

- Must have sufficient unmet need before the grant is applied.
- Students who have previously received OTEG funds and who continue to meet the requirements for eligibility shall have absolute priority for continued financial support superior to any student who is applying for a grant for the first time.
- ***Cannot receive awards for more than five years from the time the first OTEG award was received.***
- DACA students filing a FAFSA are not eligible for OTEG at this time unless the specific requirements outlined in the Regent's residency policy are met (See 3.18.6 (C)(4)).

Oklahoma Tuition Equalization Grant Procedures

- In July, presidents receive a letter from the Chancellor and an allocation worksheet showing the amount allocated to each institution.
- Institutions select eligible recipients based on OTEG program and institutional eligibility requirements.
- Template is retrieved from the OTEG resources page and selected recipients are placed on the blank claim form.
- Each school is responsible for determining eligibility, packaging the award, and notifying the student that he/she is eligible to receive OTEG.
- Claim form is submitted (via O-SAFE) on or before October 15 in fall and March 15 in spring. You can submit partial/multiple claims as long as you do not exceed your allocation.
- Each recipient is verified by OSRHE and checked for expiration.

Oklahoma Tuition Equalization Grant Procedures cont.

- Payment is made to institutions on student's behalf.
- In January, each institution is supplied with a pre-populated claim form that lists each student submitted by the institution for payment (and paid) in the fall semester.
- Institutions verify the continued eligibility of those students. Ineligible students are left on the claim with notations indicating the reason for ineligibility. New or transfer students are added at the bottom of the worksheet to replace fall recipients that are no longer eligible.
- Claims are submitted, eligibility of new students are verified and payment is made to the institution on the student's behalf.
- Annual reconciliation reports are placed on O-SAFE after the spring deadline. Cumulative GPA's are required to complete a statutory report.
- Generally, new allocations are calculated for the next year based on percentage of funds used.

Oklahoma Tuition Equalization Grant Procedures cont.

ALTERNATES

1. Submission of alternates on both the fall and spring claims allows institutions to retain funds if a recipient is found to be ineligible after the claim submission deadline.
2. Unused program funds may be paid to alternates based on highest unmet need.

Oklahoma Tuition Equalization Grant O-SAFE

https://www.okhighered.org/O-SAFE/default.aspx 150% ☆

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OSRHE Secure Access File Exchange

O-Safe: Login

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655 Research Parkway, Suite 200, Oklahoma City, OK 73104 - 405.225.9100

Oklahoma Tuition Equalization Grant O-SAFE cont.

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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
 - Eligibility requirements
 - Claim form instructions
 - Allocation information for OTEG
 - Other information related to OSRHE financial aid programs

Financial Aid Resources for Institutions

The screenshot displays the Oklahoma State Regents for Higher Education website. The header includes the organization's name, logo, and navigation links for Students, Parents, Higher Ed Admin/Faculty/Staff, K-12 Teachers/Staff, and Media. A search bar and a 'Quick Links' dropdown are also present. The main content area is titled 'OKLAHOMA TUITION EQUALIZATION GRANT (OTEG)' and provides a comprehensive list of resources, including general information, administrative rules, award procedures, eligibility requirements, forms, and statutes. A sidebar on the left offers a navigation menu with categories like 'About / Contact Us', 'College Assistance Program', 'Colleges and Universities', 'Economic Development', 'Financial Aid', 'GEAR UP', 'Higher Education CIO', 'Job Opportunities', 'Legislative Information', 'News Center', 'OKcollegestart.org', 'Oklahoma's Promise', 'OneNet', 'Reach Higher', 'Research', 'Show What You Know', and 'Studies, Reports and Data'. On the right, there is a section for 'FINANCIAL AID RESOURCES FOR INSTITUTIONS' with links to various programs and a photo of two men working at a computer.

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» Students
» Parents
» Higher Ed Admin/Faculty/Staff
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Quick Links
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HOME > INFORMATION FOR ADMIN, FACULTY & STAFF > FINANCIAL AID RESOURCES FOR INSTITUTIONS

OKLAHOMA TUITION EQUALIZATION GRANT (OTEG)

[OSRHE O-SAFE](#)

Oklahoma Tuition Equalization Grant (OTEG) General Information
[Oklahoma Tuition Equalization Grant \(OTEG\) Webpage](#) *(opens in new window)*
[Administrative Rules](#) *(maintained by the Office of Administrative Rules of the Oklahoma Secretary of State)*
[OSRHE Residency Policy](#) *(OSRHE Policy and Procedures Manual, Chapter 3 - Academic Affairs. View Section 3.18 of PDF file.)*
[OTEG Award Procedures for Institutions](#) *(PDF, 137k)*
[OTEG Student Eligibility Requirements](#) *(PDF, 108k)*
[2022-23 Allocation of Funds](#) *(PDF, 16k)*

OTEG Forms
[Award Claim Form Template](#) *(XLS, 60k)*

Statutes (Oklahoma Tuition Equalization Grant Act) *(external links to the Oklahoma State Courts Network)*
[Title 70, Section 2630 - Short Title](#)
[Title 70, Section 2631 - Purpose](#)
[Title 70, Section 2632 - Eligibility Requirements](#)

FINANCIAL AID RESOURCES FOR INSTITUTIONS

[Academic Scholars Program](#)

[Oklahoma College Assistance Program](#) *(external link)*

[Oklahoma Tuition Aid Grant \(OTAG\)](#)


[Oklahoma Tuition Equalization Grant \(OTEG\)](#)


[Oklahoma's Promise](#)

[Regional University Baccalaureate Scholarship Program](#)

[Scholars for Excellence in Child Care](#)

Other Programs





Oklahoma Tuition Equalization Grant Issues

- O-SAFE sign-up
- Program differences
(OTAG/OTEG/Oklahoma's
Promise/ Academic Scholars)
- Timelines-statutory deadlines
- New institutional employees

Oklahoma Tuition Equalization Grant Contact Information

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