ScholarTrack Training

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Agenda

- ScholarTrack Training
  - Annual Awards and Award Windows
  - Applying Award Offers
  - Reporting Credit Completion and Credit Bank
  - Edits and Edit Overrides
  - Claims and Refunds
  - On-Holds
- Questions from the group

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Annual Awards and Award Windows

Annual Awards and Award Windows

- <u>Award Start and Expiration Dates</u>:
  - If the student has never previously used state aid, or used state aid more than one award year ago:
    - Initially set as 7/1 – 6/30
    - Will adjust to (term start date of first term claimed) – (1 year – 1 day) once claimed

  - If student used state aid last award year:
    - Initially set as (last award year's award expiration date + 1 day) – 6/30
    - Will adjust to (term start date of first term claimed) – (1 year – 1 day) once claimed

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Annual Awards and Award Windows

- Exception: CVO and William A. Crawford Minority Teacher Scholarship always run 7/1 – 6/30

- Exception: Mitch Daniels Early Graduation Scholarship always runs 7/1 – 12/31

Applying Award Offers

Applying Award Offers

- To apply an award offer, award offer must be "Ready to Claim" or "Award Offered".

- Award offers must overlap with academic term:
  - Award offer must start before academic term ends
  - Academic term must start before award offer expires.

- Amount that can be applied is limited to 50% of the student's annual award amount during first term of award year (for Frank O'Bannon Grant, 21st Century Scholarship, Adult Student Grant, Next Generation Hoosier Educators Scholarship, Minority Teacher Scholarship).

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Applying Award Offers

- Determine if student meets the enrollment status requirement for award type at "state financial aid census date" for given academic term. If student does not meet requirement on that date, treat the last day of the academic term as a second census date.

  - Student must be full-time for FOB/21st/Next Gen/Minority Teacher/MDEGS/dependent WRG/full-time NGSG

  - Student must be half-time for ASG/independent WRG

  - No enrollment status requirement for CVO or part-time NGSG

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Applying Award Offers

- Student must be degree-seeking (or certificate-seeking at Ivy Tech/VU) in Title IV-eligible program during academic term.
  - Required for all award types except:
    - CVO (if student is in high school)
    - WRG (must be approved certificate program)

- Student must be meeting Satisfactory Academic Progress.
  - Required for all except CVO
  - Required for CVO beginning 2020-2021 award year

Applying Award Offers

- Amount applied cannot exceed eligible charges for academic term:
  - Defined as tuition and regularly assessed fees for Frank O'Bannon Grant, 21st Century Scholarship, Adult Student Grant, CVO

  - Defined as cost of attendance for Next Generation Hoosier Educators Scholarship, William A. Crawford Minority Teacher Scholarship

  - Mitch Daniels Early Graduation Scholarship must be tuition and fee charges first, then remaining balance refunded to student even if total grant aid exceeds cost of attendance

Applying Award Offers

- Final Term Exceptions
  - Student does not need to meet enrollment status requirement (full-time, half-time) when they are in the final term of their degree program in order to use state financial aid.
  - Institutions may apply up to 100% of award offer in final term (up to eligible charges)

Applying Award Offers

- Summer Term Exceptions:
  - Student does not need to meet enrollment status requirement based on student's prior aid usage and enrollment pattern (see chart).

  - Student is considered degree-seeking in summer if student is guest student at your institution if student used aid at another institution earlier in the award year.

  - Student may claim up to 100% of the student's annual award during the summer if the student has attended the institution full-time in all prior terms of the award year and did not use an award.

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Applying Award Offers

– If summer is not the final term of a student's award year, the institution must notify the student that using state aid in the summer will reduce the amount of state aid available in the fall and receive consent from the student prior to applying state aid in the summer

Fall Term	Spring Term	Can attend part-time and use FOB, 21st, Next Gen, ASG, or WRG in the Summer?
Full-Time / Used State Aid	Full-Time / Used State Aid	Yes
	Full-Time / Did Not Use State Aid	Yes
	Part-Time	Yes
	Did Not Attend	Yes
Full-Time / Did Not Use State Aid	Full-Time / Used State Aid	Yes
	Full-Time / Did Not Use State Aid	Yes[1]
	Part-Time	No
	Did Not Attend	No
Part-Time	Full-Time / Used State Aid	Yes
	Full-Time / Did Not Use State Aid	No
	Part-Time	No
	Did Not Attend	No
Did Not Attend	Full-Time / Used State Aid	Yes
	Full-Time / Did Not Use State Aid	No
	Part-Time	No
	Did Not Attend	No

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Order of Aid Application

- **Order of Aid Application:**
  1. Private/Institutional Grant Aid or Scholarships Specifically for Tuition and Fees
  2. Tuition Assistance (TA) from U.S. Army and Other Branches
  3. Frank O'Bannon Grant, 21st Century Scholarship, Adult Student Grant
  4. Post 9/11 GI Bill Benefits (Chapter 33)
  5. National Guard Supplemental Grant/Extension Scholarship
  6. Tuition and Fee Exemptions for Children of Disabled Veterans and Public Safety Officers (CVO)
  7. William A. Crawford Minority Teacher Scholarship
  8. Next Generation Hoosier Educators Scholarship
  9. Mitch Daniels Early Graduation Scholarship
  10. Other Grant Aid or Scholarships
  11. Workforce Ready Grant
  12. Student Loans

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Reporting Credit Completion and Credit Bank

Reporting Credit Completion and Credit Bank

- When should Credit Completion Data be reported in ScholarTrack?

  – Institutions must report Credit Completion data within two weeks of posted grades;

  – Within two weeks for updated data (grade changes, etc.);

  – Within two weeks for new additions to file (requests, late claims, etc.)

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Reporting Credit Completion and Credit Bank

- What Credit Completion Data should be reported in ScholarTrack?
  - Report for all students on the file – even if they no longer attend or have never attended the institution. Blank Record = Not Reported.
    - Local credit hours and cumulative GPA earned in a <u>specific academic term</u>.
    - Only report coursework earned with a grade of D- or better.
  - Public institutions should also "push" a file with all Indiana undergraduate students enrolled at their institution.
  - Continue to monitor and report as grades change for students (grade appeals, incompletes, etc.), report updated hours for past terms.

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Reporting Credit Completion and Credit Bank

- What Credit Completion Data should be reported in ScholarTrack?
  - Satisfactory Academic Progress: This will now be a required field effective for Fall 2020.
  - Bachelor's or Professional Degree Earned: This will now be a required field effective for Fall 2020.

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Reporting Credit Completion and Credit Bank

- You can report Credit Completion Data in ScholarTrack in one of three ways:

  - 1. Individually through the "Student Details" page and "Credit Completion" widget.

  - 2. Individually through the "Report Credit Completion" page.

  - 3. By requesting and uploading a Credit Completion file through the "Report Credit Completion" page.

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Reporting Credit Completion and Credit Bank

- If a student on your Credit Completion file did not attend your institution, report 0 hours for Local Credit Hours and 0.0000 for Cumulative GPA.

- You can add additional student records to your Credit Completion file. We will accept the data if the student record can be located in ScholarTrack.

- Once reported, Credit Completion data for a given term will remain in ScholarTrack.

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Reporting Credit Completion and Credit Bank

- Unless a correction is needed, you will report Credit Completion data for a given term one time per student record.

- If you need to make a correction, submit a new Credit Completion transaction. Each Credit Completion transaction replaces the previously submitted Credit Completion transaction by your institution.

- If a Credit Completion transaction changes any hours previously reported by your institution, the transaction will be placed on hold for review by CHE staff.

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Reporting Credit Completion and Credit Bank

- How to report Credit Completion via the Credit Completion Widget:

Reporting Credit Completion and Credit Bank

- How to request a Credit Completion File:

Reporting Credit Completion and Credit Bank

- How to report via the Credit Completion page:

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Reporting Credit Completion and Credit Bank

- Who should report Credit Bank hours?
  - The institution where hours were earned (Dual Credit Hours) should report the hours.
  - If AP/IB credits are awarded by an institution, the institution awarding those credits should report the hours.
    - Conversely, if a student does not attend the institution awarding those credits, those credits should be removed if previously reported.

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Reporting Credit Completion and Credit Bank

- How should Credit Bank Data be reported in ScholarTrack?

  – Via the Credit Bank file - Contains students who have used aid at your institution and/or user requests entered by students, College, or CHE Users. CHE also puts in requests based on matching CHEDDS data to ScholarTrack.

  – Via the Credit Bank Widget.

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Reporting Credit Completion and Credit Bank

- How to request a Credit Bank File:

Reporting Credit Completion and Credit Bank

- How to report Credit Bank data via the Credit Bank Widget:

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Edits & Edit Overrides

Edit 07: Unusual Enrollment History

- Students flagged by the U.S. Department of Education as having an unusual enrollment history (UEH) are ineligible for state financial aid until the UEH flag is resolved.

- The edit places all award offers in an "On Hold" status.

- This edit will appear if Comment Code 360 is present.

- This edit can be overridden by an institution in ScholarTrack if the institution has resolved the UEH flag and has approved the student's continuing eligibility for federal student aid.

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Edit 09: Eight-Year Rule (Non-CVO)

- Students who first used state financial aid except for the Tuition and Fee Exemption (CVO) more than eight award years ago are no longer eligible to receive non-CVO state financial aid except for the Adult Student Grant and the Workforce Ready Grant.

- This edit prevents award creation of all award offers except CVO, the Adult Student Grant, and the Workforce Ready Grant.

- This edit will impact students who first used non-CVO state financial aid in the 2011-2012 award year or later. Students who first used non-CVO state financial aid before the 2011-2012 award year are not subject to the eight-year rule until they use non-CVO state financial aid again beginning with the 2017-2018 award year.

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Edit 10: Eight-Year Rule (CVO)

- Students who first used the Tuition and Fee Exemption (CVO) more than eight award years ago are no longer eligible to receive CVO.

- This edit prevents award creation of CVO award offers.

- This edit will impact students who first used CVO in the 2011-2012 award year or later. Students who first used CVO before the 2011-2012 award year are not subject to the eight-year rule until they use CVO again beginning with the 2017-2018 award year.

Edit 15: Drug Conviction

- Students with certain drug convictions that make them ineligible to receive federal student aid are also ineligible to receive state financial aid.

- This edit prevents award creation of all award offers.

- This edit will appear if the student indicates on FAFSA Question #23 that the student has a drug conviction affecting eligibility for federal student aid for all or part of the award year. We create this edit if ISIR Field #26 (Drug Conviction Affecting Eligibility) = 2 (Yes, part-year) or 3 (Yes/I don't know), or if Reject 19 (An EFC cannot be calculated because the Department of Justice has placed a "hold" on the student) is present.

- This edit can be overridden by an institution in ScholarTrack if the student was only ineligible for federal student aid for part of the award year, and the student has now regained eligibility for federal student aid for the academic term.

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Edit 16: Selective Service

- Males students who are ineligible for federal student aid for failing to register with the Selective Service System (SSS) are also ineligible for state financial aid.

- The edit prevents award creation of all award offers.

- This edit will appear if ISIR Field #375 (Selective Service Match Flag) = N and ISIR Field #376 (Selective Service Registration Flag) is a value other than Y.

- This edit can be overridden by an institution in ScholarTrack if the institution determines the student was either exempt from registration or failure to register was not knowing or willful.

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Edit Overrides

- **Which Edits can a college user override?**
  - Edit 03: Not a first-time undergraduate.
  - Edit 07: Unusual Enrollment History.
  - Edit 11: Not a U.S. Citizen or Eligible Non-citizen.
  - Edit 15: Drug Conviction (can be overridden if Reject 19 is not present)
  - Edit 16: Selective Service Match.
  - Edit 17: Default on federal student loan and/or overpayment of federal grant.
  - Edit 22: Mailing address not IN and no edit 02.
  - Edit 28: Independent status caused by Emancipated Minor or In Legal Guardianship status.

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Override File

- **What actions can be performed using the Override file?**
  - Can use to override edits for students, in bulk.
  - Can set an ISIR override.
  - Can also set the Associate Degree Flag.
  - Can set Fast Track Enrollment Status.

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Claims & Refunds

Claims & Refunds

- **When can I claim for a term?**
  - **Reconciliation Start Date**: This is the first day you may begin to claim for this term.
  - **Reconciliation Deadline**: This is the last day you may make claims for this term without restrictions. Claims made past this date will be placed on hold subject to review by the Commission.
  - **Reconciliation Deadline + 365 Days**: This is the last day CHE will consider claims made past the term's Reconciliation Deadline.

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Claims & Refunds

- **When can I claim an award offer?**
  - You may claim an award offer when the award status is "Ready to Claim".
  - You may claim an award offer if the Term Start Date or Term End Date overlaps with the Award Start Date or Award End Date.
  - You may claim an award offer that is "Expired" up to 365 days past the Award End Date. Claims made against "Expired" award offers will be placed on hold subject to review by the Commission.
  - Claims placed on hold are reviewed daily and released provided there are no concerns.

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Claims & Refunds

- **How to claim or refund an award offer**
  - Via the Awards Widget on the Student Details page;
  - Via the Claim File, which you can request directly through ScholarTrack.

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Claims and Refunds

AWARDS

Frank O'Bannon Grant

Award Status	Ready to Claim
Award Start Date	08/28/2019
Award Expiration Date	08/27/2020
Amount Offered	$8,250
Base Amount	$8,250
Credit Completion Status	On-Time
Amount Claimed by Your Institution	$4,125
Amount Claimed by Other Institutions	$0
Remaining Balance	$4,125
Percentage Used	50%

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Claims & Refunds

On-Holds

On-Hold Claims

- Claims that are entered beyond the reconciliation deadline are placed 'On Hold' for manual review. Claims can be made up to 90 days past the reconciliation deadline.

On-Hold Credit Completion and Credit Bank

- Changes made to previously reported credit completion data or credit bank data are placed 'On Hold' for manual review to ensure accuracy.

Questions?