

# State Financial Aid Manual Fostering Independence Grant

2023-2024 Manual

## Contents

Introduction1
Program Objective
Definitions1
Academic Year1
Adoption1
Award Year1
Department of Human Services (DHS)1
Education and Training Voucher2
Extended Foster Care
FIG Adjustment Request
Foster Care
MNAid
Eligibility
Eligible Institutions
Eligible Public Institution
Eligible, Participating Private Institution
Student Eligibility
Application Process
Data-Sharing Agreement5
Award Calculation
Verification
Cost of Attendance for FIG
Submit Financial Data

Award Calculation
Award Calculation - Public Institution
Award Calculation - Participating Private Institution8
Private Institution Financial Responsibility9
Cost of Attendance Adjustments
Consortium Agreements and Multiple Schools9
ETV and Extended Foster Care
Certification
Eligibility Notifications and Award Notifications 11
Limit on Number of Annual Awards
Enrollment Changes
Total Withdrawals11
Partial Withdrawals11
Never Attended
Dropped Courses
Minnesota Future Together
Summer Awards 12
Disbursements to Student Accounts
Uncashed Checks or Incomplete Overages13
Adjustments
Adjustments Before Certification13
Adjustments After Payment
Required changes after payment14
Annual Report
Appendix A: Education and Training Voucher Notice for Checks

Appendix B: Certification Roster Instructions	16
Appendix: C: Initial Eligibility Email	23
Appendix D: Sample Award Notification Public Institution	24
Appendix E: Sample Award Notification Private Institution	26
Appendix F: FIG Adjustment Request	29

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#### About the Minnesota Office of Higher Education

The Minnesota Office of Higher Education is a cabinet-level state agency providing students with financial aid programs and information to help them gain access to postsecondary education. The agency also serves as the state's clearinghouse for data, research and analysis on postsecondary enrollment, financial aid, finance and trends.

The Minnesota State Grant Program is the largest financial aid program administered by the Office of Higher Education, awarding up to \$207 million in need-based grants to Minnesota residents attending accredited institutions in Minnesota. The agency oversees other state grant and scholarship programs, tuition reciprocity programs, a student loan program, Minnesota's 529 Institution Savings Plan, licensing and early college awareness programs for youth.

#### **Minnesota Office of Higher Education**

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## Introduction

This manual is written for institutions eligible for and receiving funds on behalf of eligible students in the Fostering Independence Grant (FIG) program and is subject to all subsequent changes in both federal and Minnesota state laws and regulations governing the program. This manual is updated on a regular basis. Institutions are required to read all e-mail and written correspondence from the Minnesota Office of Higher Education (OHE) to keep informed of any changes in policy or guidance. Changes announced during the interim have the full force and effect of the State Financial Aid Manual. All participating institutions are responsible for designating a FIG contact on campus and notifying OHE about changes to the institutional contact information; including name, e-mail address, and phone number.

## **Program Objective**

The objective of the program is to provide an individual under age 27 who is currently or was formerly in Minnesota foster care with grants for up to five years for higher education costs.

## Definitions

### **Academic Year**

An academic year is the period of time in which a full-time student is expected to complete the equivalent of at least two semesters, two trimesters, or three quarters; or at least 30 semester hours or 45 quarter hours; or at least 900 clock hours. See the 'Common Definitions' chapter of this manual for more details.

### **Adoption**

Adoption means the adoption of an individual who has been in the care and custody of a responsible social services agency or Tribal social services agency and in foster care. Adoption is a legal process that gives adoptive parents and adoptees (the persons being adopted) legal rights, benefits, and protections.

### **Award Year**

An award year is the period of time between July 1 to June 30. It can also be referred to as the state fiscal year.

### **Department of Human Services (DHS)**

The Minnesota Department of Human Services (DHS) is a state agency. They provide essential services to Minnesota's most vulnerable residents. Working with many others, including counties, tribes and nonprofits, DHS helps ensure that Minnesota seniors, people with disabilities, children and others meet their basic needs and have the opportunity to reach their full potential. The Minnesota Office of Higher Education has a data-sharing agreement with DHS to identify students for the Fostering Independence Grant.

## **Education and Training Voucher**

The Education and Training Voucher (ETV) is a federal program administered by the Minnesota Department of Human Services. Current and former foster youth can receive up to \$5,000 per academic year for post-secondary education at a college, university, vocational, technical, or trade school in the United States eligible to receive Federal Pell Grants.

Students must be under age 26, accepted into an accredited, Federal Pell Grant-eligible college, university, vocational, technical, or trade school. Students must complete the Free Application for Federal Student Aid (FAFSA). They must be high school graduates or GED recipients, eligible to receive financial aid, and meet at least one of the following:

- Experienced foster care for 30 consecutive days at age 17
- Adopted from foster care at age 16 or older
- Had transfer of permanent legal and physical custody by the court from foster care at age 16 or older
- Under state or tribal guardianship, in foster care when turning 18, and parent's parental rights were terminated or suspended.

### **Extended Foster Care**

Minnesota law allows youth that are in foster care immediately prior to their 18th birthday to receive extended foster care services and payments.

Six months prior to the youth's 18th birthday, the county or tribe will send a notice to the youth, their parent(s) or legal guardian, guardian ad litem and foster parents explaining options for the youth when they turn 18, which are:

- Continue in foster care up to age 21
- Leave foster care when they turn 18, in which case a personalized transition plan must be developed during the last 180 days they are in foster care

In some cases, youth who left foster care at age 18 may be able to return to care. All youth in extended foster care are eligible for foster care maintenance payments which include a basic rate and an assessed supplemental rate.

For youth living in a supervised independent living setting, the county or tribe may pay all or part of the foster care maintenance payment directly to the youth.

### **FIG Adjustment Request**

The process for requesting adjustments to the financial aid data used to calculate a FIG award for a student after the student has already been paid for a term.

### **Foster Care**

Foster Care in Minnesota is defined in state statute 260C.007, subdivision 18<sup>1</sup>.

### **MNAid**

MNAid is the program platform and student interface for several Minnesota Office of Higher Education financial aid programs. MNAid Access: <u>https://mnaid.guarantorsolutions.com/ApplicationSignOn/</u>

## Eligibility

### **Eligible Institutions**

An eligible institution means an eligible public institution or an eligible private institution.

- All public postsecondary institutions eligible to participate under <u>Minnesota Statutes 136A.101, Subd. 4</u><sup>2</sup> and <u>Agency Rules 4830.0300</u><sup>3</sup>;
- All accredited private postsecondary institutions eligible to participate under <u>Minnesota Statutes</u> <u>136A.101, Subd. 4</u> and <u>Agency Rules 4830.0300</u>;
- All postsecondary institutions eligible to participate under <u>Minnesota Statutes 136A.101, Subd. 4</u> and <u>Agency Rules 4830.0300</u> that are in candidacy status for obtaining full accreditation and eligible for and receiving federal financial aid programs; and
- All accredited or non-accredited postsecondary institutions eligible to participate under <u>Minnesota</u> <u>Statutes 136A.101, Subd. 4</u> and <u>Agency Rules 4830.0300</u> and student is enrolled in a joint program with another higher education institution that is accredited.

### **Eligible Public Institution**

The University of Minnesota campuses and Minnesota State Colleges and Universities are considered eligible public institutions. Eligible public institutions are required to participate in the Fostering Independence Grant program.

### Eligible, Participating Private Institution

An eligible, participating private institution is an institution eligible for Minnesota student aid that has not opted-out of the Fostering Independence Grant program. Tribal colleges not under the Minnesota State College

<sup>&</sup>lt;sup>1</sup> https://www.revisor.mn.gov/statutes/cite/260C.007#stat.260C.007.18

<sup>&</sup>lt;sup>2</sup> https://www.revisor.mn.gov/statutes/cite/136A.101

<sup>&</sup>lt;sup>3</sup> https://www.revisor.mn.gov/rules/4830.0300/

and University system, private for-profit colleges and universities, and private non-profit colleges and universities are considered private institutions.

Eligible private institutions must complete an annual opt-out to not participate in the Fostering Independence Grant program. Eligible private institutions who choose to opt-out must complete the "Eligible Private Institution Opt-Out Election" by March 1 for the following academic year. The "Eligible Private Institution Opt-Out Election" is completed online at <u>https://www.ohe.state.mn.us/surveys/Fostergrantoptout.cfm</u>.

A student receiving FIG and enrolled in a participating private institution remains eligible at their current institution even if the institution opts out in subsequent years. The student remains eligible for FIG at the institution until the student graduates, transfers, ends enrollment, or no longer meets student eligibility for FIG.

## **Student Eligibility**

Student eligibility for FIG can be met through one of two ways.

1. An individual who is eligible for the Minnesota Education and Training Voucher Program is eligible for the Fostering Independence Grant.

### Or

- 2. If the individual is not eligible for the Education and Training Voucher Program, in order to receive a foster grant, an individual must:
  - Meet the definition of a Minnesota resident student under <u>136A.101, subdivision 8</u><sup>4</sup>
  - After the individual's 13<sup>th</sup> birthday, be in or have been in foster care in Minnesota before, on, or after June 27, 2021, including any of the following:
    - i. Placement in foster care at any time while 13 years of age or older;
    - ii. Adoption from foster care at any time after reaching 13 years of age; or
    - iii. Placement from foster care with a permanent legal custodian at any time after reaching 13 years of age;
  - Be younger than 27 years of age before September 1<sup>st</sup> of the annual award year
  - Have graduated from high school or completed the equivalent as approved by the Department of Education
  - Accepted for admission to, or be currently attending, an eligible institution
  - Have submitted an annual FAFSA or Minnesota Dream Act Application
  - Meet Satisfactory Academic Progress as defined by the institution attending

A student designated with only a family arrangement kinship placement at age 13 or older are not considered eligible for the Fostering Independence Grant. Students need to be under foster care placement as defined by the State of Minnesota.

<sup>&</sup>lt;sup>4</sup> https://www.revisor.mn.gov/statutes/cite/136A.101#stat.136A.101.8

## **Application Process**

Students apply by completing the Free Application for Federal Student Aid (FAFSA) or Minnesota Dream Act application. For the 2023-2024 award year, there are two different questions presented to students on the FAFSA and one question on the Minnesota Dream Act application used to identify students. On the FAFSA and the Minnesota Dream Act application, students self-identify by answering "yes" to Question #52:

"At any time since you turned age 13, were both your parents deceased, were you in foster care, or were you a dependent or ward of the court?"

The FAFSA has a second question where students can self-identify by answering "yes." This question is only presented to students completing the online FAFSA application:

"Are you a foster youth or were you at any time in the foster care system?"

Only one of the questions must be answered with a "yes" to be considered for the FIG program. If a student misses any of these questions or answered them incorrectly, they can make a correction to their application, answer yes to one of the questions, and then submit the correction.

A "yes" answer to question #52 on the FAFSA generates a federal Student Aid Report (SAR) Comment Code 165. A yes answer to the web-only foster care question generates SAR Comment Code 166.

Students are only confirmed as FIG-eligible one time. Failure to answer one of the questions above for a different award year will not change eligibility for the program after the student has been confirmed by DHS.

The Minnesota Office of Higher Education receives ISIRs for all students who have a Minnesota address or add a Minnesota post-secondary institution to their FAFSA application. The Minnesota Dream Act is a program administered and managed by the Minnesota Office of Higher Education.

Starting in the 2024-2025 award year, there will only be one option on the FAFSA for students to self-identify for prior foster care. Students will be asked to affirm the following:

"At any time since the student turned 13, they were in foster care."

Checking the affirmative will generate SAR Comment Code 285 for the 2024-2025 award year. If students fail to answer yes, they can make a correction to their FAFSA and it will be reviewed for potential FIG eligibility.

### **Data-Sharing Agreement**

The Minnesota Office of Higher Education (OHE) has a data-sharing agreement with the Minnesota Department of Human Services (DHS) to confirm foster care placement in Minnesota.

The personal identifiable information of applicants under age 27 who answer yes to one of the foster care questions on the FAFSA or MN Dream Act is sent to the ETV Coordinator at DHS to determine the following for each student record:

- 1. Was the student in Minnesota foster care at age 13 or older? Yes or No
- 2. If yes to #1, does the student meet initial eligibility for the Education and Training Voucher? Yes or No
- 3. If yes to #1, is the student receiving Minnesota extended foster care benefits? Yes or No

The results from DHS are returned to OHE and added to the student records in MNAid. Students with a "Yes" for #1 are added to the **Submit Financial Data** roster in MNAid to the first eligible institution the student added to their FAFSA.

## **Award Calculation**

## Verification

If a student's Free Application for Federal Student Aid (FAFSA) application is selected for verification by Federal Student Aid, the institution is responsible for verifying the accuracy of data provided on the student's application using procedures and tolerances established for federal Title IV financial aid programs. Verification must be resolved before calculating the Fostering Independence Grant award.

## **Cost of Attendance for FIG**

Public Institution - For the purposes of calculating the FIG award amount, the recognized cost of attendance for a public institution is the student's federal cost of attendance (COA). Any COA budget adjustment for a public institution is included in the recognized cost of attendance except for budget adjustments for study abroad or study away.

Private Institution – For the purposes of calculating the FIG award amount, the recognized cost of attendance for a private institution is the lessor of the highest public institution cost of attendance (2-year COA, or 4-year COA) for the given award year or the student's federal cost of attendance. If the lesser COA is the student's federal cost of attendance, any COA budget adjustment is included in the recognized cost of attendance except for budget adjustments for study abroad or study away.

### **Submit Financial Data**

Students considered for FIG awards are added to the institution's award year **Submit Financial Data** roster in the Fostering Independence Grant module in MNAid.

Institutions should submit information for students who are registered for classes, have satisfied all verification requirements, and are packaged for aid.

The **Submit Financial Data** roster must be reviewed monthly throughout the award year. Institutions should regularly provide updates as packaging and awards are added to student accounts at their institution. Students who have not been packaged for the current award year should be left on the **Submit Financial Data** roster.

### Instructions for reviewing the Submit Financial Data roster

- 1. Click on **Submit Financial Data** to view the roster.
- 2. Users will see the roster of students to review. The academic year can be changed at the at the top of the page. Click on the Social Security Number to provide information on a student.
- 3. Users will fill in the relevant sections.
  - Complete information for all terms packaged. If you are submitting data for the Fall semester, provide all data information for the Fall and Spring semesters, if you have packaged both.
  - When submitting Cost of Attendance data, remember to separate the COA by term. Use the student's actual federally recognized COA for each term.
  - Include all adjustments to the COA except for Study Abroad adjustments.
  - For Expected Family Contribution, enter by term. At a semester-based school, you would divide the 9-month EFC in half. (Example: A 1000 9-month EFC would result in 500 for Fall semester and 500 for Spring semester)
  - More detail on each category:

Title	Additional Information
Enrolled Credits	Currently enrolled credits or estimated credits
Cost of Attendance (COA)	The student's individual federal cost of attendance. Include any approved COA adjustments except for adjustments made for study abroad.
Portion of COA attributed to Housing	The amount of COA that has been designated for housing.
Expected Family Contribution (EFC)	The Expected Family Contribution for the term. Divide in half for Fall/Spring semesters. Use prorated information for Summer.
PELL Grant	Pell awards based on registered credits or estimated credits assuming full-time enrollment.
Minnesota State Grant	MN SG awards based on registered credits or estimated credits assuming full-time enrollment.
Federal SEOG	Federal SEOG awards based on registered credit or estimated credits assuming full-time enrollment.
Tribal Scholarships	Any approved Minnesota Indian Scholarship Program (MISP) or tribal scholarships.
Other State/Federal Aid	Gift aid from other federal or state aid programs (MN Child Care Grant, MN GI Bill, TEACH Grant, etc.) Does not include Federal Veterans (GI) Education benefits. Federal or State Work Study should be included unless approved by OHE Staff.
Non-Institutional Awards (Outside Scholarships, 3 <sup>rd</sup> Party Funds, etc.)	Non-federal, non-state, non-institutional funding from third parties or outside entities.
Institutional Grants, Scholarships, Waivers (Public Only)	Grants or scholarships provided directly from the institution or waivers for any charged tuition, fees, housing, meal plans, books and/or supplies. Includes the American Indian Scholars Program.

- 4. After you have completed the fields, click "Save". This will remove it from your **Submit Financial Data** roster.
- 5. Students with potential Education and Training Voucher (ETV) eligibility will move to the ETV Coordinator to review for ETV awarding. After the ETV Coordinator has completed their review and awarding, the students will move to the "Certification" roster in MNAid.
- 6. Students without potential ETV eligibility, will move directly to the "Certification" roster in MNAid.

## **Award Calculation**

### **Award Calculation - Public Institution**

The student's actual, federal cost of attendance is the amount used to calculate FIG at a public institution. Cost of attendance adjustments are included in the total cost of attendance. The only exception are adjustments for study abroad or study away. Study abroad or study away adjustments are not included in the calculation of the Fostering Independence Grant. After establishing the cost of attendance, MNAid will subtract the student's:

- 1. Expected Family Contribution by term
- 2. Federal Pell Grant award
- 3. Minnesota State Grant award
- 4. Federal Supplemental Educational Opportunity Grant
- 5. Tribal scholarships
- 6. Other state and federal aid
- 7. Education and Training Voucher award
- 8. Extended Foster Care benefits
- 9. Non-Institutional Awards (Outside Scholarships, 3rd Party Funds, etc.)
- 10. Institutional Grants, Scholarships, Waivers

The remaining amount will be the Fostering Independence Grant. Calculations are made for each term of enrollment. The 9-month Expected Family Contribution is pro-rated based on the term of enrollment. The calculation of FIG is completed in MNAid.

### **Award Calculation - Participating Private Institution**

The highest 2-year public institution cost of attendance or highest 4-year public institution cost of attendance is the recognized cost of attendance to calculate the Fostering Independence Grant for private institutions. The actual federal cost of attendance will be used for the FIG calculation if it is lower than the 2-year or 4-year highest public COA. After establishing the recognized cost of attendance, MNAid will subtract the student's:

- 1. Expected Family Contribution by term
- 2. Federal Pell Grant award
- 3. Minnesota State Grant award
- 4. Federal Supplemental Educational Opportunity Grant
- 5. Tribal scholarships

- 6. Other state and federal aid
- 7. Education and Training Voucher award
- 8. Extended Foster Care benefits
- 9. Non-Institutional Awards (Outside Scholarships, 3rd Party Funds, etc.)

The remaining amount will be the Fostering Independence Grant. Calculations are made for each term of enrollment. The 9-month Expected Family Contribution is pro-rated based on the number of months in the term of enrollment. The calculation of FIG is completed in MNAid.

When submitting the COA information on the **Submit Financial Data** roster, institutions should always provide the student's actual federal COA (excluding any study abroad adjustments). MNAid will determine if the student's actual COA is higher than the highest recognized public COA.

## **Private Institution Financial Responsibility**

Private institutions with an actual cost of attendance higher than the highest public institution cost of attendance must provide institutional grants, scholarships, tuition waivers, or tuition remission in an amount equal to the difference between the student's actual cost of attendance and the sum of the foster grant and the items #1-9 listed above under "Award Calculation – Participating Private Institutions."

## **Cost of Attendance Adjustments**

Expense adjustments to the COA can only be made for those items not already accounted for in the cost of attendance unless they are in excess of the amount already included within the cost of attendance. All cost of attendance adjustments through professional judgment with documentation are considered in the student's cost of attendance for the Fostering Independence Grant except for study abroad adjustments.

Study Abroad adjustments to cost of attendance are not used in the calculation of the Fostering Independence Grant. Students with study abroad adjustments can receive student loans or work study based on individual eligibility.

### **Consortium Agreements and Multiple Schools**

Any adjustment to a student's aid or cost of attendance from the result of an approved consortium agreement must be reflected in the financial data submitted for the FIG calculation.

Students attending more than one institution during a term can only receive the Fostering Independence Grant at the institution where they are receiving state and federal financial aid. Students are responsible for inquiring with their home institution on the process for completing a consortium agreement.

## **ETV and Extended Foster Care**

Students listed as "ETV Eligible", are not necessarily receiving ETV funds. The Department of Human Services has limited funding for the ETV program. After submitting information in MNAid for the **Submit Financial Data** 

section for a student who is "ETV Eligible", the ETV Coordinator will review the information and determine if there is enough funding to award the student based on their awarding criteria.

When the student has reached the **Certification** roster in MNAid, campus users will see the student's ETV award information when clicking on "View" under "Financial Data".

ETV is considered Estimated Financial Assistance for 2023-2024, but typically the college does not receive any of the funds. The student submits receipts for college-related expenses to DHS and then is reimbursed up to their award amount. It is possible a student will request funds be sent to the institution they are attending. This check will be sent to the college along with the letter found in Appendix A.

If the student is receiving ETV, OHE recommends adding a non-disbursable blocking award for ETV on the student's account to avoid overaward situations.

Extended Foster Care is not considered Estimated Financial Assistance, but is included in the calculation of FIG. If a student has Extended Foster Care, they can potentially receive a student loan and/or work-study based on individual eligibility.

Federal Student Aid Dear Colleague Letter GEN-13-18 describes the treatment of extended foster care payments that are made directly to the student when determining Title IV federal student aid eligibility. This letter explains why Extended Foster Care is not estimated financial assistance. <u>https://fsapartners.ed.gov/knowledge-center/library/dear-colleague-letters/2013-07-03/gen-13-18-subject-extended-foster-care-payments</u>

## Certification

The **Certification** roster in MNAid will display students eligible to receive FIG based on the financial information provided by the institution, the result of any ETV awards, and if the student is receiving Extended Foster Care payments. Institutions should wait to certify the students on their rosters until after all other financial aid, scholarships, and third-party awards have been calculated or applied to the student's account.

Term	Dates
Summer 1 (Header)	August 1st
Fall	August 1st
Winter	December 1st
Spring	January 1st
Summer 2 (Trailer)	May 1st

The **Certification** roster opens for institutions based on the following schedule:

Instructions on reviewing the Certification roster are available in Appendix B.

## **Eligibility Notifications and Award Notifications**

OHE sends annual initial eligibility emails to students after receiving confirmation of FIG eligibility from DHS. Eligible students who list a participating, eligible institution on their FAFSA are sent an email with the institution listed. Eligible students who do not have a participating, eligible institution on their FAFSA are sent a separate email notifying them that they meet requirements for the program, but have not listed a participating, eligible institution. No amounts are included in the email. A sample email is available in Appendix C.

Students should be notified of their FIG award amounts through the typical awarding process at each institution. Institutions may choose to wait and notify students since actual award amounts require enrollment and all other grants, scholarships, and waivers to be finalized. Suggested award emails for public and private institutions are in Appendix D and E.

## Limit on Number of Annual Awards

Students enrolled at a 2-year institution are limited to 3 years of receipt. Students enrolled at a 4-year institution are limited to 5 years of receipt. Award receipt is tracked at OHE in MNAid.

Receiving FIG at a 2-year institution will count towards the 5 years of receipt if the student starts at a 2-year institution and moves to a 4-year institution.

## **Enrollment Changes**

Enrollment changes during a term may result in the return of FIG funds. Below are scenarios and requirements.

### **Total Withdrawals**

Before FIG is applied: Do not apply FIG to the student's account. Students are not eligible for FIG if at the time of initial disbursement, the student is not actively enrolled. If payment has already been sent to the institution, but the aid has not been applied to the student's account, a FIG Adjustment Request must be submitted.

After FIG has been applied: Do not recalculate the award or include it in the State Refund calculation. The award will stay the same and will not be adjusted.

### **Partial Withdrawals**

Before FIG is applied: Use the updated enrollment level and current award amounts in the calculation. If the student's federal COA is adjusted due to the withdrawal, provide the new COA.

After FIG has been applied: No award adjustments.

### **Never Attended**

If the student never attended any courses, the student is not eligible to receive FIG. Any FIG funds applied to the student's account must be returned. A FIG Adjustment Request must be submitted if funds were sent to the institution.

### **Dropped Courses**

If the student successfully drops one or more courses after FIG has been applied, you will need to complete a FIG Adjustment Request with the updated enrollment level and any financial data award changes.

### **Minnesota Future Together**

The Fostering Independence Grant, in most situations, is considered the last aid program to be considered when calculating aid for a student. An exception exists for students who have either totally withdrawn or received all F grades and have a balance. The Minnesota Future Together Grant can pay tuition most fee balances in one of those scenarios even after the FIG award has been calculated and applied to a student's account. The FIG calculation does not need to be recalculated as these students do not receive adjustments if a student has a total withdrawal after disbursement or when a student has earned F grades.

## **Summer Awards**

Students are eligible to receive FIG for a summer term as a header or trailer.

Institutions with a trailing summer term, should review their prior-term award rosters to determine if students are registered for summer. Students previously on the **Submit Financial Data** roster for fall or spring will not show up on the roster for summer if data was submitted for a prior term in the same award year.

Award rules and processing are the same for a summer term as a fall or spring term.

The highest 2-year and 4-year public COA for summer terms is viewable under the Award Rules for FIG in MNAid.

## **Disbursements to Student Accounts**

Disbursements must be based on the student's status as of the date of disbursement or the institution's add/drop date for the semester or term, whichever is later.

If a student withdraws or fails to meet another program eligibility requirement prior to disbursement, the student may not receive funding for that term.

Institutions may not make a payment to a student for a payment period or term until the student has registered for classes during that payment period or term.

Institutions are liable for all funds that are disbursed to a registered student prior to the start of the enrollment period if that student fails to begin the enrollment period.

Institutions must reimburse program funds disbursed to a student prior to the start of the enrollment period if the institution cannot document the student began attending classes.

All other related disbursement guidelines used for the State Grant program apply to the Fostering Independence Grant including determination of disbursement date, acceptable methods of disbursement, student authorization for Electronic Fund Transfer (EFT) transactions, student account balance requirements and other applicable guidelines described in the 'Disbursement Process' section of the State Grant chapter in the Financial Aid Manual.

## **Uncashed Checks or Incomplete Overages**

If an institution attempts to disburse funds by check or EFT transaction to the student, and the check is returned to the institution or the EFT transaction is rejected, the institution may make additional attempts to disburse the funds to the student, provided those attempts take place within 45 days after the funds were returned or rejected. If no additional attempts to disburse funds are made, the funds must be returned to the program within that 45-day period. If an institution attempts to disburse funds by check to the student and the check is not cashed, the institution must return funds to the program within 240 days of the check being issued.

If a school cannot locate a student to whom a state financial aid credit balance must be paid, the school must return the credit balance to the appropriate state financial aid program. The Agency does not specify how a school should determine which financial aid funds created the credit balance. However, when possible, the Agency encourages schools to return state financial aid fund balances to the SELF Loan program first to reduce the likelihood of default. The school is permitted to retain any interest earned on the student's credit balance funds.

## Adjustments

## **Adjustments Before Certification**

Any adjustments to financial data used to determine a student's FIG award can and should be made by the institution before certification is completed. Adjustments are made by looking a student up under **Quick View** in MNAid and clicking on the student's FIG award year record. Campus users can scroll down to the **Financial Data** section and make updates to any previously submitted information.

Changes made under **Quick View** will update the award calculation on the **Certification** roster.

If the student is ETV eligible, any changes made in Quick View will require review by the ETV coordinator. After submitting changes, the student's record will be moved to the ETV coordinator to determine if the ETV award amount will change. After it is reviewed by the ETV Coordinator, the record will return to your **Certification** 

roster. ETV awards can be added, increased, decreased, or removed entirely based on the new financial data information.

Campus users should compare award information at their campus with the information in MNAid, to ensure it is the same before completing certification.

### **Adjustments After Payment**

Individual student adjustments are not accessible by campus users in MNAid after a payment has been sent to the institution for a term. If an adjustment is required, campus users must complete a FIG Adjustment Request. Changes will be made by OHE staff in the MNAid system. After a request has been approved campus users will receive an email explaining the change in the FIG award calculation and steps to return funds to OHE. The FIG Adjustment Request can be found here<sup>5</sup> or in Appendix F.

Within 30 days of any approved adjustments resulting in a refund, the institution must make any necessary refunds to OHE. When returning FIG funds to OHE, you must include the <u>Minnesota Office of Higher Education</u> <u>Refund Return Form<sup>6</sup></u>.

### **Required changes after payment**

Institutions must complete an adjustment request if any of the following occur:

- The number of enrolled credits has changed. Withdrawals do not require an adjustment, but dropped courses the student never attended require an adjustment.
- The student's cost of attendance has changed.
- A new award has been added or increased.
- An award has been removed or decreased.
- A data entry error was previously made.

Changes that do not require an adjustment include:

- A student withdraws from a course, but remains in other courses.
- A course is coded as "Never Attended", but they remain in other courses.

## **Annual Report**

The Office of Higher Education shall prepare an anonymized report to be submitted annually to the chairperson and minority chairperson of the legislative committees with jurisdiction over higher education that contains:

1. The number of students receiving foster grants and the institutions attended; and

<sup>&</sup>lt;sup>5</sup> https://tinyurl.com/2chanafr

<sup>&</sup>lt;sup>6</sup> http://www.ohe.state.mn.us/sPages/FAForms/MultipleProgramForms/RefundReturnForm.docx

2. Annual retention and graduation data on students receiving foster grants.

The report may be combined with other legislatively required reporting. If submitted as a separate report, the report must be submitted by January 15 each year. The annual report is available on the FIG program page of the OHE website.

## **Appendix A: Education and Training Voucher Notice for Checks**

### **Education and Training Voucher award**

The attached check is federal funding from the Minnesota Education and Training Voucher (ETV) program.

Please notify your campus Financial Aid department before adding these funds to the student account. The Financial Aid department may need to adjust other awards or reduce blocked funds to avoid an overaward situation or duplication of awards.

Lutheran Social Service of Minnesota is contracted through the Minnesota Department of Human Services (DHS) to provide fiscal management of ETV grants, approve purchases, and disburse funds.

The Minnesota Education and Training Voucher (ETV) program provides up to \$5,000 a year to help students under the age of 26 who have aged out of foster care pay for college tuition and fees, room and board, books, supplies and living expenses.

Contact us for more information:

Kelsey Gubrud or Marilyn Wagoner 320.231.7075 Kelsey.Gubrud@lssmn.org or Marilyn.Wagoner@lssmn.org

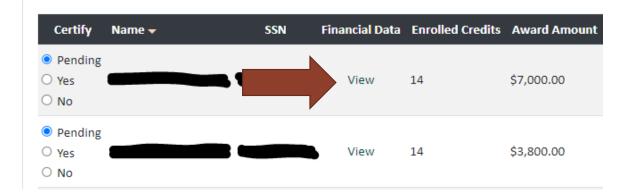
## **Appendix B: Certification Roster Instructions**

The following are instructions for completing the **Certification** section in the Fostering Independence Grant (FIG) module in MNAid.

OHE recommends completing this section of a student's FIG record after all payments have been calculated and applied to the student's account for the term you are reviewing. As a last dollar cost of attendance program, this should be the last award applied to a student's account.

- Fostering Independence GrantAward RulesSchool ProfilePayment HistorySubmit Financial DataCertificationRequest Reinstatement
- 1. Click on "Certification" to view your roster.

2. Before certifying a student, click on "View" under "Financial Data".



3. Compare the financial data on this pop-up window with the information in your campus system. If any of the numbers have changed since you previously completed "Submit Financial Data", you will need to update the information. Please review the guidance below depending on whether or not you are a public institutions or private intuition.

SPRING 2023-2024						
Enrolled Credits	15					
Cost of Attendance (COA)	\$12,405.00					
Portion of COA attributed to Housing	\$3,363.00					
Expected Family Contribution (EFC)	\$1,982.00					
PELL Grant	\$1,722.00					
Minnesota State Grant	\$3,269.00					
Federal SEOG	\$700.00					
Tribal Scholarships	\$0.00					
Other State/Federal Aid	\$0.00					
Non-Institutional Awards (Outside Scholarships, 3rd Party Funds, etc.)	\$0.00					
Institutional Grants, Scholarships, Waivers (Public Only)	\$0.00					
Extended Foster Care	\$0.00					
DHS Education Training Voucher	\$2,500.00					
Private Institutional Responsibility (calculated)	n/a					

• Public Institutions: Provide any updates to the financial data.

• Private Institutions: Provide any updates to the financial data. Your institutional responsibility is also displayed at the bottom. This is the amount your institution is required to provide the student in the form of institutional grants, scholarships, or waivers.

SPRING	2023-2024
Enrolled Credits	15
Cost of Attendance (COA)	\$29,606.00
Portion of COA attributed to Housing	\$2,995.00
Expected Family Contribution (EFC)	\$0.00
PELL Grant	\$3,697.00
Minnesota State Grant	\$3,610.00
Federal SEOG	\$0.00
Tribal Scholarships	\$0.00
Other State/Federal Aid	\$0.00
Non-Institutional Awards (Outside Scholarships, 3rd Party Funds, etc.)	\$0.00
Institutional Grants, Scholarships, Waivers (Public Only)	
Extended Foster Care	\$0.00
DHS Education Training Voucher	\$0.00
Private Institutional Responsibility (calculated)	\$11,502.00

4. To make any updates, look the student up under "Quick View" and click on the appropriate program year for the Fostering Independence Grant.

Quick View	
SSN GO	
MNAID ID GO	
SSN:	
- Existing Grants/Scholarships	
Fostering Independence Grant 2022 - 2023	
Transaction History	
Payment History	
FAFSA Data	
No Questionnaire Data	

5. Scroll down to the "Financial Data" section and click on "Update Financial Data".

Financial Data					
	Summer1	Fall	Winter	Spring	Summer2
Program Type	n/a	4-year	n/a	4-year	n/a
Enrolled Credits	0	15	0	15	0
Cost Of Attendance (COA)	0	34822	0	33436	0
Portion of COA attributed to Housing	0	4362	0	4825	0
Expected Family Contribution (EFC)	0	0	0	0	0
PELL Grant	0	3698	0	3698	0
Minnesota State Grant	0	3610	0	3610	0
Federal SEOG	0	250	0	0	0
Tribal Scholarships	0	0	0	0	0
Other State/Federal Aid	0	0	0	0	0
Non-Institutional Awards (Outside Scholarships, 3rd Party Funds, etc.)	0	0	0	0	0
Institutional Grants, Scholarships, Waivers (Public Only)	0	0	0	8900	0
Extended Foster Care	0	0	0	0	0
Remaining Need (calculated)	0	10546	0	10796	0
DHS Education and Training Voucher (ETV)	0	0	0	0	0
Private Institutional Responsibility (calculated)	0	16718	0	15332	0



UPDATE FINANCIAL DATA

6. A screen will pop-up allowing you to update any term that has not already been paid. Make all necessary changes and then click "Save".

Update Financial Data					×
	Summer1	Fall	Winter	Spring	Summer2
ProgramType	~	4-year 🗸	~	4-year 🗸	~
Enrolled Credits	0 🗸	15+ 🗸	0 🗸	15+ 🗸	0 ~
Cost Of Attendance (COA)	0	34822	0	33436	0
Portion of COA attributed to Housing	0	4362	0	4825	0
Expected Family Contribution (EFC)	0	0	0	0	0
PELL Grant	0	3698	0	3698	0
Minnesota State Grant	0	3610	0	3610	0
Federal SEOG	0	250	0	0	0
Tribal Scholarships	0	0	0	0	0
Other State/Federal Aid	0	0	0	0	0
Non-Institutional Awards (Outside Scholarships, 3rd Party Funds, etc.)	0	0	0	0	0
Institutional Grants, Scholarships, Waivers (Public Only)	0	0	0	8900	0
Extended Foster Care	0	0	0	0	0
Remaining Need	0			10796	
DHS Education and Training Voucher	0	0	0	0	0
	CANCEL	SAVE			

- 7. Close and then reopen the "Certification" roster. The changes you made will reflect in the FIG award amount.
- 8. If you have made updates to any of the financial data items and the student does not show up on the "Certification" roster it can be for one of two reasons.
  - The student is no longer eligible for FIG, or
  - The student is "ETV Eligible" and needs to be reviewed by the ETV Coordinator to determine if the changes you made to the financial data will impact the ETV award. Check your Certification roster a few days later to see what the updated information is after the ETV Coordinator has completed the review. You can review the current status at the top of the student's FIG award year record. Students with the status of "Pending ETV Data" are being reviewed by the ETV Coordinator.

9. Open "View" under "Financial Data" again to see if there are any amounts for "Extended Foster Care" or "DHS Education Training Voucher".

FALL 2022-2023					
Enrolled Credits	14				
Cost of Attendance (COA)	\$10,000.00				
Portion of COA attributed to Housing	\$0.00				
Expected Family Contribution (EFC)	\$0.00				
PELL Grant	\$3,500.00				
Minnesota State Grant	\$200.00				
Federal SEOG	\$0.00				
Tribal Scholarships	\$0.00				
Other State/Federal Gift Aid	\$0.00				
Private Grants/Scholarships	\$0.00				
Other Institutional Aid/Waivers	\$0.00				
Extended Foster Care	\$0.00				
DHS Education Training Voucher	\$2,500.00				

# **10.** If there are no amounts for these two programs, you can move to certifying the payment request. If you see amounts for either program, OHE recommends the following:

- Extended Foster Care: This is used in the calculation of FIG, but does not count in a student's COA as it is not considered Estimated Financial Assistance (EFA) by Federal Student Aid (FSA). This means, students can potentially receive student loans or work study for the amount listed.
- **DHS Education Training Voucher:** These funds are considered EFA by FSA. Typically, students receive these funds for college expenses through direct reimbursement to the student. This means they will likely not be sent to the college. OHE recommends creating a blocking award in the student's award package to avoid overawards.

### 11. You will now choose one of the following actions:

• Select "Yes" under the Certify section. This is your institution's formal request to OHE for the award amount listed. Add the award to the student's account. Click "Save" to complete the request. A payment will be sent to your institution within a week pending holidays and closures.

- Select "No" if the student has earned a bachelor's degree before payment or if the student is on SAP financial aid suspension. Click "Save" to remove the student from your **Certification roster**.
- Leave as "Pending" if you are not prepared to change the status, although this is only considered a temporary status.
- If the student never attended the term or is no longer attending at the time of certification, go back to Quick View, look the student up under the year specific FIG record, and change all financial data to zero. This will remove the student from your **Certification roster**.

Certify	Name 🗸	SSN	Financial Data	Enrolled Credits	Award Amount	Additional Options
<ul><li>Pending</li><li>Yes</li><li>No</li></ul>			View	13	\$3,800.00	
<ul> <li>Pending</li> <li>Yes</li> <li>No</li> </ul>			View	14	\$6,800.00	
		CAI	NCEL	SAVE		

## **Appendix: C: Initial Eligibility Email**

Subject: Minnesota Fostering Independence Grant Program 2023-2024

MNAid ID: XXXXXXX

Dear FIRSTNAME LASTNAME:

Congratulations! According to the information you submitted on your 2023-2024 Free Application for Federal Student Aid (FAFSA) or Minnesota Dream Act Application, you meet initial requirements for the Minnesota Fostering Independence Grant.

This is a financial aid program for Minnesota students previously in foster care. Eligible students attending a participating school can have their full cost of attendance covered through a combination of financial aid, scholarships, waivers, and other foster care benefits. More information is available from the Minnesota Office of Higher Education website.

Based on the college choices on your FAFSA or Minnesota Dream Act application, we have added you to the roster of SCHOOL NAME. This is an eligible, participating Fostering Independence Grant school. Work with the financial aid office at your school to ensure you are completing all necessary steps and paperwork to receive an award notice. The school will need to finalize your financial aid package before the Minnesota Office of Higher Education can calculate how much of a Fostering Independence Grant you can receive.

If you are not planning to attend the school listed above, please contact the Minnesota Office of Higher Education with the information below to move your application to a different school. This notice is not a guarantee that you will receive the Fostering Independence Grant. There are additional eligibility requirements that must be completed at the school you are attending. Each college has determined their own cost of attendance and therefore the amount of the Fostering Independence Grant will be different depending on the school you attend and what other forms of aid you receive.

Additionally, some students receive enough funding through other sources to not need a Fostering Independence Grant. If you have any questions, please contact the financial aid office at the college you are attending or the Fostering Independence Grant unit at the Minnesota Office of Higher Education by phone at (651) 642- 0567 or by email at <u>adam.d.johnson@state.mn.us</u>.

Sincerely,

Minnesota Office of Higher Education

## **Appendix D: Sample Award Notification Public Institution**

## Fostering Independence Grant Sample Award Notification Public Institution Fall 2023

Below is suggested language your campus can use as an award notice for the Fostering Independence Grant. Information in red is where you can personalize or provide alternative guidance to students. Feel free to add additional information where appropriate.

#### First Name Last Name (Student ID#),

Congratulations, you have been awarded the Fostering Independence Grant (FIG) for the 2023-2024 academic year.

You will receive {\$ amount} for the Fall 2023 semester and are estimated to receive {\$ amount} for the Spring 2023 based on {XX} Spring enrolled credits.

This is a need-based financial aid program to fund the last dollar of your cost of attendance at {school name} after you have been awarded other forms of college grants, scholarships, and waivers.

(Include this information if the student is receiving ETV): You have also been awarded the Minnesota Education and Training Voucher (ETV). Action is required by you to access ETV funds. You should have received an email from Paul Minehart from the Minnesota Department of Human Services with instructions on accessing your award. ETV funds can be used for college-related expenses like tuition or rent. Contact Paul Minehart at 651.402.2239 or <u>paul.minehart@state.mn.us</u> with any questions on accessing your ETV.

#### How was the Fostering Independence Grant calculated?

First, {school name} determined your federal cost of attendance based on your enrollment level and program.

The following are then subtracted from the cost of attendance:

- Your Federal Student Aid Expected Family Contribution (EFC)
- Any Federal and State Gift Aid (Example: Federal Pell Grants, Minnesota State Grant)
- Any tribal scholarships
- Extended Foster Care Benefits
- The Education and Training Voucher (ETV)
- Any private grants or scholarships
- Any institutional grants or scholarships
- Any waivers or remission

The remaining amount is your Fostering Independence Grant award for the term.

#### What is my cost of attendance?

It is the estimated cost of attending college. It includes tuition, fees, books, supplies, housing, food, transportation, and personal expenses. The amount of each category is set by the college every year. There may be several different cost of attendances at a college based on a student's program or housing situation. Check with the Financial Aid Office or search on the college website to see a breakdown of the cost of attendance.

#### Can I appeal my cost of attendance?

Students with exceptional educationally-related expenses may appeal to increase their cost of attendance. Common scenarios that may qualify a student for an increased cost of attendance include: child care expenses, significant medical/dental expenses paid during the academic year, special course fees, and disability expenses. Check with the Financial Aid Office on the appeal process.

#### Are all items in my cost of attendance included in the Fostering Independence Grant calculation?

Generally, yes. The only cost of attendance adjustment not included in the calculation are for study abroad/away adjustments.

#### Can my award change?

Yes. If you receive a new or increased grant, scholarship, or waiver after receiving the Fostering Independent Grant, your FIG award will be reduced by the same amount. You could also receive an increase in your Fostering Independence Grant if a grant, scholarship, or waiver is removed from your account.

#### How do other college Foster Care programs impact the Fostering Independence Grant calculation?

Extended Foster Care Benefits and Education & Training Voucher funds are included in the calculation of your FIG award. If you receive either of these benefits, they are subtracted from your FIG award.

#### Can I take out federal student loans?

Most students who receive a FIG award are not eligible for federal student loans. However, if you are receiving Extended Foster Care, you could have loan eligibility. Also, if you have an Expected Family Contribution (EFC) higher than zero, you might be able to take out student loans. Check with the Financial Aid Office on your options.

#### Can I receive federal or state work-study?

Most students who receive a FIG award are not eligible for federal or state work-study. If you are receiving Extended Foster Care, you might have work-study eligibility. Check with the Financial Aid Office on your options.

If you have questions on the Fostering Independence Grant award calculation, contact the state program administrator:

Adam Johnson State Financial Aid Program Administrator Minnesota Office of Higher Education 651.355.0617 Adam.D.Johnson@state.mn.us

## **Appendix E: Sample Award Notification Private Institution**

## Fostering Independence Grant Sample Award Notification Private Institution Fall 2023

Below is suggested language your campus can use as an award notice for the Fostering Independence Grant. Information in red is where you can personalize or provide alternative guidance to students. Feel free to add additional information where appropriate.

#### First Name Last Name (Student ID#),

Congratulations, you have been awarded the Fostering Independence Grant (FIG) for the 2023-2024 academic year.

You will receive {\$ amount} for the Fall 2023 semester and are estimated to receive {\$ amount} for the Spring 2024 based on {XX} Spring enrolled credits.

This is a need-based financial aid program to fund the last dollar of your cost of attendance at {school name} after you have been awarded other forms of college grants, scholarships, and waivers.

(Include this information if the student is receiving ETV): You have also been awarded the Minnesota Education and Training Voucher (ETV). Action is required by you to access ETV funds. You should have received an email from Paul Minehart from the Minnesota Department of Human Services with instructions on accessing your award. ETV funds can be used for college-related expenses like tuition or rent. Contact Paul Minehart at 651.402.2239 or <u>paul.minehart@state.mn.us</u> with any questions on accessing your ETV.

#### How was the Fostering Independence Grant calculated?

First, {school name} determined your federal cost of attendance based on your enrollment level and program. Then, the Minnesota Office of Higher Education used the lesser of your federal cost of attendance or the highest Minnesota public institution cost of attendance as a starting amount for your recognized cost of attendance.

The following are then subtracted from the recognized cost of attendance:

- Your Federal Student Aid Expected Family Contribution (EFC)
- Any Federal and State Gift Aid (Example: Federal Pell Grants, Minnesota State Grant)
- Any tribal scholarships
- Extended Foster Care Benefits
- The Education and Training Voucher (ETV)
- Any private grants or scholarships

The remaining amount is your Fostering Independence Grant award for the term.

### What if my federal cost of attendance is greater than the highest public institution cost of attendance?

If your federal cost of attendance is greater than the highest Minnesota public institution cost of attendance, {school name} has awarded you a combination of the following to reach your federal cost of attendance:

- Institutional grants or scholarships
- Waivers for tuition, housing, or meal plans.
- Remission of charges

#### What is my cost of attendance?

It is the estimated cost of attending college. It includes tuition, fees, books, supplies, housing, food, transportation, and personal expenses. The amount of each category is set by the college every year. There may be several different cost of attendances at a college based on a student's program or housing situation. Check with the Financial Aid Office or search on the college website to see a breakdown of the cost of attendance.

#### Can I appeal my cost of attendance?

Students with exceptional educationally-related expenses may appeal to increase their cost of attendance. Common scenarios that may qualify a student for an increased cost of attendance include: child care expenses, significant medical/dental expenses paid during the academic year, special course fees, and disability expenses. Check with the Financial Aid Office on the appeal process.

#### Are all items in my cost of attendance included in the Fostering Independence Grant calculation?

Generally, yes. The only cost of attendance adjustment not included in the calculation are for study abroad adjustments.

#### Can my award change?

Yes. If you receive a new or increased grant, scholarship, or waiver after receiving the Fostering Independent Grant, your FIG award will be reduced by the same amount. You could also receive an increase in your Fostering Independence Grant if a grant, scholarship, or waiver is removed from your account.

### How do other college Foster Care programs impact the Fostering Independence Grant calculation?

Extended Foster Care Benefits and Education & Training Voucher funds are included in the calculation of your FIG award. If you receive either of these benefits, they are subtracted from your FIG award.

#### Can I take out federal student loans?

Most students who receive a FIG award are not eligible for federal student loans. However, if you are receiving Extended Foster Care, you could have loan eligibility. Also, if you have an Expected Family Contribution (EFC) higher than zero, you might be able to take out student loans. Check with the Financial Aid Office on your options.

#### Can I receive federal or state work-study?

Most students who receive a FIG award are not eligible for federal or state work-study. If you are receiving Extended Foster Care, you might have work-study eligibility. Check with the Financial Aid Office on your options.

If you have questions on the Fostering Independence Grant award calculation, contact the state program administrator:

Adam Johnson State Financial Aid Program Administrator Minnesota Office of Higher Education 651.355.0617 Adam.D.Johnson@state.mn.us

## **Appendix F: FIG Adjustment Request**

#### Fostering Independence Grant Award Adjustment Request

Any qualifying change to the financial data used in the calculation of the Fostering Independence Grant (FIG) award must be updated in the MNAid system<sup>7</sup>.

Adjustments to financial data after a Fostering Independence Grant term payment has been processed for a student are made through one of the following requests:

#### Option 1:

Complete the FIG Award Adjustment Request.

#### Option 2:

Email <u>adam.d.johnson@state.mn.us</u> with the following information:

- 1. Student Last Name:
- 2. Student's MNAid ID#:
- 3. Name of your school
- 4. Why are you requesting this change? (Choose one)
  - Increasing or adding award
  - Decreasing or removing award
  - Cost of Attendance adjustment
  - Credit change with award adjustments
  - Correcting data entry error
- 5. Which semester or quarter are you requesting a change for?
- 6. What data do you want to change?
  - Enrolled Credits:
  - Cost of Attendance (COA):
  - Portion of COA attributed to Housing:
  - Expected Family Contribution (EFC):
  - Pell Grant:
  - Minnesota State Grant:
  - Federal SEOG:
  - Tribal Scholarships:
  - Other State/Federal Gift Aid:
  - Private Grants/Scholarships:
  - Other Institutional Aid/Waivers:

<sup>&</sup>lt;sup>7</sup> https://mnaid.guarantorsolutions.com/ApplicationSignOn/

After the student's record has been adjusted in MNAid, you will receive an email notifying you of a new payment or a request to return funds.