

# State Grant Training for Financial Aid Administrators

**Presented by Meghan Flores, Shannon Olson and Shawn Reynolds**

**October 5<sup>th</sup>, 2023**

# Agenda

## **Trainings will be Recorded**

### **MN State Grant 9am – 12pm Welcome**

- Application and Correction Process
- Screening Program Eligibility Requirements
- Verification and Professional Judgment

### **\*\*Break\*\***

- State Grant Award Formula
- Award Adjustments and Disbursements
- Award Recalculation and Refunds
- Funds Management
- State Grant Reporting Requirements and Output Reports
- Questions

### **\*\*Lunch Break\*\***

### **Clock Hour – State Grant Manager Overview 1pm – 2:00pm**

### **Post-Secondary Childcare Grant 2pm – 4pm**

# Welcome

Meghan Flores: State Financial Aid Programs - Manager

Shannon Olson: MN State Grant – State Grant File, Payments, Refunds, etc

Shawn Reynolds: MN State Grant and MN Dream Act

## Housekeeping

- Update your Name to First Last (Name of College / University)
- Please use Chat function to ask any questions

# OHE Financial Aid Division

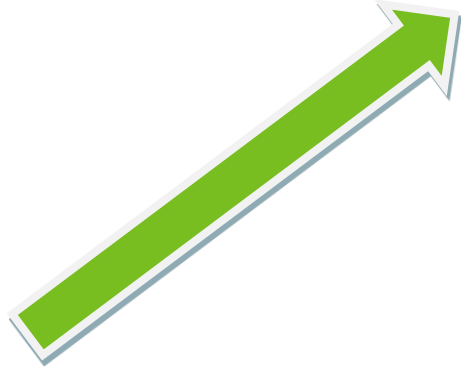
- **Meghan Flores, State Financial Aid Manager:** Manages Team and Programs below [Meghan.flores@state.mn.us](mailto:Meghan.flores@state.mn.us) (651) 355-0610
  - **Adam Johnson:** Fostering Independence Grant, MN Indian Scholarship Program, MNAid - [adam.johnson@state.mn.us](mailto:adam.johnson@state.mn.us) (651) 355-0617
  - **Brenda Larter:** Work-study, Postsecondary Child Care Grant, Public Safety Officer's Survivor Grant, Summer Academic Enrichment,). [brenda.larter@state.mn.us](mailto:brenda.larter@state.mn.us) (651) 355-0612
  - **Jennifer Skluzacek:** Tuition Reciprocity applications, enrollment data collection, eligibility reports, [jennifer.skluzacek@state.mn.us](mailto:jennifer.skluzacek@state.mn.us) (651)355-0614
  - **Shannon Olson:** MNAid Questions, SG eligibility questions, SG batch processing, SG fund advances, MN Dream Act payments [Shannon.l.olson@state.mn.us](mailto:Shannon.l.olson@state.mn.us) (651) 355-0611
  - **Shawn Reynolds:** MN State Grant, MN Dream Act, MNAid Questions [shawn.Reynolds@state.mn.us](mailto:shawn.Reynolds@state.mn.us) , 651.355.0615
  - **Tara Winchester:** MN Future Together Grant, Student Teacher Grants [tara.winchester@state.mn.us](mailto:tara.winchester@state.mn.us) 651.355.0616
- **OHE Calling Queue:** 651.642.0567 – Option 2

# Office of Higher Education Websites

The screenshot displays the website's navigation structure. The top dark blue header contains the following links: GET READY, MN COLLEGE SAVINGS PLAN, SELF LOAN, SELF REFI, and the logo for the OFFICE OF HIGHER EDUCATION. Below this is a green navigation bar with links for About Us, Blogs, School Licensure & Registration, Fast Facts, Consumer Information, Investors, and Contact, along with social media icons for Facebook, Twitter, YouTube, and Email. A search icon is located to the right of the navigation bar. Below the navigation bar is a horizontal menu with six categories: Preparing for College, Choosing a College, Paying for College, Outreach, High School & Campus Resources, and Research, Data & Reports. A large green arrow points from the text 'Just for you!' to the 'Research, Data & Reports' category. The main content area features a large banner for 'Minnesota Decision Day'. The banner includes the text 'Minnesota Decision Day', a 'Learn More' button, and the Office of Higher Education logo. The banner also features a pennant graphic with the text 'MINNESOTA DECISION DAY' and details: 'May 4, 2018 | 10:00 a.m. | University of Minnesota Ted Mann Concert Hall' and 'A Minnesota Reach Higher Initiative'. Below the pennant is a photograph of five diverse young adults smiling. The Office of Higher Education logo is also present in the bottom right corner of the page.

Just for you!





## High School & Campus Resources

### Collecting Data from Minnesota Postsecondary Institutions

#### ▼ Campus Financial Aid Administrator Resources

Financial Aid Estimator for Aid Administrators

Fostering Independence Grant Program

Future Together Grant Program

Intellectual & Developmental Disabilities Grant Program

Minnesota Dream Act Program

Minnesota Indian Scholarship Program

Minnesota State Grant Program

Minnesota State Work Study Program

Postsecondary Child Care

## Campus Financial Aid Administrator Resources

The Office of Higher Education administers several state student financial aid programs as well as other higher education related programs. Those programs include grants, scholarships, loans, loan repayment programs, and work opportunities for postsecondary education students, borrowers, and others. For each program, you will find program criteria, statutes and agency rules governing the program, and guidance used to administer the program within the State Financial Aid Manual.

For current information on state financial aid program spending and trends, visit [Financial Aid Data](#).

### State Financial Aid Program Contacts.

Meghan Flores Email: <a href="mailto:Meghan.flores@state.mn.us">Meghan.flores@state.mn.us</a> Phone: (651) 355-0610	State Financial Aid Manager
Megan Fitzgibbon Email: <a href="mailto:Megan.fitzgibbon@state.mn.us">Megan.fitzgibbon@state.mn.us</a> Phone: (651) 355-0606	State Financial Aid Manager
Jo Grebinowski Email: <a href="mailto:Jo.grebinowski@state.mn.us">Jo.grebinowski@state.mn.us</a> Phone: (651) 355-0614	Tuition Reciprocity
Adam Johnson Email: <a href="mailto:Adam.johnson@state.mn.us">Adam.johnson@state.mn.us</a>	Fostering Independence Grant

# New MNAid System



Campus Sexual Violence  
Prevention and Response

Statewide FAFSA Filing Goal

MyHigherEd

**m** OFFICE OF  
HIGHER EDUCATION  
MINNESOTA AID

Access MNAid Administrator Portal

eNEWSLETTER SIGN-UP

Get the latest news in your inbox

Email

Go

GEER UPDATES

To sign up for email updates about the  
GEER Fund, please enter your email  
below.

Email

Go

TOP PUBLICATIONS

1

Choosing a College

- Greater Minnesota Internship Tax Credit Program (186 k)
- Indian Scholarship Program (291 k)
- Minnesota State Grant Program (4.9 MB)
- MN Reconnect Scholarship
- MN GI Bill Program (Only effective until 2018-2019) (299 k)
- State Work Study Program (535 k)
- Postsecondary Child Care Grant Program
- Public Safety Officer Survivor Grant Program (452 k)
- SELF Loan Program®
- Student Teacher Grants
- Tribal College Supplemental Grant Assistance

## State Financial Aid Manuals - Prior Years

- 2015-2016 Financial Aid Manual (9.2 MB)
- 2014-2015 Financial Aid Manual (8.2 MB)
- 2013-2014 Financial Aid Manual (7.4 MB)
- 2012-2013 Financial Aid Manual (7.5 MB)
- 2011-2012 Financial Aid Manual (5.1 MB)
- 2010-2011 Financial Aid Manual (10.7 MB)
- 2009-2010 Financial Aid Manual (5.9 MB)
- 2008-2009 Financial Aid Manual (5.6 MB)
- 2007-2008 Financial Aid Manual (4.9 MB)

## OHE Audit Guides and Policies

- 2020-2021 OHE Audit Guide (accessible)

# Application Process





# Application Process

- Submit Free Application for Federal Financial Aid (FAFSA) to the Central Processing Center (CPS)

**Generally - October 1<sup>st</sup> each year – \*2024-2025 Available December 2024\***

- FAFSA on the WEB (FOTW) at [www.studentaid.gov](http://www.studentaid.gov)
  - FAFSA on the WEB requires a valid federal school code
- **2023-2024 FAFSA (July 1, 2023 – June 30, 2024)**
- **2024-2025 FAFSA (July 1, 2024 -June 30, 2025)**

# Application Assistance

- Application and Verification Guide (AVG) of the Federal Student Aid (FSA) Handbook
  - Download at: [www.fsapartners.ed.gov](http://www.fsapartners.ed.gov)
- FSA Training Center [www.fsatraining.ed.gov](http://www.fsatraining.ed.gov)
- Call federal financial aid hotline at (800) 433-3243 or get help on-line at: [www.studentaid.gov](http://www.studentaid.gov)
- Call State Grant Unit at (651) 642-0567 #2 or (800) 657-3866 #1

# MN Dream Act Application Process

- **Undocumented students meeting criteria in MN Dream Act cannot use FAFSA**
- **OHE annually creates a MN Dream Act Application for these students**
  - Modeled after FAFSA on the Web
  - 2024-2025 application available Dec 2023
  - Questions are in English and Spanish
  - Uses Prior Year (PPY)
  - Uses Student MNAid username / password
  - 100% verification w/ 1040s

[www.ohe.state.mn.us/MNDreamAct](http://www.ohe.state.mn.us/MNDreamAct)



# \*\*State Grant Application Deadline\*\*

- **\*\*Beginning for 2023-2024 year, application deadline is *June 30<sup>th</sup> of the financial aid year applied (i.e. 06/30/24 for 23-24 year)***
  - Matches the Federal Pell Grant deadline
  - Deadline applies only to ORIGINAL application:
    - Must be received by CPS by June 30 of the financial aid year applied.
    - Deadline for corrections: Date listed in Federal Register each year of when CPS will stop processing corrections.
- ~~Missing deadline for one term won't affect subsequent terms (if deadline met for those terms)~~ **No Longer Applicable**

# Application Deadlines

- The Office of Higher Education (OHE) will reject term payment submitted by school if student didn't meet application deadline –
  - No Longer Applicable, since students will be unable to submit ISIR after 06/30 deadline.
- If school combines “mini-terms” into one term, term start date is first day of first “mini-term” – No Longer Applicable with 06/30 deadline
- State auditors will review term start dates, application receipt dates during audits – still relevant for prior to 23-24

# Application Deadlines

- For clock hour schools and schools with multiple start dates for term, FAFSA application receipt date (or MN Dream Act application submission date) must be within 30 days of date student's term or payment period starts
  - No longer applicable as new application deadline 06/30

# Application Deadlines

- **New Application deadline of 06/30 also applies to MN Dream Act financial aid application**
  - Applies to initial application and not supporting documentation (100% verification for MN Dream Act applicants)

# Application FAFSA Output

- **School must use ISIR/SAR to screen for State Grant eligibility**
  - **ISIR will provide a lot of eligibility information (EFC, Residency, Academic History, etc)**
- If school not on Title IV programs, school must use student's Student Aid Report (SAR) – beginning in 24-25 FAFSA Submission Summary or download from State Grant Manager
  - **Private schools not participating in the Federal Pell Grant program must have students read and sign a disclosure statement – appendix 23 of State Grant Manual**
  - Informs student s/he won't be eligible for Federal Pell Grant at that particular school
- OHE does eligibility screening centrally for MN Dream Act applicants
- ISIR might not have all the information you need to establish MN Residency



# Application State Questionnaire

- **School must collect and / or review supplemental data to determine MN State Grant Eligibility to collect information not on FAFSA**
  - School may use MN State Grant Student Eligibility form designed by OHE (Appendix 2 of manual) or incorporate questions into institutional form(s)
  - This form collected by school and NOT submitted with FAFSA
  - MN State Grant Student Eligibility form not required if school has sufficient information from other sources (*i.e. 2022 HS Graduate, Dependent student – parents state of legal residence MN*).
  - Be aware that NSLDS and State Grant Historical databases are not comprehensive sources of previous post-secondary attendance.
- **Form must only be completed when student first starts**
  - School responsible for resolving any conflicting information thereafter
- **Not required for MN Dream Act applicants, since questions built into the application itself**
- **Effective 2013-2014, schools have choice of using FOTW state interface for this purpose**

# Grant Student Eligibility Questionnaire- App 2

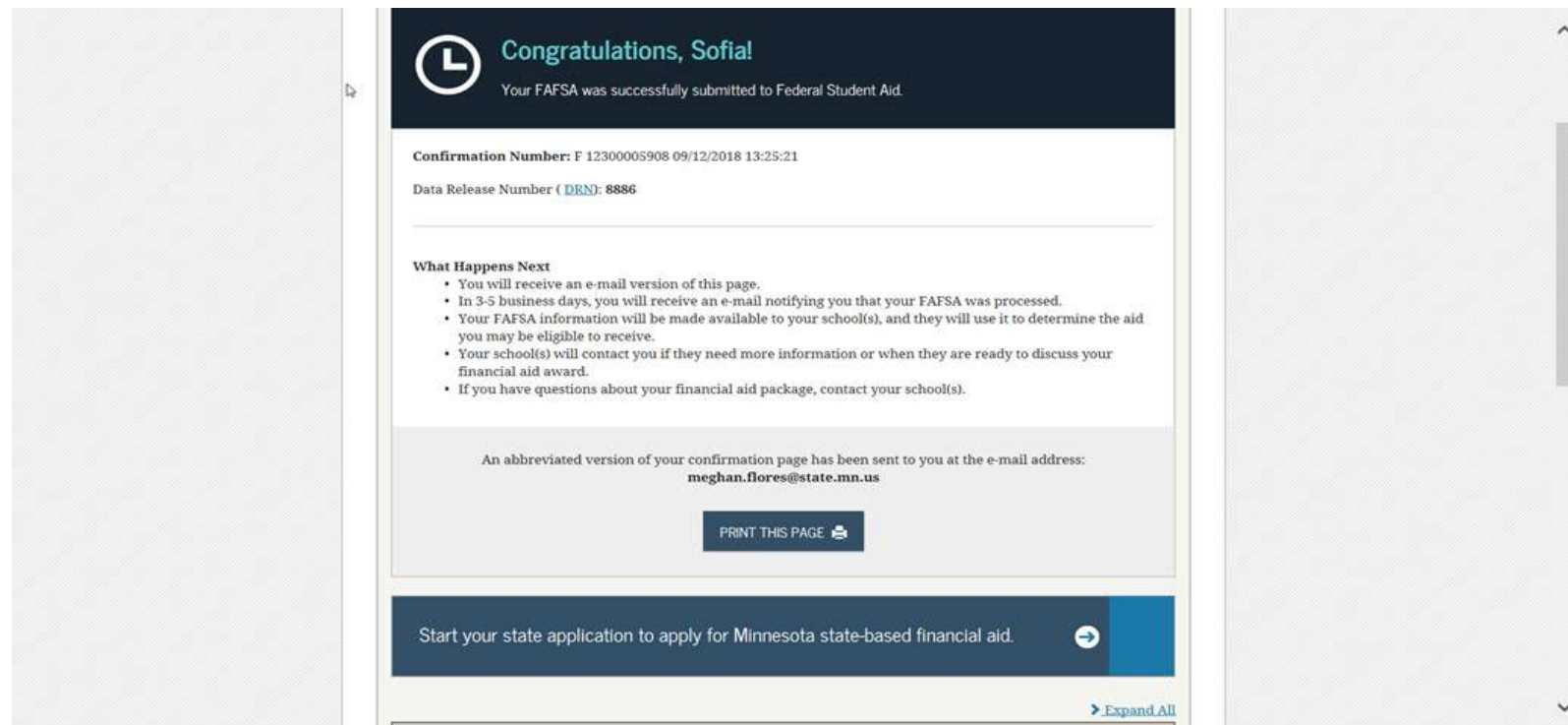
<b>FINANCIAL AID MANUAL</b>		NUMBER Section III	PAGE App 2
SECTION <b>State Grant Program</b>	DATE July 2016		

<b>MN STATE GRANT PROGRAM STUDENT ELIGIBILITY QUESTIONNAIRE</b> <b>AID YEAR: _____</b>
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<b>Student Name:</b>	<b>Social Security Number:</b>
Name and address (city and state) of your high school and year you received your diploma. (Write N/A if you didn't graduate.)	Your address when you received your high school diploma. (Write N/A if you didn't graduate.)
Did you earn a G.E.D.?	Parents' address at time you completed your Free Application for Federal Student Aid (FAFSA):
<input type="checkbox"/> Yes <input type="checkbox"/> No   If "yes," in which state? _____ If "yes," date earned: ____/____/____	
Please list all the states (or countries) in which you have resided, your dates of residence and your reason for residing (e.g., college, employment, military service, place of birth, etc.) in each state. Please circle any of the following reasons for residing in Minnesota if they apply to you, your spouse or your parent(s):	
<ul style="list-style-type: none"> <li>• active federal military service in Minnesota</li> <li>• you are a spouse or dependent of a veteran who is a Minnesota resident</li> <li>• active member of Minnesota National Guard residing in Minnesota</li> <li>• active member of the reserve component of the U.S. Armed Forces who resides and whose duty station is located in Minnesota.</li> <li>• relocation to Minnesota from presidential disaster area within 12 months of disaster declaration</li> <li>• immediate relocation to Minnesota as a refugee from another country</li> </ul>	
State	Reason for Residing in State

# MN Online Student Eligibility Questionnaire

Student must click on MN link on FOTW confirmation page to be redirected to the OHE online questionnaire website.



**Congratulations, Sofia!**  
Your FAFSA was successfully submitted to Federal Student Aid.

**Confirmation Number:** F 12300005908 09/12/2018 13:25:21  
**Data Release Number (DRN):** 8886

**What Happens Next**


- You will receive an e-mail version of this page.
- In 3-5 business days, you will receive an e-mail notifying you that your FAFSA was processed.
- Your FAFSA information will be made available to your school(s), and they will use it to determine the aid you may be eligible to receive.
- Your school(s) will contact you if they need more information or when they are ready to discuss your financial aid award.
- If you have questions about your financial aid package, contact your school(s).

An abbreviated version of your confirmation page has been sent to you at the e-mail address:  
**meghan.flores@state.mn.us**

[PRINT THIS PAGE](#)

Start your state application to apply for Minnesota state-based financial aid. [→](#)

[Expand All](#)



# MN On-Line Student Eligibility Questionnaire

- **When MN resident student submits the **original** FOTW, confirmation page will show link/message to access state financial aid application**
  - Student must list MN as state of legal residence on FOTW to see link on FOTW confirmation page
  - Student will receive message on screen about interface when entering 'MN' for state of legal residence
  - Must be student's **original** FOTW, not correction
- **67% of MN students presented the link completed it using FOTW state interface**
  - **OHE will have secure web site for students to access if they miss the FOTW link (another 31% complete it this way)**

# MN On-Line Student Eligibility Questionnaire

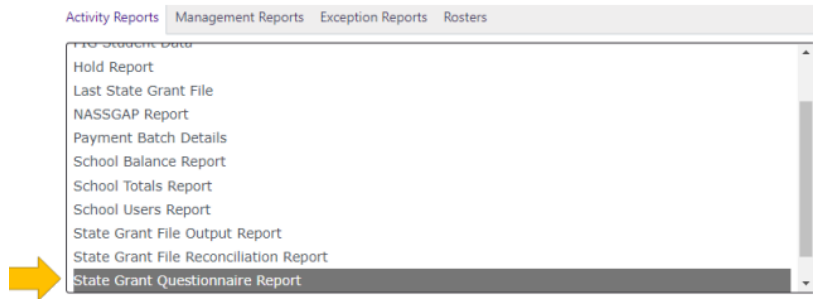
- **OHE loads ISIR records each night**
- **Will cross reference on-line questionnaire database to determine if student has successfully completed questionnaire**
- **Will push out email to student with unique link to on-line questionnaire if:**
  - Student not screened out (see App 24 SG manual); AND
  - No on-line questionnaire on file OR
  - Incomplete questionnaire on file
- **Will push out existing on-line questionnaire to any new colleges listed on ISIR**

# MN On-Line Student Eligibility Questionnaire

- **If student loses email with unique link to on-line state questionnaire, student can log-in with SSN, name and DOB (as they are on FAFSA) at this site: [Student Portal - Login \(guarantorsolutions.com\)](https://www.guarantorsolutions.com)**
- Can only access if:
  - OHE has loaded student's ISIR record
    - Takes 5 days from original FOTW submission
  - Student has not already successfully completed a questionnaire

# Participating Schools- Report View Results

4. Click on State Grant Questionnaire Report.



5. Your institution will be preselected. Enter your desired date range, then click Generate Report. Open the Excel document from the Downloads in your browser.

Academic Year:

School:

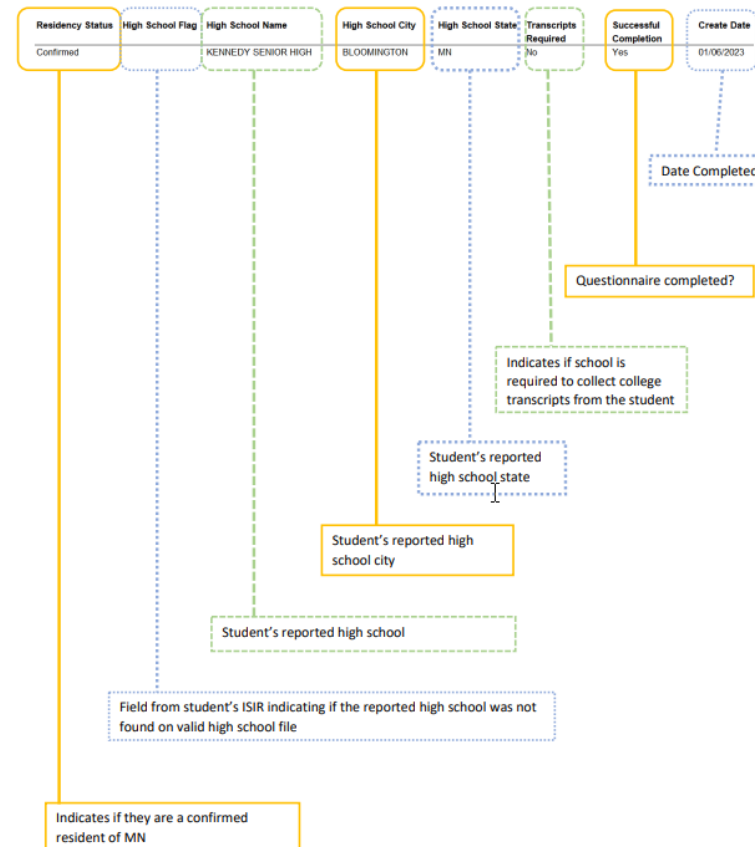
\*Enter Date in MM/DD/YYYY Format

Today  
 Date  
 Date Range

Date:

**GENERATE REPORT**

6. Review the report. The screen shot below omits the name and SSN of the students.



# Participating Schools- Individual View Results

## Viewing Questionnaire Data on Individual Student Records

1. Click on Quick View.



2. Enter the student's SSN and click Go.

3. Click on the State Grant Questionnaire Data.



4. The following screen will display the results of their eligibility questionnaire.

Academic Year:	2023	Create Date:	1/4/2023
High School Flag:		Attend College After High School:	Yes
High School Name:	WHITE BEAR AREA LEARNING CENTER	Withdraw Due To Illness:	No
High School City:	WHITE BEAR LAKE	Withdraw Due To Illness Date:	
High School State:	MN	Withdraw Due To Military:	No
State at High School Graduation:	MN	Withdraw Due To Military Date:	
GED State:		Physical MN:	
GED Date:		Reciprocity:	No
Residency Status:	Confirmed	SELF:	Yes
Transcripts Required:	No	Successfully Completed:	Yes

5. If the student listed additional states of residence and post-secondary education, it will display at the bottom.

No Residency Information found.

Attended	Start Date	End Date	Enrollment
Anoka Technical College	08/22/2023	01/23/2023	Full-time



# Program Eligibility Requirements



# Eligibility Screening

- School is responsible for verifying students meet all State Grant program eligibility requirements
- School financially liable for disbursements to ineligible students

# U.S. Citizen or Eligible Non-Citizen

- **For terms starting after July 1, 2013:**
  - No longer a requirement for students to be a U.S. citizen or eligible non-citizen
- **However, students must be lawfully present to meet one of the state residency criteria (except MN Dream Act)**
  - “Lawfully present” means:
    - Citizen or eligible non-citizen
    - Undocumented students granted Deferred Action for Childhood Arrivals (DACA), TPS, VISA holders, Political Asylum pending

# Minnesota Resident M.S.136A.101, Subd. 8

- Meet **ONE** of the following criteria:
  - Student who graduated from MN high school while residing in MN (must be physically attending college in MN if residing in another state\*); **OR**
  - Student who earned GED in MN after residing in MN for one year; **OR**
  - Dependent student whose parents resided in MN when FAFSA completed; **OR**
  - Student who resided in MN for 12 consecutive months without being enrolled for 6 or more credits in any term

\*Restriction on distance education applies ONLY if graduating from a MN high school is the ONLY way a student can establish MN residency

## Continued- Minnesota Resident M.S.136A.101, Subd. 8

- A member (or spouse or dependent of) of the armed forces of the U.S. stationed in MN on active federal military service as defined in MS 190.05, Subd. 5c; or
- A spouse or dependent of a veteran who meets the residency requirement; or
- A person (or spouse of) who relocated to MN from an area that is declared a presidential disaster area within the preceding 12 months, if the disaster interrupted the person's postsecondary education; or
- A person defined as a refugee under US Code, Title 8, section 1101 (a)(42) who upon arrival in the US, moved to MN and has continued to reside in MN; or

- **Effective August 1, 2015, the following individuals are also considered MN residents:**
  - An active member (or spouse or dependent of) of the state's National Guard who resides in MN
  - An active member (or a spouse or dependent of) of the reserve component of the U.S. armed forces whose duty station is located in Minnesota and who resides in Minnesota
  - Template letter for verifying active membership in MN National Guard or Reserves (Appendix 26)

# Minnesota Resident MN Dream Act M.S. 135A.043

## A person eligible for resident tuition rates under 135A.043 AKA the MN Dream Act

### Requirements:

- Attend a MN high school for at least 3 years
- Graduate from a MN high school or earn a GED in MN
- If male, complied with Selective Service registration requirements
- Apply for lawful immigration status if a federal process becomes available (does not refer to Deferred Action for Childhood Arrivals/DACA)
  - This requirement not yet enforced, since federal process does not yet exist



# Minnesota Resident Agency Policy

- **Student who resided in MN for 12 consecutive months without being enrolled for 6 or more credits in any term**
  - Does not have to be initial year student lived in MN
  - Residency established this way is lost if student later leaves MN for more than 1 year (unless for college, military, missionary service and still file taxes in MN)
  - Does not apply to GED recipients, do not lose residency if move out of MN greater than year





# Minnesota Resident Agency Rules

- Independent student who originally met residency requirement as dependent because parents resided in MN when FAFSA completed grandfathered once independent *if continues to live in MN* (4830.0100 Subp. 10E)
- Families not penalized for leaving MN to attend college or serve in military or missionary service if still paying taxes in MN (4830.0400 Subp. 2a.)

# MN Resident

- Graduated from MN high school, lives in Eau Claire, WI and drives to classes at Century College in MN. **Yes- if attending in person. No, if was distance education & only way to meet residency requirement was graduating from MN HS.**
- Graduated from MN high school, lives in MN, taking only distance education classes from MN college. **Yes- living in MN, so mode of delivery doesn't matter**
- First moved to MN on June 1, 2011. Attended U of M full-time from January 23, 2012 to December 31, 2012. Moved from MN on November 1, 2013, to work in another state. Returned to MN on June 14, 2015 and attended U of M full-time during 14-15 aid year. Is this student a resident for 15-16? **No**
- Dependent student first moved to MN after high school graduation in Colorado. Parents divorced. Mother stayed in CO, but father moved to MN. Mother's income provided on FAFSA. **No**
  - Same example, what if father's information was provided on the FAFSA? – **Yes, if father indicated MN Resident on FAFSA**
- [CommonDefinitions.pdf \(ohe.state.mn.us/pdf/FAManual/CommonDefinitions.pdf\)](http://ohe.state.mn.us/pdf/FAManual/CommonDefinitions.pdf)  
Very Helpful Resource – pages 10- 15

# Additional Requirements

- **Student must be 17 years old OR a H.S. graduate/GED recipient**
  - No state ability-to-benefit requirement
  - Cannot award State Grant to student in high school
- **Student cannot receive MN State Grant AND receive tuition reciprocity benefits from neighboring state**
  - Affects only public colleges in MN
  - Will be more beneficial for student to turn down reciprocity if attending MN campus that no longer charges non-resident rates

# Enrollment in Eligible School

- Must be enrolled for 3 or more credits/6 clock hours per week @ a clock hour school
- In program leading to diploma, certificate or degree
  - Minimum program length is 8 weeks long and 300 clock hours or 12 credits
- No requirement that student be accepted in program at each MN school, just one eligible MN school

# Satisfactory Academic Progress

- **State adopts Title IV Satisfactory Academic Progress policy**
  - Qualitative Component
    - GPA requirements
  - Quantitative Component
    - Timely completion of program
  - SAP Policy must be at least as strict or stricter as the policy the institution applies to students not receiving *Title IV* aid
- **On-line tutorial at: [FSA Training Center \(ed.gov\)](https://www.fsa.gov/training-center)**

# Satisfactory Academic Progress

- **Qualitative - GPA component**

- **Like Title IV policy, student must have GPA of 2.0 or academic standing consistent with school's graduation requirements at end of 2<sup>nd</sup> academic year and thereafter**

- This means GPA can be below 2.0 if school's graduation requirements have a lower GPA standard
- "Academic year" means school's definition of academic year for federal financial aid programs
  - Typically, two semesters or three quarters

# Satisfactory Academic Progress

## Quantitative - Timely Completion Component

- School must define maximum time frame for program completion
  - At minimum, cannot exceed 150% of published program length
  - For example, 6 academic years to complete 4 year program  
(4 X 1.5 = 6)
  - School can have stricter policy than 150%
- To determine percentage of courses student must complete to meet timely completion component, divide program length by 150% of program length
  - Example: 4 years divided 6 years = 67%
  - Clock hour schools should set policy based on scheduled hours completed within a given timeframe

# Satisfactory Academic Progress

## Frequency of SAP Evaluations

- Must include evaluation at the end of each payment period for programs of one year or less
- For all other programs, at least an annual review to correspond with the end of a payment period
- Clock-hour schools may use federal payment periods to check SAP



# Satisfactory Academic Progress Definitions

- **Financial Aid Warning:** A status a school assigns to a student who is failing to make satisfactory academic progress. The school reinstates eligibility for aid for one payment period and may do so without a student appeal. This status may only be used by schools that check SAP at the end of each payment period
- **Termination, Loss of Eligibility, Suspension** – Determined that student is not making Satisfactory Academic Progress, resulting in loss of Title IV eligibility.
- **Appeal:** A process by which a student who is not meeting SAP standards petitions the school for reconsideration for Title IV eligibility.
- **Financial Aid Probation:** A status a school assigns to a student who is failing to make satisfactory academic progress and who successfully appeals. Eligibility for aid may be reinstated for one payment period.
- **Academic Plan:** If determined, based on the appeal, that the student will require more than one payment period to meet progress standards, you place him on probation and develop an academic plan for the student. You must review the student's progress at the end of one payment period.
- - FSA Handbook 21-22 Chapter 1 School Determined Requirements

# Undergraduate Program

- **Student must be in undergraduate program and not have bachelor's degree**
  - Bachelor's degrees earned at foreign schools still count as bachelor's degrees
  - Student can take graduate level classes as long as student enrolled in undergraduate program

# Amount of Post-Secondary Education

- **Student ineligible once enrolled for the equivalent of 8 full-time semesters of postsecondary education \*\* Changes for 2024-2025\*\***
  - Schools must request and review academic transcripts for students who indicated at least 3 or more years of postsecondary education on the State Grant Student Eligibility Questionnaire
    - Includes attendance at current campus
  - NSLDS student loan history on SAR/ISIR is another possible resource of previous attendance
  - OHE MNAid System only tracks units of State Grant **PAID**

# Reviewing Academic Transcripts

- Separate transcript from **each** school -does not need to be official transcript
- School can make good faith effort to assign units when transcript lacks information needed to make accurate determination
  - Course work not separated by term, no start or end date, no credits shown for any course work
  - If course shows grade of 'W' with no attempted credits, use assumed value of 4 credits (unless all other classes show otherwise)
- Written statement from student reconstructing history when transcript can't be obtained due to school closure, destruction of records, civil war, etc.

# Reviewing Academic Transcripts

## **Can't use if school holding transcript due to unpaid bill**

However, FERPA and MN Data Practices Act allow student to inspect education records  
Voluntary waiver of SG & CCG form if can not obtain transcript (Appendix 25) -

## **\*New MN Transcript Access Law\* -**

### **College must not refuse to provide a transcript if:**

- Debt owed is less than \$250
- Student has entered into and, per by the college, is in compliance with a payment plan
- The transcript request is made by a prospective employer
- The schools has sent the debt to Department of Revenue or to a collection Agency

***Remember that reviewing Academic Transcripts is a MN State Grant Requirement – not always a Requirement of Federal Student Aid***

# Reviewing Academic Transcripts

- **ALL course work counts EXCEPT:**

- \*\*\*Developmental Education or below college-level coursework taken on or after 07/01/2021.
- Term during which student withdrew for active military service after December 31, 2002
- Term during which student withdrew due to serious health condition for themselves or family. Appeals directly to the college / university and notifies MN OHE.
- Courses taken during high school under the Post-Secondary Enrollment Options (PSEO);
- CLEP/AP course work (tests out of class w/o attending);
- 'FN' grade at MinnState campus (failed - never attended)

# Reviewing Academic Transcripts

- **ALL course work counts EXCEPT:**
  - Programs under 8 weeks in duration (or under 300 clock hours- Nursing Assistant);
  - Course work not offered by a post-secondary school (e.g., Red Cross training, Military Training) even if a college later grants college credit for the training;
  - Course work or training assigned –CEUs (continuing education units);
  - Courses the student audited;
  - Course work at Minnesota schools not participating in the State Grant Program and from which no course work transferred to the current school. Historical list of State Grant schools on OHE web site <http://www.ohe.state.mn.us/mPg.cfm?pageID=1406>

# Reviewing Academic Transcripts

## Be sure to include:

- Unaccredited or non-transferable course work
- Course work completed outside the U.S. or in other states,
- Course work taken at a post-secondary school during military service (as opposed to military training)
- Courses with grades of “F,” “NC,” “W,” “I”, “FW” (unless student withdrew for active military service after 12/31/2002 or **serious health condition** for the student or while providing care for a family member that limited student’s ability to complete)



# Reviewing Academic Transcripts

## Be sure to include:

- Remedial course work credit equivalencies, **taken prior to 07/01/2021.**
- Independent study courses
- Course work taken during a term for which the student was not eligible for a State Grant (e.g., missed application deadline, not eligible at student's enrollment level, etc.)

Use Appendix 7 of State Grant Manual or Transcript Review Spreadsheet to review transcripts and record units [hand out copy of spreadsheet and sample case]

# Units of Postsecondary Education

(Units Shown for Full-Time Enrollment)

Quarter System			Units per Acad Year	Semester System	
8	8	8	= 24 =	12	12
8	8	8	= 24 =	12	12
8	8	8	= 24 =	12	12
8	8	8	= 24 =	12	12
Cutoff if current college is on quarter system = <b>94.4</b>			96 units = 8 FT semesters	Cutoff if current college is on semester system = <b>93.6</b>	
<p><b>Student ineligible if units EXCEED cutoff. If units are at or under the cutoff, student can continue to be paid State Grant for any enrollment level until units cutoff is exceeded.</b></p>					

# Units are Based on Term Enrollment Level

(Full-Time Definition Changed from 12 to 15 Credits July 1, 1992)

Pre-July 1, 1992 Course Work			Post-July 1, 1992 Course Work		
	QTR	SEM		QTR	SEM
12+ credits	8	12	15+ credits	8	12
9-11 credits	6	9	14 credits	7.5	11.2
6-8 credits	4	6	13 credits	6.9	10.4
1-5 credits	bank*	bank*	12 credits	6.4	9.6
			11 credits	5.9	8.8
			10 credits	5.3	8.0
			9 credits	4.8	7.2
			8 credits	4.3	6.4
			7 credits	3.7	5.6
			6 credits	3.2	4.8
			5 credits	2.7	4.0
			4 credits	2.1	3.2
			3 credits	1.6	2.4
			2 credits	1.1	1.6
			1 credit	.5	.8

\*total credits in each bank divided by 12 to determine the number of full-time quarters or semesters

Example:  
 18 Qtr credits / 12 = 1.5 FT quarters  
 1.5 X 8 units = 12 units



# Reviewing Clock Hour Transcripts

- **To determine the amount of post-secondary education at a progressive clock hour school (other than your school):**
  - Divide total number of clock hours in program by number of weeks in program to get average hours per week
    - Determine enrollment level based on average hours per week
  - Divide number of weeks in program by 12 to get approximate number of quarters in program
  - Determine units of post-secondary education by multiplying the number of quarters in program by the units for enrollment status
- **Assume continuous enrollment without breaks unless the transcript states otherwise (approved Leave of Absence (LOA))**
- **If total clock hours do not appear on a cosmetology transcript, assume these total hours:  
Cosmetology = 1,550 hours, Barbering = 1,500 hours, Esthetician = 600 hours, and Nail Tech = 350 hours**

# Reviewing Clock Hour Transcripts

Example:

- Period of Enrollment was 9/1/89 to 8/26/90 = 51 weeks
- Total Hours Completed = 1550
- Average Hours Per Week =  $1550/51 = 30$
- Assumed Enrollment Status = full-time
- Number of Quarters in Period =  $51/12 = 4.25$
- Number of PSE Units =  $4.25 \times 8 \text{ units} = 34 \text{ units}$

*Enter the info above in the transcript review tool*

# Limit on Post-Secondary Education

- **Student ineligible once enrolled for the equivalent of 8 full-time semesters of postsecondary education**
- **\*\* Changes coming in 24-25\*\***
- **Moving from Terms of Attendance to Terms of Receipt (i.e State Grant Paid)**
- **Limit is moving to equivalent of 8 Full-time Semesters to 12 Full-time Semesters (6 years)**
- **How do we communicate this to students? For example, students who are ineligible for MN State Grant for 2023-2024, but will be eligible for MN State Grant for 2024-2025**

# Federal Student Loan Default

- Students in default of federal loan not eligible for State Grant
- When FAFSA processed, interface run with NSLDS database
  - Students in default have indicator on SAR or ISIR
- Fresh Start Program for Defaulted Loans
- Regaining eligibility extended retroactively to current aid year for State Grant



# Default on SELF Loan

- Student not eligible if defaulted on SELF loan
  - Does **NOT** affect eligibility for federal aid
- If loan not in collections, eligibility regained by paying off loan or making 4 to 6 monthly payments
  - Eligibility retroactively extended to beginning of current aid year
- If loan is in collections, must fully repay to regain eligibility
- Regular interface run between SELF and State Grant databases at OHE
  - OHE notifies schools via State Grant on-line hold report, which can be viewed via MNAid Hold Reports and Student Quick View

# Child Support Hold

- Student not eligible if 30+ days in arrears on child support obligation
- Student regains eligibility by paying off past due amount or complying with monthly payment plan approved by caseworker
  - Eligibility retroactively extended to beginning of current aid year
- Weekly interface run between Department of Human Services (DHS) and State Grant database at OHE
  - OHE notifies schools of holds via the MNAid online hold report.
- Students should be referred to county

# Eligibility Notification

- Student loses eligibility as of month/year student placed on hold (regardless of when school notified)
- School liable for overpayment if school paid **AFTER** receiving notification student on hold
- OHE notifies school via MNAid within the Hold Report and the student Quick View

# Eligibility Screening Tools

- FAFSA output – ISIR or SAR
- SG Student Eligibility Questionnaire
- Documentation at school (transcripts, admissions forms, etc.)
- MNAid System
- MN Hold and >72 Unit Report
- Appendix 6 of manual has a full list of all State Grant eligibility requirements in a chart format

# MNAid Eligibility Screening

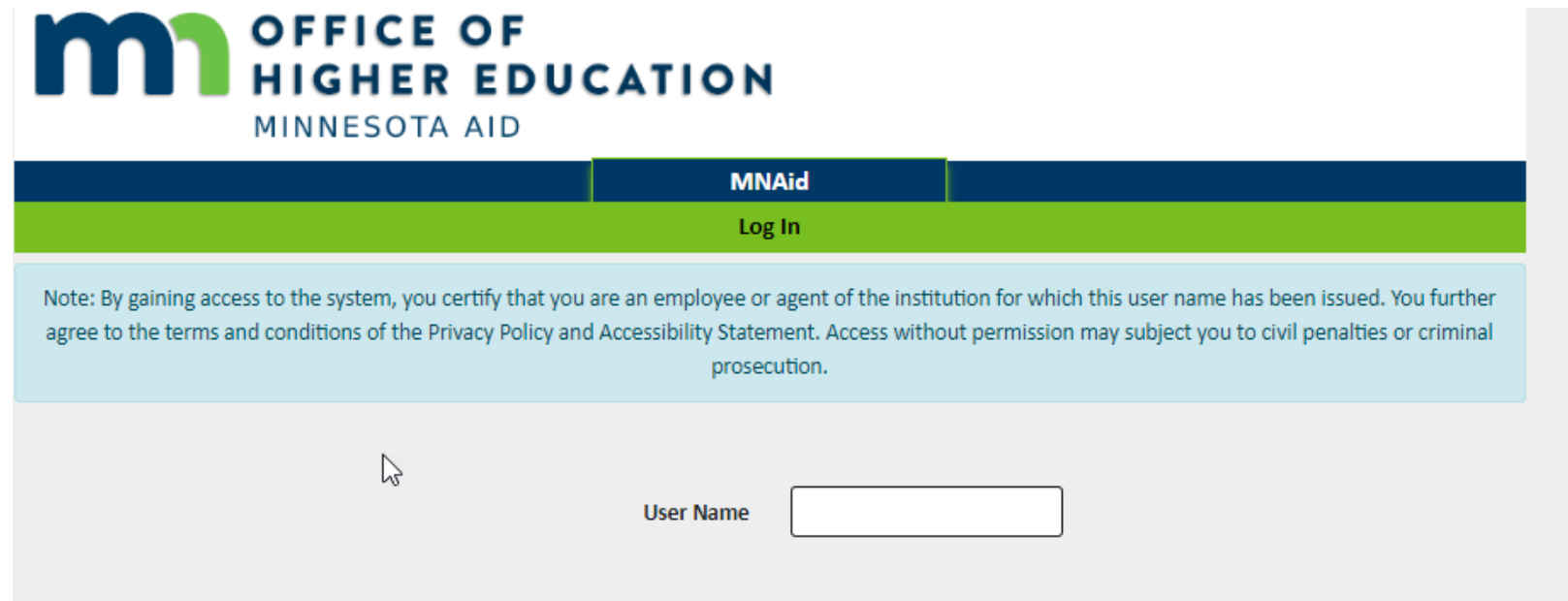
- **State Grant On-Line Hold Report**
  - OHE downloads ISIRs each night
  - Data written to school's on-line hold report each night if:
    - Student has new hold/warning or released hold; and
    - School listed on ISIR or DDS record previously submitted by school
  - School notified via email if data added/revised
  - School can print comprehensive report or alter date range to select only new/revised records

# MNAid Eligibility Screening

- Hold data displayed on report:
  - Child support arrears
  - SELF loan default
  - Units of State Grant PAID through current year
  - Previous State Grant Overpayment (rare)
  - Continuously monitor the hold reports- students can have a hold, have it removed and go back on hold within the same aid year

# MNAid System

- MNAid System [Login \(guarantorsolutions.com\)](https://guarantorsolutions.com)
- School's designate financial aid staff members who need access to the MNAid system. Those staff members are assigned a username, password, and a designated role within the MNAid system.



**mn** OFFICE OF  
HIGHER EDUCATION  
MINNESOTA AID

MNAid  
Log In

Note: By gaining access to the system, you certify that you are an employee or agent of the institution for which this user name has been issued. You further agree to the terms and conditions of the Privacy Policy and Accessibility Statement. Access without permission may subject you to civil penalties or criminal prosecution.

User Name

# MNAid System

- Student Quick View can be used to determine:
  - Holds (child support arrears, SELF default, federal loan default, State Grant overpayment)
  - Units of State Grant payments (*just payments, not attendance*)
  - Awards and payments for current year
- School must be listed as college on student's current ISIR in order for school to access State Grant database





# Student Look-up - Holds Review –Total Units

Quick View

SSN Quick View

SSN

- Existing Grants/Scholarships

- State Grant 2022 - 2023
- State Grant 2021 - 2022
- State Grant 2020 - 2021
- State Grant 2019 - 2020
- State Grant 2018 - 2019

Transaction History

Payment History

FAFSA Data

Dependency Status	Independent	Federal EFC	\$0.00
Formula Type	SNT: independent with dep other than a spouse	Student Contribution	\$0.00
Family Size	3	Parent Contribution	n/a
Comment Code(s)	149 351 001 118 073 006	SELF Default Holds	Add
Reject Code(s)		Child Support Holds	Add
Assumption Code(s)	n/a		

## Program Totals

Total Units	36.0000
Total Cumulative Award	\$3,582.00

# Student Look-up - Payment and Unit History

**Quick View**

**SSN Quick View**

SSN



**- Existing Grants/Scholarships**

- State Grant 2022 - 2023
- State Grant 2021 - 2022
- State Grant 2020 - 2021
- State Grant 2019 - 2020
- State Grant 2018 - 2019

- Transaction History
- Payment History
- FAFSA Data



Academic Year 2021 - 2022							
Date	Batch Number	Program	Institution	Term	Type	Units Paid	Amount
2022/01/31		State Grant	ST. CATHERINE UNIVERSITY	Spring	Payment	11.2	\$2942.00
2021/09/08		State Grant	ST. CATHERINE UNIVERSITY	Fall	Payment	12.0	\$3376.00

Academic Year 2020 - 2021							
Date	Batch Number	Program	Institution	Term	Type	Units Paid	Amount
2021/03/03		State Grant	ST. PAUL COLLEGE	Spring	Payment	9.6	\$81.00
2020/09/09		State Grant	ST. PAUL COLLEGE	Fall	Payment	8.8	\$594.00

Academic Year 2019 - 2020							
Date	Batch Number	Program	Institution	Term	Type	Units Paid	Amount
2020/07/22		State Grant	ST. PAUL COLLEGE	Summer2	Payment	6.4	\$506.00
2020/01/29		State Grant	ST. PAUL COLLEGE	Spring	Payment	5.6	\$247.00

# MNAid Holds Report

The screenshot displays the MNAid web application interface. At the top left is the logo for the Office of Higher Education, Minnesota Aid. Below the logo is a navigation menu with options: MN AID, Home, Reports (with a close icon), Search, Reports, Update Student SSN, File Requests, Send Email, Student User Management, Help, State Grant, System Administration, and Quick View. The main content area is titled 'MNAID Report Options' and contains a sub-menu with 'Activity Reports', 'Management Reports', 'Exception Reports', and 'Rosters'. A dropdown menu is open under 'Activity Reports', listing various report types: Awards by Institution Report, ETV Data, FIG Student Data, Hold Report (highlighted with a mouse cursor), Last State Grant File, NASSGAP Report, Payment Batch Details, School Balance Report, School Totals Report, and School Users Report. Below the dropdown, there are input fields for 'Academic Year' (set to 2022-2023) and 'School'. There are also radio button options for 'Display' (Alphabetical By Last Name, By Last Transaction Date) and 'Criteria' (All, Active), and a checkbox for 'Include Hyphens From SSNs:'. A 'GENERATE REPORT' button is located at the bottom right of the form area.

# Student Look-up and Holds Review

Date printed: 9/23/2022 12:30:38 PM

Page 1 of 1

**Minnesota Office of Higher Education  
Hold Report  
MN College**

**Academic Year: 2022- 2023**

SSN	Name	Graduate Student	SG File/ISIR	Federal Default/ Overpayment	SELF Hold Active	SELF Hold Start Date	SELF Hold End Date	SELF Notification Date	Child Support Active	Child Support Hold Start Date	Child Support Hold End Date	Child Support Notification Date	Last Transaction Date
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y									07/25/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y					Y	06/12/2010			01/26/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y									05/17/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y					Y	12/12/2015			02/02/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	N					Y	08/13/2022		09/19/2022	09/19/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y					Y	01/14/2017			07/29/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y									01/03/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	N					Y	08/13/2022		09/19/2022	09/19/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y									08/04/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y									05/09/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y					Y	03/10/2018			05/31/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y									09/07/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y									09/19/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y									06/28/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y									08/30/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y									07/15/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y									03/16/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	Y									06/30/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	N					Y	09/10/2022		09/19/2022	09/19/2022
xxx-xx-xxxx	Last name, First Name	N	ISIR	N					Y	08/13/2022		09/19/2022	09/19/2022

# > 72 Units Report Reports

The screenshot shows the 'MNAID Report Options' web application. The header includes the 'm' logo and 'OFFICE OF HIGHER EDUCATION MINNESOTA AID'. The navigation bar has 'Home' and 'Reports x'. A left sidebar contains menu items: 'MN AID', 'Search', 'Reports', 'Update Student SSN', 'File Requests', 'Send Email', 'Student User Management', 'Help', 'State Grant', 'Fostering Independence Grant', 'System Administration', and 'Quick View'. The main content area is titled 'MNAID Report Options' and has sub-tabs for 'Activity Reports', 'Management Reports', 'Exception Reports', and 'Rosters'. A dropdown menu is open under 'Activity Reports', listing: 'Hold Report', 'Last State Grant File', 'NASSGAP Report', 'Payment Batch Details', 'School Balance Report', 'School Totals Report', 'School Users Report', 'State Grant File Output Report', 'State Grant File Reconciliation Report', and 'Units Greater Than 72'. To the right of the dropdown is a tooltip: 'Report of students fi on the FAFSA or hav'. Below the dropdown are input fields for 'Academic Year' (with '2022-2023' selected) and 'School:'. A checkbox labeled 'Include Hyphens From SSNs:' is present. A 'GENERATE REPORT' button is at the bottom right.

# > 72 Units Report Reports

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Page 1 of 1

**Minnesota Office of Higher Education  
Units Greater Than 72 Report  
NORMANDALE COMMUNITY COLLEGE 007954  
Academic Year: 2022- 2023**

SSN	Name	Graduate Student	SG File/ISIR	Units	Last ISIR Date	Date > 72
xxx-xx-xxxx	Test Last Name, Test First Name	N	SG File	79.2	06/03/2022	01/19/2022
xxx-xx-xxxx	Test Last Name, Test First Name	N	SG File	72.8	03/21/2022	09/02/2022
xxx-xx-xxxx	Test Last Name, Test First Name	N	SG File	76.8	09/01/2022	01/09/2023
xxx-xx-xxxx	Test Last Name, Test First Name	N	ISIR	93.6	08/25/2022	01/10/2022
xxx-xx-xxxx	Test Last Name, Test First Name	N	SG File	84.8	11/22/2021	06/01/2022
xxx-xx-xxxx	Test Last Name, Test First Name	N	SG File	95.2	08/22/2022	05/28/2020
xxx-xx-xxxx	Test Last Name, Test First Name	N	ISIR	72.8	06/28/2022	01/23/2023
xxx-xx-xxxx	Test Last Name, Test First Name	N	SG File	80.8	09/08/2022	02/03/2021

# Verification



# Verification

- Must verify certain items reported on FAFSA if selected for verification
- Text of student's SAR will indicate if application was selected for verification, as will Verification Flag = Y shown under 'For Financial Aid Office Use Only'
  - **SAR will also have asterisk following the EFC if selected for verification**
- ISIR record will indicate if the application was selected for verification
- OHE will perform verification for ALL MN Dream Act state financial aid applicants (100% verification)



# Verification

**School must use federal guidelines and forms for verification (even if not participating in federal aid programs)**

[2023-2024 Federal Student Aid Handbook in PDF Format | Knowledge Center](#)

## **V-1 Standard Verification Group**

- Adjusted gross income (AGI), U.S. income tax paid, Education credits
- Household size, Number in college
- Income earned from work
- Untaxed portions of IRA distributions , Untaxed portions of Pension, IRA deductions and payments
- Tax-exempt interest income

## **V-4 Custom Verification Group**

- Identity/statement of educational purpose  
School liable for any overpayments if verification not performed
- **Must resolve Comment Codes (“C” Codes) on ISIR – prior to disbursing funds. “C” codes indicate that there are problems the student or school must resolve.**

**Examples: SSN / Identify mismatch, Defaulted Loans, Overpayments,**

# Conflicting Information

- School also responsible for resolving any **conflicting information** on student's financial aid application and other documentation collected by the school. Must have adequate internal system to identify conflicting information regardless of source and regardless of whether the student was selected for verification.
- Sources of Conflicting Information
  - Internal – FA Office / Other Offices within Institution
  - External – Scholarship, DOE website, etc

# Conflicting Information Examples

- Example 1: Student reported not having a high school diploma, but reports having a high school diploma on FAFSA.
- Example 2: Student reports being married as of 03/01/2019 on the FAFSA, but during verification you find that he/she filed as head of household on her 2020 taxes.
- Example 3: Student reported not filing taxes, but reported having earnings above the minimum threshold required to file taxes.
- Example 4: Dependent siblings attending the same college, family size of 4, two in college with same parents, but different parent income for each sibling.

# Professional Judgement



# Professional Judgment

- Schools must use Title IV guidelines for professional judgment
  - Federal Student Aid Handbook – Application and Verification Guide [Special Cases | 2022-2023 Federal Student Aid Handbook](#) is a resource
- Adjustments must be based on **unusual circumstances** that can be **adequately documented**, preferably by someone outside the family
- Adjustments must be done on **a case-by-case basis** and not applied to a broad class of students

# Professional Judgement

- Common examples include:
- Significant change in income from past tax year based on unemployment, underemployment, death, divorce, military service or natural disaster
- Unusually high medical expenses
- Nursing home expenses
- Elementary or secondary school tuition
- Significant college costs for dependent student's parent attending college
- Dependency override
- Family should contact financial aid administrator to discuss unusual circumstances

# Professional Judgement

- Dependency override allows dependent student to apply as independent
  - Examples: Left parental household due to abuse, inability to locate parents
- Dependency override should not be done merely because:
  - Parents unwilling to complete FAFSA
  - Student lives independently of parents after graduating from high school
- Aid administrators can use professional judgment to adjust the cost of attendance used for state campus-based programs, such as State Work Study, but NOT State Grant budget

# Professional Judgment

- Aid administrators cannot use professional judgment to override a State Grant Program eligibility requirement (e.g., application deadline, residency, citizenship, etc.).
- Can adjust **financial data elements** to end up with different EFC but cannot make bottom-line change to EFC
- OHE will perform professional judgment adjustments for undocumented students completing the MN Dream Act application



# State Grant Enrollment Levels



# State Grant Enrollment Levels

<b>Credits Per Term</b>	<b>Average Clock Hours Per Week</b>	<b>Level</b>	<b>% of Full-Time Enrollment State Grant Budget Used</b>
15+	30+	Level 15	100%
14	28-29	Level 14	93.3%
13	26-27	Level 13	86.7%
12	24-25	Level 12	80.0%
11	22-23	Level 11	73.3%
10	20-21	Level 10	66.7%
9	18-19	Level 9	60.0%
8	16-17	Level 8	53.3%
7	14-15	Level 7	46.7%
6	12-13	Level 6	40.0%
5	10-11	Level 5	33.3%
4	8-9	Level 4	26.7%
3	6-7	Level 3	20.0%

# State Grant Award



# Design for Shared Responsibility

## 2022-2023 Annual Award Calculation

Average Tuition & Mandatory Fees\* (30 sem/45 qtr credits)  
+ Living and Misc Expense Allowance (LME)\*\* (\$11,418)  
= State Grant Budget

- 50% Assigned Student Responsibility
- Annual 9-month FM PC (dependent) X .79
- Annual FM EFC X .71 (independent with deps) or  
Annual FM EFC X .35 (independent w/o deps)
- Pell Grant Award\*\*\*

= State Grant Annual Award (minimum \$100)

\*Subject to tuition & fee caps: \$16,654 for 4-yr program; \$6,580 for 2-yr or less program

\*\*LME \$0 for those in correctional facility

\*\*\*From 2022-2023 Federal Pell Grant Disbursement Schedule. Amount based on student's EFC. Amount subtracted even if student not actually receiving Pell.

# State Grant Award Notice

- School must calculate the student's State Grant award on campus and notify student
  - OHE performs this function for MN Dream Act applicants; however, schools should incorporate the award into their campus financial aid award letter as well.
- Award notice should indicate that State Grant will vary based on enrollment level
- Shared Responsibility formula is used to calculate award
- Shared Responsibility formula is described in text of State Grant Manual and Appendices 8 and 9

# MN Dream Act State Grant Student Award Screen

**m OFFICE OF HIGHER EDUCATION MINNESOTA AID**

MN AID Home Certification(Dream Act) x IND-0514(DREAMACT) x

State Grant UPDATE APPLICATION TRANSFER STUDENT

Dream Act

Fostering Independence Grant

System Administration

Quick View

SSN GO

MNAID ID GO

TEST IND | TEST IND  
SSN: [REDACTED]

- Existing Grants/Scholarships  
Dream Act 2022 - 2023

Transaction History  
Payment History  
FAFSA Data  
No Questionnaire Data

- Document Review Information
- Residency Information
- School Information
- Family Information
- Student Tax Information
- Parent Tax Information
- Award Amounts Information

Institution: PINE TECHNICAL AND COMMUNITY COLLEGE

Total Credits	Amount
3	\$861.00
4	\$1,150.00
5	\$1,434.00
6	\$1,722.00
7	\$2,011.00
8	\$2,295.00
9	\$2,583.00
10	\$2,872.00
11	\$3,156.00
12	\$3,444.00
13	\$3,733.00
14	\$4,017.00
15	\$4,306.00

# MN Dream Act Enrollment Certification

The screenshot shows the user interface for the MN Dream Act Enrollment Certification. At the top left is the logo for the Office of Higher Education, Minnesota Aid. The top right shows a user profile for 'Hi, Shawn'. Below the header is a navigation menu with options: Home, Certification(Dream Act) (selected), and a close button. The main content area is titled 'Online Certification DREAM ACT' and shows the 'Academic Year: 2022-2023'. There are two dropdown menus: 'Please select the Institution' with '00535 - PINE TECHNICAL AND COMMUNITY COLLEGE' selected, and 'Please select Academic Term' with 'Spring' selected. A 'CERTIFICATION ROSTER' button is located below the dropdowns. The left sidebar contains a list of navigation items: MN AID, State Grant, Dream Act (highlighted), Award Rules, School Profile, Payment History, Certification (highlighted), Request Reinstatement, Reinstatement Awards, Request Payments, Process Funds Manually, Generate Emails, Email File Requests, Fostering Independence Grant, System Administration, and Quick View.

# MN Dream Act Enrollment Certification

The screenshot shows the MN Office of Higher Education web application. The left sidebar contains a navigation menu with items such as MN AID, State Grant, Dream Act, Award Rules, School Profile, Payment History, Certification, Request Reinstatement, Reinstatement Awards, Request Payments, Process Funds Manually, Generate Emails, Email File Requests, Fostering Independence Grant, System Administration, and Quick View. The main content area is titled "005535-PINE TECHNICAL AND COMMUNITY COLLEGE 2022-2023 Spring Certification Roster" and "Dream Act". It features a "Filter" input field with "APPLY" and "RESET" buttons. Below this is a table with columns: Certify, Name, SSN, Total Credits, DevEda Credits, Award Amount, and Additional Options. The table contains one row with "TEST IND | TEST IND" as the name, a blue SSN field, "15+" in the Total Credits dropdown, "0" in the DevEda Credits dropdown, and "\$4,306.00" in the Award Amount field. The "Certify" column has radio buttons for "Pending" (selected), "Yes", and "No". Below the table is a text box with the certification statement: "I certify that the listed students are enrolled for at least three hours for the semester indicated and are maintaining satisfactory academic progress as defined by this institution." At the bottom are "CANCEL" and "SAVE" buttons.

Certify	Name	SSN	Total Credits	DevEda Credits	Award Amount	Additional Options
<input checked="" type="radio"/> Pending <input type="radio"/> Yes <input type="radio"/> No	TEST IND   TEST IND	[Redacted]	15+	0	\$4,306.00	



# Award for Non-Standard Term

- “Non-standard” term means semester less than 15 weeks or quarter less than 10 weeks
- Award for non-standard term is same as award for standard term
  - No adjustments required for shorter term length

# Award for Full Fiscal Year

- Student may receive State Grant for up to 4 full-time quarters or 3 full-time semesters during a fiscal year
  - This translates into 60 quarter credits or 45 semester credits in a fiscal year
- Term with 15 or more credits only counts as 15 credits
- If student transfers to another school, the new school must limit payment to stay within these credit limits

# Fiscal Year Award Limitation for Transfer Student

## Example of Transfer Student

- Student completes 17 semester credits at School A
- Student transfers to School B, which is on the quarter system
- School B must translate 15 semester credits to 22.5 quarter credits (15 X 1.5)  
(17 credits only counted as 15)
- School B can only award the student for the remaining 37.5 quarter credits of eligibility for the aid year

# Award for 4<sup>th</sup> Quarter or 3<sup>rd</sup> Semester

- State Grant award for student's 4th quarter or 3rd semester within fiscal year is calculated in the same manner as for other terms

# Attending Multiple Schools

- Student can receive separate State Grants at multiple MN schools during the same term based on the cost and credits at each school attended
- Can't receive payment for more than 15 credits per term
  - School that reports payment that exceeds 15 credits will have payment rejected by OHE
  - School must recalculate payment for enrollment level of remaining credits. Example:
    - School A pays for 12 credits and has payment accepted
    - School B pays for 6 credits and has payment rejected
    - School B must recalculate State Grant to Level 3 instead of Level 6

# Attending Multiple Schools

- When calculating awards at separate schools for the same term:
  - Each school must use the average tuition and mandatory fees, appropriate tuition and fee maximum, and LME for the student's enrollment level **at that school**
- Example of the award calculation for a student attending two schools for the same term can be found as Example 7 in Appendix 9 of State Grant manual

# Combining Credits at 'Home School'

- One eligible MN school may act as the 'home school' and base student's award on the costs for combined credits at both schools
- A consortium agreement is not required as long as both schools are eligible MN schools
  - However, home school must monitor student's enrollment at other school to determine if student withdraws or is making satisfactory progress

# Combining Credits at 'Home School'

- **“Home school” must add the average tuition and fees charged at both schools for up to 15 credits per term**
  - Home school can use its own tuition and fees if the other school is within the same system (MNState, U of M, Private 4-year, Private 2-year)
  - The lesser of the tuition and fees or the applicable tuition and fee maximum for the student’s degree program must be used in the award calculation
- **LME used in State Grant award calculation cannot exceed the full-time LME for 15 credits**
- **Example award calculation can be found as Example 8 in Appendix 9 of the State Grant manual**
  - Multiple school award calculation spreadsheet available at: [www.ohe.state.mn.us](http://www.ohe.state.mn.us)



# Attending Multiple Schools

- A student cannot receive a State Grant at an ineligible school unless the school has a consortium agreement with an eligible MN school and the student is accepted into a degree, certificate or diploma program at the eligible MN school
  - The eligible MN school must act as the 'home school' and award the State Grant

# Crossover Term Award

Overlaps fiscal years (starts before and ends after July 1<sup>st</sup>)

- Award may be funded from either aid year
  - Decision on which aid year's FAFSA to use can differ on student-by-student basis
  - Must match aid year selected for Federal Pell Grant
  - Considerations:
    - Which year's FAFSA might yield the highest State Grant award?
    - Has the student met the application deadline for both years?
    - Has the student already been awarded for 3 FT semesters or 4 FT quarters for the current aid year?
- Laws, regs and policies for aid year selected apply

# Disbursement

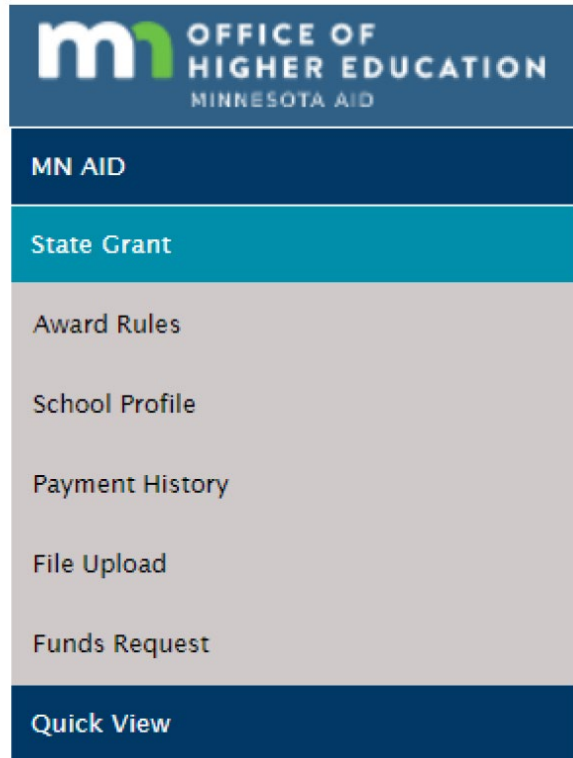


# Initial Funds Advances

- Initial State Grant File is uploaded – School will need to review State Grant File Output Report to verify award amounts, OHE happy to assist with questions or concerns.
- Schools cannot receive funds more than 14 days before term start date and it takes approximately two days for the funds to be pushed out via EFT.
- Be sure to closeout previous aid year, Advances held if school missed close out deadline for prior year or not meeting monthly reporting requirements

# State Grant Funds Request

Request funds using the MNAid System - [Login \(guarantorsolutions.com\)](https://guarantorsolutions.com)



# State Grant Funds Request

Request funds using the MNAid System - [Login \(guarantorsolutions.com\)](https://guarantorsolutions.com)

Funds request process will limit advances to the Total Awards minus Total Advances for the term.

Term	Term Start Date	Advances	Awards	Payments	Balance	Requested Amount	
Summer1	7/2/2021	\$82,730	\$163,225	\$130,772	\$-48,042	\$0	Request
Fall	9/1/2021	\$289,742	\$289,844	\$218,033	\$71,709	\$0	Request
Spring	3/1/2022	\$88,805	\$200,209	\$73,387	\$15,418	\$0	Request
Summer2	5/1/2022	\$0	\$82,321	\$0	\$0	\$0	Request

SUBMIT REQUEST

CANCEL

# State Grant Funds Request

Request funds using the MNAid System - [Login \(guarantorsolutions.com\)](https://guarantorsolutions.com)

Request Amount for Summer1 Term ×

Amount Requested

**REQUEST** **CANCEL**

Requested Amount
8,000
\$0
\$0
20,000

8. Click Submit Request.

**SUBMIT REQUEST** **CANCEL**

# How Funds Disbursed

- **State Grant funds must be maintained in separate account or in a manner that allows auditors to adequately track funds**
- **Interest earnings must be used to offset State Grant administrative costs**
- **Schools can disburse State Grant funds to students using any of the following methods:**
  - **by check directly to the student**
  - **by check mailed to the student**
  - **applying funds to the student's account**
  - **transferring funds via EFT**



# MN Dream Act State Grant Funds

- Schools Certify Student Enrollment within MNAid
  - Be sure enrollment is set, any schools wait until after their drop/add period to certify
- Certification leads to OHE sending separate State Grant funds via EFT for MN Dream Act recipients
  - OHE will email school when funds are sent
  - These recipients not included in State Grant files
- Payment roster can be generated by school in MNAid
- School can return refunds at end of term using OHE Refund Return Form

# MN Dream Act State Grant Payment Roster

The screenshot shows the MN Office of Higher Education website interface. The top navigation bar includes the logo and the text "OFFICE OF HIGHER EDUCATION MINNESOTA AID". Below this, a breadcrumb trail shows "Home", "Certification(Dream Act)", "IND-0514(DREAMACT)", and "Reports". A search bar is present on the left. The main content area is titled "MNAID Report Options" and contains a sub-menu with "Activity Reports", "Management Reports", "Exception Reports", and "Rosters". The "Rosters" sub-menu is open, showing "Certification Roster", "Payment Roster" (which is highlighted), and "Ready To Pay Roster". To the right of this menu, a note states "All students at t a status of 'Paid'". Below the menu, there are several form fields: "Academic Year" (2022-2023), "Program" (Dream Act), "School" (002338-00 BETHEL UNIVERSITY), and "Term" (Spring). At the bottom, there are radio buttons for "Display" options: "Alphabetical By Last Name" (selected), "Numerical By SSN", and "Chronological By Paid Date". There are also checkboxes for "Include Only Students With Adjustments" and "Include Hyphens From SSNs".

# When Funds are Disbursed

- **School may not disburse funds to a student until the student is registered for a term**
  - If disbursing prior to term start, disbursement date is considered to be the first day of the term
- **If student does not attend, funds must be returned**
- **If school posts State Grant payment with own funds prior to beginning of fiscal year**
  - Liable for any overpayments related to changes in eligibility requirements, enrollment level, etc.

# Disbursement Date

- **If funds disbursed after term starts, disbursement date is:**
  - date funds are applied to student's account or applied to tuition charges; or
  - for funds mailed to student or transferred via EFT, date of check or EFT transaction,
  - for funds disbursed directly to student via check, date student picks up the check
- **State Grant payment must always be based on student's enrollment status AS OF THE DATE OF DISBURSEMENT**

# Late or Retroactive Disbursement

- **Can pay late in term or retroactively for completed term (even if student not currently enrolled) if student:**
  - met the application deadline for the term in question
  - currently meets all other program eligibility requirements
- **Payment must be based on student's enrollment status for term as of the **date of disbursement****
  - Classes with passing grades or grades of "F," "NC," or "I" **CAN** be included when determining enrollment status as of the end of the term
  - Classes with grades of "W," "FW" or "FN" **CANNOT** be counted

# Student Authorization

- **School must obtain written authorization from student allowing school to disburse State Grant funds via EFT or to hold excess funds on student's account**
  - **School cannot require student to authorize these activities**
- **Authorization is provided for one academic year and can be used for future years if school notifies student and offers opportunity to rescind authorization**

# Student Authorization

- **Unless otherwise authorized by student, any excess state financial aid funds on student's account beyond institutional charges must be disbursed to student within 14 days of the later of:**
  - **the date the balance occurs; or**
  - **the first day of classes for the term/period; or**
  - **the date the student rescinds authorization**
- **This includes State Grant payments posted with institutional funds**
- **School must document all disbursements for auditing purposes (for further instructions, see “Method of Disbursement to Students” in the State Grant manual)**

# Award Recalculation and Refunds





# Award Recalculation

- **State Grant must always be recalculated if student drops/withdraws from credits without having attended**
  - For example, recalculate Level 15 award to Level 12 if student drops 3 credit class without attending
  - For example, Level 12 State Grant disbursed for two combined summer sessions of 6 credits each recalculated to Level 6 if student doesn't attend second summer session

# Award Recalculation

- Withdrawals backdated to beginning of term treated as if student never attended
- Entire State Grant must be refunded if student drops/withdraws from all classes without attending

# Withdrawing/Adding Credits After Beginning Attendance (First effective 2013-2014 aid year)

- No state award adjustments required after student has *begun* attendance in all classes
- School can have written policy to adjust awards through a certain date
  - E.g. end of drop/add period, end of term, etc.
- School can have different policy for different programs
  - E.g. day school vs weekend college
- Policy must be used for all state financial aid programs requiring adjustments
  - Adjustment end date does NOT have to match end date used for Federal Pell Grant program

# Withdrawing/Adding Credits After Beginning Attendance

- If school has policy opting for award adjustments, they must be done regardless of whether award increases or decreases if they occur before adjustment end date

Action	Result	Adjustment
Add credit(s)	Increases award	Disburse additional State Grant funds to student
Add credit(s)	Decreases award	No adjustment of State Grant award unless Pell Grant actually increased
Withdraw credit(s)	Increases award	No adjustment of State Grant award unless Pell Grant actually decreased
Withdraw credit(s)	Decreases award	Perform partial withdrawal refund for State Grant using OHE Refund Calculation Worksheet

# Partial Withdrawal Resulting in Decreased State Grant Award

- **If student withdraws from attended class *after* State Grant disbursement:**
  - School must complete appropriate OHE Refund Calculation Worksheet (Appendix 13 of State Grant Manual or spreadsheet)
  - The lesser of the amount of the refund of institutional charges or the difference between the original and revised State Grant is refunded
  - School not required to complete OHE Refund Calculation Worksheet/Spreadsheet if no refund of institutional charges
    - School must at least review case and make notation in student's file

# Withdrawing/Adding Credits After Beginning Attendance

- **When first awarding/disbursing funds AFTER the adjustment end date, award must be based on enrollment level *as of the date of disbursement***
  - No further adjustments after that point
- **If student has withdrawn class removed from transcript, treat as if student was never enrolled and perform award recalculation**
- **School can have a policy to add credits after state award adjustment end date if:**
  - Credits would have normally been added during drop/add period and failure to originally add credits was beyond student's control; or
  - Interim credits were registered after fall term award adjustment end date and will be allocated to fall term

# Award Adjustments

- If a student first withdraws from and then adds credits *after* beginning attendance and *before* award adjustment end date:
- First do partial withdrawal refund for withdrawn class
- Compare revised award for new net enrollment level (don't include Ws) with previous disbursement retained by student
  - If new award is *less* than what was retained from original disbursement, there is not an overpayment
  - If new award is *higher* than what was retained from original disbursement, disburse additional funds to student
- **Consult Appendices 26 and 27 in State Grant manual for more detailed instructions**

# Refund for Total Withdrawal

- **If student totally withdraws from school after attending classes, school must complete the appropriate OHE Refund Calculation Worksheet or Spreadsheet**
  - Not required if no refund of institutional charges, but school must review and make notation in student's file. MN OHE adopts Dept. of Education definition of Institutional Charges.
- **Different worksheet/spreadsheet based on how school charges (upfront for entire program or by term)**
  - **Line A:** Amount of cash or financial aid applied to original institutional charges (capped at the amount of original institutional charges)
  - **Line B:** Subtract amount of original institutional charges school is allowed to retain according to its refund policy
  - **Line C:** Gross refund (if zero or negative, STOP! )
  - **Line D:** Subtract institutional share of any required refund due to Title IV programs
  - **Line E:** Net refund (distributed proportionally among non-Title IV aid programs except State Work Study)



# Refund for Total Withdrawal

- If school charges for entire program at onset of program:
  - Line A represents all financial aid and cash received to date for the entire program
  - This includes funds disbursed to the student for living costs UNLESS they exceed the amount of total program charges
- School charges \$15,000 for cosmetology program at onset of program
- Program normally takes 5 payment periods to complete
- School disburses excess financial aid to student each payment period as though school charged by the payment period (e.g., \$3,000 charges associated with each period)
- All funds received by school to date for program are included on Line A up to \$15,000

# Award Adjustments

- **In some cases, both an award recalculation and withdrawal refund calculation must be performed**
  - **Example:** Student is paid a State Grant for 12 credits at the beginning of summer semester (6 credits per summer session). Student withdraws during first summer session and does not enroll for second summer session.
    - First *recalculate* Level 12 State Grant to Level 6 because student never attended classes in second summer session
    - Perform withdrawal refund calculation for Level 6 State Grant

# State Grant Refunds

- **For main State Grant activity, schools do not return individual student refunds to the OHE throughout school year**
  - Refunds deposited into the school's State Grant fund on campus
  - Excess funds returned to OHE in lump sum at end of year
- **For MN Dream Act State Grant recipients, schools perform award adjustments and/or refunds**
  - Individual student refund amounts returned with payment roster at end of term

# Reporting Requirements



# Reporting Requirements

- **Schools are required by law to report State Grant data to OHE on monthly basis throughout the school year**
- **The data record submitted for each student is described under the State Grant File Format**
  - Upload files to OHE using [Application Selection \(guarantorsolutions.com\)](http://guarantorsolutions.com)
  - Schools using an automated FTP process can continue to FTP files to OHE
- **OHE uses FAFSA Transaction Number reported by calculate awards**

# Reporting Requirements

## Schools should only report data for students who:

- have completed their financial aid applications,
- have a SAR/ISIR that is not rejected,
- plan to enroll at the school for the school year being processed,
- meet all of the State Grant Program eligibility requirements, and
- have been through the State Grant formula to determine whether they are a recipient or no-need applicant
- are not MN Dream Act recipients

# State Grant File

- **Beginning 2022-2023 year, schools report the FAFSA Transaction number that State Grant was paid on, instead of reporting ISIR data.**
  - **Title IV cost of attendance** (actual tuition and fees, books, equipment, room and board, transportation, miscellaneous personal expenses)
  - **Less than half-time Title IV cost of attendance**
    - Has effect on less than half-time Pell Grant award
    - Consists of full-time tuition & fees, books, equipment, and transportation (no room and board or misc expenses)

# State Grant File

- **Term Enrollment Status**

- Reported as full-time (15 credits) for terms of standard academic year (fall through spring terms) unless school knows otherwise
- Should be updated later if changes
- Should reflect the student's enrollment status **as of the date of disbursement**



# State Grant File

- **Term Tuition and Fee Maximums**
  - 2 = Student in 2-year or less degree program
  - 4 = Student in 4-year degree program
- **Term Award and Payment Fields**
  - If student is not enrolled (or not eligible) for term, term award and payment should be reported as zeroes
- **Term Disbursement Date Fields**
  - Used to determine if student was paid before or after being placed on hold

# Uploading SG File

The screenshot displays the user interface for uploading a State Grant file. On the left is a navigation menu with the following items: MN AID, State Grant (highlighted in teal), Award Rules, School Profile, Payment History, File Upload (highlighted in dark green), Funds Request, Funds Request Approval, Process Funds Manually, Fostering Independence Grant, System Administration, and Quick View. The main content area has a breadcrumb trail: Home > 013505-00, ACADEMY COLLEGE File Upload(State Grant) X. Below the breadcrumb is a header for "Upload State Grant File" with the school name "013505-00, ACADEMY COLLEGE" and the academic year "Academic Year: 2022 - 2023". A file upload section shows a "File" label, a "Choose File" button, and the text "No file chosen". A light blue informational box contains the text: "The State Grant file is used to electronically award students at your school (click here to view the file)" and "I certify that the students who are indicated as eligible for payment of a State Grant in the attached file, have completed including citizenship and academic progress, as specified in the program guideline". At the bottom right of the main area is a dark blue "UPLOAD" button.

# Reviewing Upload Files

**m** OFFICE OF HIGHER EDUCATION  
MINNESOTA AID

MN AID

Home Reports x File Requests x

### File Requests



Select Institution: 005535-00, PINE TECHNICAL AND COMMUNITY C

REFRESH

*It may take a few minutes for the file to be processed and ready for download*

SELECT A ROW TO VIEW FILE RESULTS AND ERRORS

Show Prior Academic Years Records

File Type	Request Date	Status	User Name	Aid Program	ACYear	Download
Upload State Grant File	01-01-2023	<a href="#">The File has completed successfully.</a>	CONV	State Grant	2022-2023	
Upload State Grant File	10-04-2022	<a href="#">The File has completed successfully.</a>		State Grant	2022-2023	
Upload State Grant File	08-25-2022	<a href="#">The File has completed successfully.</a>		State Grant	2022-2023	

# State Grant Output Reports



# State Grant Output Reports

- **The school should review the reports and correct any errors prior to submission of its next monthly batch**
- **Key Reports and Items to Review:**
  - State Grant Output Report
    - Roster of Rejected Awards/Payments
    - All Warnings and Errors
    - Roster of Accepted Payments
  - Reconciliation Report
    - Accounting totals for batch

# State Grant Output Report

- Output reports available after State Grant File Successfully Uploaded and are available (check for pop-up blocker)

The screenshot shows the MNAID Report Options page. The left sidebar contains navigation links: MN AID, Search, Reports, Update Student SSN, File Requests, Send Email, Student User Management, Help, State Grant, Fostering Independence Grant, System Administration, and Quick View. The main content area has tabs for Activity Reports, Management Reports, Exception Reports, and Rosters. A dropdown menu is open, listing various reports: Hold Report, Last State Grant File, NASSGAP Report, Payment Batch Details, School Balance Report, School Totals Report, School Users Report, State Grant File Output Report (highlighted), State Grant File Reconciliation Report, and Units Greater Than 72. The Academic Year is set to 2022-2023.

# State Grant Output File

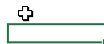
Date printed: 10/12/2022 10:54:23 AM

## Minnesota Office of Higher Education

State Grant File Output Report  
Academic Year: 2022-2023  
State Grant  
College

### Roster of Rejected Awards and Payments

SSN	Name	Date of Birth	Summer1 Credits	Summer1 Award	Summer1 Payment	Fall Credits	Fall Award	Fall Payment V
xxxxxxxx	Last name, First Name		00	\$0.00	\$0.00	17	\$1,266.00	\$1,266.00
xxxxxxxx	Last name, First Name		00	\$0.00	\$0.00	14	\$0.00	\$0.00



- Rejected Awards and Payments
- Warning Award and Payments
- Accepted Payments

# State Grant Output File

## Common Errors

- Date of Birth Invalid/Student DOB does not match MNAid DOB
  - If the DOB reported by the school matches the current year ISIR or the ISIR transaction the school is paying from, OHE will correct the DOB in MNAid and the reject will clear with the school's next file
  - If the DOB reported by the school does not match the current year ISIR DOB, the school must work with the student to determine correct DOB.

Quick View

SSN Quick View

SSN  GO

- Existing Grants/Scholarships

State Grant 2022 - 2023

Name

Address

City, State, Zip SLEEPY EYE, MN 56085

Home Phone Number

Cell Phone Number

Email Address

Date Of Birth 4/12/2003

Exception Date Of Birth 4/12/2004

Gender Male

MN AID ID



# State Grant Output File

## Common Errors (Continued)

- SSN Not Found
  - SSN was mistakenly used by another student, OHE will correct
  - Student is not in MNAid – School must review
- FAFSA/Transaction Not Found
  - Most often, the ISIR has not been loaded into MNAid yet.
- Federal Reject (followed by additional message)
  - ISIR is rejected
  - Occasionally, student information reported does not match MNAid

# State Grant Output File

## Common Errors (Continued)

- Award/Payment Too High
  - Review enrollment vs award/payment
  - Could be a timing issue
- SELF Default/Child Support Hold Before Fall Disbursement
  - Review student profile in MNAid/Hold report
- Multiple Payments > 15 Credits
  - Using Quick View, review student's current year Existing Grants

# State Grant Output File

When in doubt, reach out!

Please,  
help me!



# State Grant Reconciliation Report

The screenshot displays the Minnesota AID web application interface. At the top left is the logo for the Office of Higher Education, Minnesota AID. Below the logo is a navigation menu with items: MN AID, Search, Reports, Update Student SSN, File Requests, Send Email, Student User Management, Help, State Grant, Fostering Independence Grant, System Administration, and Quick View. The 'Reports' menu item is active, showing a sub-menu with 'Activity Reports', 'Management Reports', 'Exception Reports', and 'Rosters'. The 'Activity Reports' sub-menu is open, displaying a list of report options: FIG Student Data, Hold Report, Last State Grant File, NASSGAP Report, Payment Batch Details, School Balance Report, School Totals Report, School Users Report, State Grant File Output Report, and State Grant File Reconciliation Report. The 'State Grant File Reconciliation Report' option is highlighted. Below the report selection area, there are two input fields: 'Academic Year' with the value '2022-2023' and 'Program' with the value 'State Grant'.

**m** OFFICE OF HIGHER EDUCATION  
MINNESOTA AID

MN AID

Home Reports x

Search

Reports

Update Student SSN

File Requests

Send Email

Student User Management

Help

State Grant

Fostering Independence Grant

System Administration

Quick View

**MNAID Report Options**

Activity Reports Management Reports Exception Reports Rosters

FIG Student Data

Hold Report

Last State Grant File

NASSGAP Report

Payment Batch Details

School Balance Report

School Totals Report

School Users Report

State Grant File Output Report

State Grant File Reconciliation Report

Academic Year: 2022-2023

Program: State Grant

# State Grant Reconciliation Report

## Minnesota Office of Higher Education

### State Grant Payment File Reconciliation Report

Academic Year: 2022- 2023  
State Grant



#### Reconciliation Report

Cutoff Date	09/30/2022
Request Date	10/03/2022
Request Completed Date	10/03/2022

Trailer Reconciliation	OHE	School
Number of Records	1238	1239
Net Payment Amount	\$1,972,465.00	\$1,972,465.00

Outstanding Balance Summary	OHE	School
Total Advances	\$-1,525,000.00	
Total Payments Accepted	\$1,969,022.00	
Balance On Hand	\$444,022.00	\$-1,972,465.00
Total Rejected Payments		\$3,443.00
Unidentified School Difference		\$-3,443.00
Balance Payable to OHE		\$444,022.00

#### Advance Details

Trans Date	Term	Amount
8/24/2022	Fall	(\$1,525,000.00)
Totals		(\$1,525,000.00)

# End of Year Process



# End of Year Process

- Schools must close out State Grant by August 31<sup>st</sup> of each year, which means they've submitted an error free State Grant File and have returned any excess State Grant Funds to OHE.
- Communicate with OHE, - very busy time for schools, closing out one year and disbursing for another year, OHE is happy to help.
- Failure to meet close-out deadline will hold fund advances for the next aid year

# Post-Closure Refunds

- Return any post-closure refunds to OHE using Refund Return Form [RefundReturnForm.docx \(live.com\)](#)
- School does **NOT** need to re-open batch activity



# Refund Return Form

## MN Office of Higher Education Refund Return Form

For Returning End of Year Balances or Returning Individual Student Refunds

### Returning End of Year Balance or Interim Excess

(for use with ID Grant, Postsecondary Child Care Grant, State Grant, State Work Study)

Program Name	Aid Year	Amount of Refund
		\$
		\$
		\$
		\$
		\$

### Returning Individual Student Refund(s)\*

(for use with ID Grant, Indian Scholarship, MN Reconnect Scholarship, Postsecondary Child Care Grant, State Grant/Dream Act, State Work Study, Teacher Candidate Grant)

Student's Name	SSN	Program	Amount	Term	Aid Year	Reason Code	At Disbursement Enrollment Level	Current Enrollment Level
	XXX-XX-		\$					
	XXX-XX-		\$					
	XXX-XX-		\$					
	XXX-XX-		\$					
	XXX-XX-		\$					
	XXX-XX-		\$					
	XXX-XX-		\$					
	XXX-XX-		\$					
	XXX-XX-		\$					

Reason Codes:  
 NE = not enrolled for term/withdrawal before disbursement  
 VI = total withdrawal from school after disbursement  
 PW = withdrew from class but still enrolled  
 CH = changed enrollment level, refunding full difference in awards  
 OT = other (provide explanation above)

Return refund with form to:  
 Minnesota Office of Higher Education  
 Administrative Services Division  
 PO Box 64449  
 St. Paul, MN 55164-0449

Person Returning Funds:		Phone Number:
Name of College:	School Code:	Date Completed:

# Post-Closure Payments

- It may be possible for OHE to issue a manual payment to the school
  - Contact Grant Unit for assistance
- Once State Grant activity is closed out for aid year, school must keep all associated student records **for 3 years or until all audit findings for that school year are resolved**

# Thank you and Questions

- **Meghan Flores, State Financial Aid Manager:** Manages Team and Programs below [Meghan.flores@state.mn.us](mailto:Meghan.flores@state.mn.us) (651) 355-0610
- **Shannon Olson:** SG eligibility questions, SG batch processing, SG fund advances, SG online budget questionnaire [Shannon.l.olson@state.mn.us](mailto:Shannon.l.olson@state.mn.us) (651) 355-0611
- **Shawn Reynolds:** State Grant, MN Dream Act (general, processing and status of application), OHE FA Estimators [shawn.Reynolds@state.mn.us](mailto:shawn.Reynolds@state.mn.us) , 651.355.0615