

Office of Student Financial Assistance | July 11-12, 2023

STATE FINANCIAL AID PROGRAMS 2023-2024 TRAINING WORKSHOPS



MASSACHUSETTS
Department of
Higher Education

2023-2024

PRESENTERS

Clantha McCurdy
Senior Deputy Commissioner & Interim Chief Academic Officer

Stephannie Barboza
Senior Assistant Director

Robert Brun
Senior Associate Commissioner

Alison Connolly
Assistant Commissioner

Robert Dais
Director of GEAR UP

Stephanie Perez
Assistant Director of Teacher Scholarship Programs

Kathy Taylor
Director of Special Projects

2023-2024

Workshop Agenda

9:30-9:35	Welcome & Introductions
9:35-10:30	DHE Policies, New Initiatives & Legislative Update
10:30-10:45	High Demand Scholarship Updates
10:45-11:00	Foster Child Assistance
11:00 – 11:15	Teacher Education Programs
11:15-11:30	GEAR UP
11:30-11:45	GEAR UP Payment
12:00-1:00	Lunch
1:00-1:15	MassReconnect
1:15-2:15	MASSGrant/MASSGrant Plus Program Overview
2:15-2:45	No Interest Loan
2:45-3:00	Wrap-up Discussion/Closing

New Initiatives & Legislative Update

Massachusetts Department of Higher Education
Office of Student Financial Assistance



The Equity Agenda

Achieving Racial Justice in
Massachusetts Public Higher Education

MASSACHUSETTS
Department of
Higher Education

EQUITY AGENDA – Action Plan

Three major plans received by the Board of Higher Education will help the DHE achieve these goals:

- *Strategic Framework for Support Services for Student Success*
- *Strategic Plan for Racial Equity*
- *Framework for Strategic Public Higher Education Financing*

Department of Higher Education

Statewide Priority Objectives

*Our singular focus is on ensuring that the public higher education system continues its historic mission of serving as a catalyst for social mobility and as a bulwark against social and income inequality. Policy decisions are driven by the expectation that **students' academic progress is our prime consideration.***

To that end, Massachusetts must achieve these objectives:

1. **Make college more accessible and affordable** for all Massachusetts residents
2. **Close gaps** in student opportunity and achievement
3. **Improve** college completion rates

EQUITY AGENDA

Key Initiatives

- *Redesign of State Financial Aid*
 - make higher education more accessible for all students by increasing effectiveness and efficiency
 - Address the substantial unmet financial need facing many students and families
 - Consolidate programs with similar goals
 - Apply lessons learned and innovations from pilot programs to existing aid programs
 - Improve communications regarding state financial aid programs for clarity and increased awareness

- *Policy Audit*
 - Audit and assess all policies and initiatives
 - Identify and remove those that exacerbate racial inequity

Guiding Principles

- *State Financial Aid is purposed to promote access and affordability for Massachusetts resident students, particularly low-income, underrepresented and underserved Students of Color, as aligned with the DHE's priorities under the Strategic Plan for Racial Equity (Equity Agenda)*
- *Goal is to provide students with a more accessible and affordable quality higher education by **eliminating unmet need***
- *Increase in FY24 budget appropriation will be used to fulfill the goals and objectives of the MASSGrant Plus program, which began with community college students in FY19, and as of this year now includes Pell eligible students at all public colleges and universities*

Guiding Principles

- Broaden goal to also eliminate unmet need for basic needs – expanding the definition to include additional costs that also serve as barriers for access, completion, and success for students, such as food, housing, basic health, transportation, etc.
- Increase in appropriation in the FY24 budget will be directed to fulfill the promise of the MASSGrant Plus program, which began with community college students in FY19, and as of this year, now includes Pell eligible students at all public colleges and universities

Legislative Update – FY24 Budget

- **An historic investment in State Financial Aid**
- State Financial Aid is funded under four main line accounts – FY23 budget:
 - 7070-0065 \$175m General Scholarship
 - 7066-0021 \$7.2m Adopted and Foster Fee Assistance
 - 7066-0016 \$1.4m Foster Child Grant
 - 7070-0066 \$2.0m Mass High Demand Scholarship
 - \$50million appropriation to expand High Demand Scholarships to public and **private** college students
- Expansion of State Financial Aid, projected at a minimum of \$84million to -\$100million, depending on Conference budget

Legislative Update – FY 2024 Budget

- **7070-0065 General Scholarship Account**
 - **MASSGrant**
 - **MASSGrant Plus**
 - **Early Childhood Educators Scholarship**
 - **Paraprofessional Teacher Preparation Grant**
 - **Gilbert Matching Grant**
 - **Cash Grant**
 - **Part-Time Grant**
 - **Christian Herter Scholarship**
 - **Washington Center Internship**
 - **One Family, Inc. Scholars Program**

Financial Aid Programs Highlights

2023-2024

Cash Grant Program

- **Need-based grant awarded to full or part-time students**
- **30,000+ students are assisted through this program annually**
- **\$26 million allocated in FY 2023 – project same for FY24**
- **Allocations are formula-driven, based on a BHE approved policy, first implemented in FY2012**
- **Formula considers three-year average of key factors:**
 - **Institutional enrollment**
 - **EFC = O – Pell EFC – (revised annually, as required)**
 - **EFC = Pell to 10,000 (equivalent to median income)**

Cash Grant Program

- **Notification of FY 2024 allocations sent via mail – no change anticipated - based on Governor’s approval of final budget**
- **Funds scheduled for two equal disbursements, fall and spring (anticipated for mid-September and early January)**
- **Funds may be awarded to full and part-time students**
- **Grants may be awarded up to the cost of tuition/fees (student) as determined by the campus (guidelines)**
- **Institutions are required to reconcile and submit an aggregate report to OSFA at close of each fiscal year**
- **Institutions must reconcile by August 31st each year – which must be submitted to receive an allocation for 2023-24**

Commonwealth Commitment

- **Partnership** between 2-year and 4-year public institutions
 - First cohort of participating students – 2016-17
 - Opportunity to complete bachelor's degree at a cost savings that averages \$5,090 over four years:
 - Provides 10% tuition & fee rebate every semester to participants
 - An additional MassTransfer tuition credit – bachelor's program
- Student must complete a minimum of 15 credits and **earn a minimum 3.0GPA to receive the 10% rebate**
- Tuition freeze at two and four-year colleges for participants who complete the associates, transfers and earns the bachelor's within two years
- Commitment currently offers transfer pathways in twenty-four degrees programs
- **Rebates funded by DHE through financial aid appropriation and awarded to student at the end of term**

Tuition Waivers

- Over 26 various financial aid related waivers offered annually
- Annual cost to the Commonwealth generally exceeds \$60 million
- Popular waivers include the following:
 - John & Abigail Adams Scholarship
 - Need-Based Tuition Waiver
 - Categorical Waivers
 - Applies to Veterans, Senior Citizens and Native Americans
 - Recipient may possess a prior bachelor's degree – Senior Citizens Waiver
 - Institution must waive state-supported courses
 - Encouraged to waive non-state supported costs
 - Courses must be applied to an eligible certificate or degree program
 - Requires recipient to be matriculated
 - Foster Child Tuition Waiver
 - Adopted Child Tuition Waiver
 - National Guard Waiver
 - Paul Tsongas Tuition Scholarship Waiver
 - Mass Transfer Tuition Waiver

Tuition Waivers

- **Need-Based Waiver is the largest of all waiver programs, averaging \$17 million annually**
- **FY 2024 allocation for the Need-Based Waiver is based on funding model identical to formula used for the Cash Grant)**
- **Expenditure level periodically increased to reflect changes in enrollment and eligibility demands**
- **Clarification of FAFSA requirement for certain waivers issued in the Dear Colleague letter series; guidelines updated to reflect changes**
- **Institutions are required to reconcile and report all awarded waivers as part of the annual year-end data submission**
- **Year-End Financial Aid Data File includes identifier for a larger number of waivers**

John & Abigail Adams Scholarship

- Implemented in 2004 - with an initial cohort of 13,000 students designated to receive scholarship in first year of college, starting fall 2005
- An average of 18,000 students designated annually - roughly 30% of each new class take advantage of the scholarship
- Award equals value of tuition only – ranging up to \$1,742
- Duplicate Adams Scholarship letters may be obtained directly from OSFA
- **Appeals granted only under rare or extenuating circumstances:**
 - **Adams Scholarship Committee**
Massachusetts Department of Higher Education
75 Pleasant Street, 3rd Floor - Malden, MA 02148
 - Must include appeal, copy of transcript and documentation to support extenuating circumstance

John & Abigail Adams Scholarship

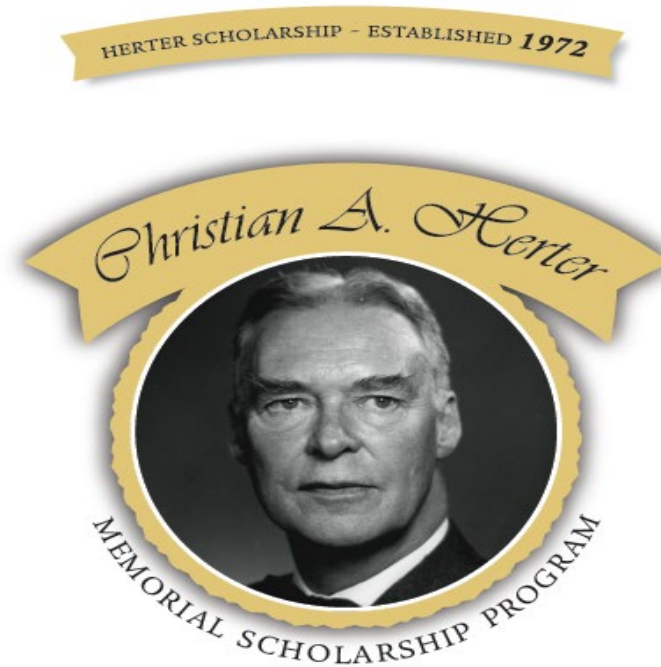
- **BHE approved guidelines, as amended:**
 - Provides up to six years for designated students to receive the eight semesters of tuition scholarship waiver:
 - Allows greater flexibility to the student
 - Eliminates “consecutive” semester enrollment requirement
 - Student retains eligibility after gap year or less than full-time status
 - In all circumstances, student must maintain a cumulative 3.0 GPA
 - Transfer students must also have earned the 3.0 GPA for eligibility
 - Recipients are required to complete the FAFSA annually and enroll full-time
 - *Extends eligibility to students who are high school graduates and a United States Citizen or a non-citizen authorized by the federal government to live and work in the United States on a temporary or permanent basis*

Gilbert Grant

- Institutional allocation – formula-driven and based on a three-year average of institutional expenditure for need-based aid
- 2023-2024 Institution Applications currently available – **Deadline was July 31, 2023**
- Recipients must meet all eligibility criteria, including full-time enrollment
- \$200 - \$2500 annual maximum award
- Recipient must demonstrate a \$500 minimum need to be eligible
- Year-End data required and matched

Financial Aid Programs

Christian A. Herter Memorial Scholarship



Christian A. Herter Memorial Scholarship Ceremony

*Thursday, May 30, 2013
Massachusetts State House*

Christian A. Herter Memorial Scholarship

- **Competitive scholarship awarded to students who have encountered unusual hardships or extenuating circumstances**
- **Twenty-five high school (sophomore or junior) students are selected to receive scholarships upon earning a high school diploma annually**
- **Scholarship is portable to colleges throughout the U.S.**
- **About one-third of the recipients are enrolled in colleges outside Massachusetts each year**
- **Massachusetts awards an average of \$1.2 million in scholarships to students annually**

Christian A. Herter Memorial Scholarship

Certification of eligibility and reporting of other recipient information integrated into MASSAid system

- **Institutions must provide Cost of Attendance and financial aid information to facilitate determination of scholarship eligibility**
- MASSAid process for Herter is aligned with other programs (Foster Grant, GEAR UP Scholarship)
- Scholarship award is determined upon submission of student level data
- Disbursements are paid via EFT

Christian A. Herter Memorial Scholarship

- **Herter Scholarship seeks to address unmet need – and reduce loan debt, where appropriate**
- **Anticipated Certification:**
 - August 1 – Fall 2023 (currently available)
 - January 1 – Spring 2024
- **Funds are disbursed via EFT, beginning August/September for fall; late January for spring – upon completion of certification**
- **Institutions are required to reconcile awards each semester, and at the conclusion of the academic year**

Financial Aid Programs

Christian A. Herter Memorial Scholarship



High Demand Scholarship

2023-2024

High Demand Scholarship Program

Purpose: to encourage degree completion in high demand disciplines to address workforce needs in the Commonwealth

- **Program initially funded and implemented in FY2013**
- **Scholarship supports training and degree completion in disciplines that are deemed to be critical shortage areas (ex. STEM fields, health professions)**
- **Recipients must be enrolled in a high demand degree or certificate program**
- **Must demonstrate a commitment to the discipline**

MHDS Program

- **High Demand is its own budget line item, not in the general scholarship account**
 - 7070-0066
- **In addition to being enrolled in a high demand discipline, students must show a minimum 3.0 GPA on college-level coursework**
- **Students submit application form and upload unofficial transcript in MASSAid**
- **Funding in 7070-0066 is directed to students at public institutions**
 - Final FY24 budget is not yet signed, unsure if this line item will be funded

MHDS 2023-2024 New Funding

- **In 2022, the Legislature appropriated \$50 million of federal ARPA funding to a reserve for high demand scholarships**
 - To be expended by FY2027
- **Funding is for students in degree or certificate programs in high demand disciplines, as before**
- **Reserve funding is also open to students attending independent institutions**
- **Per appropriation language:**
 - the department shall prioritize the distribution of scholarship awards to students enrolled in a course of study or training program [...] in high-demand fields including, but not limited to, students enrolled in healthcare, including nursing, education, including early education and special education, manufacturing and cybersecurity programs
 - preference in awarding scholarship awards shall be given to first generation students and traditionally underserved student populations
 - preference shall be given to students attending public institutions of higher education

MHDS 2023-2024

- **Scholarships may be awarded based on merit, and/or to meet financial need**
- **Factors considered:**
 - **Commitment to the declared major, as seen through completed coursework**
 - **Potential for excellence in the declared discipline, as seen through academic achievement in major courses**
 - **Financial need**
 - **Award a diversity of grade levels and majors/disciplines**
- **Program guidelines and max award values on OSFA website (23-24 award values TBD)**
- **Hope is that application will open this month**

Programs for Adopted and Foster Children

2023-2024

Adopted and Foster Child Fee Assistance Program

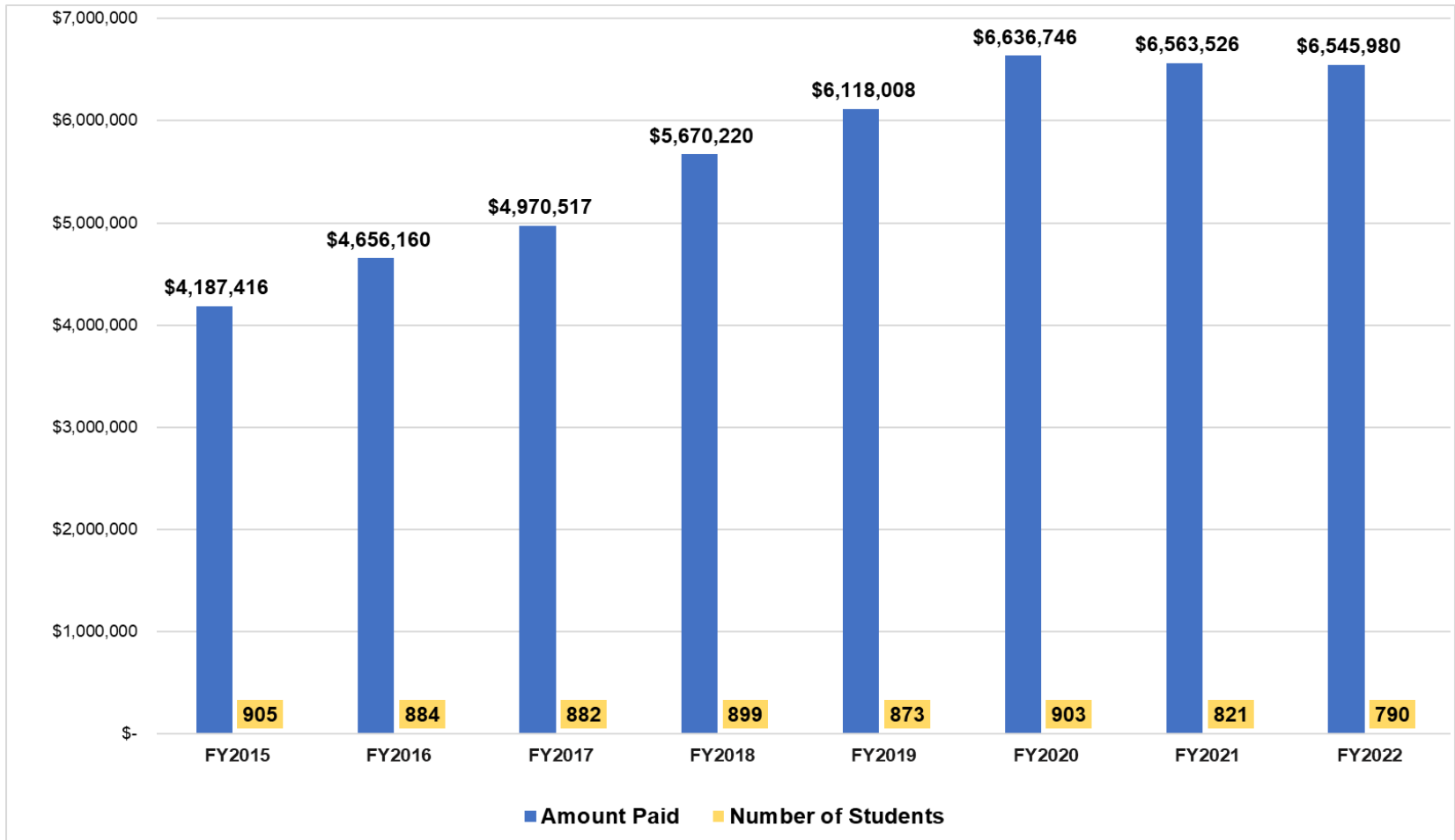
Provides for full tuition and fee waivers, based upon legislative appropriation, for foster children in the custody of the Department of Children and Families (DCF) and children adopted through this agency that choose to attend a Massachusetts public institution of higher education.

- Fee waiver awards are generally paid out as reimbursements for eligible billed fees.
 - Schools can only request reimbursement for state-support supported credits (fees)
 - **UMASS CAMPUSES ONLY:** due to tuition retention, schools can now request tuition and fees from OSFA
- FY2014 was the first year where 100% of all eligible fees were reimbursed
- The number of students assisted each year has shown a steady increase, growing from **550 in FY 2010** to **790 students in FY 2022**

Financial Aid Programs

Adopted and Foster Child Fee Assistance Program

DCF FEE ASSISTANCE TOTALS



Adopted and Foster Child Fee Assistance Program

- **Fall processing will begin on September 1, 2023 and extend until November 10, 2023.**
 - Reminder email will be generated early September
- **Spring processing will open on January 10, 2024 and extend until March 22, 2024.**
- Due to limited appropriation, OSFA will review any students submitted after the MASSAid deadline on a funds available basis with no guarantee of fee assistance awards

Financial Aid Programs

Adopted and Foster Child Fee Assistance Program



Click to exit MASSAid

MASSAid

MASSGrant

MASSGrant PLUS

Early Childhood Educators

Scholarship

Paraprofessional Teacher

Preparation Grant

GEAR UP Scholarship

Foster Child Grant

DCF Adopted and Foster Child Fee Assistance

Award Rules

School Profile

Payment History

Home | Award Rules(DCF Fee Assistance) X

Award Rules DCF Adopted and Foster Child Fee Assistance Academic Year 2023 - 2024

Change Academic Year: Year 2023 To 2024 ▼

Total Funds Awarded 0

Total Funds Paid 0

Total Funds Refunded 0

Age Cutoff 24

Age As Of Date 09/01/2023

EFC Cutoff 1,000,000

Days to Send 2nd Ineligible Email 14

Program Email Address sbarboza@dhe.mass.edu

Fall Create Records Available Date 09/01/2023

Fall Application Cutoff Date 11/10/2023

Fall Awarding Percent 100

Spring Create Records Available Date 01/10/2024

Spring Application Cutoff Date 03/22/2024

Spring Awarding Percent 100

Activity Code FAFW

Encumbrance Code RR130023241AUGU1FAFW

Days Buffer for MMARS 5

Payment File Create End Date 07/15/2024

UPDATE AWARD RULES

VIEW TRANSACTION HISTORY

Adopted and Foster Child Fee Waiver Program

Adopted and Foster Child Fee Assistance Program FAQ's

- Students must be 24 or under as of September 1, 2023, to receive funding during 2023-2024
 - If the student turns 25 during the academic year, they may be awarded for **both** fall and spring semesters
- Out-of-state students who were adopted through the MA DCF by an eligible MA resident or eligible MA state employee may participate in the fee assistance program
 - Out-of-state students must have a current FAFSA on file and have submitted DCF eligibility documentation to their campus
 - Out of state students are only eligible for fee assistance equivalent to the **in-state resident rate** and are responsible for any billed fees above that amount
 - Campus must submit a hard copy of the students FAFSA to OSFA to complete eligibility review

Financial Aid Programs

Adopted and Foster Child Fee Assistance Program

Application Information			
Current Institution	002221-00, UNIVERSITY OF MASSACHUSETTS-AMHERST		
Fall Institution	009936-00, MIDDLESEX COMMUNITY- BEDFORD, MASS.	Spring Institution	002221-00, UNIVERSITY OF MASSACHUSETTS-AMHERST
Title IV Eligible		Application Date	11/08/2022
Dependency Status	Dependent	Application Date Override	
SSN Match	SSN, Name, and DOB match	1st BA Override	
SAR C Flag	No Flag Set	Grade Level	3rd Year/Junior
NSLDS Override		Bachelors Degree	No
NSLDS Match	Student Not in Default or Overpayment	Degree/Certificate	Associates Degree - General Ed/Transfer
Drug Override		Master/Doctorate	No
Drug Conviction	No		
Citizenship Override			
SSA Citizenship	US Citizen		
Eligibility Documentation on File	Yes		
			FAFSA on File (non-MA residents)

[UPDATE APPLICATION INFORMATION](#) [TRANSFER STUDENT](#)

- **DCF Eligibility documentation is tracked by MASSAid**
 - A student that has had eligibility documentation submitted by another institution and transfers does not need their paperwork re-submitted

Financial Aid Programs

Adopted and Foster Child Fee Assistance Program

Creating DCF Fee Assistance Records



Click to exit MASSAid

MASSAid

MASSGrant

MASSGrant PLUS

Early Childhood Educators Scholarship

Paraprofessional Teacher Preparation Grant

GEAR UP Scholarship

Foster Child Grant

DCF Adopted and Foster Child Fee Assistance

Award Rules

School Profile

Payment History

Create DCF Fee Assistance Records

Home

Award Rules(DCF Fee Assistance) x

002181-00, MASSACHUSETTS MARITIME ACADEMY Create DCF Fee Assistance Records(DCF Fee Assistance) x

Create DCF Adopted and Foster Child Fee Assistance Records

002181-00, MASSACHUSETTS MARITIME ACADEMY

Search Students Fall 2022-2023

Last Name

First Name

SSN

SEARCH

ADD NON-RESIDENT

ADD RENEWAL NON-RESIDENT

UPLOAD FILE

RESET

⚠ Enter as much information as possible for faster response time.

Search Results

No matches found.

Results shown below represent DCF Fee Assistance students with no financial data for the term selected.

Financial Aid Programs

Adopted and Foster Child Fee Assistance Program



Click to exit MASSAid

MASSAid

MASSGrant

MASSGrant PLUS

Early Childhood Educators Scholarship

Paraprofessional Teacher Preparation Grant

GEAR UP Scholarship

Foster Child Grant

DCF Adopted and Foster Child Fee Assistance

Award Rules

School Profile

Payment History

Create DCF Fee Assistance Records

Approve Additional Disbursements

Home

011210-00, BUNKER HILL COMMUNITY COLLEGE Create DCF Fee Assistance Records(DCF Fee Assistance) x

DCF Adopted and Foster Child Fee Assistance

Fall 2022-2023

Submit Financial Information
MONICA S THYME, XXX-XX-4150

Fee Assistance Type *(required)* Adopted

Estimated Family Contribution (EFC) 0

Family Size 1

Parent Adjusted Gross Income

Fall Enrollment FullTime

Number of State Supported Fall Credits *(required)*

Number of Non-State Supported Fall Credits *(required)*

Total Fall Fees Waived (State Supported Only) *(required)*

SAVE

CANCEL

Adopted and Foster Child Fee Assistance Program

- School users can only create Fee Assistance records for students that have their institution listed on their MASSAid account
- Fee Assistance records should **not** be created for students that do not have any eligible fees that can be requested for reimbursement
- Records need to be created for both fall and spring semesters
 - Students that have a fall record will automatically appear on your list when you go to create spring records
- Please run 'Eligible Students' and 'Ineligible Students Report' when you are done creating records

Financial Aid Programs

Adopted and Foster Child Fee Assistance Program



Click to exit MASSAid

MASSAid

Reports

Search

File Requests

Send Email

Help

MASSGrant

MASSGrant PLUS

Early Childhood Educators Scholarship

Paraprofessional Teacher Preparation Grant

GEAR UP Scholarship

Foster Child Grant

DCF Adopted and Foster Child Fee Assistance

Herter Scholarship

Commonwealth Commitment

Herter Applicant Selection

High Demand Scholarship

Home

Reports x

MASSAid Report Options

Activity Reports

DEEC Reports

Management Reports

Exception Reports

Rosters

Labels

Eligible Students Report

Herter Nominees To Date Report

High Demand Max Semesters Override

Ineligible Reasons Report

Ineligible Students Report

MASSGrant Plus Enrollment Mismatch Report

NASSGAP Report

NIL Default Students Report

Other Majors Report

Payment Summary Report

Academic Year: 2023-2024

Aid Program: DCF Adopted and Foster Child Fee Assistance

*** All Schools ***

001542-00 AGNES SCOTT COLLEGE

030667-00 AILANO SCHOOL OF COSMETOLOGY

001002-00 ALABAMA A&M UNIVERSITY

001374-00 ALBERTUS MAGNUS COLLEGE

School: 003229-00 ALBRIGHT COLLEGE

Display:

Alphabetical By Last Name

Numerical By SSN

Generate Report

Financial Aid Programs


Adopted and Foster Child Fee Assistance Program

Requests for Additional Disbursements

**DCF Adopted and Foster Child Fee Assistance
Academic Year 2015 - 2016**

**Update Financial Information
PROVOST, MEGHAN A, XXX-XX-3874**

Fee Assistance Type	Foster Child <input type="button" value="v"/>
Estimated Family Contribution(EFC)	0
Family Size	1
Parent Adjust Gross Income	
FALL DATA:	
Fall Enrollment	Full-time
Number of State Supported Fall Credits	<input type="text" value="6"/>
Number of Non-State Supported Fall Credits	<input type="text" value="7"/>
Total Fall Fees Waived(State Supported Only)	<input type="text" value="955"/>
SPRING DATA:	
Spring Enrollment	Full-time
Number of State Supported Spring Credits	<input type="text" value="12"/>
Number of Non-State Supported Spring Credits	<input type="text" value="0"/>
Total Spring Fees Waived(State Supported Only)	<input type="text" value="3923"/>

 **REQUEST ADDITIONAL DISBURSEMENT**

REQUEST ADDITIONAL DISBURSEMENT

SAVE **CANCEL**

Financial Aid Programs

Adopted and Foster Child Fee Assistance Program

Requests for additional disbursements are approved based on the availability of funds.

- Click to exit MASSAid
- MASSAid
- MASSGrant
- MASSGrant PLUS
- Early Childhood Educators Scholarship
- Paraprofessional Teacher Preparation Grant
- GEAR UP Scholarship
- Foster Child Grant
- DCF Adopted and Foster Child Fee Assistance
- Award Rules
- School Profile
- Payment History
- Create DCF Fee Assistance Records
- Approve Additional Disbursements
- Create Payments
- Process Pre-Payment/Returned Funds
- Reconcile Payments
- Update Letter Text
- Generate Letters

Home | Reports x | Fall Approve Additional Disbursements(DCF Fee Assistance) x

Approve Additional Disbursements
DCF Adopted and Foster Child Fee Assistance
Fall 2022-2023

SALEM STATE UNIVERSITY
Total Requested Students: 2
Total Requested Award Amount:\$312.00

Select All

Select All in Date Range to

School:

Name	SSN	Institution	Award Amount	Date Requested	Approve
[REDACTED]	[REDACTED]	SALEM STATE UNIVERSITY	262	03/15/2023	<input type="checkbox"/>
[REDACTED]	[REDACTED]	SALEM STATE UNIVERSITY	50	05/02/2023	<input type="checkbox"/>

<< Page 1 of 1 >>

Total Amount Selected: \$0.00
Total # of Students Selected:0

Financial Aid Programs

Adopted and Foster Child Fee Assistance Program

Schools have 30 days to reconcile payments



Click to exit MASSAid

MASSAid

MASSGrant

Early Childhood Educators Scholarship

Paraprofessional Teacher Preparation Grant

DCF Adopted and Foster Child Fee Assistance

Award Rules

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Payment History

Create DCF Fee Assistance Records

Approve Additional Disbursements

Create Payments

Process Pre-Payment/Returned Funds

Reconcile Payments



Home

011210-00, BUNKER HILL COMMUNITY COLLEGE Create DCF Fee Assistance Records(DCF Fee Assistance) X

UNIVERSITY OF MASSACHU

Create Payments(DCF Fee Assistance) X

Select Payment Batch to Reconcile
UNIVERSITY OF MASSACHUSETTS-BOSTON
DCF Adopted and Foster Child Fee Assistance 2018-2019

<<

Page

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Batch Number	Batch Date	Term	Batch Total	Batch Count	
B0137572	06-18-2019	Spring	\$218,924.00	33	Reconcile

Schools must also complete year-end reconciliation

Adopted and Foster Child Fee Waiver Program

- **DCF eligibility documentation must originate from the Department of Children and Families.**
 - OSFA has no ability to provide this documentation to students
 - Students should contact DCF to obtain their certificate of eligibility
- Students **cannot** receive fee assistance for summer credits
- Students can use fee assistance funds for **study abroad**, but only if the **credits are considered state supported**
 - Campus must be collecting tuition and fees on behalf of the Commonwealth and not the international institution
- **Students that are selected for verification must complete this process for continued eligibility under the DCF Fee Assistance Program**

Teacher Scholarship Programs

2023-2024

Early Childhood Educators Scholarship

- Funded as a pilot initiative in FY2005 by the Legislature
 - Purpose: Increase the quality and availability of teachers and care providers to work with young children and youth in inclusive settings including infant/toddler, preschool and school age programs.
 - Initial appropriation: \$1 million
 - Current appropriation: \$5 million
- Student Eligibility
 - Employed for at least six months & 20 hours per week, as an educator or provider in an early education and care program or out of school time program
 - Enroll in a certificate, associate, bachelor's, or master's degree program in an eligible early childhood education program

Early Childhood Educators Scholarship

Institution Type	Maximum award amounts
University of Massachusetts	\$500 per credit, maximum of \$4,500 per semester
Private College/University	\$500 per credit, maximum of \$4,500 per semester
State University	\$400 per credit, maximum of \$3,600 per semester
Community College	\$250 per credit, maximum of \$2,250 per semester

Early Childhood Educators Scholarship

- Applicants may receive scholarships to assist with the cost of no more than three courses (11 credits per semester)
- **Certification opens:**
 - **August 28, 2023 – Fall**
 - **January 8, 2024 - Spring**
- Institutions must complete certification within 60 days via MASSAid
- Payment batch reconciliation must be completed within 30 days

2023-2024 ECE Application Deadline: **August 1, 2023**

Paraprofessional Teacher Preparation Grant

- Provides financial assistance to Massachusetts residents who are currently employed as paraprofessionals in Massachusetts public schools and wish to become certified as full-time teachers.
- **Student Eligibility:**
 - Employed as a paraprofessional for at least two-years in a Massachusetts public K-12 school
 - Work at least 20 hours per week
 - Grants may be awarded to paraprofessionals with less than two years of employment if enrolled in a high-need discipline (Mathematics, Science, Foreign Languages, Bilingual Education)

Paraprofessional Teachers Preparation Grant

- **Enroll in an undergraduate degree program (full-time or part-time) that offers a DESE approved teacher preparation program leading to licensure**
- **Service Obligation**
 - **Secure employment as a full-time teacher in a Massachusetts public school (K- 12)**
 - **Ranges from a minimum of two and a maximum of four years**

Financial Aid Programs

Paraprofessional Teachers Preparation Grant

Institution Type	Maximum Award Amounts
University of Massachusetts	\$625 per credit, maximum of \$7,500 per academic year
Private College/University	\$625 per credit, maximum of \$7,500 per academic year
State University	\$450 per credit, maximum of \$6,000 per academic year
Community College	\$250 per credit, maximum of \$4,000 per academic year

Paraprofessional Teacher Preparation Grant

- Scholarships are based on a per credit rate, depending on the type of institution (2-year or 4-year) - max credits to be set by OSFA
- **Certification opens**
 - **August 28, 2023 - Fall**
 - **January 8, 2024 - Spring**
- Institutions must complete certification within 60 days via MASSAid
- Payment batch reconciliation must be completed within 30 days
- 2023-2024 PTPG Application Deadline: **August 1, 2023**

Tomorrow's Teacher Scholarship Program

- Purposed to help diversify the teaching profession by attracting and encouraging underrepresented students (high school and college) to become licensed to teach in the Massachusetts k-12 public school system
 - First scholarships will be awarded for the 2023-24 academic year with an appropriation of \$7.5 million
 - Application available: **June 28, 2023**
 - Application deadline: **October 1, 2023**
 - TTSP applications are completed via the MASSAid student portal

Eligibility Criteria:

- Students must meet all other state financial aid eligibility criteria
 - MA resident 1 year, meet SAP, not be in default of any state and/or federal loans, citizenship, and completed FAFSA
- Students must be attending a Massachusetts 4-year public institution

Tomorrow's Teacher Scholarship Program

- Has not earned prior baccalaureate degree, or the equivalent, **except for those pursuing or intending to pursue post-baccalaureate course work** in an approved educator preparation program
- Enroll, as a matriculated student, in an **undergraduate or post baccalaureate degree program**, full-time (minimum of 12 credits or the equivalent), in an approved course of study that meets the licensure requirements for employment at a Massachusetts public elementary or secondary school
 - Post-baccalaureate students **do not** need to be enrolled full-time

Scholarship Conditions & Recipient Responsibilities

- *Acknowledge that this scholarship is considered repayment through service and in absence of fulfilling that commitment, the scholarship reverts to a loan that must be repaid by the scholarship recipient, per the terms of the Scholarship Promissory Note. ***

Tomorrow's Teacher Scholarship Program

- Acknowledge the set forth repayment through service schedule, that one year of teaching will forgive one year of scholarship.
- Complete the scholarship application (via MASSAid) and sign a promissory note, annually, for continuation of scholarship funds.
 - Promissory note will be electronic via Adobe sign
- Provide an official transcript to confirm eligibility requirements for program of study and progress towards degree completion
 - Incoming first-year students are required to submit a declaration of their major from the institution's registrar's office.
 - Students will need to upload documentation via the MASSAid Student Portal
- Sign a scholarship agreement to "obtain the appropriate certification in accordance with section 38G of chapter 71" and "commit to teaching for 4 years in a school district, as defined in section 2 of chapter 70, in the commonwealth." Failure to complete the required 4-year teaching service will result in a repayment of funds as defined in the agreement.

Tomorrow's Teacher Scholarship Program

- Become employed as a teacher of record, within 12 months of degree completion or the completion of post-baccalaureate course work in an approved educator preparation program.
- Annually provide proof of employment to document fulfillment of the service obligation.

Scholarship Award Value:

- Scholarships of up to **\$25,000 per academic year** will be awarded per student, subject to the availability of funds which may influence the amount awarded. The scholarships may be used to cover educational expenses that make up the Cost of Attendance (COA) including but not limited to **tuition, fees, room and board, books and supplies, transportation, childcare, and personal expenses.**
- Undergraduate students may receive scholarship funds for up to a maximum of 4 years or 8 semesters. Students pursuing post-baccalaureate coursework may receive scholarship funds for up to a maximum of 3 semesters.

**Payment table will be generated by OSFA at a later date and set award amounts will be based on institution type (UMASS vs. State) and undergraduate vs. Post-baccalaureate*

Tomorrow's Teacher Scholarship Program

School User Award Process:

- Students determined to be eligible by OSFA and have submitted a fully completed and signed promissory note will populate on the school's certification roster (fall & spring)
 - Certification will include entering the COA data, as well as confirming student meets all other federal, state and TTSP eligibility criteria
 - Certification period: **60 days**
- Payment batches will be generated similar to all other programs
 - Payment batch reconciliation: **30 days**
- Information such as certification dates, application deadline, payment table will be available under 'Award Rules' in MASSAid

GEAR UP Massachusetts



What is GEAR UP?

- Gaining **Early Awareness** and **Readiness** for **Undergraduate Programs**
- **Federally funded**, \$29.79M seven year (2018-2025), grant program, with matching funds from the Commonwealth
- Designed to increase the number of **low-income students** who are prepared to enter and succeed in postsecondary education



Who does GEAR UP serve?

- **Nationally**, GEAR UP serves over **560,000** students, representing **45** states
- **In Massachusetts**, GEAR UP serves approximately **6,300** students, representing **8** middle schools and **8** high schools
- Students in grades **7** through **1st year** of higher education who qualify for **free** or reduced lunch and attend partner schools



Who does GEAR UP serve?

In Massachusetts:

- **56%** of GEAR UP participants are **female**
- **60%** of GEAR UP students are **Latinx**
- **15%** of GEAR UP students are **Black/A.A.**



Communities Served by GEAR UP

■ School Districts

- Lawrence
- Lowell
- Boston
- Worcester
- New Bedford
- Springfield
- Holyoke

■ Community Partners

- Middlesex Community College (MCC)
- American Student Assistance (ASA)
- Massachusetts Education and Career Opportunities, Inc. (MassEdCo)



GEAR UP Program Objectives

- Prepare underrepresented youth to **succeed** in HS, **graduate** HS & successfully **transition** to postsecondary education
- Increase student/parent **knowledge** about college requirements and **financial aid**
- Increase **success** rates in **pre-Algebra** and **Algebra I**
- Increase **academic** and **career planning**
- Increase student success in rigorous courses, **Early College, Innovation Pathways, AP, Dual Enrollment** and on-time promotion
- Increase **FAFSA** completion/**SAT** test-taking
- Increase college enrollment and **reduce** the need for **remediation**



GEAR UP Program Initiatives: *Massachusetts College Application Celebration (MCAC)*

- Too often, **HS seniors begin the college application process & get stuck** or simply procrastinate on completing the requirements, resulting in the application never being completed or submitted.
- The goal of **MCAC** is to give every graduating senior the opportunity to complete **at least one college application** by the conclusion of the week-long event.
- MCAC is designed to provide the **guidance and support needed by students** in addition to harnessing the **positive peer pressure** of a week of events culminating in the submission of a completed college application.



GEAR UP Program Initiatives: 2022 Massachusetts College Application Celebration (MCAC) Results

- 30 high schools
- 2,054 students
- 5,506 college applications
- 1,741 On-the-Spot acceptances
- \$14,605,419 in scholarship \$ offered



THANK YOU!

"I want to say thank you for all the times you helped me with my college applications...I know that God sent you here (North High) for a reason. You are fulfilling that reason by helping us when we need it and influencing good things for our future. Thank you for being a big part of my life, I will always remember you as the



GEAR UP Scholarship

Scholarship Processing

GearUp Scholarship

- GEAR UP scholarships are portable to eligible schools in Massachusetts or states (VT, PA, District of Columbia) that have existing reciprocity agreements with MA
- Each year, the GEAR UP program submits a list of the graduating high school seniors who are eligible to receive a scholarship from the program
- GEAR UP students are eligible to receive a maximum lifetime of 2 semesters awards under the program
- Eligible students are tracked in OSFA's database and matched to a FAFSA record each year
- The GEAR UP program does not have an EFC requirement

GearUp Scholarship

- A current student must file a current year FAFSA to be considered for a GEAR UP scholarship
- Students should go to college financial aid to inform them of their GEAR UP scholarship (As told by their GEAR UP advisors)
- Financial Aid Directors should log into MASSAid(on left hand side of MASSAID - GEAR UP is listed From menu, school should select MASSAid/GEAR UP/Submit Financial Aid Data
- If they do not have access to MASSAid they should contact Robert Brun rbrun@dhe.mass.edu to enter their name to obtain a MASSAid user account or have the GEAR UP program added to an existing MASSAid profile
- At the point that financial aid data are entered, MASSAid will automatically package a GEAR UP scholarship amount

GearUp Scholarship

- Financial Aid Directors must enter financial aid data of that GEAR-UP student
- Financial Aid Directors certify that that student is there
- Once certified OSFA will send payment
- Please reconcile within 30 days

Lunch Break!



MassReconnect

Focus on Students 25+ Years of Age

MassReconnect

■ FY24 House Budget Language

1596-2418 For MassReconnect, a scholarship program to provide financial assistance to students from the commonwealth who: (i) are enrolled in and pursuing either (A) a program of higher education at a public community college; or (B) an associate degree or certificate program at a municipal college; (ii) are age 25 or older as of the first day of classes; (iii) have not previously earned a college degree; and (iv) are enrolled in at least 6 credits; provided, that the funds shall be used to cover any remaining tuition and fees, costs of books and supplies for any eligible student after all other sources of federal and state grant aid have been exhausted; provided further, that funds from this item may be expended on student support services, administration and the marketing of said scholarship program; provided further, that funds may be expended for programs or activities during the summer months; and provided further, that the commissioner of higher education, in consultation with the executive office of education and the Massachusetts association for community colleges and in coordination with the Massachusetts state scholarship office, shall adopt guidelines governing the eligibility for and the awarding of financial assistance\$20,000,000

■ FY24 Senate Budget Language

1596-2418 For the MassReconnect scholarship program to provide financial assistance to Massachusetts students who: (i) are enrolled in and pursuing a program of higher education at a public community college in the commonwealth; (ii) are not less than 25 years of age as of the first day of classes; (iii) have not previously earned a college degree; and (iv) are enrolled in not less than 6 credits; provided, that the funds shall be used to cover any remaining tuition and fees due and the cost of books and supplies for any eligible student after all other sources of federal and state grant aid have been exhausted; provided further, that funds from this item may be expended on student support services, administration and marketing of said scholarship program; provided further, that appropriated funds may be expended for programs or activities during the summer months; provided further, that the commissioner of higher education, in consultation with the executive office of education and the Massachusetts Association of Community Colleges, and in coordination with the Massachusetts state scholarship office, shall adopt guidelines governing the eligibility for and the awarding of financial assistance under this item; provided further, that not later than February 1, 2024, the department of higher education, in consultation with the Massachusetts Association of Community Colleges, shall submit a report to the joint committee on higher education and the house and senate committees on ways and means detailing the metrics and benchmarks being used to measure program success including, but not limited to: (a) enrollment; (b) retention; (c) barriers to student participation; and (d) demographic 366 data related to program participants; and provided further, that not later than May 31, 2024, the department of higher education shall submit information to the executive office for administration and finance, the joint committee on higher education and the house and senate committees on ways and means on the number of students participating in MassReconnect at each community college\$20,000,000

MassReconnect

- FY24 MassReconnect guidelines currently are under review and pending final language from a FY24 Massachusetts state budget
- Possible language addition includes, but not limited to the following:
 1. Other MA non-community colleges as eligible institutions
 2. Inclusion of certain undocumented students as eligible
- The Department of Higher Education (DHE) has engaged numerous stakeholders such as Massachusetts community colleges presidents and administrators, higher education agencies, etc., in shaping MassReconnect guidelines
- Final MassReconnect guidelines will be approved by the DHE Commissioner under summer delegation authority

MassReconnect

- Major MassReconnect guidelines highlights

Student must be 25 years or older

1. Has not received a previous bachelors or associate degree
2. Student can attend on a full-time or part-time basis
3. Must file a current year FAFSA
4. Must be a Massachusetts resident for at least one at least one year at the point of enrollment
5. MassReconnect covers remaining cost of tuition, fees, books and supplies
6. MassReconnect is to be used as a last dollar program

Participating in Massachusetts State Financial Aid Programs in 2023-2024 Participation Agreement

Participation Agreement

2023-2024 Program Participation Agreement

- The last Participation Agreement signed by all Massachusetts institutions will remain in force through award year 2023-2024
- Institutions that are eligible to participate in Massachusetts state financial aid programs in 2023-2024 will receive a letter of continuance of the above Agreement
- Letters of continuance will be sent out very shortly

Audit Guide and FY23 Reporting

- State Financial Aid Programs Audit Guide last revised in June 2014 remains in effect for fiscal year 2023 reporting
- Very shortly, schools will also receive notifications of their FY23 audit requirements to the Department of Higher Education
- Schools must submit either a copy of their A-133 Federal Single Audit or an Attestation Report specific of state aid programs
- The audit requirement follows an every-third year rotation with 2 years of OSFA accepting a school's federal A-133 Single Audit and an Attestation Report due at year 3

Audit Guide and Reporting

- Institutions will continue to electronically submit their attestation reports to OSFA via the Executive Office of Education's Drop Box at:

<https://gateway.edu.state.ma.us>

- To add or remove EOE Drop Box users, institutions should submit requests to:

Judi Kennedy

Beiermann@bhe.mass.edu

OR

Robert Brun

rbrun@dhe.mass.edu

2022-2023 MASSGrant Processing

Some Highlights

2022-2023 Processing

Some Highlights

- 2022-2023 MASSGrant FAFSA filing deadline was August 1, as mandated by the Massachusetts Legislature
- Highest 2022-2023 MASSGrant award was \$2,800, compared to \$2,200 in 2021-2022
- MASSGrant awarded a total of \$69,229,460 to 36,941 students
- In 2021-2022, MASSGrant paid a total of \$59,533,023
- Payments to students who had missed the 21-day deadline to resolve MASSGrant discrepancies, started as early as fall 2022

2023-2024 MASSGrant Processing

An Overview of the 2023-2024 Applicant Pool

On-time Applicants Across 5 years

Award Year	Number of Applications
2023-2024	252,913 (May 1 deadline)
2022-2023	245,898 (August 1 deadline)
2021-2022	264,495
2020-2021	269,726
2019-2020	279,096

2023-2024 MASSGrant Processing

Number of Applicants – An 8-year History

Award Year	EFC 0-200	Eligible EFC>200	Total Eligible
2023-2024	38,548	27,143	65,691
2022-2023	35,517	26,768	62,285
2021-2022	42,323	27,641	69,964
2020-2021	45,951	29,591	75,542
2019-2020	51,242	32,274	83,516
2018-2019	47,681	29,802	77,483
2017-2018	50,026	29,347	79,373
2016-2017	43,734	26,736	70,460

2023-2024 MASSGrant Processing

Eligible Students by School Type to Date

School Type	Eligible Students
MA Private	16,982
University of Massachusetts	15,562
MA Public Universities	9,758
MA Community Colleges	20,335
MA Proprietary	698
MA Vocational Technical	194
MA Nursing	525
Out of State	1637

2023-2024 MASSGrant Processing

Building Upon Award-Year 2022-2023

2023-2024 Processing

Processing Activities

- 2023-2024 MASSGrant FAFSA filing deadline remains May 1, as of now
- In award year 2022-2023, the FY23 Massachusetts budget language included a MASSGrant deadline of August 1, 2022
- OSFA is up to date with sending 2023-2024 MASSGrant notifications of ineligibility
- Students with no e-mail addresses or undeliverable ones receive letters

Processing Activities

- Students and schools have the standard 21-day period to resolve discrepancies
- OSFA continues to receive ISIR transactions (new and correction) daily and uploads them at night
- Students with ineligible MASSGrant EFC and that need professional judgement are referred to financial aid offices
- OSFA will handle other appeals (i.e., miss MASSGrant FAFSA deadline) on a case-by-case basis

Correcting Discrepancies and Tracking Eligibility

- MA residency discrepancy (student and/or parent) requires student to submit documentation directly to OSFA
- Schools are able to clear the following ineligible reasons in MASSAid on behalf of students in batch format:
 1. Citizenship
 2. Prior Bachelor's Degree Received
 3. Answered "YES" to Drug Question
 4. Loan Default and/or Owe Refund on Federal Aid
- Institutions are subject to the same 21-day period to correct discrepancies on a student's behalf

MASSGrant and Other Ineligible Reasons

- Student not meeting Massachusetts residency requirements
- Parent(s) not meeting Massachusetts residency requirements
- Maximum number of semesters of eligibility reached
- EFC and/or dependency status could not be determined (Missing Information)
- FAFSA received by Federal Processor after 05/01/2023
- Expected Family Contribution exceeds 6656

MASSGrant and Other Shared Ineligible Reasons

- Applicant has prior bachelor's degree
- Student's Name, Date of Birth and/or Social Security Number Mismatch
- In default of Massachusetts No Interest Loan
- Christian A. Herter Memorial Scholarship recipient
- Student in default of Federal Title IV loan or owes refund on a Federal grant

MASSGrant and Other Shared Ineligible Reasons

- Student owes refund to State financial aid programs
- Student enrolled less than full time (only if student had updated his/her assumed status of full-time)
- Student not meeting United States citizenship status requirements

Clear Ineligible Reasons in MASSAid



Click to exit MASSAid

MASSAid

MASSGrant

Award Rules

School Profile

Payment History

Information Roster

Certification

Request Reinstatement

Reinstate Awards

Clear Ineligible Reasons

Owe Refund Students

Create Payments

Home

Search x

ABDO-4617(DocumentManagement) x

ABDO-4617(MASSGRANT) x

ASSUMPTION COLLEGE Clear Ineligible Reasons(MASSGrant) x

Clear Ineligible Reasons - MASSGrant

ASSUMPTION COLLEGE
Academic Year 2020-2021

Change Academic Year:

[Citizenship Status](#) 21

[Prior Bachelors Degree Received](#) 267

[Answered Yes to Drug Question](#) 0

[Loan Default and/or Refund Owed on Federal Financial Aid](#) 2

2023-2024 Processing

Clear Ineligible Reasons

The screenshot displays the MASSAid web application interface. On the left is a navigation sidebar with the MASSAid logo and a list of menu items: "Click to exit MASSAid", "MASSAid", "MASSGrant", "No Interest Loan Origination", "Early Childhood Educators Scholarship", "Paraprofessional Teacher Preparation Grant", "GEAR UP Scholarship", "Foster Child Grant", "DCF Adopted and Foster Child Fee Assistance", "Herter Scholarship", "System Administration", "View Privacy Policy", "View Accessibility Statement", "Quick View", "SSN Quick View:" (with an input field and "GO" button), "Run Eligibility" (with a redacted area), "Existing MASSGrant" (AY 2020 - 2021), "Existing Grants/Scholarships" (GEAR UP 2020 - 2021), "Transaction History", "Payment History", "FAFSA Data", and "Document Management" (highlighted with a red arrow). The main content area shows browser tabs for "Home", "Search", "ABDO-4617(DocumentManagement)", "ABDO-4617(MASSGRANT)", and "ASSUMPTION COLLEGE Clear Ineligible Reasons(MASSGrant)". Below the tabs is a "Document Management" header, followed by "Uploaded Documents for RASHID K ABDO" and "No Documents Found". A blue "UPLOAD NEW" button is centered on the page, with a red arrow pointing to it from below.

Accessing MASSAid

- School users have either “View Only” or “Update” access to MASSAid, as directed by financial aid offices
- At the time of first logon, school users are required to change their password and recommended to register their computer
- A school user is automatically locked out of the system after 3 unsuccessful login attempts
- If a school needs to add/remove a user or unlock a user account, it should contact Robert Brun at rbrun@dhe.mass.edu
- A school can also submit a request to add a user by completing and submitting a request form via the below link:

<https://forms.microsoft.com/g/G2GpSfSu5T>

MASSGrant Award Notification

- OSFA will continue to prioritize the MASSGrant program under any funding scenario for award year 2023-2024
- 2023-2024 MASSGrant payments will be no less than those of 2022-2023
- OSFA will begin sending 2023-2024 MASSGrant e-mail award notifications to students within a few weeks of the availability of a final FY24 Massachusetts state budget
- A final 2023-2024 MASSGrant Payment Schedule will be made available to institutions before we start e-mailing award notifications

2023-2024 Processing

MASSGrant Certification and Payment

2023-2024 Processing

MASSGrant Certification & Payment

- MASSGrant fall 2023 certification begins on 09/11/23
- MASSGrant spring 2021 certification to begin on 01/15/24
- MASSGrant records are ready for payment as soon as they are certified as eligible
- Schools have option of certifying via on-line screen or through a file download/upload process
- The certification file upload process has specific file layout requirements


2020-2021 Processing

MASSGrant Certification Options

The screenshot displays the MASSAid web application interface. On the left is a navigation sidebar with the MASSAid logo and a list of menu items: "Click to exit MASSAid", "MASSAid", "MASSGrant", "Award Rules", "School Profile", "Payment History", "Information Roster", "Certification", "Request Reinstatement", "Reinstate Awards", "Clear Ineligible Reasons", and "Owe Refund Students". The main content area features a breadcrumb trail: "Home" > "Award Rules(MASSGrant) x" > "BERKLEE COLLEGE OF MUSIC Certification(MASSGrant) x". Below the breadcrumb is a "Select Academic Term" section with a dropdown menu currently set to "Fall", indicated by a red arrow. At the bottom of the main area are three dark buttons: "UPLOAD ROSTER", "CERTIFICATION ROSTER", and "DOWNLOAD ROSTER".

2020-2021 Processing

MASSGrant Certification Process



Click to exit MASSAid

MASSAid

MASSGrant

Award Rules

School Profile

Payment History

Information Roster

Certification

Request Reinstatement

Reinstate Awards

Clear Ineligible Reasons

Owe Refund Students

Create Payments

Process Pre-Payment/Returned Funds

Reconcile Payments

Reconcile Year-End 2011-2012

Update Letter Text

Generate Letters

Letter File Requests

Home(Message Board) BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY Certification(MASSGrant) X

BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY Spring 2012-2013 Data Element Changes MASSGrant

2 Students Remaining to Certify


Filter:

To update student/parent data prior to certification, please select the student. Once all changes are made, please select [Go To Certification] to begin the certification process.

<< Page >>

Name	SSN	EFC	Dependency Status
Brian Atkinson	xxx-xx- 4227	0	Independent
Lawrence Baker	xxx-xx- 0435	0	Dependent

MASSGrant Certification Process



Click to exit MASSAid

MASSAid

MASSGrant

Award Rules

School Profile

Payment History

Information Roster

Certification

Request Reinstatement

Reinstate Awards

Clear Ineligible Reasons

Owe Refund Students

Create Payments

Process Pre-Payment/Returned Funds

Reconcile Payments

Reconcile Year-End 2011-2012

Update Letter Text

Generate Letters

Letter File Requests

Home(Message Board)
BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY Certification(MASSGrant) X

BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY

2012-2013 Spring Certification Roster

MASSGrant

2 Students Remaining to Certify


Filter:

<< Page >>

#	Name	SSN	# Days Remaining to Certify	EFC	Award Amount	Certification	No Award Reason	Award Reduced Reason
1	Brian Atkinson	xxx-xx-4227	60	0	800	▼	▼	▼
2	Lawrence Baker	xxx-xx-0435	60	0	800	▼	▼	▼

I certify that the students who are indicated as eligible for payment of a MASSGrant, have completed all verification and eligibility requirements, including citizenship and academic progress, as specified in the program guidelines.

MASSGrant Batch Payment Roster



Click to exit MASSAid

MASSAid

MASSGrant

- Award Rules
- School Profile
- Payment History
- Information Roster
- Certification
- Request Reinstatement
- Reinstate Awards
- Clear Ineligible Reasons
- Owe Refund Students
- Create Payments**
- Process Pre-Payment/Returned Funds
- Reconcile Payments
- Reconcile Year-End 2011-2012
- Update Letter Text
- Generate Letters
- Letter File Requests

Home(Message Board) Create Payments(MASSGrant) X BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY Certification(MASSGrant) X

View Payment Batch MASSGrant

Batch Number	School Code	School	Term	Total Amount	Total Sent to School	Total Students
B0105133	002151-00	BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY	Spring	\$1,600.00	\$1,600.00	2
Total:				\$1,600.00	\$1,600.00	2

[Close](#)

2023-2024 Processing

MASSGrant Certification and Payment

- Schools have 60 days from start of certification period to certify a student's eligibility
- OSFA has the flexibility to extend the number of days for certification on a school-by-school basis
- Once an award is certified as eligible, it automatically becomes available for payment
- Schools are not required to certify all available records all at once
- We invite schools to contact OSFA whenever assistance is needed

MASSGrant Award Reinstatement

- Awards previously certified as ineligible or that remain un-certified as of the expiration of the 60-day period are automatically available for requests for reinstatement
- OSFA approves all requests for reinstatement based on the availability of funding
- Reinstated awards must again be certified by the institution within a 20-day period
- Schools are limited to one reinstatement request of each award in each term

Certification and Payment

- OSFA typically generates payment batches on a weekly basis
- MASSGrant users automatically receive an e-mail notification when OSFA generates a payment batch for their institution
- A payment batch is generated for an institution as long as it has students in a “Ready to be Paid” status
- Institutions that prefer to receive payment batches at times that they wish to select, should contact OSFA
- Payments are sent to schools directly from the Treasury

MASSGrant Reconciliation


- Schools are required to reconcile payment batches within 30 days of their creation
- Reconciliation of MASSGrant payments can occur via an on-line screen or through a file download/upload option
- The reconciliation file upload function is subject to specific file layout requirements
- Any refunds associated with a change in eligibility or occasioned by the reconciliation process automatically carry over to the next payment batch, unless a check is received at OSFA for those refunds prior to the next payment batch

MASSGrant Reconciliation

- Any payment that is not reconciled for a period of more than 30 days or any other specified time frame will result in OSFA not being able to generate the next payment batch for the institution
- Schools are also required to perform a year-end payment reconciliation process
- The year-end reconciliation process can occur via an on-line screen or a year-end reconciliation file download/upload option
- The year-end reconciliation file download/upload option has very specific file layout requirements

2023-2024 Processing

MASSGrant Payment Batch Reconciliation



Click to exit MASSAid

MASSAid

MASSGrant

- Award Rules
- School Profile
- Payment History
- Information Roster
- Certification
- Request Reinstatement
- Reinstate Awards
- Clear Ineligible Reasons
- Owe Refund Students
- Create Payments
- Process Pre-Payment/Returned Funds
- Reconcile Payments**
- Reconcile Year-End 2011-2012
- Update Letter Text
- Generate Letters
- Letter File Requests

Home(Message Board) Create Payments(MASSGrant) X BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY Certification(MASSGrant) X


BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY Reconcile Payments(MASSGrant) X

Select Payment Batch to Reconcile
BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY
MASSGrant 2012-2013

<< Page >>

Batch Number	Batch Date	Term	Batch Total	Batch Count			
B0105133	06-19-2013	Spring	\$1,600.00	2	Reconcile	Download	Upload

2023-2024 Processing MASSGrant Payment Batch Reconciliation



Click to exit MASSAid

MASSAid

MASSGrant

- Award Rules
- School Profile
- Payment History
- Information Roster
- Certification
- Request Reinstatement
- Reinstate Awards
- Clear Ineligible Reasons
- Owe Refund Students
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- Reconcile Payments**
- Reconcile Year-End 2011-2012
- Update Letter Text
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- Letter File Requests

Home(Message Board) Create Payments(MASSGrant) X BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY Certification(MASSGrant) X

BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY Reconcile Payments(MASSGrant) X

BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY Reconcile Payments MASSGrant Batch #: B0105133

	Name	SSN	Term	Payment Amount	Reconciliation
1.	[REDACTED]	xxx-xx-4227	Spring	\$800.00	<input type="radio"/> Paid Full Amount <input type="radio"/> Paid Partial Amount - Enter Amount Paid <input type="text"/> <input type="radio"/> Not Paid (Full Refund)
2.	[REDACTED]	xxx-xx-0435	Spring	\$800.00	<input type="radio"/> Paid Full Amount <input type="radio"/> Paid Partial Amount - Enter Amount Paid <input type="text"/> <input type="radio"/> Not Paid (Full Refund)

Prev Page 1 of 1 Next

Save Cancel

MASSGrant Year-End Reconciliation

The screenshot displays the MASSAid web application interface. On the left is a vertical navigation menu with the MASSAid logo at the top. The main content area shows a breadcrumb trail: Home(Message Board) > Create Payments(MASSGrant) > BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY Certification(MASSGrant) > BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY Reconcile Payments(MASSGrant) > BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY Reconcile Year-End 2011-2012(MASSGrant). The central panel is titled "Year-End Reconciliation" and contains the text "BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY MASSGrant 2011-2012" and "Select one of the following to perform year-end reconciliation:". Three options are listed: "Online Year-End Reconciliation Roster", "Download Year-End Reconciliation File", and "Upload Year-End Reconciliation File".

MASSAid

Click to exit MASSAid

MASSAid

MASSGrant

Award Rules

School Profile

Payment History

Information Roster

Certification

Request Reinstatement

Reinstate Awards

Clear Ineligible Reasons

Owe Refund Students

Create Payments

Process Pre-Payment/Returned Funds

Reconcile Payments

Reconcile Year-End 2011-2012

Update Letter Text

Generate Letters

Letter File Requests

Home(Message Board) Create Payments(MASSGrant) X BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY Certification(MASSGrant) X

BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY Reconcile Payments(MASSGrant) X BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY Reconcile Year-End 2011-2012(MASSGrant) X

Year-End Reconciliation

**BENJAMIN FRANKLIN INSTITUTE OF TECHNOLOGY
MASSGrant 2011-2012**

Select one of the following to perform year-end reconciliation:

- [Online](#) Year-End Reconciliation Roster
- [Download](#) Year-End Reconciliation File
- [Upload](#) Year-End Reconciliation File

Mailing of Refund Checks

- Schools can access OSFA's Refund Form via the following link:

https://secure.osfa.mass.edu/year_end_report/yearendrefundform.jsp

- All refund checks and any other correspondence from schools should be sent to the current Malden address below:

Massachusetts Office of Student Financial Assistance
75 Pleasant Street, 3rd Floor
Malden, MA 02148

FY 23 Year End Data File Submission

An Update

Some Target Dates

- FY23 year-end financial aid data file layout will be released to production on OSFA's website on 07/13/2023
- Deadline for Massachusetts institutions to submit FY23 year-end data file is November 30, 2023
- There are no anticipated changes to the FY23 file layout
- Requests for on-line access to the year-end data application can be sent to rbrun@dhe.mass.edu

2023-2024 Processing

State Financial Aid Programs Guidelines

All 2023-2024 updated Massachusetts State Financial Aid Programs Guidelines and Procedures will be available on-line on OSFA's site, very shortly

MASSAid Application Enhancement

College Cost and Financial Aid Eligibility Tool

What's new in MASSAid

The MASSAid Portal lets students access and track college financial aid information upon completing the FAFSA

In the past...

- Students visit the website of each college they are interested in attending to locate and see the cost of attendance, making it difficult to easily compare costs across institutions.
- Students visit the website for each state aid program to see if they are potentially eligible for aid
- Students provide the same information multiple times to apply for different state financial aid programs, even if the state already has their information.
- Students visit the website of each college to locate contact information for that college's financial aid office

With this enhancement to MASSAid...

- Students can **view and compare the cost of attendance for any Massachusetts institution of higher education**, public or private, and compare costs for up to 4 colleges at once.
- Students can **see their potential eligibility for 11 state aid programs**
- Students visit a single page on the OSFA website listing **contact information for all Massachusetts college financial aid offices.**

Welcome Banner

First-time FAFSA filers will see a banner featuring the new “College Cost and Financial Aid Eligibility Information” tool.

MASSAid Massachusetts Department of Higher Education
Office of Student Financial Assistance

College Cost and Financial Aid Eligibility Information

[Click Here](#) to learn more about college costs and state financial aid programs you may qualify for to reduce those costs.

- View and compare the cost of the Massachusetts colleges you included on your FAFSA application.
- View your “expected family contribution” (EFC) - the amount the federal government estimates you and your family will need to pay towards the cost of college.
- View federal and state financial aid that you may be eligible for and update your eligibility by providing additional information.

Welcome Bobby!

Name: [Redacted]
Address: [Redacted]
Email: [Redacted]
Phone: [Redacted]
Cell Phone: [Redacted]

Select [Update Student Info](#) to receive text alerts from OSFA.

[Update Student Info](#)

My MASSGrant Year 2023 to 2024

Award Status

Good news! Based on your interest in attending UNIVERSITY OF MASSACHUSETTS-AMHERST for the 2023-2024 school year, you are eligible for a MASSGrant award. (Select a different institution to see your MASSGrant eligibility there.)

Term	Amount	Status	Paid Date
Fall	\$600.00	ReadyToCertify	Pending
Spring	\$600.00	ReadyToCertify	Pending

Estimated Cost of Attendance

The College Cost and Financial Aid Eligibility tool automatically populates Estimated Cost of Attendance information for the first four Massachusetts colleges listed on the student's FAFSA.

College Cost and Financial Aid Eligibility Information				
The colleges shown are the first four Massachusetts colleges from your FAFSA application. Use the drop-down menus to view and compare costs for other colleges. Note the costs shown below are based on attending full time and provided by colleges. If costs aren't shown, look up the cost on the college website. Please contact the college's Financial Aid Office for more information about aid opportunities.				
UNIVERSITY OF MA: ▼ TUFTS UNIVERSITY ▼ NORTHEASTERN UN ▼ BOSTON UNIVERSIT ▼				
Estimated Cost of Attendance before Expected Family Contribution (EFC) and Financial Aid Opportunities	\$31728	\$84568	\$81432	\$82760
Housing and Meals	\$14776	\$16780	\$18440	\$17400
Tuition and Fees	\$16952	\$65222	\$60192	\$62360
Books and Supplies	\$0	\$1000	\$1000	\$1000
Transportation	\$0	\$0	\$900	\$630
Other Education Expenses	\$0	\$1566	\$900	\$1370

Cost of attendance data is from Peterson's and can be adjusted by the institutions.
College selection can be changed by the student using a dropdown menu of all Massachusetts colleges.

Expected Family Contribution (EFC)

The next section displays the student's EFC as calculated from their FAFSA. If a FAFSA is modified and resubmitted, the change will be reflected here within 72 hours.

College Cost and Financial Aid Eligibility Information

The colleges shown are the first four Massachusetts colleges from your FAFSA application. Use the drop-down menus to view and compare costs for other colleges. Note the costs shown below are based on attending full time and provided by colleges. If costs aren't shown, look up the cost on the college website. Please contact the college's [Financial Aid Office](#) for more information about aid opportunities.

UNIVERSITY OF MA! ▾

TUFTS UNIVERSITY ▾

NORTHEASTERN UN ▾

BOSTON UNIVERSIT ▾



Expected Family Contribution (EFC)	\$4715	\$4715	\$4715	\$4715
Amount your family is expected to pay for college before grants, scholarships, or tuition waivers are considered	\$4715	\$4715	\$4715	\$4715

Federal Financial Aid Opportunities


The next section displays the student's estimated full-time Pell Grant award. Clicking the name of the program takes the student to the Federal Student Aid website with further information about eligibility requirements.

College Cost and Financial Aid Eligibility Information

The colleges shown are the first four Massachusetts colleges from your FAFSA application. Use the drop-down menus to view and compare costs for other colleges. Note the costs shown below are based on attending full time and provided by colleges. If costs aren't shown, look up the cost on the college website. Please contact the college's [Financial Aid Office](#) for more information about aid opportunities.

UNIVERSITY OF MA! ▼ TUFTS UNIVERSITY ▼ NORTHEASTERN UN ▼ BOSTON UNIVERSIT ▼

Financial Aid Opportunities (State, Federal , Institutional and Others)	\$2045	\$2045	\$2045	\$2045
Estimated Full-time Pell Grant	\$2045	\$2045	\$2045	\$2045



State Financial Aid Information

The last section provides information on the student's potential eligibility for 11 state aid programs at each college selected. (Eligibility depends on many factors, including citizenship status, whether the student seeks to attend a public or private institution, etc.)

College Cost and Financial Aid Eligibility Information

The colleges shown are the first four Massachusetts colleges from your FAFSA application. Use the drop-down menus to view and compare costs for other colleges. Note the costs shown below are based on attending full time and provided by colleges. If costs aren't shown, look up the cost on the college website. Please contact the college's [Financial Aid Office](#) for more information about aid opportunities.


UNIVERSITY OF MA: ▼


TUFTS UNIVERSITY ▼


NORTHEASTERN UN ▼

BOSTON UNIVERSIT ▼

State Financial Opportunities (click the links below to learn more about these forms of aid)

 You may be eligible for financial aid from this program; click the link for the program to learn more. Have questions? Contact the college's [financial aid office](#) or the Office of Student Financial Assistance at 617.391.6070.

 We need additional information to determine if you may be eligible for financial aid from this program; click the link for the program to learn more and [update your eligibility here](#)

 Based on the information provided, you are not eligible for financial aid from this program at this institution. Have questions? Contact the college's [financial aid office](#) or the Office of Student Financial Assistance at 617.391.6070.

MASSGrant



GEAR UP Scholarship




State Financial Aid Information- Automated potential eligibility info

Clicking the name of a program takes the student to the Department of Higher Education webpage with further information about program eligibility and the application process.

MASSGrant				
GEAR UP Scholarship				
Foster Child Grant				
DCF Foster Child Fee Assistance				
DCF Adopted Child Fee Assistance				
MASSGrant PLUS Good News! It looks like you may qualify for the MASSGrant Plus program at one or more colleges. MASSGrant Plus provides enough financial aid to cover the cost of the Tuition and Fees at public higher education institutions. Please contact the college's Financial Aid Office for more information.				
John and Abigail Adams Scholarship				
Valedictorian Program Tuition Waiver				
Massachusetts Cash Grant				
Massachusetts Gilbert Matching Student Grant				
Need Based Tuition Waiver				

State Financial Aid Information- Self-reported data

Students can click “update your eligibility here” to provide additional data that is not reported on their FAFSA and further inform potential eligibility for aid. These questions are optional, and answers can be changed at any time by the student.

 We need additional information to determine if you may be eligible for financial aid from this program; click the link for the program to learn more and [update your eligibility here](#)



Additional Eligibility Questions

Your responses to the below questions will help us determine your eligibility for additional forms of aid.

Do you anticipate graduating from high school as a Valedictorian?

Your planned enrollment status:

Are you currently or were you ever in the custody of the Massachusetts Department of Children and Families?
 Yes No Yes

Were you adopted by a Massachusetts resident or Massachusetts state employee?



Foster Child Grant



Foster Child Grant



Contact Information for students to learn more

Students have access to contact information for OSFA and a link to a comprehensive list of every financial aid office for all Massachusetts Colleges and Universities.

Massachusetts Colleges and Universities Financial Aid Information

MA Colleges and Universities Financial Aid Sites

x

College	Financial Aid Office
American International College	https://apps.aic.edu/static/phonebook/depts/financial_aid_office/
Amherst College	https://www.amherst.edu/offices/financialaid
Anna Maria College	https://annamaria.edu/admission/financial-aid/
Assumption University	https://www.assumption.edu/people-and-departments/organization-listing/office-financial-aid
Babson College	https://www.babson.edu/tuition-and-financial-aid/contact-us/
Boston Baptist College	https://www.boston.edu/financialaid
Bay Path University	https://www.baypath.edu/admissions-aid/graduate-admissions/financial-aid/
Bentley University	https://www.bentley.edu/offices/financial-assistance
Berklee College of Music	https://www.berklee.edu/student-financial-services/financial-aid

No Interest Loan

2022-2023 Activity Summary

- Allowed Schools to extend the loan period so that all Promissory Notes could be received and processed
- Final 2022-2023 NIL Disbursement Rosters were created by OSFA June 30th
- 2022-2023 NIL Reconciliation Rosters are now available for you to download

Year	Dollars Disbursed	Disbursed Loans
2021-2022	\$2,876,787	2,222
2022-2023	\$3,101,648	2,300

2022-2023 Activity Summary

- Borrowers may view "Status" of their Promissory Note on Dashboard
- Borrowers and Schools now receive email if we need to send a Promissory Note back
- Borrowers and Schools have the ability to print Promissory Notes
- Our annual mailing of Default Rates, Exit Interview Report and All in School report occurred in March
- Schools have until **July 15th** to meet the Exit Requirements

No Interest Loan

2023-2024 Loan Origination

- 2023-2024 NIL FAFSA filing deadline is March 15, 2024
- EFC Eligibility Range 0-15,000
- Loan Amounts
 - Minimum \$1,000
 - Maximum \$4,000
- 2023-2024 Anticipated Allocation Forms were sent to schools in June
- 2023-2024 Allocation Notifications will be mailed out to institutions *Late July and MASSAid will be turned on August 1*

Student Eligibility

- **Permanent legal resident of Massachusetts, United States citizen or eligible non citizen**
- **Enrolled full time**
- **EFC must fall within 0-15,000 range**
- **Enrolled in a certificate, associate or bachelors degree program**
- **Not have received a prior bachelors degree or its equivalent**
- **In compliance with Selective Service Registration Requirements**
- **Not in default of any federal or state loans or owe a refund for any previous financial aid received**
- **Maintain satisfactory academic progress**

No Interest Loan

Promissory Note Creation

The screenshot shows a web browser window with the URL <https://massaid-beta.guarantorsolutions.com/Navigation/>. The browser has several tabs open, including 'MASSAid', 'Whom Do I Call?', and 'Login'. The browser's address bar shows the URL, and the page title is 'MASSAid'. The browser's menu bar includes 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. The browser's toolbar includes 'Suggested Sites', 'Microsoft', 'Best of the Web', 'BHE Staff Web', 'Channel Guide', 'gometro Ashburton Café', 'gometro MITC Café', 'Internet Start', 'Massachusetts Board of H...', 'Massachusetts Office of S...', 'Microsoft', 'OSFA Intranet', and 'Web Slice Gallery'. The browser's status bar shows 'Home(Message Board)', 'School Profile(No Interest Loan Origination) X', 'Payment History(No Interest Loan Origination) X', and 'AHERN-6741(NOINTERESTLOAN) X'. The browser's address bar shows 'NIL Award Info(No Interest Loan Origination) X'.

The application interface displays the 'No Interest Loan Award Info' for 'STONEHILL COLLEGE, 002217-00'. The 'Academic Year 2013-2014' is selected. The 'Change Academic Year' dropdown menu is set to 'Year 2013 To 2014'. The table below shows the following data:

NIL Allocation		NIL Disbursed	
400,000		0	
NIL De-obligated		NIL Remaining	
0		400,000	
NIL Committed			
0			

A 'Close' button is located at the bottom of the table.

The left sidebar contains the following navigation links:

- Click to exit MASSAid
- MASSAid
- MASSGrant
- No Interest Loan Origination
- NIL Award Info**
- School Profile
- Payment History
- NIL Promissory Note Creation
- File Requests
- View Privacy Policy
- View Accessibility Statement
- Quick View

Promissory Note Creation

The screenshot shows a web browser window with the URL <https://massaid-beta.guarantorsolutions.com/Navigation/>. The browser tabs include 'MASSAid', 'Whom Do I Call?', and 'Login'. The browser's address bar and menu bar are visible. The website's navigation menu on the left includes links for 'Click to exit MASSAid', 'MASSAid', 'MASSGrant', 'No Interest Loan Origination', 'NIL Award Info', 'School Profile', 'Payment History', 'NIL Promissory Note Creation' (highlighted), 'File Requests', 'View Privacy Policy', 'View Accessibility Statement', and 'Quick View'. The main content area is titled 'NIL Promissory Note Creation Academic Year 2012-2013' and features a user profile for SOPHIA R. ADRIEN. The form is divided into three sections: 'Student Information', 'Promissory Note Information', and 'School Certification for FAO Information'. The 'Student Information' section includes fields for Name (SOPHIA R. ADRIEN), SSN (018-76-0443), Address (23 WOODWARD PARK), City, State, Zip (BOSTON, MA 02125), Home Phone Number ((857)249-6895), Email Address, and Dependency Status (Dependent). The 'Promissory Note Information' section includes Loan Amount (from 1000 to 4000), Disbursement Preference (Fall, Spring), Loan Period Begin Date (8/29/2012), Fall Disbursement Date (9/1/2012), Loan Period End Date (5/10/2013), Spring Disbursement Date (2/1/2013), and Graduation Date. The 'School Certification for FAO Information' section includes fields for FAO Name (Eric Newnum), FAO Title (Assistant Director for Loans), Phone Number for PNote ((508)565-1076), Phone Number for OFSA to Contact, School Address for PNote (320 WASHINGTON ST), School City for PNote (EASTON), School State for PNote (Massachusetts), and School Zip for PNote (02357 - 0000).

Home(Message Board) NIL Promissory Note Creation(No Interest Loan Origination) X

NIL Promissory Note Creation Academic Year 2012-2013

SOPHIA R. ADRIEN

Student Information

Name: SOPHIA R. ADRIEN
SSN: 018-76-0443
Address: 23 WOODWARD PARK
City, State, Zip: BOSTON, MA 02125
Home Phone Number: (857)249-6895
Email Address:
Dependency Status: Dependent

Promissory Note Information

Loan Amount: from 1000 to 4000
Disbursement Preference:
Loan Period Begin Date: 8 / 29 / 2012
Fall Disbursement Date: 9 / 1 / 2012
Loan Period End Date: 5 / 10 / 2013
Spring Disbursement Date: 2 / 1 / 2013
Graduation Date: / /

School Certification for FAO Information

FAO Name: Eric Newnum
FAO Title: Assistant Director for Loans
Phone Number for PNote: (508)565-1076
Phone Number for OFSA to Contact:
School Address for PNote: 320 WASHINGTON ST
School City for PNote: EASTON
School State for PNote: Massachusetts
School Zip for PNote: 02357 - 0000

Promissory Note Creation

- **Loan Period**
 - **Loan Processing Cycle is from August 1 – June 30**
 - **Borrower's Loan Period must fall within this date range**
 - **Loan Period must coincide with period of enrollment for the academic year**
- **Disbursement Dates**
 - **Schools control when loan disburses by populating fields with desired dates**
 - **Loan Periods > 155 days require at least 2 disbursements**

No Interest Loan

Promissory Note Creation

Home(Message Board) NIL Promissory Note Creation(No Interest Loan Origination) X

STONEHILL COLLEGE
Promissory Note Creation - Summary Screen
NIL 2012-2013

	SSN	Name	Loan Amount
<input checked="" type="checkbox"/>	018-76-0443	SOPHIA R. ADRIEN	\$1,000

OK Cancel

Click to exit MASSAid

- MASSAid
- MASSGrant
- No Interest Loan Origination
- NIL Award Info
- School Profile
- Payment History
- NIL Promissory Note Creation**
- File Requests
- View Privacy Policy
- View Accessibility Statement
- Quick View

No Interest Loan

Promissory Note Creation

The screenshot shows a web browser window with the URL <https://massaid-beta.guarantorsolutions.com/Navigation/>. The browser tabs include 'MASSAid', 'Whom Do I Call?', and 'Login'. The browser's address bar shows the current page is 'Home(Message Board)'. The page content is organized into several sections:

- Navigation Menu (Left):** Includes links for 'Click to exit MASSAid', 'MASSAid', 'MASSGrant', 'No Interest Loan Origination', 'File Requests', 'View Privacy Policy', 'View Accessibility Statement', 'Quick View', and 'SSN Quick View' with a search box and 'GO' button.
- Page Header:** Shows navigation tabs: 'Home(Message Board)', 'School Profile(No Interest Loan Origination)', 'Payment History(No Interest Loan Origination)', and 'AHERN-6741(NOINTERESTLOAN)'. The current page is 'No Interest Loan Record Academic Year 2012 - 2013'.
- Status:** 'Status: Eligible' and 'P-Note Status: Disbursed'. A 'Re-Print P-Note' button is visible.
- Student Information: SSN XXX-XX-7413**

Name	[REDACTED]
SSN	[REDACTED]
Address	17 MIDDLE ST
City, State, Zip	NATICK, MA 01760
Home Phone Number	(508)653-6936
Email Address	
Date of Birth	10/09/1992

[Add Comments](#)
- Application Information**

Institution	002217-00, STONEHILL COLLEGE	P-Note Created Date	01/24/2013
Dependency Status	Dependent	P-Note Received Date	01/24/2013
EFC	6869	P-Note Approved Date	01/24/2013
Final Disclosure Sent Date		Right to Cancel Date	01/30/2013
1st Disbursement Letter Sent Date		P-Note Unique ID	P002336
- Promissory Note Information**

Loan Amount	\$1,000.00	Disbursement Preference	Fall Only
Loan Period Begin Date	08/29/2012	Fall Disbursement Date	12/01/2012
Loan Period End Date	12/31/2012	Spring Disbursement Date	
Graduation Date	06/30/2013	Summer Disbursement Date	
- Reference Information**

<u>Reference 1</u>	<u>Reference 2</u>
Name: ahern, andy	Name: ahern, drew
Address: 422 main street	Address: 221 main street

Promissory Note Submission

- OSFA must receive an intact fully completed ORIGINAL COPY of the promissory note (as printed on the note)
- Promissory note must be printed with the promissory note paper which cites the Terms & Conditions of the loan
- All promissory notes capture emails displayed in MASSAid. Please have borrower make any necessary updates
- Borrower must provide two (2) unique U.S. references with zip codes (business addresses will not be accepted)

Promissory Note Submission

- Borrower must sign full legal name as it appears on the promissory note and date appropriately
- Promissory Note must be signed by school official
- A **Complete** Self-Certification Form must accompany Original Promissory Note
- Promissory Note must be received by OSFA prior to the loan period end date to be eligible for a disbursement
- Denied promissory notes will be returned to School Official's attention and reflected on Student's MASSAid Dashboard

No Interest Loan

Loan Origination

The screenshot shows a web browser window with the URL <https://massaid-beta.guarantorsolutions.com/Navigation/f>. The browser tabs include 'MASSAid', 'Whom Do I Call?', and 'Login'. The browser's address bar shows the URL, and the browser's menu bar includes 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. The browser's toolbar includes 'Suggested Sites', 'Microsoft', 'Best of the Web', 'BHE Staff Web', 'Channel Guide', 'gometro Ashburton Café', 'gometro MITC Café', 'Internet Start', 'Massachusetts Board of H...', 'Massachusetts Office of S...', 'Microsoft', 'OSFA Intranet', and 'Web Slice Gallery'. The browser's status bar shows 'Home(Message Board)', 'NIL Promissory Note Creation(No Interest Loan Origination) X', and 'Payment History(No Interest Loan Origination) X'. The browser's content area displays the 'Payment History' for 'STONEHILL COLLEGE, 002217-00'. The page has a 'Change Academic Year' dropdown menu set to '2012-2013'. The page content includes a table for 'Academic Year 2012-2013' with columns for 'Date', 'Program', 'Term', 'Type', 'Batch Number', 'Reconciled', 'Number Of Students', and 'Payment Amount'. The table contains three rows of data and a total row. The table is as follows:

Date	Program	Term	Type	Batch Number	Reconciled	Number Of Students	Payment Amount
01/31/2013	NIL	Fall	Payment	B0105118	Y	1	\$1,000.00
01/03/2013	NIL	Fall	Payment	B0105065	Y	44	\$84,750.00
12/27/2012	NIL	Fall	Payment	B0105061	Y	107	\$194,261.00
Total:							\$280,011.00

The left sidebar of the application contains the following links:

- Click to exit MASSAid
- MASSAid
- MASSGrant
- No Interest Loan Origination
- NIL Award Info
- School Profile
- Payment History
- NIL Promissory Note Creation
- File Requests
- View Privacy Policy
- View Accessibility Statement
- Quick View

No Interest Loan

Loan Origination

The screenshot shows a web browser window with the URL <https://massaid-beta.guara...>. The browser tabs include 'MASSAid', 'Whom Do I Call?', and 'Login'. The browser's address bar and menu bar are visible. The page content includes the MASSAid logo and a navigation menu on the left with options like 'Click to exit MASSAid', 'MASSAid', 'Reports', 'Search', 'Send Email', 'Help', 'MASSGrant', 'No Interest Loan Origination', 'File Requests', 'View Privacy Policy', 'View Accessibility Statement', and 'Quick View'. The main content area features a 'MASSAid Report Options' section with tabs for 'Activity Reports', 'NIL Reports', 'NIL Forms', and 'Rosters'. Under 'NIL Reports', a dropdown menu is open, listing 'NIL Activity Report', 'NIL Default Students Report', 'NIL Disbursement Roster' (highlighted), 'NIL History Report', 'NIL Reconciliation Roster', and 'NIL Students Roster'. Below the dropdown, there is a 'School:' dropdown menu set to 'STONEHILL COLLEGE' and a 'Batch Number:' text input field. A 'Generate Report' button is located at the bottom of the report options section. A red warning message at the bottom of the page reads: 'Please be aware! The information you are accessing may display the student's Social Security Number (SSN) and should be considered confidential.'

Loan Origination

■ Cancellations

- May be performed in real time in MASSAid
- Must be done PRIOR to disbursement
- Funds from cancelled disbursements revert to school's allocation

■ Refunds

- Once disbursement occurs, if student is no longer eligible, school must refund monies to OSFA
- Refunded monies DO NOT revert to school's allocation

■ Timely Submission of Promissory Notes

- Facilitates accurate Exit Interview processes

Truth in Lending Act

- At the time of origination, the system will automatically create a borrower specific Massachusetts No Interest Loan Offer
- School must provide this to student to review prior to signing the promissory note. The Massachusetts No Interest Loan Offer Form does not need to be returned to OSFA
- At the time of approval, OSFA will automatically create a borrower specific Massachusetts No Interest Loan Disclosure that is now emailed to each borrower
- The Loan Disclosure will provide three (6) business days for the borrower to decline the loan. Loans will be disbursed after the six day period

Clearinghouse Updates

- Heartland ECSI runs a Clearinghouse interface file every weekend. The file that is sent to the Clearinghouse includes all borrowers ECSI shows in an enrolled status
- If there is a match and the Clearinghouse shows that borrower to be withdrawn, less than half-time, or graduated, ECSI creates an Exit for the borrower
- If an account is in a past due status, the Clearinghouse information will not update account
- It is important schools are accurately and timely reporting to the Clearinghouse

Default Management

- **Reports**
 - Expected Separation Dates**
 - OSFA mails throughout the year
 - Reports can be generated at any time on ECSI's WebX system
 - Opportunity to update separation dates
- **A March mailing included the current In-School report to allow schools to make any updates and the fiscal year 2022 cohort default rate**
 - **By request, OSFA mails schools a list of defaulted borrowers**

Default Management

- If the default rate exceeds 30% the institution must file a Loan Default Management Plan with OSFA by June 30 and achieve 100% return rate on on-line Exit Interviews to be considered for continued participation, no later than **July 15th**
- If the default rate exceeds 10% the institution must achieve 100% return rate on on-line Exit Interviews to be considered for continued participation, no later than **July 15th**
- If the default rate is less than 10% the institution must achieve at least 75% return rate on on-line Exit Interviews to be considered for continued participation, no later than **July 15th**
- Any school that does not achieve 100% return on all Exit Interviews by **July 15th** and have a prior year default rate in excess of 30% can receive no more than 75% of their highest allocation in the program in the last five years

No Interest Loan Default Management Exit Interview Overview

	Total Borrowers 2020-2021 2021-2022	Completed Exits	Current in Repayment	In Deferment	In Default
Private Institutions	507	274	483	9	15
	456	257	445	3	9
State Universities	423	189	397	9	17
	315	186	298	7	10
Proprietary	24	14	19	1	4
	24	14	17	0	7

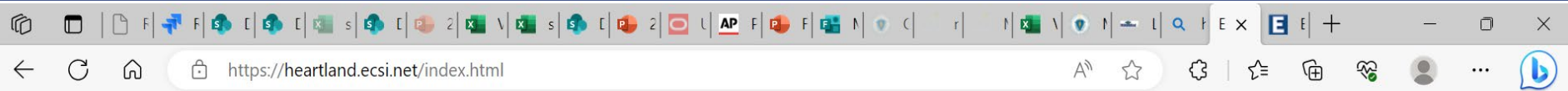
Default Management

- OSFA continues to work with schools to help them reach the Exit requirements
- Common Practices for Exiting Students
 - No Interest Loan notices mailed or emailed to students by financial aid offices. These include amount that was borrowed, Exit instructions, and login information
 - Placing holds on Graduation Tickets
 - Placing holds on Transcripts and/or Diplomas**
 - Constant calls and emails to borrowers until 100% Exit completion is reached

Default Management

- All Exits are generated electronically by ECSI
- Sixty days prior to separation, ECSI sends an email to borrowers with their username, password, and instructions to complete their Exits
- Schools are encouraged to frequently remind students of this responsibility
- Encourage borrowers to register for ACH payment at the time they are completing their Exits

No Interest Loan Loan Servicing



⚠ ECSI will be performing system maintenance on **Sunday, July 9, 2023 from 2:00 am ET to 7:00 am ET** and **Sunday, July 16, 2023 from 2:00 am ET to 7:00 am ET**. You will not have access to our system during this maintenance period. Thank you for your patience.

ECSI

Toll-Free +1 (888) 549-3274

[Sign In](#) | [Register](#)

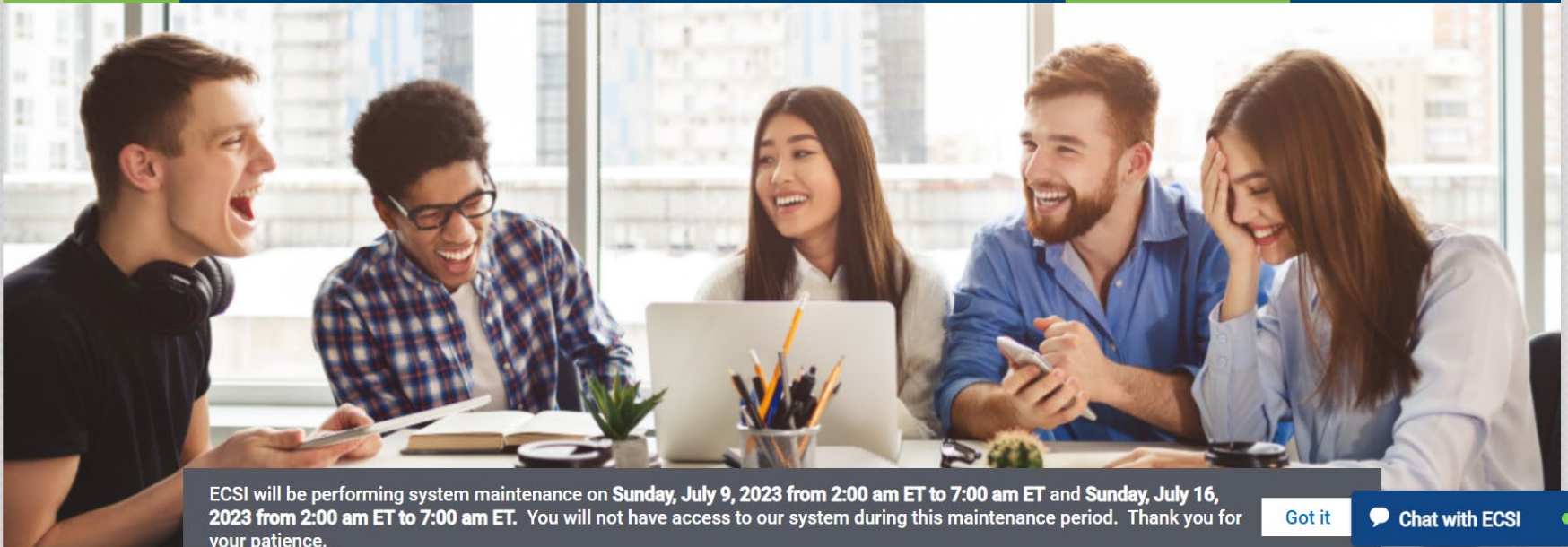
[Home](#)

[Find Your Tax Document](#)

[Download Forms](#)

[Help Center](#)

[Contact Us](#)



ECSI will be performing system maintenance on **Sunday, July 9, 2023 from 2:00 am ET to 7:00 am ET** and **Sunday, July 16, 2023 from 2:00 am ET to 7:00 am ET**. You will not have access to our system during this maintenance period. Thank you for your patience.

[Got it](#)

[Chat with ECSI](#)

No Interest Loan

Loan Servicing

The screenshot shows a web browser window with the URL <https://heartland.ecsi.net/index.main.html#/access/signIn>. The browser tabs include "Office of Student Financial Ass...", "MASSAid", and "Heartland ECSI - Secure Pro...". The page title is "Heartland ECSI accounts together." and the browser menu includes "File", "Edit", "View", "Favorites", "Tools", and "Help".

The page content is divided into two main sections:

- Sign In**
TO AN EXISTING PROFILE
- Register**
AND CREATE A NEW PROFILE

The Sign In section contains two input fields: a text field and a "Password" field, with a "Cancel" button below them.

The Register section contains three input fields: "Username", "Password", and "Confirm Password", with a "Cancel" button below them.

At the bottom of the page, there is a link: "Forgot your username or password? [Reset it here »](#)".

In the bottom right corner, there is a red "Live Chat" button with a speech bubble icon.

No Interest Loan

Default Management

The screenshot shows a web browser window with the URL <https://heartland.ecsi.net/index.main.html#/app/page/connectA>. The browser's address bar also shows "MASSAid" and "Heartland ECSI - Secure Pro...". The page content includes the following text and form elements:

your profile. If you don't know your Heartland key, search using the fields below.

Connect An Account

ENTER YOUR HEARTLAND KEY BELOW TO CONNECT AN ACCOUNT

Search for Heartland Key

IF YOU DO NOT KNOW YOUR HEARTLAND KEY, YOU CAN SEARCH FOR IT BELOW

If you do not want to connect an account now, skip this step and continue to your profile. You can connect accounts at any time.
[Skip this step »](#)

At the bottom left, there is a red "Live Chat Online" button. At the bottom right, the browser's zoom level is set to 100%.

No Interest Loan Default Management

https://heartland.ecsi.net/index.main.html#/access/downloadFormPages

Deferment, Forbearance, and Cancellation Forms

Do you need a deferment, forbearance, or cancellation for your Federal Perkins Student Loan, Health Professions Loan, Institutional Loan, or other Student Loan? You have come to the right place. Our goal is to provide you with detailed information about your options to make an informed choice. Please remember that there are Federal regulations that must be met before these types of privileges can be granted so be sure to review the qualifications and required documentation before submitting your request.

School Name (start by typing the first several letters of your school name)

Type School Name Here

Not Sure Which Form To Choose?

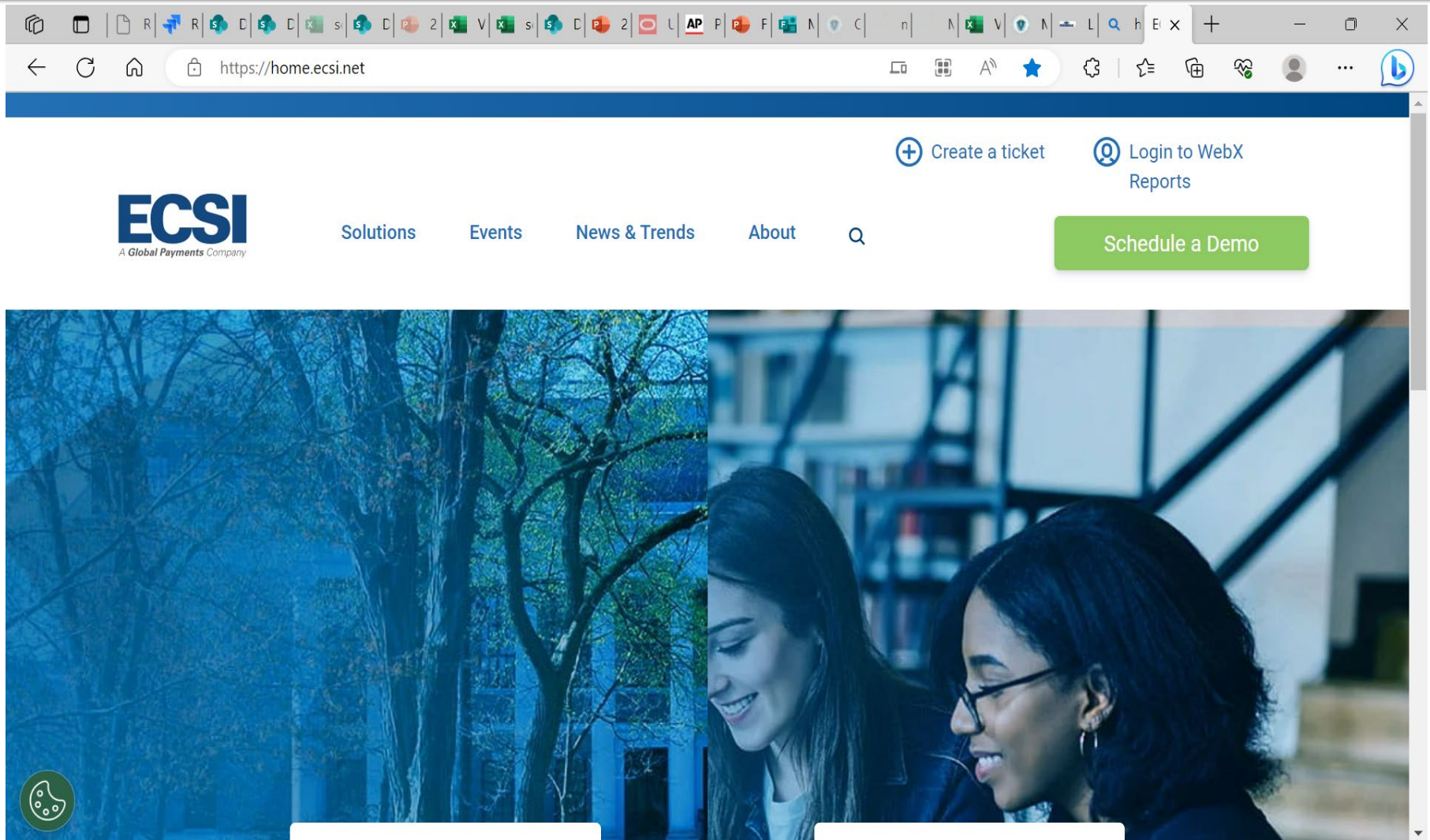
If you're not sure if you are eligible for a deferment, forbearance or cancellation, or you don't know which one to apply for, you can review a list of possible options including the conditions under which each option can be granted.

To view the list, [click here](#).

Chat with ECSI

No Interest Loan

Default Management



No Interest Loan


Default Management

WebExits by Date Range - Windows Internet Explorer provided by Mass Board of Higher Education

https://www.ecsi.net/cgi-bin/webx.exe

File Edit View Favorites Tools Help

WebExits by Date Range OSFA Intranet



WebExits by Date Range

To retrieve a list of WebExits.

Enter date range, select a check box and click the 'Find' link. When the list is presented, select an electronic Webexit to view.

Select Your Campus:

From: / / To: / / [\[Find\]](#)

E-Signed P-Signed Incomplete Unsigned Mailed Canceled Denied PIF Export to Excel

Return to the [\[Menu\]](#).

Page: ccgi05 (Ver: 01.01.22)

Internet 100%

No Interest Loan


Default Management

WebExits by Date Range - Windows Internet Explorer provided by Mass Board of Higher Education

https://www.ecsi.net/cgi-bin/webx.exe

File Edit View Favorites Tools Help

WebExits by Date Range OSFA Intranet



WebExits by Date Range

To retrieve a list of WebExits.

Enter date range, select a check box and click the 'Find' link. When the list is presented, select an electronic Webexit to view.

Select Your Campus: 01 - TUFTS UNIVERSITY

From: 07 / 01 / 2008 To: 12 / 31 / 2009 [Find](#)

E-Signed P-Signed Incomplete Unsigned Mailed Canceled Denied PIF Export to Excel

[View]	Account [+] [-]	Campus [+] [-]	Name [+] [-]	Loan Type [+] [-]	Total Financed [+] [-]	Signed [+] [-]	Memo [+] [-]
<input checked="" type="radio"/>				NIL01A	4,000.00	04/24/2009 06.32.44	E-Signed Exit
<input type="radio"/>				NIL01A	4,000.00		Unsigned Exit
<input type="radio"/>				NIL01A	2,000.00		Unsigned Exit
<input type="radio"/>				A NIL01A	1,500.00	06/02/2009 21.16.53	E-Signed Exit

Total Borrowers = 4
E-Signed = 2
P-Signed =
Incomplete =
Unsigned = 2
Mailed =
Canceled =
Denied =
PIF =
Other =
Total WebExits = 4

Return to the [Menu](#).

Internet 100%

Default Management

- **Common Practices for Preventing Default**
 - **Students must participate in mandatory Exit Counseling Sessions where loans are broken down by type and repayment options**
 - **After receiving the default list—school mails borrower past due letter**
 - **Staff reviews Delinquent Rosters monthly and reaches out to students by mail or phone. If school has different address, updates are made to OSFA and ECSI. Also check to see if they are past due on Perkins Loans or other loans through the school**

Default Management

- **Preventing Fraud**
 - **Making students aware of scams targeting schools**
 - **Advertisements, Fake Facebook messages, Bad PR or Credit Reports**
- **Students should not pay a fee for help managing debt**
- **Links to help students with questionable companies**
 - <https://www.consumerfinance.gov/complaint/>
 - <https://www.ftccomplaintassistant.gov/#&panel1-1>
 - <https://studentaid.ed.gov/sa/types/scams>

Wellness Program

- **Wellness Program**
 - Each month OSFA mails to institutions a report of borrowers who are up to 90 days past due
 - Once a loan is disbursed borrowers can view a loan information brochure reminding them of loan terms and conditions on their Dashboard
 - OSFA mails a post-card to borrowers during their grace period, as an additional reminder of their loan and billing servicer
 - Monthly OSFA calls and emails 30, 60 and 90 day past due borrowers

Helpful Reminders

- **When contacting ECSI, school code for all OSFA programs = 4F**
- **OSFA DOES NOT remove accounts from collections once placed with an agency**
- **Accounts are FULLY accelerated @ 120 days past due**
- **Students have a 6 month, one-time only grace period**
- **NIL is not a Federal loan – therefore cannot be rehabilitated**

Helpful Reminders

- **NIL CANNOT be consolidated**
- **NIL does not appear on NSLDS**
- **Students in default may have any state funds intercepted**
- **Students must complete a Commonwealth of Massachusetts exit interview**
- **Borrowers must complete exit interview EVEN IF they are continuing in the fall in a graduate program (must apply for deferment)**

Contact Information

- **Heartland-Educational
Computer Services, Inc (ECSI)**

Schools/Institutions

Phone 1-800-437-6931

- **Borrowers**

MDHE

C/O ECSI

PO Box 1289

Moon Township, PA 15180

Phone: 888-549-3274

Fax: 866-291-5384

Web: www.heartlandecsi.com

OSFA

Alison Connolly

617-391-6073

aconnolly@dhe.mass.edu

Thank you for joining us today!



**75 Pleasant Street,
Malden, MA 02148**