

The Massachusetts Office of Student Financial Assistance



ACTION LETTER

Action Letter #1
September 2011

2011-2012 PROGRAMS GUIDELINES UPDATES

Dear Colleague:

This Action Letter publishes revised guidelines for Massachusetts State financial aid programs and other important information. The content of this Dear Colleague Letter is as follows:

- I. New Telephone Number for the Massachusetts Office of Student Financial Assistance**
- II. Loan Default and Eligibility for Massachusetts State Financial Aid Programs**
- III. Revised John & Abigail Adams Scholarship Guidelines**

The revised guidelines and other information, as included in this Dear Colleague Letter, take effect immediately and/or as of the start of this academic year 2011-2012. Please do not hesitate to contact the Massachusetts Office of Student Financial Assistance at 617.391.6070 if you have questions.

Thank you.

Massachusetts Office of Student Financial Assistance

I. OSFA NEW TELEPHONE NUMBER

Effective immediately, the Massachusetts Office of Student Financial Assistance (OSFA) has a new telephone number. That number is **617.391.6070**. Likewise, all OSFA staff members now have new telephone numbers. For a complete listing of all OSFA staff new telephone numbers, go to www.osfa.mass.edu and click “**Contact Us**”.

The fax number for the Massachusetts Office of Student Financial Assistance remains **617.727.0667**.

II. LOAN DEFAULT AND ELIGIBILITY FOR MASSACHUSETTS STATE FINANCIAL AID PROGRAMS

Students who are in default of any education loan, including a Massachusetts No Interest Loan, are not eligible to receive assistance from Massachusetts State financial aid programs until their default status has been cleared. An institution cannot retroactively award a student Massachusetts State financial aid programs funds for a semester or term during which they were in default. A student is, however, eligible to retain funds from a Massachusetts financial aid program if the institution was notified of the default status after the funds were disbursed to the student’s account. The student is not eligible for any subsequent disbursement until the default status has been cleared. A monthly updated list of No Interest Loan defaulters who filed a current year Free Application for Federal Student Aid (FAFSA) is available for schools to access under the “Reports” section of the MASSAid system.

III. REVISED JOHN AND ABIGAIL ADAMS SCHOLARSHIP GUIDELINES

DEFINITIONS

ELIGIBLE INSTITUTION:

An institution within the system of public institutions of higher education as identified in Section 5 of Chapter 1 5A of the Massachusetts General Laws, except those institutions retaining Massachusetts resident tuition payments.

ELIGIBLE PROGRAM:

Any state-supported undergraduate degree program offered by an eligible institution.

ELIGIBLE STUDENT:

An undergraduate student who has been **admitted** to an eligible institution and meets the following requirements:

- a) has graduated from or under the auspices of a Massachusetts public high school, and as of June 2005 thru June 2015, and by the end of the junior year, was in the highest 25 percent in their district on the 10th grade Massachusetts Comprehensive Assessment System (MCAS) English Language Arts and Mathematics test, and scored in the Advanced category on one test and Proficient or Advanced on the other test; or

as of June 2016 or thereafter, and by the end of their junior year, was in the highest 25 percent in their district on the 10th grade Massachusetts Comprehensive Assessment System (MCAS) English Language Arts, Mathematics and Science test, and scored in the Advanced category on one test and Proficient or Advanced on the other tests

(Note: an earned GED does not fulfill the high school graduation requirement)

- b) is a permanent legal resident of Massachusetts for at least one year prior to the start of the academic year and who is a United States citizen or a non-citizen eligible under Federal Title IV guidelines
- c) is enrolled full-time in a Massachusetts public college or university, and has not earned a prior bachelor's degree
- d) maintains a cumulative 3.0 GPA on all academic coursework at the institution awarding the degree; or if transferring, has maintained a cumulative 3.0 GPA at the transfer institution;

(The institution is responsible for verifying the cumulative GPA at the end of the spring semester of each academic year; if the student drops below the required 3.0 GPA, the scholarship is permanently forfeited.)

- e) annually files the Free Application for Federal Student Aid (FAFSA)
- f) maintains Satisfactory Academic Progress in accordance with institutional standards
- g) is in compliance with applicable law regarding Selective Service Registration
- h) is not in default with applicable law regarding any Federal or State student education loans for attendance at any institution or owes a refund for any previous financial aid received

The institution may not grant an exception to the above requirements. In rare and extenuating circumstances, the Commissioner or the Commissioner's designee may permit an exception to the above criteria and authorize (in writing) the institution to award the Adams Scholarship. In such cases, supporting documentation must be provided by the student and maintained by the institution and the Office of Student Financial Assistance.

AWARD VALUE

The award under this program shall be equal to the value of required tuition (not including fees) for all state-supported undergraduate courses.

The scholarship may be awarded to eligible students for a maximum of eight semesters of enrollment (not including summer terms), which must occur within six years following high school graduation.

The program will be awarded at no cost to the institution.

AWARD PROCEDURE

Beginning with the Class of 2005, the State Department of Education will annually certify the eligibility of student recipients for the John and Abigail Adams Scholarship. Consistent with other programs, the State Department of Education will provide students with a letter of eligibility and provide the Board of Higher Education and Office of Student Financial Assistance with a list of eligible students designated as Adams Scholarship recipients.

Each John and Abigail Adams Scholarship recipient shall be responsible for submitting documentation of eligibility to the institution where he/she will enroll.

The Office of Student Financial Assistance shall annually provide institutions with a roster of eligible students that have met the requirements of completing the FAFSA. Institutions may use this roster to verify student eligibility whenever other documentation is not available.

The institution shall award scholarships equal to the value of required tuition. The Adams Scholarship is a non-need based program. Financial need is not a requirement for eligibility. However, recipients must meet all requirements as defined for eligible students including filing the FASFA.

ANNUAL REVIEW

One year after the date of implementation, the Board of Higher Education shall evaluate the effectiveness of this program to determine adjustments to the selection and eligibility criteria, as necessary and as warranted by state-wide performance of students on the MCAS, and by any changes to the exam contents (e.g., the addition of Science and History test to the competency determination). Thereafter, a comprehensive evaluation will be conducted annually to assess the program's effectiveness, the results of which will be reported to the Governor and members of the Massachusetts Legislature.

PARTICIPATION AGREEMENTS

All institutions must file a State Financial Aid Participation Agreement to be maintained on file in the State Office of Student Financial Assistance.

AUDIT REQUIREMENTS

- a) It shall be the responsibility of each college and university to maintain documentation of a recipient student's eligibility for the John and Abigail Adams Scholarship.
- b) The Commissioner shall require each campus to furnish annually to the Board of Higher Education a report detailing specific information regarding recipients of the John and Abigail Adams Scholarship Program. The Office of Student Financial Assistance will coordinate specification and procedures for this report
- c) All financial books, records and documents pertaining to this program shall at all times be open to inspection, review, and audit by the Commissioner, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records, and documents are located. The institution shall retain such financial books, records, and documents for seven years. An institution may retain such records for a period of five years if approval is received from the Records Conservation Board in accordance with General Laws, Chapter 30, Section 42.