Introduction to Tuition Assistance Program (TAP) Processing

SUNYFAP 2015
Topics

• FAFSA Application
• TAP Application
• ISIR Selection
• TAP Application Processing
  – Residency
  – Income Verification
  – Student Record Maintenance
  – TAP Certification Processing Flow
• TAP Resources
  – TAP Training Modules
FAFSA Application: fafsa.gov
TAP Link on FAFSA

2014-2015 Confirmation Page

- Your confirmation page has been sent to you at the e-mail address: Renee.Adenos@ed.gov

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

- Does your brother or sister need to complete a FAFSA? If so, you can transfer your parents’ information into a new FAFSA for your brother or sister to save time. Your parents will have to provide a signature again, but that’s all.

- Start your state application to apply for New York state-based financial aid.

What Happens Next

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

School(s) on your FAFSA:

<table>
<thead>
<tr>
<th>School Name</th>
<th>Graduation Rate</th>
<th>Retention Rate</th>
<th>Transfer Rate</th>
<th>Additional Information from College Navigator</th>
</tr>
</thead>
<tbody>
<tr>
<td>SYRACUSE UNIVERSITY</td>
<td>82%</td>
<td>92%</td>
<td>NA</td>
<td>NA</td>
</tr>
</tbody>
</table>

Eligibility Information

- Estimated Expected Family Contribution (EFC): $0,000

The EFC is a measure of how much you can contribute to the cost of your education. Schools use your EFC to determine your federal student aid eligibility.

- Based on the eligibility criteria, you may be eligible for the following:
  - Pell Grant Estimate: $5,545.00
  - Direct Stafford Loan Estimate: $8,500.00

NEW YORK STATE OF OPPORTUNITY.

Higher Education Services Corporation
Institutional Student Information Record (ISIR) Selection

- ISIR record selected for NYS processing when all conditions are met:
  - Nine-digit numeric entry in student’s SSN field
  - Citizenship status is
    - Not blank or not 3, or
    - Not blank and student’s assumed citizenship is not blank
  - Primary EFC is shown
  - ISIR shows SSN match equal to 2,3 or 4
ISIR Selection

- Student’s Permanent State is not blank
- Student’s State of Legal Residence equals NY
- College code equals a NYS School (found on the HESC college table)
- An ETA or completed processed application has not previously been created for the same student determined by a match on SSN
TAP Application: TAP on the Web

Welcome to TAP on the Web! This online application process allows you to apply for New York State’s Tuition Assistance Program (TAP). The New York State Higher Education Services Corporation (HESC) is the State’s student financial aid agency, helping people pay for college by administering 18 student financial aid programs, including TAP, a highly successful College Savings program, and offering guidance to students, families, and counselors.

To complete your online TAP application, you must first create a user name and personal identification number (PIN). Click here.

If you have not submitted a FAFSA application, you may do so at www.fafsa.ed.gov

TAP may be unavailable every Sunday from 1:00 a.m. to 11:00 a.m. Eastern Time. We apologize for any inconvenience this may cause.
Express TAP Application (ETA)

• ETA printed only upon request by student or school
  – Student can call HESC or request online
  – School can request ETA to be sent using request TAP form task
  – School will continue to have on-site print function under Reports/Standard Reports
ETA by Request

- Same prefilled application based on FAFSA data
- ETA available 1 or 2 days after ISIR selection
TAP Application Processing

- TAP
- VIAC
- Citizenship
- Loan Default
- Residency
- SSN
- Income Verification
TAP Processing: Residency

• HESC makes initial determination based on
  – History
    • Was student denied/pending in a previous year?
  – FAFSA Data
    • Student’s state of residence
    • Parents’ state of residence (for dependent students)
    • Student’s address not New York State
TAP Processing: Residency

• HESC can question residency any time during application process
  – If student indicates IT-203 filed by themselves or parents, residency will be questioned immediately upon receipt of the application
  – If student’s TAP record shows a change to out-of-state address due to updating from ISIR, residency will be questioned
TAP Processing: Residency

• School must question residency (decertify or notify HESC) if:
  – Parental data on file indicates parents are not New York State residents (for dependent students)
  – Student’s high school diploma is not from a New York State school
Residency

• Inform HESC via
  – DocTrac
  – Student Record Maintenance

• Please indicate why you are questioning residency
TAP Processing: Income Verification Process (IVP)

• HESC attempts to verify every SSN (student, spouse, parents) on every student record
• IVP begins in May for new processing year
• IVP is then processed every week until the end of August after the end of the school year
• Information on verification provided on View Student Record, Student Status Lists
Verification of Income Adjustment Claim (VIAC)

- Income used to calculate TAP eligibility can be adjusted for other family members (OC) attending college full time
  - For dependent student, sibling, spouse, parent
  - For independent student, spouse, children
- Application process collects OC name, SSN, relationship to applicant
  - Must be full time for at least one term
  - Can attend out of state
TAP Processing: VIAC

• HESC needs signature sign off for all OC (one time only) to send information regarding the OC to the Clearinghouse to verify enrollment

• Clearinghouse verifies full-time enrollment; if no found or found less than full-time, OC will be deleted and award recalculated (spring)
TAP Processing: Student Record Maintenance (SRM)

- Supply and revise student data from the FAFSA, TAP on the Web (TOTW) application and/or ETA
- Adjustment to the number of other family members attending college, used in the calculation of the TAP award
- Certify student awards currently pending on a roster, amend student awards previously certified
TAP Certification Processing Flow

1. HESC creates rosters from approved applications
2. School certifies, corrects rosters and returns to HESC
3. HESC gathers all certification data daily, processes Thursday night, releases remittance advices Friday
4. Changes may be made to certifications prior to and after processing
Resources on hesc.ny.gov

• Click “Partner Access”
• Select “Financial Aid Professionals”
Transaction Processing

View Student Record

Enter the student Social Security Number and Academic Year you wish to view. The G5S Student Data provides you with general information used to calculate eligibility for a TAP award. If you wish to view more specific details, click on the arrow in the drop down box below and select either G5S Processing Data, G5S Income Data, G5S Payment Data, G5S APTS Term Data, or All G5S Data. (This G5S APTS Term Data will only appear if a student has an APTS award). Once the selection is made, click on the VIEW button to obtain the data requested.

Required information is marked with a "*".

* Academic Year: 

* Student SSN: 

For more information see Working with View Student Record.
Programs, Policies, and Procedures
TAP Coach

Search for glossary terms (regular expression allowed)

**search...**

- Begin with
- Contains
- Exact term
- Sounds like

[Search]  [Clear]

Term  Definition
TAP Processing Schedule

The following schedule includes the anticipated date of Rosters, Remittance Advices, Accounting Documents and Student Status Listings. If HESC is unable to meet the scheduled date of any of the listed reports, we will send an e-mail update.

APRIL 2015 TAP Processing Schedule

April 1st
- 2013-14 Remittance Advice
- 2013-14 Student Status Listing

April 2nd
- 2015-16 Student Status Listing
TAP Training Modules

• New FA professionals & those needing refresher
• 6 modules, 3-12 minutes each
  – TAP application process
  – Eligibility requirements for a TAP award
  – Award determination, good academic standing
  – G&S Transaction Processing and Student Record Maintenance (SRM)
  – Using DocTrac to submit more info
Training

• Additional topics to be added
• Make suggestions – your input is valuable to HESC
  – Contact Priority Services at 866-431-4372 or Priorityservices@hesc.ny.gov
Questions?

• Contact: Barbara Hochberg
  Director, Grants & Scholarship Programs
  Barbara.Hochberg@hesc.ny.gov