Agenda

• TAP Process
• TAP Award Schedules
• Good Academic Standing
  – Pursuit of Program
  – Satisfactory Academic Progress
  – Tap Waivers
• Mainframe Rosters
• Consolidated Scholarship Rosters
Evaluating Student Eligibility
Evaluating Student Eligibility

- HESC
  - Citizenship
  - New York State residency
  - Income eligibility
  - Financial independence
  - Not in default on a state or federal student loan
Citizenship

• Federal requirements
• Title IV eligibility
NYS Residency

• Who is
  – Residing in New York State permanently
  – Can evidence domicile/permanent abode
  – Member of Armed Forces stationed in NYS and immediate family members
  – Financially dependent on parents who are also legal residents of NYS
  – Financially dependent student is considered resident of state where parents reside

• Who isn’t
  – Merely living in New York State to attend college
  – Cannot evidence domicile/permanent abode
  – Financially dependent on parents who reside in another state
Residency - Points

• Legal resident 12 months prior to term
• Parents retired to Florida
  – If claimed as dependent, student now Florida resident
  – Ineligible for TAP
• Residency appeal
  – Log into HESCWeb and request a Residency Questionnaire
  – HESC will evaluate
Residency

- **Warning signs**
  - Parents have a non-New York address
  - Student off-campus address not in New York
  - H.S. diploma not from New York school
- **Consult with HESC**
  - Don’t certify if unsure
  - Log onto HESCCWeb-Student Record Maintenance to request RFI or Residency Questionnaire be sent to student
  - Send any documents you have using Doc Trac
- **DocTrac**
  - E-mail: doctrac@HESC.ny.gov
  - Fax: (518) 473-1414
Income Eligibility

- Income determines award
- What is income?
  - NYS Net Taxable Household Income
  - Pensions not included on tax return
- HESC verifies income with NYS Department of Tax & Finance
- Maximum income
  - Dependent or married with dependents - $80,000
  - Independent, single with dependents - $80,000
  - Independent, married, no dependents - $40,000
  - Independent, single, no dependents - $10,000
  - Dependent, also includes student who is either a orphan, a ward of the court or in foster care
Financial Independence – Basic Conditions

• Does not and will not live with parents for more than six weeks during preceding, current and future tax year
• Did not receive support from parents exceeding $750 during preceding, current and future tax year
• Is not claimed as dependent on parent(s) tax return(s) for preceding or current tax year
• Honorably discharged from US military service and not claimed by parents for preceding or current tax year
Financial Independence – (cont.)

• 35 yrs. as of June 30 of academic year  
  – June 30, 2015, for 2015-16  
• 22-35 yrs. as of June 30 and meet basic conditions  
• Married on or before December 31 preceding the academic year and meet basic conditions  
• Previously approved for financial independence and meet basic conditions  
• Under 22 yrs.  
  – Meet basic conditions and  
  – Meet special conditions
Financial Independence – Special Conditions

- Under 22
- Both parents are
  - Deceased; or
  - Totally and permanently disabled; or
  - Declared incompetent
- Applicant receives public assistance
- Applicant is ward of the court
- Involuntary dissolution of family unit
High School Diploma

- Diploma or certificate from high school within the United States
- Equivalent exam acceptable to NYS Education Department (e.g. TASC-Test Assessing Secondary Completion)
- Passing score on Ability to Benefit Test (ATB)
- Maintain documentation in student file
TAP Award Schedules
TAP award schedules

- Dependent students; orphan, foster child or ward of the court; married with dependents; or independent students with tax dependents
  - Maximum TAP award is $5,165
- Students who are independent, married and no tax dependents
  - Maximum TAP award is $3,025
- Independent students who are single with no dependents
  - Maximum TAP award is $3,025
Schools Responsibilities for Certification
School responsibilities

- High School diploma
- Approved program of study
- Enrolled
  - Study abroad
  - Out of state study
- Matriculated status
- Full-time status
- Good academic standing
- Level of study – undergraduate only
Matriculated

• Applied for admission at school offering approved program
• Enrolled in courses fulfilling degree requirement
Full-Time

• 12 credits or more per semester toward degree program
• No repeated courses for better grade
• Can retake failed course if Good Academic Standing requirements met
Good Academic Standing

• Two components measure student’s academic progress:
  – Pursuit of Program (POP)
    • Measure of **effort** to complete a program
  – Satisfactory Academic Progress (SAP)
    • measure of **achievement** of earning credits toward a degree or certificate with specified GPA
• Evaluated each term at certification
Good Academic Standing - POP

• Pursuit of program
  – Student must receive a passing or failing grade in a certain percentage of courses each term
  – Based on number of TAP payments student has received
## Good Academic Standing - POP

<table>
<thead>
<tr>
<th>Payment</th>
<th>Must Receive Grade for</th>
</tr>
</thead>
<tbody>
<tr>
<td>1, 2</td>
<td>50% of min. full-time requirement (6 credit hrs./semester)</td>
</tr>
<tr>
<td>3, 4</td>
<td>75% (9 credit hrs.)</td>
</tr>
<tr>
<td>5 or more</td>
<td>100% (12 credit hrs.)</td>
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</table>
Good Academic Standing - SAP

• Satisfactory academic progress
  – Accumulate a specified number of credits
  – Achieve a specified cumulative grade point average each term
  – Based on number of TAP payments students have received
  – C average requirement after 4th payment
# Good Academic Standing - SAP

<table>
<thead>
<tr>
<th>Before Being Certified for This payment</th>
<th>1&lt;sup&gt;st&lt;/sup&gt;</th>
<th>2&lt;sup&gt;nd&lt;/sup&gt;</th>
<th>3&lt;sup&gt;rd&lt;/sup&gt;</th>
<th>4&lt;sup&gt;th&lt;/sup&gt;</th>
<th>5&lt;sup&gt;th&lt;/sup&gt;</th>
<th>6&lt;sup&gt;th&lt;/sup&gt;</th>
<th>7&lt;sup&gt;th&lt;/sup&gt;</th>
<th>8&lt;sup&gt;th&lt;/sup&gt;</th>
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<th>10&lt;sup&gt;th&lt;/sup&gt;</th>
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<tbody>
<tr>
<td>Student Must Have Accrued At Least This Many Credits</td>
<td>0</td>
<td>6</td>
<td>15</td>
<td>27</td>
<td>39</td>
<td>51</td>
<td>66</td>
<td>81</td>
<td>96</td>
<td>111</td>
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<tr>
<td>With At Least This Grade Point Average</td>
<td>0</td>
<td>1.5</td>
<td>1.8</td>
<td>1.8</td>
<td>2.0</td>
<td>2.0</td>
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</table>
Beneficial Placement

- Applies when a recipient of State student aid in good standing transfers to another institution, or changes academic programs within same institution
- Student is repositioned on SAP chart based on number of credits earned or number of payments received, whichever is more beneficial to student
- Beneficial placement applies only to satisfactory academic progress
Beneficial Placement

• Beneficial placement does not have a bearing on POP requirement
• Students must still meet 2.0 GPA requirement if they have received two or more years of payment, even if they are repositioned at a point on the chart where a GPA of less than 2.0 is required
Exceptions and Waivers

• Americans with Disabilities Act (ADA)
  – May be eligible for TAP for 3 credits or more (1 class)

• Medical/Health Waiver
  – Serious illness or other adverse physical condition which requires restricting student’s program of study
  – Combine course work of multiple terms to meet full-time study requirement
  – Medical documentation

• Document special conditions in student file
Waivers

- One-time GAS waiver
  - Extenuating circumstances
  - Possible if institution makes its criteria and procedures for waivers available to students and the public
  - Based on school’s **published** criteria
- C average waiver
  - Death of relative
  - Student illness or injury
  - Extenuating circumstances

- Document all waivers
Certification Process
Rosters

• Mainframe Rosters
• Consolidated Scholarship Rosters (SU069)
<table>
<thead>
<tr>
<th>Name</th>
<th>SSN</th>
<th>DOB</th>
<th>Award Amount</th>
<th>Cost Code</th>
<th>F/T/Y</th>
<th>Waiver</th>
<th>Status</th>
<th>Tuition and Fees</th>
<th>Other Aid</th>
<th>Budget</th>
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<td></td>
<td></td>
<td>$750.00</td>
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<td>Student 3</td>
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<tr>
<td>Student 4</td>
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<td>Student 5</td>
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Note: The document shows consolidated scholarship roster information for the 2015-16 academic year. The table includes columns for student name, SSN, DOB, award amount, cost code, F/T/Y, waiver, status, tuition and fees, other aid, and budget.
<table>
<thead>
<tr>
<th>Code</th>
<th>Explanation</th>
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<tr>
<td>1</td>
<td>Eligible</td>
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<tr>
<td>2</td>
<td>Tap No Scholarship</td>
</tr>
<tr>
<td>3</td>
<td>Withdrawn with Tuition Lability</td>
</tr>
<tr>
<td>4</td>
<td>Not Registered</td>
</tr>
<tr>
<td>5</td>
<td>Not Full-Time</td>
</tr>
<tr>
<td>6</td>
<td>Not Matriculated</td>
</tr>
<tr>
<td>7</td>
<td>Does not meet Accelerated Study requirements</td>
</tr>
<tr>
<td>8</td>
<td>Not in Good Academic Standing</td>
</tr>
<tr>
<td>9</td>
<td>Miscellaneous</td>
</tr>
</tbody>
</table>
Certification Components

• When?
  – HESC processes no earlier than 14 days after term start date
  – 60 days from the roster date or 30 days from end of term, whichever is later

• Other benefits
• Enrollment status – “FT”
• Academic waiver – GAS Waiver Only
• 5 year program?
TAP Certification Processing Flow

- HESC creates rosters from approved applications
- School certifies, corrects rosters and returns to HESC
- HESC gathers all certification data daily, processes Thursday night, releases remittance advices Friday
- Changes may be made to certifications prior to and after processing
• QUESTIONS?
Thank You

• HESC Contact

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barbara.hochberg@hesc.ny.gov