

2021 ISFAA-ICHE Webinar Series

State Financial Aid Appeals

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May 18th, 2021

OVERVIEW

- ▶ Financial Aid Support Center
- ▶ The Purpose of State Financial Aid Appeals
- ▶ Common Appeal Reasons
- ▶ Filing Appeals
 - ▶ How a student files an appeal vs. A guardian filing an appeal
- ▶ General Update
 - ▶ Recent Legislative Tasks
 - ▶ CHE Update



STATE FINANCIAL AID APPEALS

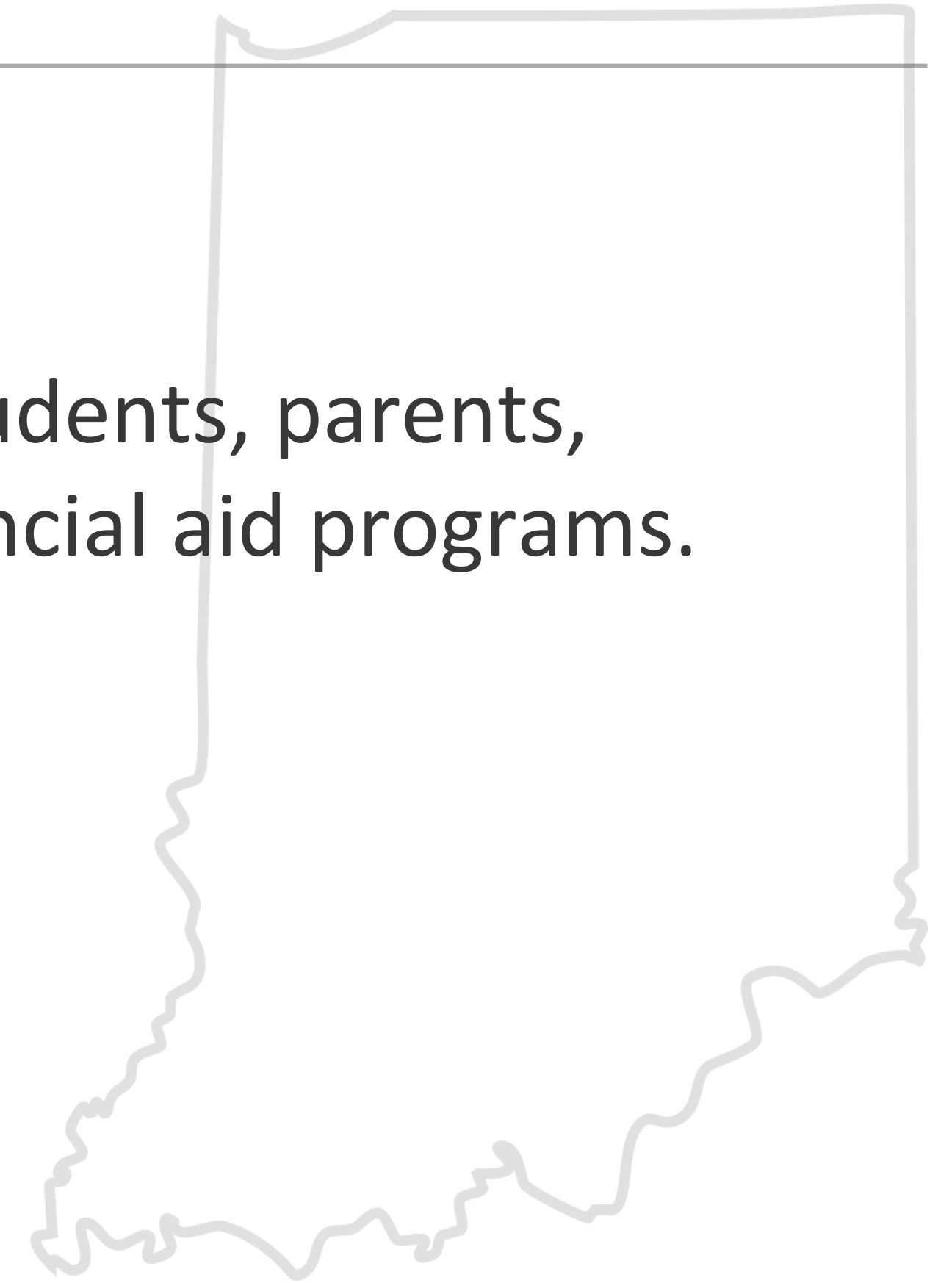
THE FINANCIAL AID SUPPORT CENTER



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FINANCIAL AID SUPPORT CENTER

- ▶ The Financial Aid Support Center provides direct support to students, parents, colleges, and other partners concerning Indiana's student financial aid programs.
- ▶ The administration of financial aid has three prongs:
 - ▶ Financial Aid Operations
 - ▶ College Support
 - ▶ Direct Student Support
 - ▶ Appeals Committee



THE PURPOSE OF STATE FINANCIAL AID APPEALS

- ▶ State financial aid appeals are used to evaluate students' unusual or unfortunate circumstances that resulted in the loss of their award.
- ▶ The appeals process gives the student (or guardian) the opportunity to advocate for the reinstatement of their aid or overriding a Commission policy.
- ▶ The Financial Aid Support Center processes over 1,800 financial aid appeals each year.
- ▶ Typical time-frame for review and response is 21 days.

STATE FINANCIAL AID APPEALS

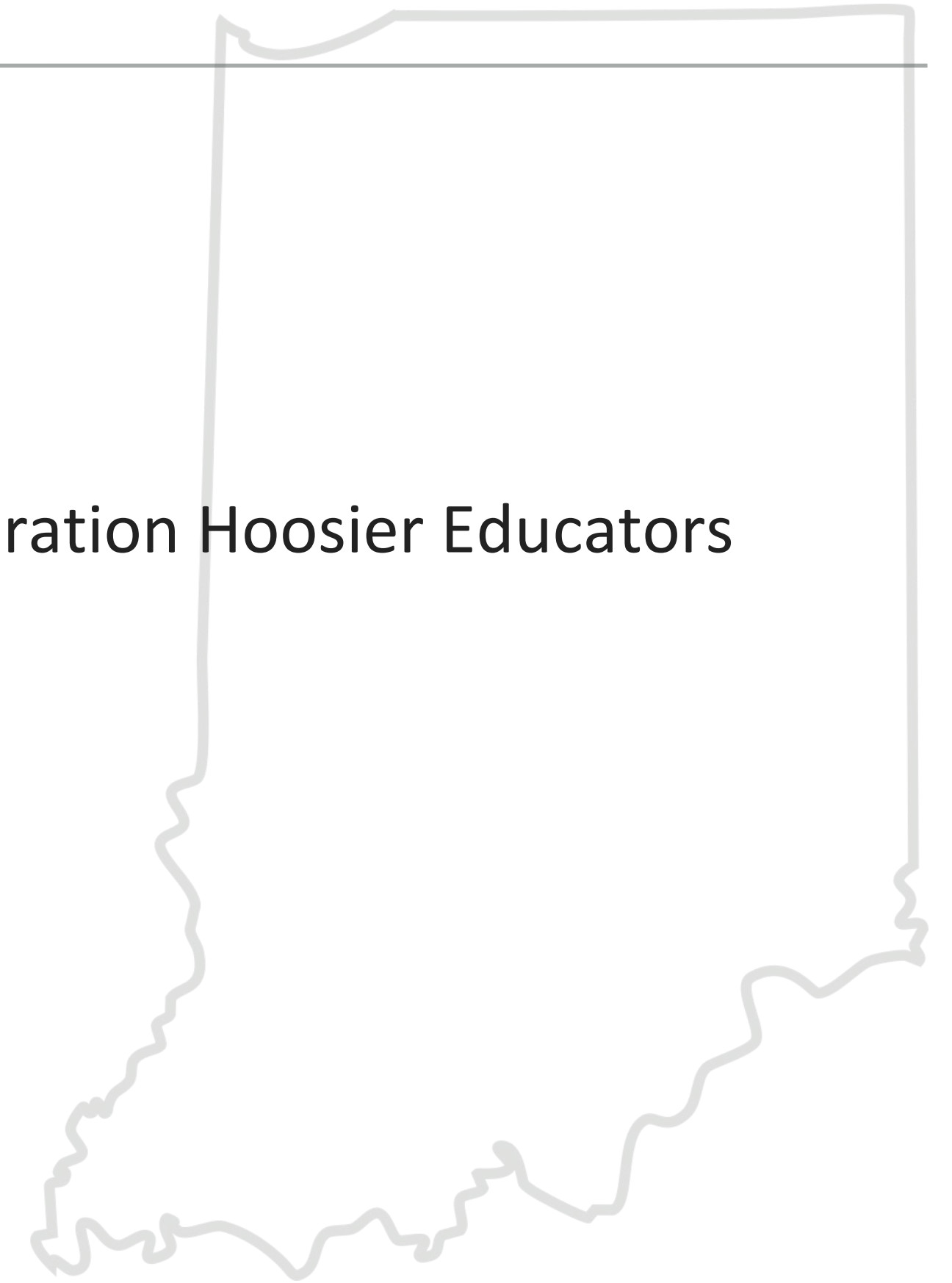
COMMON APPEAL REASONS



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COMMON APPEAL REASONS

- ▶ Credit Completion Requirement
 - ▶ 21st Century Scholarship, Frank O'Bannon Grant, Adult Student Grant, Next Generation Hoosier Educators Scholarship
- ▶ FAFSA Deadline
- ▶ Indiana Residency
 - ▶ Unusual circumstance, military spouse
- ▶ Active Duty Military
- ▶ CVO Usage 8+ Years
- ▶ State Financial Aid Usage 8+ Years



COMMON APPEAL REASONS CONT'D

- ▶ June 30th Enrollment Deadline
- ▶ Income Eligibility
 - ▶ 21st Century Scholars initial application
- ▶ High school GPA/Diploma Type
- ▶ Foster Care
- ▶ Pledge Violation



SAMPLE EXTENUATING CIRCUMSTANCES

- ▶ Death in the Family
- ▶ Documented Illness/sickness
 - ▶ Medical, Counseling, Therapy, etc.
- ▶ Divorce
- ▶ Natural Disaster or Global Pandemic
- ▶ Earned an Associate's Degree or certificate



STATE FINANCIAL AID APPEALS

FILING STATE FINANCIAL AID APPEALS



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FILING STATE FINANCIAL AID APPEALS

- ▶ All state financial aid appeals must be submitted via ScholarTrack and supporting documentation must be attached.
- ▶ Appeals can be submitted through a Student ScholarTrack Account or Guardian ScholarTrack Account.
- ▶ All appeal communication remains within the appeal. There are no phone or in-person meetings with the appeals committee.
- ▶ If the appeal is denied, it can escalate to a 2nd and 3rd level review, upon request from the student/guardian.

FILING A STATE FINANCIAL AID APPEAL – STUDENT ACCOUNT

- ▶ Access student account from ScholarTrack.IN.gov
- ▶ Student must log into account
- ▶ Next select **State Aid Resources**
- ▶ Next select **My Appeals**
 - ▶ Select an appeal reason
 - ▶ Insert a narrative
 - ▶ Upload documentation



FILING A STATE FINANCIAL AID APPEAL – STUDENT ACCOUNT

The screenshot displays the ScholarTrack website interface. At the top, there is a teal navigation bar with the 'LEARN MORE INDIANA' logo on the left, the 'ScholarTrack' title in the center, and navigation links for 'MY DASHBOARD', 'STATE AID RESOURCES', and 'CONTACT' on the right. A dropdown menu is open under 'STATE AID RESOURCES', listing 'Apply for State Aid', 'My Appeals', and 'Scholar Success Program'. Below the navigation bar, the main content area is light gray. On the left, there is a white box titled 'Parents/Guardians' with an 'ADD' button. Below this box, there is a redacted area and a 'Remove Access' link. In the center-right, there are two teal buttons: 'VIEW AS A STUDENT' and 'VIEW AS A PARENT/GUARDIAN'.

FILING A STATE FINANCIAL AID APPEAL – STUDENT ACCOUNT

Submit New Appeal ✕

Are you sure you want to submit a new appeal?

Once an appeal is received, a Commission staff member will review the appeal. The appeal can be approved, denied, or more information may be requested. If more information is requested, the student will have 21 days to submit the requested documentation. A student can ask for additional time to submit supporting documentation, but must do so within the 21-day time frame. Failure to submit all documentation or request an extension will result in a denial.

For information on reasons to appeal, [click here](#).

Yes, I understand the above terms and want to open a new appeal

APPEAL INFORMATION

Reason(s) for Appeal

For ALL Student Financial Aid Recipients:

- Active Military Duty
- COVID-19 / Coronavirus
- Credit Completion Requirements
- FAFSA Filing Deadline
- Indiana Residency
- U.S. Citizenship (or Eligible Non-Citizen)

FILING A STATE FINANCIAL AID APPEAL – STUDENT ACCOUNT

NARRATIVE EXPLANATION

Please use the space below to describe your reason for appealing. Responses are limited to 500 words.

0 / 500

SUPPORTING DOCUMENTATION

You may attach one or more of the following pieces of supporting documentation depending on the nature of your appeal. (Supporting documentation is limited to 10 pages.)

- Academic Performance (*High School or College Transcript*)
- Citizenship/Residency (*Social Security Card, Immigration/Naturalization Documentation, or Fishing/Gaming License*)
- Extenuating Circumstances (*Medical Records, Court Records, Death Certificate, Accident Reports, Military Records*)
- Income Eligibility (*1040 Tax Form, Tax Transcript, Letter of Non-filing Status, Child Support Statements, or Social Welfare Benefit Summary*)

UPLOAD

Supported file extensions include: .pdf,
.txt, .csv, .jpeg, .jpg, .gif, .tiff, .tif, .bmp,
.png, .dat



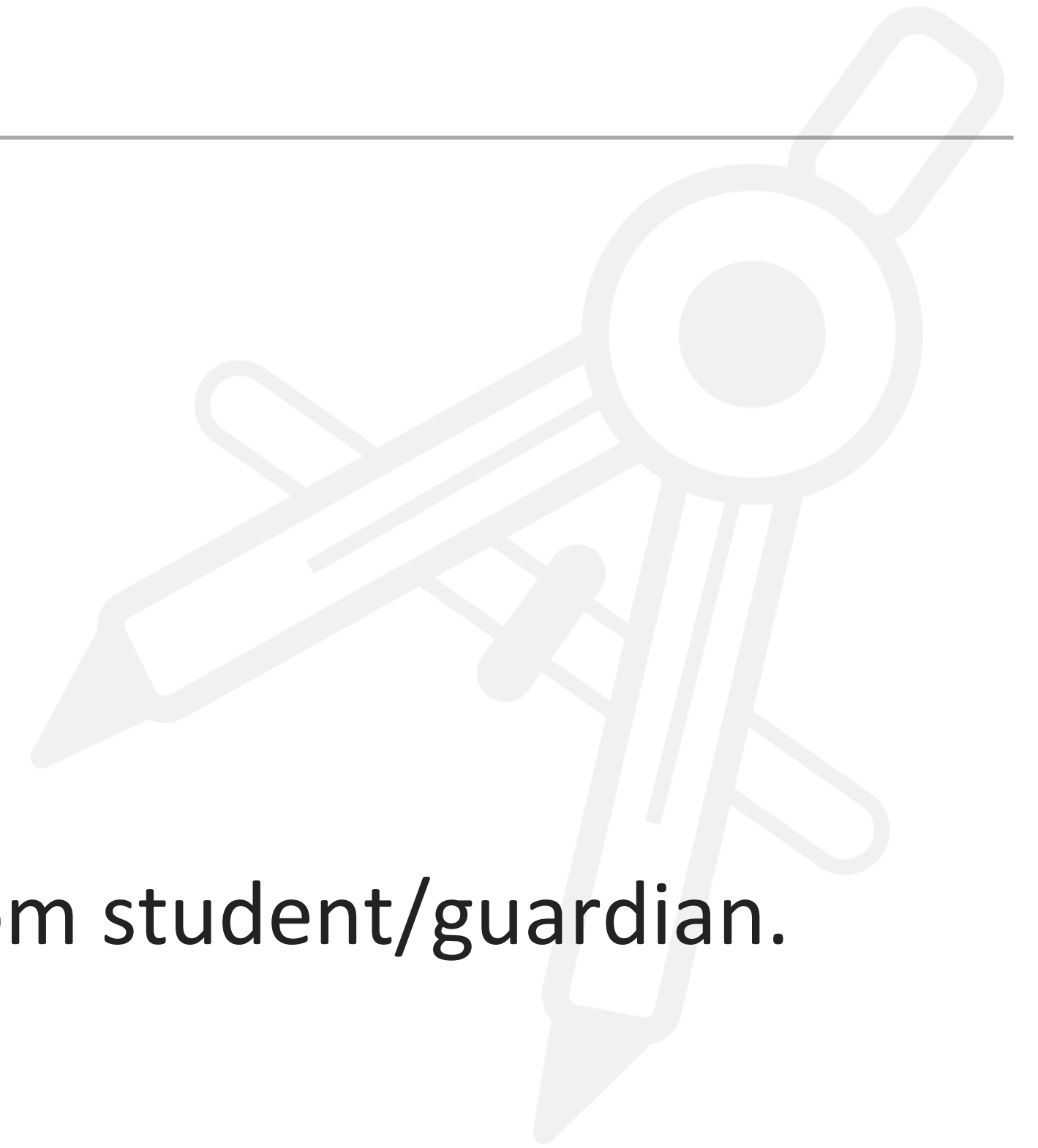
FILING A STATE FINANCIAL AID APPEAL – GUARDIAN ACCOUNT

- ▶ Access Guardian Account from ScholarTrack.IN.gov
- ▶ Guardian must log into account
- ▶ Next select **View & Submit Appeals for this Student**
- ▶ Next select **Submit Student Appeal**
 - ▶ Select an appeal reason
 - ▶ Insert a narrative
 - ▶ Upload documentation



FINAL NOTES

- ▶ Appeals may exceed 21 days.
- ▶ Additional documentation may be necessary.
- ▶ Appeals are withdrawn after 30 days if there is no response from student/guardian.
- ▶ Final decision notification.
 - ▶ Student/Guardian notified via ScholarTrack
- ▶ What if student/guardian is unhappy with the appeal decision?
 - ▶ 2nd and 3rd level appeals available



STATE FINANCIAL AID APPEALS

GENERAL UPDATE



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SEA 101 & HEA 1553

- ▶ SB 101 - Education & Higher Education Matters
 - ▶ Improves high school graduation plan
 - ▶ Ensures students can access transcripts from closed institutions
 - ▶ Allow minors to access the Next Generation Hoosier Educators Scholarship
- ▶ HB 1553 – Higher Education Matters
 - ▶ Expands qualifications for Next Generation Hoosier Educators Scholarship
 - ▶ Expands National Guard Supplemental Grant to cover graduate credit hours

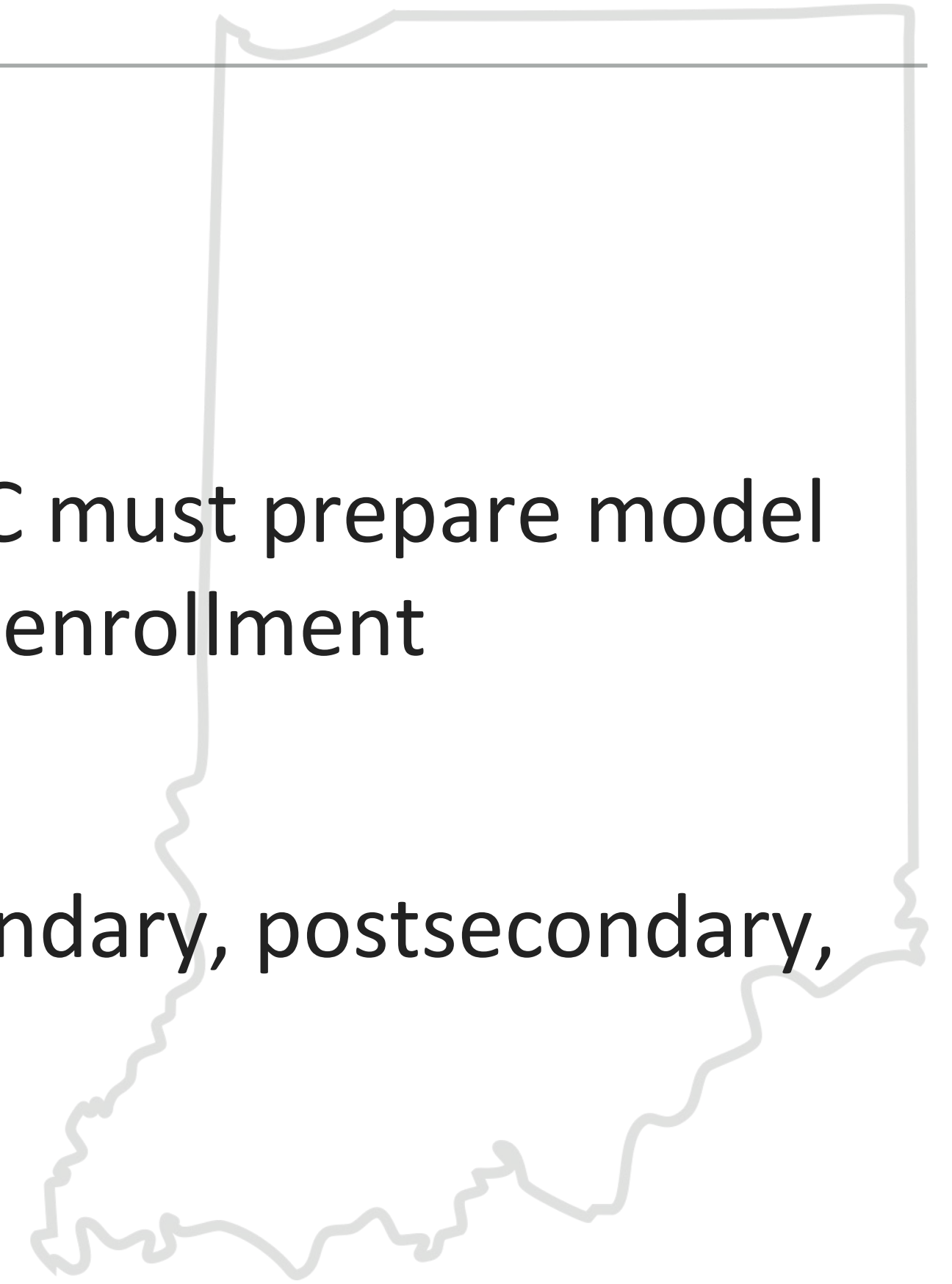


HEA 1549 – PRIOR LEARNING ASSESSMENT

- ▶ HEA 1549-2021 requires the Commission, IDOE and GWC to create the Indiana Postsecondary Prior Learning Assessment (PLA) Clearinghouse by July 1, 2022
- ▶ The PLA Clearinghouse must include an inventory of all PLA opportunities which provide postsecondary credit at state educational institutions
- ▶ State educational institutions must provide the information needed for the PLA Clearinghouse by March 1, 2022

HEA 1549 – WORK-BASED LEARNING

- ▶ Similar to the PLA Clearinghouse, the Commission, IDOE and GWC must prepare model guidance and informational resources concerning postsecondary enrollment opportunities which incorporate work-based learning
- ▶ The guidance must describe the roles and responsibilities of secondary, postsecondary, and employer stakeholders
- ▶ The guidance must be issued by January 1, 2022



HEA 1549 – BUSINESS MODEL REPORT

- ▶ The Commission must prepare a report outlining how Indiana's state educational institutions reduced costs without reducing quality over the last ten years
- ▶ The report must include information concerning administration, buildings, degree program offerings and fees, nonacademic initiatives and cost centers, technology utilization and maintenance, the percentage of faculty tenured, and inflation
- ▶ The goal is to find ways to reduce the average total cost for students by 24-25 with the report due by November 1, 2021

HEA 1549 – FREE SPEECH REPORT

- ▶ The Commission must prepare a report which includes a description of how state education institutions recognize and protect the freedom of speech and association rights
- ▶ The report must also include a recommendation on a survey instrument that institutions shall administer by May 1, 2022
- ▶ The purpose of the survey is to determine perceptions on whether free speech and academic freedom are recognized and fostered on campus

CHE GENERAL UPDATE

- ▶ FAFSA Deadline
- ▶ Email List
- ▶ Student Aid Index Projections
- ▶ Financial Aid Manual





Questions?



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