

HEAB Best Practices



April 13, 2023

2:50 p.m.

The Higher Educational Aids Board



- The state agency responsible for the management and oversight of the state's student financial aid system for Wisconsin residents attending institutions of higher education. It also may enter into interstate agreements, such as remission of nonresident tuition.
- HEAB administers programs of student financial aid, including grant, scholarship, and loan programs; tuition reciprocity agreements; and tuition capitation contracts.

Joy Dyer, Grant Specialist

WG-PNP, MURG, MTL, & HSSP



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Wisconsin Grant Programs



Common Questions About WG-PNP

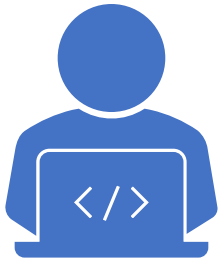


When should File Maintenance be sent to HEAB?

Every WG-PNP school should send File Maintenance to HEAB within **2 weeks** after your school's **census date**.

Continue to send additional File Maintenance to HEAB as student enrollment changes in your school occur.

Wisconsin Grant Programs



How does an “N Code” on a student’s account get removed if the student is now attending your school?

Send a request to have HEAB manually remove the **N Code** from the student’s account.



How does a student’s Alternative Tuition Code at HEAB get updated in HEAB’s computer system?

Send **File Maintenance** to HEAB for students enrolled in programs that use your school’s Alternative Tuition Codes at HEAB.

Continue to send additional File Maintenance to HEAB if an enrolled student changes programs, or if an Alternative Tuition Code must be updated again in HEAB’s computer system.

Minority Undergraduate Retention Grant (MURG)

Common Questions

My school's notification list shows a YEAR IN SCHOOL REJECT error for one of my nominated MURG students. How can I fix this?



If a nominated MURG student's Year in School is in error, the school or the student may go into the student's **FAFSA** and electronically update the nominated MURG student's Year in School on the FAFSA to be at least a **Year in School "2" or higher**.



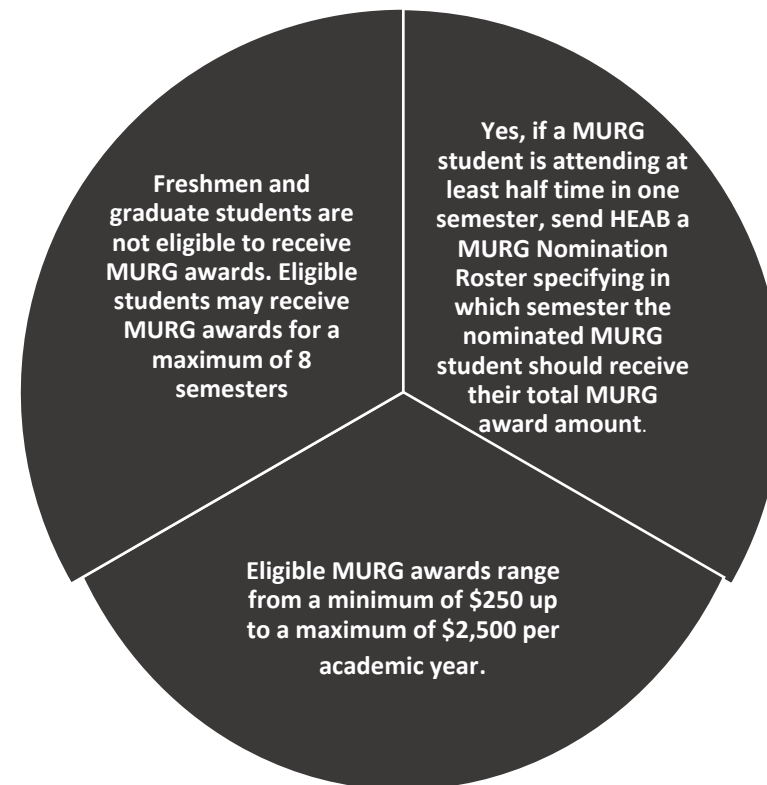
Email HEAB to notify that this nominated MURG student's updated Year in School on the student's FAFSA is completed.



Once the nominated MURG student's updated FAFSA is loaded into HEAB's computer system, HEAB will enter the student's MURG award and the school may voucher for it again.

Minority Undergraduate Retention Grant (MURG)

If one of your school's nominated MURG students is not attending your school in one semester during the academic year, may that student receive the entire MURG award in the other semester that the student attends?



Minority Undergraduate Retention Grant (MURG)

If one of your school's nominated MURG students withdraws, or is no longer eligible for a MURG award, may a new student be nominated to receive a MURG award instead?

- Yes, if a nominated MURG student withdraws or is no longer eligible, a new MURG student may be nominated in its place.
- Send HEAB an **updated MURG Nomination Roster** specifying a **\$0** MURG award amount to the previously nominated MURG student who withdrew or is not eligible.
- Add the newly nominated MURG student to the **updated MURG Nomination Roster** and specify this student's new MURG award amount on the roster.

Minority Teacher Loan (MTL) Program

Common Questions

Do newly nominated MTL Program students need to work only in the City of Milwaukee after graduation to be eligible for MTL Program loan forgiveness?

- **No**, due to the changes in the Wisconsin Statutes, the MTL Program no longer requires MTL Program students to agree to work only in the City of Milwaukee after graduation to be eligible for MTL Program loan forgiveness.
- Students who participate in the MTL Program must agree to teach **full time** in a public or private elementary or secondary school, or a tribal school, in a **Wisconsin school district with a 40% or higher minority student population**.

Minority Teacher Loan (MTL) Program

MTL Program students must be currently enrolled in programs **leading to teacher licensure in a discipline identified as a designated teacher shortage area** for the state of Wisconsin by the U.S. Department of Education.

For each year that the MTL Program student meets all MTL forgiveness criteria requirements, **25%** of the MTL Program loan is forgiven. If the forgiveness criteria requirements are not met, the MTL Program loan must be repaid at an interest rate of **5%**.

What is the current definition of “Minority” for the MTL Program?

- For eligibility purposes of the MTL Program, **sec. 39.40 (1), Wisconsin Statutes**, defines a “**minority student**,” as a Black American; American Indian or Alaskan native; Hispanic; person of Asian or Pacific Island origin; or person whose ancestry includes two or more races.

Health Services Scholarship (HSSP) Program

Common Questions

Are part-time students at your school eligible for HSSP scholarships and will they be prorated?

- No, part-time students are **not** eligible for HSSP scholarships and HSSP scholarships are **not prorated**.
- HSSP scholarship recipients' **full-time cost of attendance** in your school's Health Training Program for the academic year must be at least as much, or greater than, as their HSSP scholarship amount.
- HEAB will award **dentists, primary care physicians, and psychiatrists** HSSP scholarships equal to **\$30,000** each for every academic year in which they apply and are eligible.
- HEAB will award **physician's assistants and nurse practitioners** HSSP scholarships equal to **\$25,000** each for every academic year in which they apply and are eligible.

Health Services Scholarship (HSSP) Program

Who is eligible to apply for the HSSP scholarships?

- Students are eligible to apply for HSSP scholarships if they are **Wisconsin residents** and **all** of the following:
 - Currently in a dental, psychiatry, or medical school to become a dentist, primary care physician, or psychiatrist; or are in a graduate program to become a physician's assistant or a nurse practitioner.
 - Enrolled in their **2nd** year of the Health Training Program or higher at a **non-profit college in Wisconsin**.
 - Intent to practice in a **designated Health Shortage Area in Wisconsin** after graduation.

Jody Gennrich, Grant Specialist



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WI Residency

Eligibility is based on **sec. 36.27(2) (e), Wisconsin Statutes**

A student who enters and remains in this state principally to obtain an education is presumed to continue to reside outside this state and such presumption continues in effect until rebutted by clear and convincing evidence of bona fide residence.



In determining bona fide residence at the time of the beginning of any semester or session and for the preceding 12 months the intent of the person to establish and maintain a permanent home in Wisconsin is determinative.



Physical presence in WI for at least 12 months preceding the beginning of the semester or session for which the student registers, and, if the student is not a U.S. citizen, possession of a visa that permits indefinite residence in the U.S.

Common Eligibility Exceptions

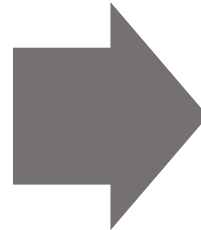
If a student has already received an award in a prior academic year, and is otherwise eligible, except for the residency block, HEAB may, upon request, remove the residency block on a student's account to allow the student to continue to receive a WG award in the current academic year.

Any student who is a graduate of a Wisconsin high school and whose parents are bona fide residents of this state for 12 months next preceding the beginning of any semester or session for which the student registers at an institution or whose last surviving parent was a bona fide resident of this state for the 12 months preceding death.

Any person continuously employed full time in this state, who was relocated to this state by his or her current employer or who moved to this state for employment purposes and accepted his or her current employment before applying for admission to an institution and before moving, and the spouse and dependents of any such person, are entitled to the exemption under par. (a) if the student demonstrates an intent to establish and maintain a permanent home in Wisconsin according to the criteria under par. (e).

Wisconsin Residency Determination

If it is not clear the student meets any of the resident eligibility or exceptions a student may be required to complete a Residency Determination Form.



The form and the supporting requested documentation such as, student and/or parent Federal and State tax returns, dependency, employment and voter registration assist in determining resident status.

Requesting Residency Updates

When sending an email requesting a residency update for a student, please provide what makes them a resident.

A brief description on how they qualify as residents. For example....

- **Can you update the residency status for this student-- xxxxxxxx Simple Simon is a non-resident on the Notification List, but our Registrar's Office has determined that they are a WI resident for tuition: Provided information demonstrating that she has been enlisted in the Wisconsin National Guard for six months and has resided in Wisconsin for six months prior the start of the semester.**
- **Can you update the residency status for the following students who were approved for residency in previous years and have received WG previously**

Why do students need to complete a FAFSA for the WI Veteran Grant for WG-PNP?

By completing the FAFSA, HEAB can pull the student into our system.

HEAB does not look at EFC or AGI, we use the demographics from the FAFSA completed by the student.

Assist with Legislators' inquiries.

What is the difference between **Part-time** and **Half-time**?

Part-time by Federal standards description is 1 credit.

Half-time by Federal standards description is 6 credits.

How do I know when I can request the funds for a student?

Typically, when you see the student on your notification report you may request the funds.

Any questions, reach out to HEAB staff.

Cassie Weisensel Grant Specialist



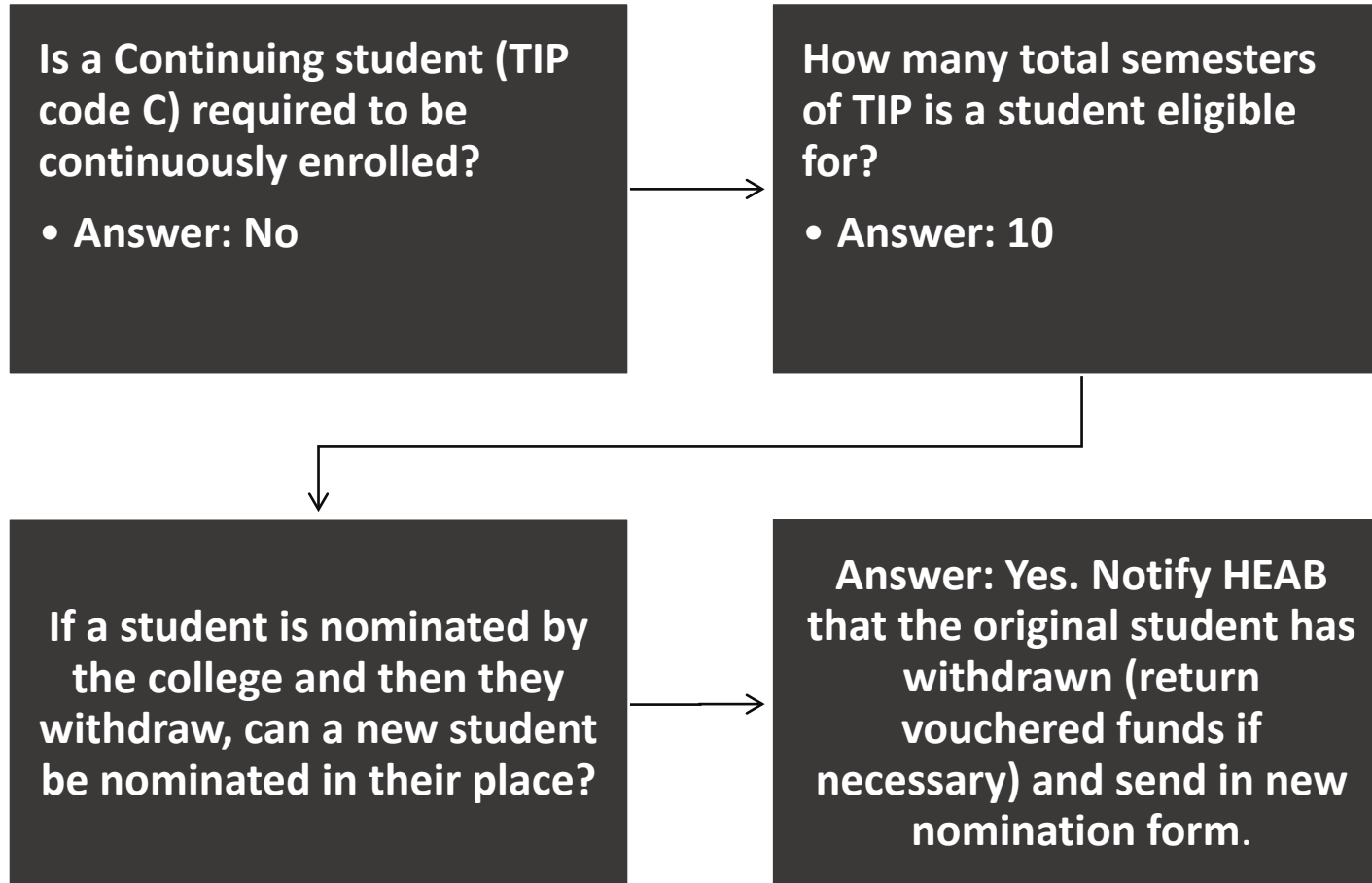
Talent Incentive Program (TIP)

Academic Excellence Scholarship (AES)

Technical Excellence Scholarship (TES)

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Talent Incentive Program (TIP)



Academic Excellence Scholarship (AES)

What is the refund policy for AES?

- Answer: Refunds for AES are processed with the same guidelines as the other State programs.

How many credits are required for a student to receive AES?

- Answer: 12 per semester

If a student is graduating in the current semester and they are enrolled in less than 12 credits, can the student still receive their scholarship?

- Answer: Yes, as long as the student is enrolled in at least 6 credits. You must notify HEAB of this situation before awarding the student so that HEAB can grant a waiver.

Technical Excellence Scholarship (TES)



How many credits are required to receive TES?

Answer: 6 credits per semester



What is the refund policy for TES?

Answer: Follow the same procedure that you follow for the other State programs.



Can students receive TES if they are in an apprenticeship?

Answer: Yes. Have the student contact HEAB. The student is required to sign a waiver before they can be awarded.

Barb Moermond

IS Operations Support Tech Senior



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Frequently Asked Questions

Student not on notification list

Is the Student State of Legal Residence WI?

- **Yes?** Send a request to HEAB for us to add your school manually.
- HEAB currently only has room to add the first 6 eligible WI schools listed on the FAFSA.
- **No?** Send a request to HEAB for us to request the ISIR from CPS.

Common Voucher Questions



Voucher error “Requested Amount Not Available”

This usually means that the funds being requested have already been disbursed, so check your records, previous vouchers, etc.



Voucher error “\$ spent at school ###”

If the student is enrolled at your school, contact the listed school to request they refund the student.



Voucher error for TIP “Partial Amount Avail”

This is specific to Initial TIP and means there isn't enough left in the allocation to honor the entire request.

Voucher request timing

- Before spending for an academic year begins, HEAB determines when requests will be opened up for each term.
- The general rule is Fall requests can start in the second week of August, Spring in the first week of December, and 3rd trimester in the first week of February.
- Once a term is opened up, requests for that term may be submitted through the end of the academic year

Child Support

HEAB receives 2 files from DWD once a week.

The lien docket itself




The APP [Approved Payment Plan] file. A person stays on the lien docket with a zero balance for 6 months, so people with zero balances are also in the APP file.

A job runs a comparison between the two and removes people in the APP file from the lien docket prior to marking the remaining students.

Issues need to be resolved by the student with the County Clerk of Courts where the lien originated. This may result in an update to the APP file which will remove the block.

ACTIVITY FOR DEMO SCHOOL

Below is a listing of the uploads that have been attempted for this school.

<i>Date</i>	<i>Result</i>	<i>User</i>	<i># of Records</i>	<i>File</i>
2/21/2007 4:43 PM	Success	dem989	4	
2/21/2007 4:40 PM	Failed Details	dem989	4	
2/21/2007	Failed		4	

Voucher Request Uploading

- We don't save your file name, so when communicating about a specific upload, you will need to provide the system time stamp of the upload and the number of records in the file.

If there is a problem with even one line in the file, the entire file is rejected and will need to be corrected and reuploaded.

Resources for Administering State Financial Aid	Upload Your Financial Aid File:
HEAB Homepage	Directions:
Logout	<ol style="list-style-type: none">1. Click on the Browse... button.2. Select the file you wish to upload.<ol style="list-style-type: none">A. File must be text only; possible extensions are: .txt and .prnB. File must meet the formatting standards found here.3. Click on the Upload button to upload.4. If any errors are found, you will be forced to correct them before any of the items will be saved
Demo School	Select the file to upload:
Upload Vouchers	<input type="text"/> <input type="button" value="Browse..."/>
School Upload Activity	Errors on line 4
Recent Login Activity	LW-STOUT (School Code: 160) is not an allowed to upload voucher request for the third trimester.
Send Email to Staff	Please refer to the Formatting Guide for more information on the errors you are receiving
Files	<input type="button" value="Upload"/> <input type="button" value="Reset"/>
Voucher Template	
Formatting Guide	

All of the errors in the file are listed so that you know what needs to be fixed.

The screenshot shows a web interface for uploading financial aid vouchers. On the left is a sidebar menu with the following items: **Administering State Financial Aid**, HEAB Homepage, Logout, **Demo School**, Upload Vouchers, School Upload Activity, Recent Login Activity, Send Email to Staff, **Files**, Voucher Template, and Formatting Guide. The main content area has a red header with the text **Directions:** and a list of four instructions: 1. Click on the Browse... button. 2. Select the file you wish to upload. (A. File must be text only; possible extensions are: .txt and .prn. B. File must meet the formatting standards found [here](#).) 3. Click on the Upload button to upload. 4. If any errors are found, you will be forced to correct them before any of the items will be saved. Below this is another red header with the text **Select the file to upload:** and a file input field with a 'Browse...' button. Underneath are three error messages: **Errors on line 2**: The Disbursement Code "65" can only be uploaded by staff members. **Errors on line 3**: Request amount is 6 characters long, with no decimal for the cents, received "9200EV". **Errors on line 4**: MILWAUKEE AREA TECH (School Code: 316) is not an allowed to upload voucher request for the third trimester. At the bottom, there is a link to the [Formatting Guide](#) and two buttons: 'Upload' and 'Reset'.



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