

NJ GEAR UP State Project Scholarship Guide



NJ GEAR UP Scholarship Guide

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About the NJ GEAR UP Scholarship

The purpose of this document is to explain the procedures used by the NJ Commission on Higher Education (CHE), the Higher Education Student Assistance Authority (HESAA), and the managers of the NJBEST account to administer the NJ GEAR UP (Gaining Early Awareness and Readiness for Undergraduate Programs) State Project scholarship.

The NJ GEAR UP State Project is funded by a federal grant awarded to the NJ Commission on Higher Education from the U.S. Department of Education. Money for scholarships has been budgeted for eligible students who enroll in associate or bachelor's degree programs in New Jersey colleges. ***CHE and the institutions that receive scholarship funds have a fiduciary responsibility to the federal government to accurately and promptly account for all funds. Programs are subject to audit.***

NJ GEAR UP State Project Programs

The five programs that are part of the NJ GEAR UP State Project are:

- **College Bound/GEAR UP** at New Jersey City University
- **College Bound SMT/GEAR UP** at Passaic County Community College
- **Project S.M.I.L.E./GEAR UP** at Mercer County Community College
- **C.H.A.M.P./GEAR UP** at Rowan University
- **GEAR UP** at The Consortium for Pre-College Education in Greater Newark (Rutgers–Newark, UMDNJ, and NJIT).

Additional information about NJ GEAR UP is available at <http://www.nj.gov/highereducation/gearup>.

NJ GEAR UP Partnership Programs

The GEAR UP *Partnership* grant is a second type of grant program funded by the U.S. Department of Education. Partnership programs are not associated with the NJ GEAR UP State Project. Students from a GEAR UP Partnership program are not eligible to receive scholarships from the NJ Commission on Higher Education.

Student Eligibility for the NJ GEAR UP Scholarship

Each semester, CHE provides a roster of all eligible students to institutions where GEAR UP scholarship students are enrolled. **All students must complete the FAFSA within established NJ HESAA deadlines.** GEAR UP is need-based and can be used to replace the Expected Family Contribution (EFC). See page 7 for a complete list of eligibility requirements and page 8 for a list of administrative requirements.

If a student says that he/she is a GEAR UP student but is not on your roster, contact CHE to verify eligibility (see contact information on page 2):

- The student could be a GEAR UP student who had not notified CHE that he/she is attending your institution or
- The student is a former GEAR UP scholarship recipient that has exceeded the maximum number of semesters for funding or
- The student could be from a GEAR UP partnership program that is not associated with the NJ GEAR UP State Project or
- The student could have been a participant in an eligible program but did not meet the eligibility requirements to receive the scholarship.

CHE and HESAA are the only entities that can verify NJ GEAR UP scholarship eligibility.

Part-Time Students

Only students who have completed at least one full-time semester are eligible for a part-time award. CHE will indicate on the roster which students are eligible for part-time awards. Awards for part-time students should be reduced by no more than the percentage reduction in their enrollment status (for example, 75%-time can receive no less than 75% of the full-time amount).

Award Limits

Institution Type	Award Limit
4-year	Up to the maximum Pell Grant Award per semester for up to 8 semesters
2-year	Up to the maximum Pell Grant Award per semester for up to 4 semesters

Role of the EOF Directors

The Educational Opportunity Fund (EOF) has a partnership with NJ GEAR UP. EOF directors are encouraged to recruit from the program because many GEAR UP students are eligible for EOF. CHE informs EOF directors of GEAR UP students at their institutions and encourages them to help students with the transition from high school to college. Once enrolled in college, GEAR UP alumni are eligible to receive EOF services such as counseling and tutoring and participate in the EOF summer program. They may also be eligible for the EOF Student Grant.

Definitions

Primary Contact: Someone at the institution who verifies the enrollment status and the amount awarded to each student. This person is usually a representative from the financial aid office or scholarship services.

Secondary Contact: An additional contact who has an interest in knowing which GEAR UP students are attending the institution. This person is usually an EOF Director or second contact in financial aid.

Contact for Checks: The designated recipient for the checks sent to the institution from NJBEST. This person is responsible for making sure checks are deposited and properly accounted for. This can be the primary contact, secondary contact or the bursar.

Certification: The process of confirming the enrollment status of students on the roster and indicating how much of the award has been applied to student accounts.

Reconciliation: The process of settling the difference between the amount sent and the amount applied to student accounts.

Contact Information

Please contact the Commission if you have questions about the scholarship or if there is a change in the primary contact, secondary contact, contact who receives checks or the EOF director at your institution.

Marilyn Coleman
NJ GEAR UP Data Assistant
(609) 984-2487
marilyn.coleman@che.state.nj.us

(609) 984-2699 Main GEAR UP phone
(609) 292-7225 Fax

US Mail
NJ GEAR UP
NJ Commission on Higher Education
PO Box 542
Trenton, NJ 08625

Fall Semester Procedures

Rosters

Each academic year, eligible students submit NJ GEAR UP Scholarship Forms (see page 10) to CHE indicating where they plan to enroll. The GEAR UP staff at CHE compiles the information from the forms to create a roster for each institution where NJ GEAR UP students will attend. Students who plan to enroll in the same institution for both semesters only submit the form once in the fall. **You do not have to verify enrollment at this time – the enrollment certification process is explained on page 4.**

From this roster, CHE produces an Eligibility Notice (see page 11) and HESAA creates an eligibility letter. Both documents are sent to eligible students by HESAA. CHE then sends a roster similar to the sample below to all primary and secondary contacts at institutions where NJ GEAR UP scholarship students are enrolled. Primary contacts will also receive a roster in a password-protected Excel file. The roster will indicate the value of the check sent for each student and whether the current semester is a student’s last semester of eligibility and if the student is eligible to receive part-time funding.

NJ GEAR UP Students Attending NJ Institutions, Fall 2006, By Institution									
<i>Institution</i>		College or University Name	Received by _____			Date _____			
<i>Check One</i>		<i>Student Name</i>	<i>Is this the student's LAST semester of GU Funding?</i>	<i># of Semesters¹ Previously Funded</i>	<i>SS #</i>	<i>DOB</i>	<i>Semester</i>	<i>Year</i>	<i>Scholarship Eligibility</i>
<i>Deposited</i>	<i>Returned</i>								
<input type="checkbox"/>	<input type="checkbox"/>	Doe, Jane	0	0	111-11-1111	9/22/1987	Fall	2006	\$1,500.00
<input type="checkbox"/>	<input type="checkbox"/>	Doe, John	0	0	111-11-1112	10/21/198	Fall	2006	\$1,500.00
<input type="checkbox"/>	<input type="checkbox"/>	Jones, Joseph	0	0	111-11-1113	3/11/1988	Fall	2006	\$1,500.00
<input type="checkbox"/>	<input type="checkbox"/>	Smith, Mary	0	0	111-11-1114	2/10/1988	Fall	2006	\$1,500.00
<input type="checkbox"/>	<input type="checkbox"/>	Smith, Thomas	0	0	111-11-1115	10/23/198	Fall	2006	\$1,500.00
<input type="checkbox"/>	<input type="checkbox"/>	Williams, Michael	2	2	111-11-1116	3/13/1987	Fall	2006	\$1,500.00
<i>Institution Total:</i>									\$9,000.00

Please sign the Received by line and indicate whether the check for each student was deposited or immediately returned. If you are returning checks now, please write the name of the overnight carrier and tracking number. Fax the complete form to the Commission on Higher Education at (609) 292-7225.

Overnight Carrier _____ Date Returned _____
 Tracking Number _____

Disbursements

In July, CHE sends a copy of each institution’s roster to the managers of the NJ GEAR UP account at NJBEST. NJBEST generates individual checks for each student and sends them via overnight mail to each institution’s designated contact for scholarship checks by July 30. CHE strongly suggests that you make copies of these checks for your records.

Each institution’s roster is included in the mailing from NJBEST. This document will serve as a reference if questions arise about whether a check was received and will help ensure the accuracy of the next semester’s roster. The person who processes the checks will sign the *received by* line and mark the box next to each student’s name to indicate that each check was deposited or returned directly to NJBEST. **Fax your completed roster to CHE at 609-292-7225.**

If you choose to return checks immediately, complete the overnight carrier information and tracking number at the bottom of the roster, and send overnight to Marilyn Coleman at the overnight delivery address: NJ GEAR UP, NJ Commission on Higher Education, PO Box 542, 20 West State Street, 7th Floor, Trenton, NJ 08608.


If we receive notice that a student will attend your institution after we have processed the initial disbursements we may ask if you can extend the payment deadline or keep the student in good standing until we process an additional disbursement or complete the roster certification reconciliation at the end of the semester. You may use your discretion in accepting these requests.

Enrollment Certification

In October, CHE begins the process of certifying enrollment of students for the fall semester using the following web-based Student Enrollment Verification form. CHE sends the primary contacts the link and a password to the website via email. The form is pre-populated with the names and social security numbers of each student that was on the roster that NJBEST used to generate checks.

The primary contact completes:

- Enrollment status: full time, part time or not enrolled
- Amount of the award applied
- Notes: for example, if a student is enrolled and was not awarded the scholarship because the student did not file the FAFSA.
- You may also add additional NJ GEAR UP students in the spaces provided.

 STUDENT ENROLLMENT VERIFICATION		SEMESTER: Spring 2007
Institution: Bloomfield College		
Official Verifying:		<i>*-required</i>
Title:		
Telephone:		
Email:		<i>*-required</i>
Student/SSN/EOF Status	Enrollment Status (select only one)	GEAR UP Grant Amount
1. Jane Smith 100-00-0000 <small># of previously funded semesters: 0 Spring 2007 amount disbursed: \$3000</small>	<input type="radio"/> Not Enrolled <input type="radio"/> Withdrew <input type="radio"/> Enrolled F/T <input type="radio"/> Enrolled P/T <input type="radio"/> Enrolled, but no award because:	\$ 0.00
2. Joe Smith 200-00-0000 <small># of previously funded semesters: 4 Spring 2007 amount disbursed: \$1500</small>	<input type="radio"/> Not Enrolled <input type="radio"/> Withdrew <input type="radio"/> Enrolled F/T <input type="radio"/> Enrolled P/T <input type="radio"/> Enrolled, but no award because:	\$ 0.00
3. Mary Smith 300-00-0000 <small># of previously funded semesters: 0 Spring 2007 amount disbursed: \$1500</small>	<input type="radio"/> Not Enrolled <input type="radio"/> Withdrew <input type="radio"/> Enrolled F/T <input type="radio"/> Enrolled P/T <input type="radio"/> Enrolled, but no award because:	\$ 0.00
Additional NJ GEAR UP Students not listed above		
Additional Student 1 Enter SSN	<input type="radio"/> Not Enrolled <input type="radio"/> Withdrew <input type="radio"/> Enrolled F/T <input type="radio"/> Enrolled P/T <input type="radio"/> Enrolled, but no award because:	\$ 0

Secondary contacts receive a link and password to a read-only web page that lists the students. They are not responsible for certifying enrollment, but may collaborate with the primary contact to verify information.

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When the primary contact submits the form, an email containing the information entered is sent to CHE. This information is used to tally refunds owed to or from the institution.

Institution owes a refund to CHE if:	CHE owes a refund to the institution:
<ul style="list-style-type: none">• Student did not enroll after funds were sent.• Student was enrolled part-time and was awarded a partial sum of the total.• Student was not awarded funds that were sent for other reasons allowed by the guidelines and determined by the institution.	<ul style="list-style-type: none">• CHE asked the school to cover a student until final reconciliation.

Reconciliation

After enrollment is certified, the next step is to reconcile the difference between the funds disbursed to each institution and the funds applied to student accounts. CHE calculates the amounts applied to student accounts and compares this figure to the amount sent to the institution.

- If the amount disbursed equals the amount applied, the accounts are settled and no action needs to be taken.
- If the amount disbursed is less than the amount applied, CHE owes the institution the difference. The refund check is sent to the scholarship contact for checks. An email is sent to the primary contact with the following text:

*According to the certified roster that your institution submitted for the fall 2006 semester, **College** is owed a refund of \$1,500.00 from the Commission on Higher Education for scholarship funds awarded to GEAR UP students but not disbursed. This refund is for student **Jane Doe** and will be processed and sent by check to the institution from our scholarship account with NJBEST within 20 days of the date on this message.*

- If the amount disbursed is greater than the amount applied, the institution owes CHE the difference and an email is sent to the primary contact with the following text:

*According to the certified roster that your institution submitted for the fall 2006 semester, **College** owes \$3,000.00 to the Commission on Higher Education for scholarship funds disbursed for NJ GEAR UP students but not awarded to the following students: **John Smith and Jane Doe**.*

Payment Instructions

If your institution owes a refund to CHE: make checks payable to NJBEST; reference account #0001055904 in the memo line; and mail the check via overnight mail within ten days of the date of the email to:

NJ GEAR UP
NJ Commission on Higher Education
20 West State St., 7th Floor
Trenton, NJ 08608

This is the CHE overnight mailing address. US mail is not deliverable to this address.

Please make a copy of your checks and record tracking numbers for your records.

Spring Semester Procedures

Updated Rosters

After reviewing the certified rosters for the fall semester, CHE prepares to disburse funds to institutions for the spring semester.

The enrollment status of each student is updated based on the fall roster certification and a new roster is created. The updated roster includes students who were enrolled full time or part time in the fall semester and students who indicated that they will enroll in the spring semester only.

Students who did not enroll in the fall semester are not automatically included on spring semester rosters.

If an eligible student surfaces in the spring semester who was enrolled in the fall but did not receive the scholarship because they did not notify CHE, **please confirm eligibility with CHE before awarding funds to a student who is not on your roster.**

Disbursements

The spring roster is sent to the managers of the NJ GEAR UP account at NJBEST in December. Checks are processed and sent to institutions by early January.

Enrollment Certification & Reconciliation

In March, the enrollment certification and reconciliation processes described on pages 4 through 5 are repeated.

Scholarship Eligibility Requirements

1. Students must have participated in one of the five programs in the NJ GEAR UP State Project in 7th grade and remain an active participant through 12th grade (as determined by the program directors) to be eligible for the NJ GEAR UP Scholarship.
2. Students must attend NJ, Title IV eligible, degree-granting institutions and be enrolled in an associate, bachelor's degree program. Students who enroll in an out-of-state institution at any time forfeit future eligibility for the NJ GEAR UP Scholarship.
3. The NJ GEAR UP Scholarship may be renewed for a maximum of 8 semesters for 4-year degree programs or 4 semesters for 2-year degree programs.
4. The NJ GEAR UP Scholarship is only available for fall and spring semesters. No summer payments will be made.
5. Part-time NJ GEAR UP funding is available to students only after an initial full-time payment has been awarded.
6. Students must file the Free Application for Federal Student Aid (FAFSA) in accordance with NJ FAFSA requirements to be considered for the NJ GEAR UP Scholarship. The deadline is June 1 for students who have received a Tuition Aid Grant (TAG) in the previous year. For all other applicants, the FAFSA deadline is October 1 for fall and spring terms or March 1 for spring term only.
7. Students must apply for the NJ GEAR UP Scholarship and enroll in an eligible institution no later than the second fall semester following high school graduation to remain eligible for the NJ GEAR UP Scholarship.
8. Students transferring from one NJ GEAR UP eligible institution to another NJ GEAR UP eligible institution remain eligible for the NJ GEAR UP funding.
9. NJ GEAR UP scholarships are contingent upon federal funding.
10. In order to maintain NJ GEAR UP scholarship eligibility after the initial year of enrollment, students must maintain Satisfactory Academic Progress in accordance with EOF standards at the institutions they attend.
11. Students must be United States citizens or eligible non-citizens and must be residents of the State of New Jersey pursuant to guidelines established by HESAA.
12. CHE will address other issues on a case-by-case basis. Student appeals regarding the loss of NJ GEAR UP funding for any reason shall be resolved by CHE.

Updated 4/21/07
Director of Financial Aid Services, NJHESAA
Director of NJ GEAR UP, CHE

Administrative Requirements

1. The New Jersey Commission on Higher Education (CHE) has been designated as the lead agency for the New Jersey GEAR UP State Project and as such is the primary contact for inquiries, requests and communications from or on behalf of students, families and institutions relating to the award, disbursement and administration of the GEAR UP Scholarship.
2. The New Jersey Higher Education Student Assistance Authority (HESAA) has primary responsibility for informing students, parents, and guidance counselors about financial aid and is responsible for GEAR UP scholarship award administration.
3. Notification of award eligibility is made through GEAR UP student eligibility notices and institutional GEAR UP award rosters.
4. GEAR UP award rosters are forwarded by CHE for institutional certification of student enrollment to primary contacts designated by the institution. Enrollment certification is to be completed by the primary contact.
5. Each semester, GEAR UP funds are disbursed directly to institutions in the form of individual checks from GEAR UP's NJBEST account following approval from CHE.
6. GEAR UP student eligibility notices are sent to students identified as eligible by the GEAR UP Program Director. Copies of this notification will be forwarded to EOF and Financial Aid offices when a "first choice" college has been provided to CHE.
7. **GEAR UP funds can be used to replace EFC.** Thus, an overaward only occurs if a student is packaged over the Cost of Attendance. Excess funds are to be returned to CHE if the student is overawarded.
8. The maximum NJ GEAR UP scholarship is equal to the annual maximum Pell Grant.
9. Awards for part-time students should be reduced by no more than the percentage reduction in their enrollment status.
10. New Jersey GEAR UP scholarships are contingent upon federal funding. In the event that funds are restricted, GEAR UP scholarships will be awarded based on need. At such time that this is necessary, CHE will provide guidance based on GEAR UP regulations.
11. CHE will address other issues on a case-by-case basis. Student appeals regarding the loss of GEAR UP funding for any reason shall be resolved by CHE.

Updated 4/21/07
Director of Financial Aid Services, NJHESAA
Director of NJ GEAR UP, CHE

Sample Scholarship Check

NJBEST
529 COLLEGE SAVINGS PLAN - NEW JERSEY

S T A T E M E N T

NJ HESAA Providing access and affordability for a college education. New Jersey Higher Education Student Assistance Authority (HESAA) is the Program Administrator.
Franklin Templeton Distributors, Inc.
One Franklin Parkway
San Mateo, California 94403-1906

TH000031-NJB-NJB1PA02
School Name
FBO Student Name
School Address

Distribution Confirmation

July 14, 2006
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Parent Name FBO
Student Name
FT 529 College Savings Plan
Commission on Higher Ed Address

Customer Service: 1-866-362-1597
NJBEST.com

Account Number:

In this transaction, Franklin Templeton Distributors, Inc. acted as agent for the customer and for NJBEST 529 College Savings Plan.

Transaction Detail

Portfolio Name	Portfolio Number	CUSIP Number		
Franklin Stable Value	406			
Transaction Date	Transaction Description	Number of Units	Unit Price	Dollar Amount
07/14/06	529 Beneficiary Withdrawal	141.243	\$10.62	\$1,500.00

This transaction was executed as of 4:00 PM Eastern Time on the transaction date.



NJB-NJB1PA02 TH 1 1 1 51 FDI 999999999 0

NJBEST
529 COLLEGE SAVINGS PLAN
NEW JERSEY

NJ HESAA Providing access and affordability for a college education. New Jersey Higher Education Student Assistance Authority (HESAA) is the Program Administrator.

Redemption Check

Franklin Stable Value

Date: 07/14/06
Account #:

Pay To The Order of:
School Name
FBO Student Name
School Address

Amount
\$1,500.00

Amount: One Thousand Five Hundred Dollars And 00/100

Stephen M. Wyman
AUTHORIZED SIGNATURE

Issued By Integrated Payment Systems Inc. Englewood, Colorado JPMorgan Chase Bank, N.A., Denver, Colorado

NJ GEAR UP Scholarship Form



Students who are eligible for the NJ GEAR UP State Project Scholarship and wish to be considered for this award must complete this form prior to each academic year that they are enrolled in college in New Jersey. For updated forms, eligibility requirements and other information visit <http://www.nj.gov/highereducation/gearup>.

Deadlines are June 1st for the next academic year and November 1st for spring semester only. Late submissions will result in forfeiture of the scholarship for that semester.

- Complete this form only after you have been accepted to the college that you will attend.
- It is your responsibility to complete and return this form each academic year that you attend college. You do not need to submit a new form in the spring if you continue at the same college for both semesters.
- If you transfer to another college, you must submit a new form immediately.

You must file the FAFSA and submit this form each year or you WILL NOT receive funding

Date: _____ SS#: _____

Student Name: _____ Date of Birth: _____

Current Address/City/State/ZIP: _____

Phone number: _____ Email: _____

If your name has changed since 2000, write your previous name: _____

Indicate the semester(s) in which you will enroll: Both Fall and Spring* Fall Only Spring Only

*If you do not attend in the fall semester, funds will not be sent to your institution for the spring semester. You must notify the Commission if you return to college for the spring semester.

At which college or university do you plan to enroll? _____

Are you enrolled at a particular campus?: _____

Degree program (e.g. A.S., B.S., B.A.): _____ Major: _____

How many college semesters have you completed?: _____

Have you earned a degree since 2000? Yes No

If yes: Degree earned: _____ Major: _____ Date earned: _____

Institution: _____

Family Educational Rights Privacy Act (FERPA) Permission to Release Information

In compliance with the FERPA, Federal Family Educational Rights and Privacy Act of 1974 as amended, information held by your college may not be released to a third party without written permission. To grant College Bound/NJ GEAR UP access to your information, please complete and sign: I, _____ authorize College Bound/NJ GEAR UP to have access to my educational records, including my college/ university academic, financial, and enrollment records, and to share my financial information and social security number with their banking institutions to facilitate the processing of any scholarship awards.

Student Signature _____ Date _____

IF STUDENT IS NOT YET 18 YEARS OLD:

Parent Signature _____ Date _____

Parent SS# _____

Please **FAX** this form to GEAR UP at (609) 292-7225, **OR MAIL TO:**
NJ GEAR UP, NJ Commission on Higher Education, P.O. Box 542, Trenton, NJ 08625-0542



NJ GEAR UP Scholarship Eligibility Notice

This form contains information that you have submitted to the Commission on Higher Education on your GEAR UP Scholarship form. Bring this document to the financial aid office at your institution to use as evidence to your eligibility for the GEAR UP scholarship. To make any corrections to the information below, write the correction and fax the form to NJ GEAR UP at (609) 292-7225, or mail it to: NJ GEAR UP, NJ Commission on Higher Education, P.O. Box 542, Trenton, NJ 08625-0542.

Date: _____

Student Name: _____ SS#: On file

Current Address: _____

City/State/ZIP: _____

Phone: _____

Email: _____

If your name has changed since 2000, write the old name _____

At what institution are you enrolled _____

Degree program: _____ Major: _____

Prior semesters of GEAR UP scholarship funding received _____

Degree(s) earned since 2000

Institution: _____ Date earned: _____

Degree Earned: _____ Major: _____

**This form contains information that you have submitted to us. To submit updates, please fax the form to GEAR UP at (609) 292-7225, OR MAIL IT TO:
NJ GEAR UP, NJ Commission on Higher Education, P.O. Box 542,
Trenton, NJ 08625-0542**