Mastering Roster Management!

CONDUCTED BY:

OFFICE OF THE SECRETARY OF HIGHER EDUCATION (OSHE)

EDUCATIONAL OPPORTUNITY FUND (EOF)

OSHE/EOF Central Staff

Dr. Hasani Carter
Hasani.Carter@oshe.nj.gov

Peter Collazo
Peter.Collazo@oshe.nj.gov

Hema Patel
Hema.Patel@oshe.nj.gov

Dr. Stephanie Shanklin
Stephanie.Shanklin@oshe.nj.gov

Purpose of the Roster Management Workshop



REVIEW OF EOF UG ELIGIBILITY REQUIREMENTS



RESOURCES



CAMPUS RELATIONSHIPS



THE ACADEMIC CALENDAR



DISCUSSION TOPICS

Review of EOF UG Eligibility Requirements

EOF Funding Priorities

Based on an institution's annual academic year EOF Article III appropriation, student grant funds shall be awarded to eligible students in the following priority order:

1. Renewal students who were funded during the **PREVIOUS** academic year

2. First-time, full-time freshmen

3. Students that have earned 24 or more college credits while in high school or who participated in a dual enrollment program and have earned an associate's degree as part of their high school graduation requirements and have no prior history of EOF funding support

4. EOF transfer students who received an EOF student grant at their previous institution, in the preceding academic year;

5. Renewal students readmitted or returning who did not receive funding the prior academic year; and

6. Eligible students who do not fall into any of the other four categories listed above.

EOF Income Guidelines

- All funded EOF Students must meet Household Income and Asset Requirements
- EOF campus administrators/directors can admit **up to 10% of the annual class of <u>initial students</u>** in the Discretionary Range
- If an applicant's reported household income and assets exceeds the maximum allowable limit for discretionary consideration, then by regulation, the student is financially ineligible to receive an EOF grant award.

2026-2027 EOF FINANCIAL ELIGIBILITY SCALE WITH ASSET CAP CALCULATION

Household Size	Gross Income (Not to Exceed)	Max. Asset Cap (Not to Exceed)
1	$31,300	$6,260
2	$42,300	$8,460
3	$53,300	$10,660
4	$64,300	$12,860
5	$75,300	$15,060
6	$86,300	$17,260
7	$97,300	$19,460
8	$108,300	$21,660
***	Add $11,000 for each additional family member	Add $2,200 for each additional family member

2026-2027 EOF MAXIMUM FINANCIAL ELIGIBILITY FOR DISCRETIONARY STUDENTS

Household Size	Gross Income (Not to Exceed)	Max. Asset Cap (Not to Exceed)
1	$43,977	$8,796
2	$59,432	$11,887
3	$74,887	$14,978
4	$90,342	$18,069
5	$105,797	$21,160
6	$121,252	$24,251
7	$136,707	$27,342
8	$152,162	$30,433
***	Add $15,455 for each additional family member	Add $3,091 for each additional family member

Resources

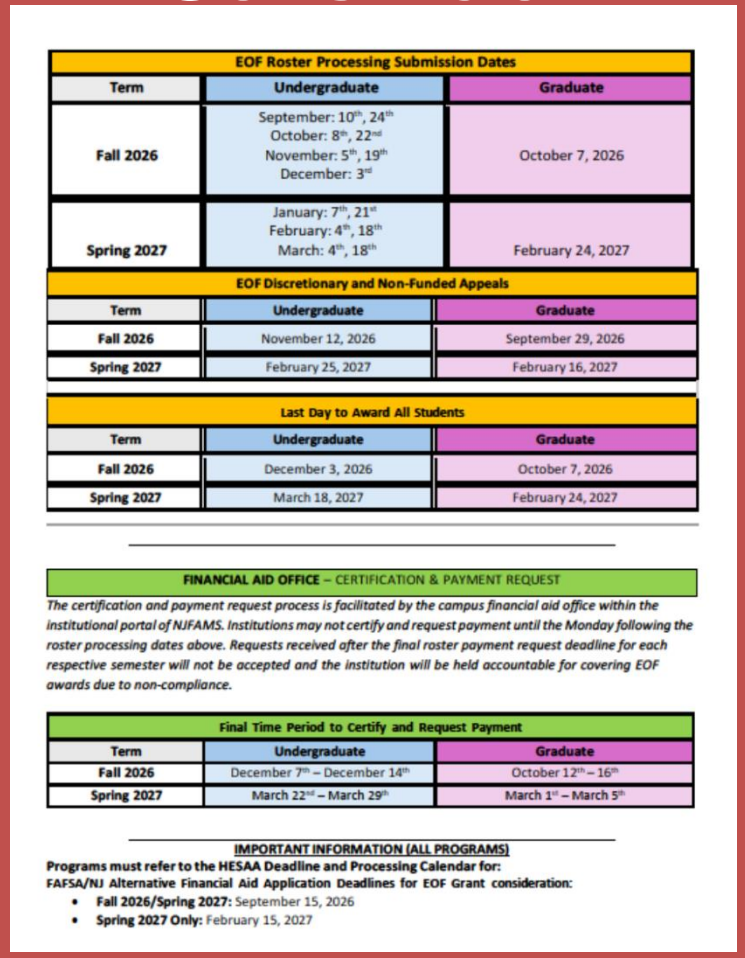
OSHE EOF Website

https://www.nj.gov/highereducation/EOF/EOF_Progra_Resources.shtml

Campus Program Resources

- EOF Annual Report
- EOF Contracts
- EOF Directors Professional Development Resources
- EOF Forms and Other Reports
- EOF Frequently Asked Questions (FAQs)
- EOF Graduate Grants
- EOF Program Liaisons - Institutional Assignments
- EOF Publications
- EOF Regulations
- EOF Trainings and Instructions
- EOF Undergraduate Grants
- EOF Winter Session Funding Application

EOF Processing Calendar



EOF Roster Processing Submission Dates

Term	Undergraduate	Graduate
Fall 2026	September: 10th, 24th October: 8th, 22nd November: 5th, 19th December: 3rd	October 7, 2026
Spring 2027	January: 7th, 21st February: 4th, 18th March: 4th, 18th	February 24, 2027

EOF Discretionary and Non-Funded Appeals

Term	Undergraduate	Graduate
Fall 2026	November 12, 2026	September 29, 2026
Spring 2027	February 25, 2027	February 16, 2027

Last Day to Award All Students

Term	Undergraduate	Graduate
Fall 2026	December 3, 2026	October 7, 2026
Spring 2027	March 18, 2027	February 24, 2027

FINANCIAL AID OFFICE – CERTIFICATION & PAYMENT REQUEST

The certification and payment request process is facilitated by the campus financial aid office within the institutional portal of NJFAMS. Institutions may not certify and request payment until the Monday following the roster processing dates above. Requests received after the final roster payment request deadline for each respective semester will not be accepted and the institution will be held accountable for covering EOF awards due to non-compliance.

Final Time Period to Certify and Request Payment

Term	Undergraduate	Graduate
Fall 2026	December 7th – December 14th	October 12th – 16th
Spring 2027	March 22nd – March 29th	March 1st – March 5th

IMPORTANT INFORMATION (ALL PROGRAMS)

Programs must refer to the HESAA Deadline and Processing Calendar for:
FAFSA/NJ Alternative Financial Aid Application Deadlines for EOF Grant consideration:

- **Fall 2026/Spring 2027:** September 15, 2026
- **Spring 2027 Only:** February 15, 2027

https://www.nj.gov/highereducation/documents/pdf/EOF/2026-2027/2026-2027EOFProcessingCalendar.pdf

- Participating institutions must adhere to the **EOF Processing Calendar**.
- Programs receive an advance payment of 75% of ½ of their EOF undergraduate Article 3 allocation at the beginning of the Fall term.
  - Final Fall payment in January is based on the final Fall paid roster.
- Spring advance payment is based on 75% of the program's Fall paid roster.
  - Final payment is based on the program's final Spring paid roster.
- Do not send EOF refunds to HESAA. All refunds must be sent to OSHE/EOF and will be based on the program's final desk audit.
  - **Do not send any refunds until a final desk audit is received**

NJFAMS Rosters

There is action you must take for the rosters in the Certification Rosters section. The rosters in the Informational Rosters section are for reference and reporting purposes.

School Program: <Choose One>

Term: <Choose One>

SSN:

First Name:

Last Name:

Student ID:

EOF Approval Rosters - Action Required

	View and Print (PDF)	Approve Online	Download File (CSV)
EOF Approval	PDF	Online	Download

Informational Rosters

	View and Print (PDF)	View Online	Download File (CSV)
Approved and Eligible	PDF	Online	Download
State Verification Not Complete	PDF	Online	Download
Approved, Eligible and Certified	PDF	Online	Download
Certified and Not Paid	PDF	Online	Download
Paid	PDF	Online	Download
Refund Due	PDF	Online	Download
Ineligible	PDF	Online	Download
Incomplete	PDF	Online	Download
All Students	PDF	Online	Download

Campus Relationships

Financial Aid/Registrar

Registrar

For coding and report retrieval purposes

Financial Aid

Certification

FA must certify enrollment of all EOF students. Students cannot be awarded without this

Reconciliation

To ensure FA rosters and EOF rosters are consistent, specifically with respect to enrollment status. Otherwise, the certification action will be undone

Requesting Payment

Via NJFAMS, once certified, the FA office must request payment

Academic Calendar

Prep-work

AUGUST: PRE-SEMESTER

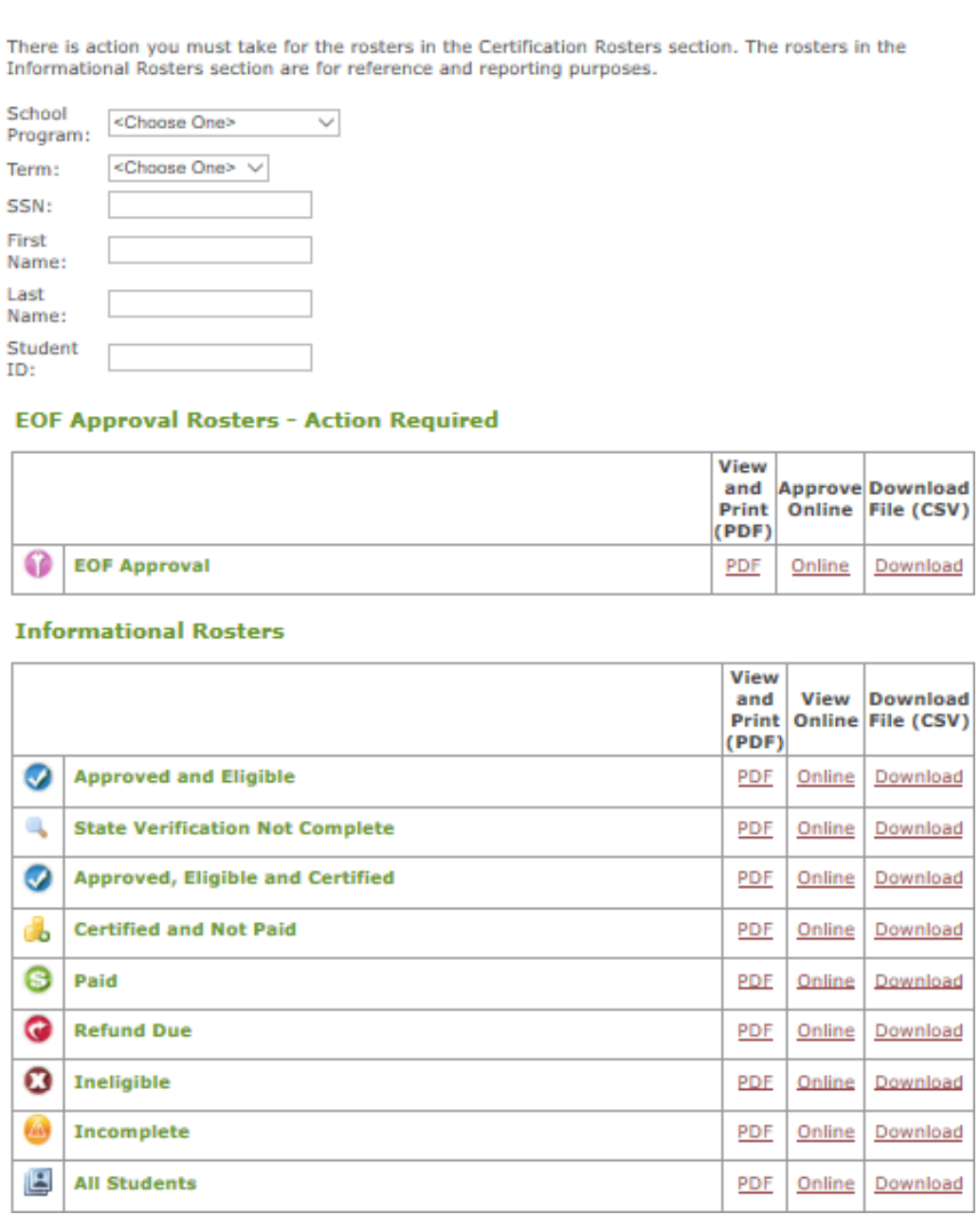
- **Prepare your Renewal roster** by reviewing OSHE's Final Enrollment Report and your campus enrollment report based on EOF-coded students for reconciliation purposes
- **Check Approved and Eligible Roster** in NJFAMS for renewal students who are enrolled for Fall
- **Check Ineligible Roster** in NJFAMS for enrolled students who may be eligible (e.g., unsubmitted documents, in verification, etc.). Reach out to them if they need to submit documents
- **Update demographics and add awards** for all Renewals and Summer Initials (NJFAMS likely accessible in mid-August)
- **Review EOF Approval Roster** for students who may qualify for recruitment

Discussion: Do you know your rosters?

Look for eligible Initials and Renewals who were not on the program's roster as of the Fall term of the previous Academic Year. Also, a source to find students who may already be enrolled at your school.

Renewal students who appeared on a program's roster during the Fall term of the previous Academic Year & who remain eligible should appear here.

Ineligible students BUT EOF discretionary eligible students will appear here.



There is action you must take for the rosters in the Certification Rosters section. The rosters in the Informational Rosters section are for reference and reporting purposes.

School Program: <Choose One>

Term: <Choose One>

SSN:

First Name:

Last Name:

Student ID:

EOF Approval Rosters - Action Required

	View and Print (PDF)	Approve Online	Download File (CSV)
EOF Approval	PDF	Online	Download

Informational Rosters

	View and Print (PDF)	View Online	Download File (CSV)
Approved and Eligible	PDF	Online	Download
State Verification Not Complete	PDF	Online	Download
Approved, Eligible and Certified	PDF	Online	Download
Certified and Not Paid	PDF	Online	Download
Paid	PDF	Online	Download
Refund Due	PDF	Online	Download
Ineligible	PDF	Online	Download
Incomplete	PDF	Online	Download
All Students	PDF	Online	Download

Your First Roster

SEPTEMBER

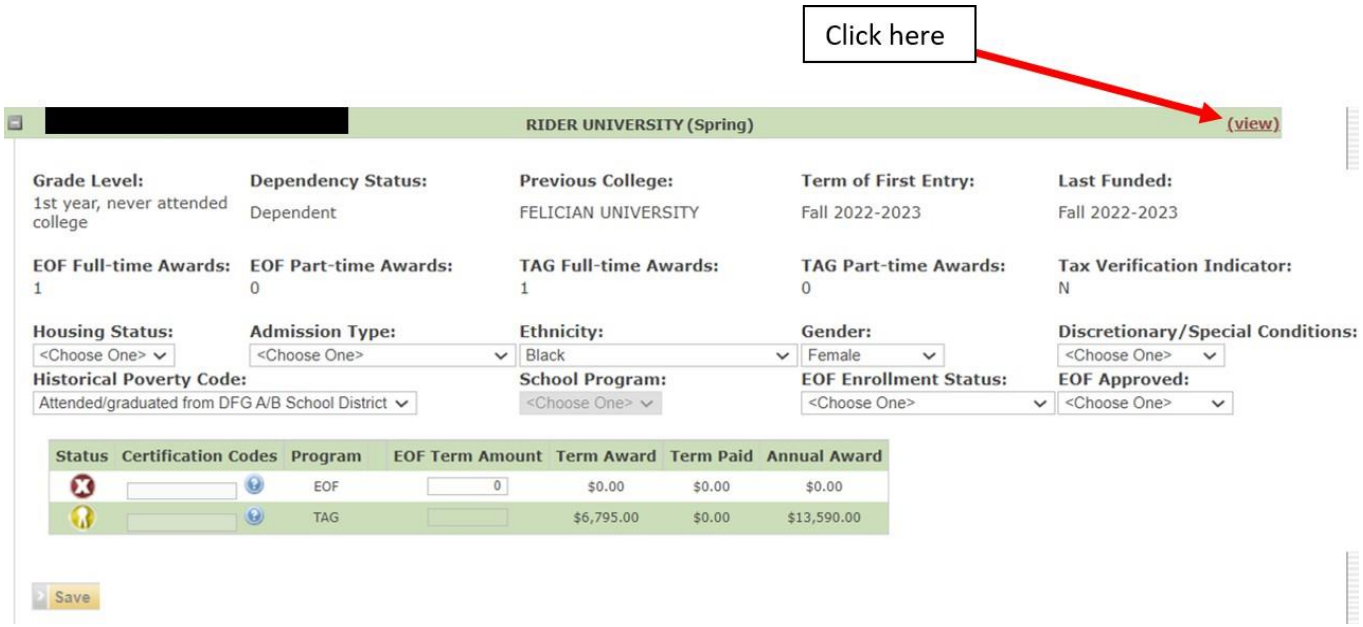
- **Monitor your campus's enrollment report** during add/drop
- **Add demographics and awards** for all Renewal, Initials, Dual enrollment, Transfers, and Readmitted students (note: ordered by funding priorities)
- **Submit your first roster!**
  - Financial Aid can certify and request payment on Monday or Tuesday of the following week.
  - Check NJFAMS to make sure students have yellow award symbol and blue checkmark after certification
- **Check Ineligible Roster** in NJFAMS for students who may qualify for discretionary/non-funded appeal requests

NJFAMS: View Access

Discussion

How are your staff members using NJFAMS?

The "(view)" link in the upper right-hand corner will help verify a student's eligibility.



EOF Household Size and Financial Eligibility Verification Flow Diagram

The flow diagram to the right provides Institutions/EOF campus programs with a visual representation of the process that must be followed to properly determine household size and EOF financial eligibility.

For additional information, please see EOF NJFAMS Training: [New Jersey Financial Aid Management System (NJFAMS)](#).

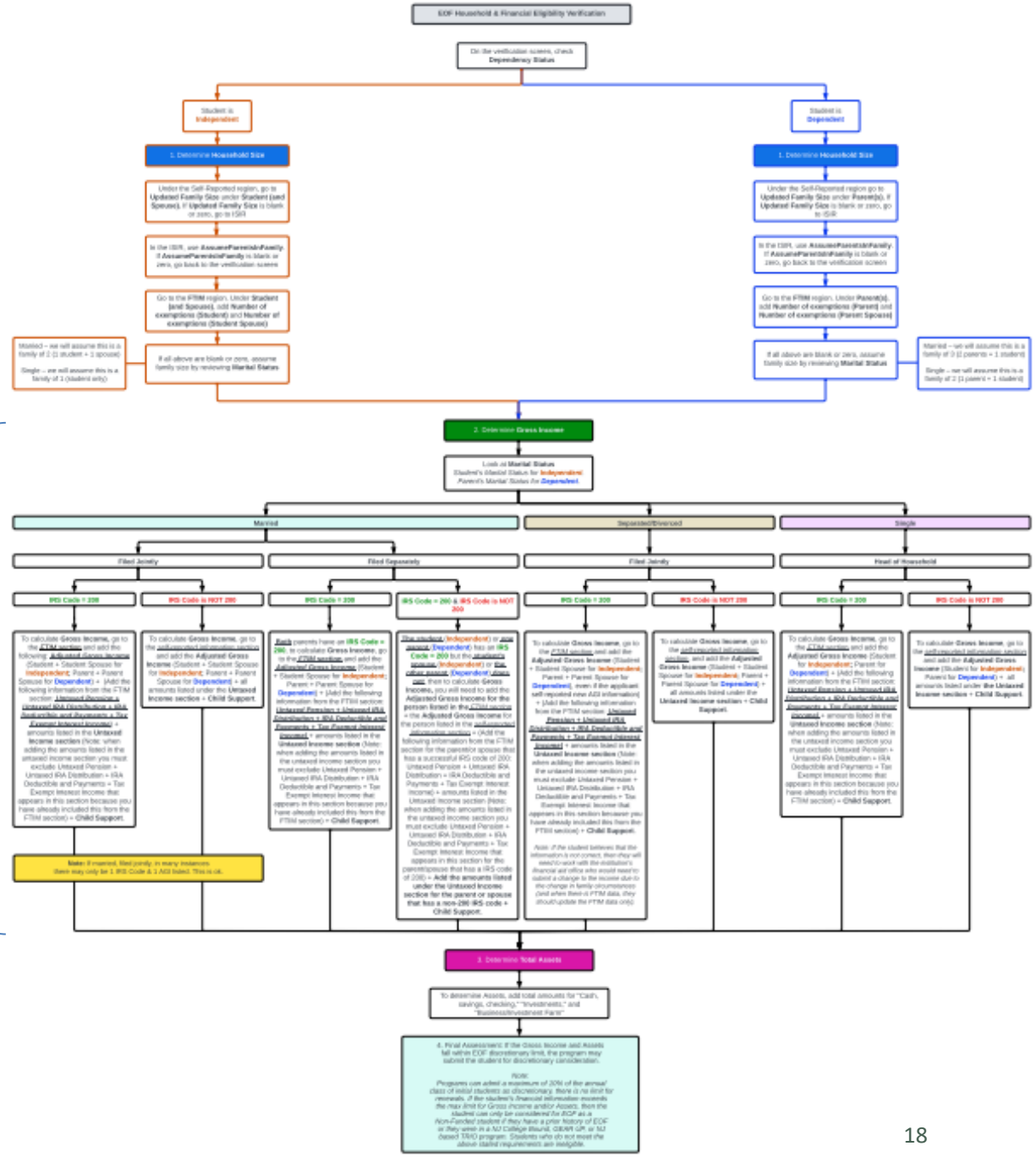
1. Dependency Status

2. Household Size

3. Gross Income: Adjusted Gross Income and Untaxed Income

- **Marital Status**
- **Filing Status**
- **IRS Response Code**

4. Assets



Appeal Form

New form:

HESAID #	First Name	Last Name	Year in College	Enrollment Status	Dependency Status	# in household	Marital Status	Adjusted Gross Income Student/ Parent ($)	Adjusted Gross Income Student Spouse/ Parent Spouse ($)	FTIM Section: Untaxed Pension Only include this information if the IRS Response Code is 200	FTIM Section: Untaxed IRA Distribution Only include this information if the IRS Response Code is 200	FTIM Section: IRA Deductible and Payments Only include this information if the IRS Response Code is 200	FTIM Section: Tax Exempt Interest Income Only include this information if the IRS Response Code is 200	Untaxed Income Section ($) (Note: If IRS Code is 200, the amounts listed for the areas highlighted columns L-0 on this form may be excluded from this total.)	Child Support	Total Gross Income (Adjusted Gross Income + Untaxed Income) ($)	Total Assets ($)	# of previous EOF Full-time Awards	# of previous EOF Part-time Awards	Requesting student to be coded as non-funded (Y/N)	Did the student participate in the NJ GEAR UP, College Bound,TRIO program? (Y/N)	Action Taken (EOF CENTRAL STAFF ONLY)	Comments (EOF CENTRAL STAFF ONLY)

Updates

OCTOBER

- **Add demographics and awards** for all Renewal, Initials, Dual enrollment, Transfers, and Readmitted students
- **Monitor student enrollment and adjust awards**
  - Check campus enrollment report
  - Request updates from counselors (should check NJFAMS
  - **Check Ineligible Roster** in NJFAMS for students who may qualify for discretionary/non-funded appeal requests
- **Begin drafting pending verification form**
- **Check NJFAMS periodically** for students who have cleared verification
- **Reconcile enrollment with Financial Aid Office** for students who may have dropped
- **Submit roster updates!** Be mindful of October submission deadlines.

Discussion:

How do you manage your Pending Verification Form?

At the <u>conclusion</u> of each semester, if there is a student who is pending verification (federal, state, institution) and has not cleared by the final deadline for EOF campus programs to award students on their roster, the EOF campus program must submit the name of the student and the appropriate information to OSHE/EOF on the Pending Verification Form. (Note: Do not send this form at the beginning of the semester).

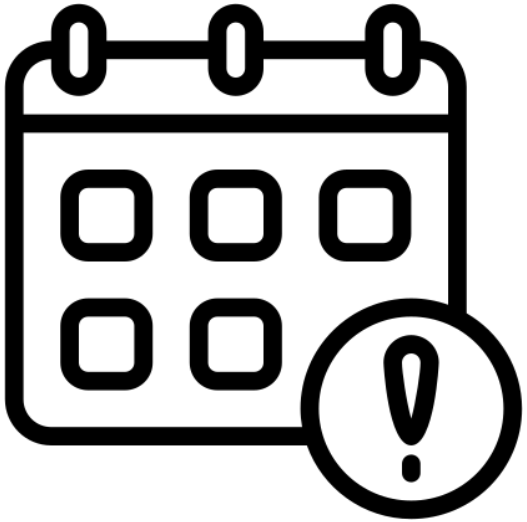
This is especially important during the Spring term due to the Fund's lack of carry forward ability and the need to sweep all accounts in March.

It is the responsibility of the EOF campus program to monitor and notify OSHE/EOF when a student successfully clears verification.

Programs that fail to properly submit the appropriate information are subject to covering the grant award for each student not properly accounted for.

Pending Verification Reminders

- Students who appear on your pending verification list must successfully clear verification and be requested for funding by **March xx,xxxx** to be considered for the Spring 2024 term.
- If a student is still pending ***HESAA verification*** after March 30, 2024, programs must notify the OSHE/EOF Central Office that the student has cleared HESAA verification within one week of their posted NJFAMS clearance date.
- It is the EOF campus program's responsibility to notify our office when a student has successfully cleared verification and is now eligible for EOF.
- Students who are still under ***institutional review***, but have not been selected for HESAA verification, must be cleared, awarded, certified and requested by **March xx,xxxx**



Reminder: Pending Verification Form

Educational Opportunity Fund - Students Pending Verification

Student Appeal Form

* Please note: For any item that is highlighted in yellow, there is a dropdown option that you must select from.

Institution/Program:	
Name of Submitter (Full Name):	
Date of Submission:	

The OSHE/EOF office is not responsible for checking the status of students placed on this form. Students submitted on this form must be monitored by the EOF campus program/institution. If a student clears on or before the EOF deadline, the EOF campus program is responsible for awarding the student accordingly within NJFAMS by the stated deadline. Any student who clears verification AFTER the EOF deadline must be awarded before the final HESAA processing deadline for the term. It is the responsibility of the EOF campus program/director to contact the OSHE/EOF office immediately if the latter situation arises.

NJHESAA ID#	Student First Name	Student Last Name	City/Town of Residence (NJ ONLY)	Housing Status	Admission Type	Ethnicity	Gender	Historical Poverty Code	Enrollment Status	# of EOF Full-time Awards	# of EOF Part-time Awards	Fall Amount Request ($)	Spring Amount Request ($)	Total Amount Request (Fall + Spring) ($)
														$0
														$0
														$0
														$0
														$0
														$0
														$0
														$0
														$0
														$0
														$0
														$0
														$0

Your Final Roster

NOVEMBER

- Submit all Discretionary Appeals
- Submit Pending Verification list
- **Check Part-time rate**
- **Submit Final Roster!**

DECEMBER

- **Reconcile Roster with Financial Aid Office** for Final Certification Deadline
- Monitor students on Pending Verification list and notify OSHE as they clear

Spring Semester

JANUARY

- **Monitor students on Fall Pending Verification list** and notify OSHE as they clear
- **Review Fall roster** to make sure all students are certified. Check for drops and notify OSHE of adjustments
- **Update Spring awards/enrollment status** for all renewal students from Fall roster with campus enrollment report during add/drop
- **Submit your first Spring roster!**

Spring Semester Updates

FEBRUARY

- Add awards of Initial, Transfer, and Readmitted students
- Monitor student enrollment and adjust awards
  - Check campus enrollment report
  - Request updates from counselors
  - **Check Ineligible Roster** in NJFAMS for students who may qualify for discretionary/non-funded appeal requests
- **Submit Roster Updates!**
- Submit final Discretionary Appeals

Closing out the Roster

MARCH

- Review final campus enrollment report
- IMPORTANT: Submit Pending Verification list
- **Submit Final Roster!**
- Check PT count
- Reconcile Roster with Financial Aid Office for Final Certification Deadline
- Monitor students on Pending Verification list and notify OSHE as they clear

APRIL/MAY

- Monitor students on Pending State Verification list and notify OSHE as they clear

Closing

Final Comments

It is important to know what resources you have access to. NJFAMS **is a great resource to assist programs with recruiting students**.

Know which offices at your institution are vital to your program's success and their roles.

Roster management should be done throughout the year.

The OSHE/EOF team is here to assist. Please do not hesitate to contact us if you have any questions.

Put roster tasks on your calendar as reminders.

Use this monthly guidance to help you develop your Procedures Manual, identifying which staff members complete tasks or serve as back-up.



OPPORTUNITY INNOVATION

A STUDENT-CENTERED VISION FOR HIGHER EDUCATION

Thank You!

We look forward to working with you

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