

# Mastering Roster Management!

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CONDUCTED BY:

OFFICE OF THE SECRETARY OF HIGHER EDUCATION (OSHE)

EDUCATIONAL OPPORTUNITY FUND (EOF)



# OSHE/EOF Central Staff

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# Purpose of the Roster Management Workshop

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REVIEW OF EOF  
UG ELIGIBILITY  
REQUIREMENTS



RESOURCES



CAMPUS  
RELATIONSHIPS



THE ACADEMIC  
CALENDAR



DISCUSSION  
TOPICS

# **Review of EOF UG Eligibility Requirements**

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# 9A:11-2.3 Financial Eligibility for Initial Article III Student Grants

- Annually, students are required to submit their FAFSA or NJ Alternative Financial Aid Application by the identified state EOF deadline to be eligible for consideration for participation in the Fund.
- Beginning the Spring 2024 term, any undergraduate student admitted into the EOF, the participating institutions should use NJFAMS to verify student financial eligibility.
  - The institution must continue to have a copy of the appropriate financial documentation for any student admitted during the Fall 2023 term (and prior).
- Any student who is a participant in the Fund shall provide the required documentation to verify their financial eligibility at the request of the Office of the Secretary of Higher Education/EOF Central Office or the Higher Education Student Assistance Authority.
- If you have conflicting documentation during your eligibility review, the appropriate verification process must be followed by your institution.

# EOF Funding Priorities

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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.

# Eligibility and Discretionary Scale

- Income Eligibility posted on OSHE EOF website
- Discretionary Scale sent in email memo in September

**EOF INCOME ELIGIBILITY SCALE  
AY 2023-2024**

Household Size	Gross Income (Not to Exceed)	Max. Asset Cap (Not to Exceed)
1	\$27,180	\$5,436
2	\$36,620	\$7,324
3	\$46,060	\$9,212
4	\$55,500	\$11,100
5	\$64,940	\$12,988
6	\$74,380	\$14,876
7	\$83,820	\$16,764
8	\$93,260	\$18,652
***	Add \$9,440 for each additional family member	Add \$1,888 for each additional family member

**MAXIMUM INCOME ELIGIBILITY FOR DISCRETIONARY STUDENTS**

Household Size	Gross Income (Not to Exceed)	Max. Asset Cap (Not to Exceed)
1	\$38,188	\$7,638
2	\$51,451	\$10,290
3	\$64,714	\$12,943
4	\$77,978	\$15,596
5	\$91,241	\$18,248
6	\$104,504	\$20,901
7	\$117,767	\$23,553
8	\$131,030	\$26,206
***	Add \$13,263 for each additional member of the household	Add \$2,653 for each additional family member

# Resources

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# OSHE EOF Website

[https://www.nj.gov/highereducation/EOF/EOF\\_Program\\_Resources.shtml](https://www.nj.gov/highereducation/EOF/EOF_Program_Resources.shtml)

+ 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

## Undergraduate

- [Institutions participating in EOF Part-time](#) 
- [EOF Undergraduate Academic Year Grant Processing Calendar](#) 
- [NJFAMS EOF Roster Selection, Awarding, Certification and Payment Request Instructions](#) 
- [EOF Undergraduate Grant Award Table](#) 

+ EOF Winter Session Funding Application

# Institutional Accountability

- All participating institutions must adhere to the EOF statewide processing deadlines.
- Institution's that fail to properly adhere to the EOF processing calendar will:
  1. Need to provide in writing why this error/oversight occurred.
  2. How it plans to address and ensure that this error/oversight does not happen again.
  3. Demonstrate how the institution will hold the students harmless (i.e., use institutional funds to cover the EOF grant amount that the institution failed to properly process and request in accordance with the EOF processing guidelines.)



OFFICE OF THE SECRETARY OF HIGHER EDUCATION  
EDUCATIONAL OPPORTUNITY PROGRAM (EOF)  
STUDENT SELECTION, AWARDING, & PAYMENT PROCESSING CALENDAR  
FOR THE 2023-2024 ACADEMIC YEAR\*\*

*Selection, awarding, certifying and requesting payment for EOF students is a process that requires the involvement of both the EOF campus program and their respective financial aid office.*

EOF Campus Programs		
EOF Selecting and Awarding Students		
(This process is facilitated by the EOF campus program. The EOF campus program is responsible for placing students on the EOF "Approved & Eligible Roster" within the NJFAMS EOF portal. EOF campus programs must ensure that all of their students have been properly awarded and processed within NJFAMS.)		
EOF Central Roster Processing Schedule:	Fall 2023	Spring 2024
(The following dates are when programs must submit the EOF Roster Processing sheet to the EOF Central Office to have their Awarded students moved from "Qualified" to "Awarded" Status. Programs must award for both the Fall and Spring terms. Submissions must be received by 12pm.)	September: 21 <sup>st</sup> October: 5 <sup>th</sup> , 19 <sup>th</sup> November: 2 <sup>nd</sup> , 16 <sup>th</sup> , 30 <sup>th</sup>	January: 11 <sup>th</sup> , 25 <sup>th</sup> February: 8 <sup>th</sup> , 22 <sup>nd</sup> March: 7 <sup>th</sup>
Fall 2023 Term	DEADLINE	
EOF Discretionary and Non-Funded Appeals	November 9, 2023	
Last Day to Award All EOF Students	November 30, 2023	
Spring 2024 Term	DEADLINE	
EOF Discretionary and Non-Funded Appeals	February 15, 2024	
Last Day to Award All EOF Students	March 7, 2024	

College/University Financial Aid Office	
EOF Certification and Payment Request	
(This 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 each of the above identified EOF Campus Program Roster processing dates. December 18 <sup>th</sup> is the final date to request payment for the Fall 2023 term; March 18 <sup>th</sup> is the final date to request payment for the Spring 2024 term.)	
Fall 2023 Term	Final Time Period to Certify and Request Payment
ALL EOF Students	December 4 <sup>th</sup> – December 11 <sup>th</sup>
Spring 2024 Term	Final Time Period to Certify and Request Payment
All EOF Students	March 11 <sup>th</sup> – March 18 <sup>th</sup>

\*\* Programs must refer to the HESAA Deadline and Processing Calendar for:  
FAFSA FILING DEADLINE

Incomplete Applications/Corrections/Verification/Task Completion/Appeals/Add a College

Reminder: FAFSA/NI Alternative Financial Aid Application Deadline for EOF Grant consideration

Fall 2023/Spring 2024 – September 15, 2023

Spring 2024 Consideration Only – February 15, 2024

# 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:

Term:

SSN:

First Name:

Last Name:

Student ID:

## EOF Approval Rosters - Action Required

	View and Print (PDF)	Approve Online	Download File (CSV)
 EOF Approval	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>

## Informational Rosters

	View and Print (PDF)	View Online	Download File (CSV)
 Approved and Eligible	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>
 State Verification Not Complete	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>
 Approved, Eligible and Certified	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>
 Certified and Not Paid	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>
 Paid	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>
 Refund Due	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>
 Ineligible	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>
 Incomplete	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>
 All Students	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>

# Campus Relationships

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# Financial Aid/Registrar

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## Registrar

For coding and report retrieval purposes

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## 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

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# 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:

Term:

SSN:

First Name:



Last Name:

Student ID:

### EOF Approval Rosters - Action Required

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 State Verification Not Complete	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>
 Approved, Eligible and Certified	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>
 Certified and Not Paid	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>
 Paid	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>
 Refund Due	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>
 Ineligible	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>
 Incomplete	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>
 All Students	<a href="#">PDF</a>	<a href="#">Online</a>	<a href="#">Download</a>



# 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.

Click here 



**RIDER UNIVERSITY (Spring)** [\(view\)](#)

**Grade Level:** 1st year, never attended college  
**Dependency Status:** Dependent  
**Previous College:** FELICIAN UNIVERSITY  
**Term of First Entry:** Fall 2022-2023  
**Last Funded:** Fall 2022-2023

**EOF Full-time Awards:** 1  
**EOF Part-time Awards:** 0  
**TAG Full-time Awards:** 1  
**TAG Part-time Awards:** 0  
**Tax Verification Indicator:** N

**Housing Status:** <Choose One> ▾  
**Admission Type:** <Choose One> ▾  
**Ethnicity:** Black ▾  
**Gender:** Female ▾  
**Discretionary/Special Conditions:** <Choose One> ▾

**Historical Poverty Code:** Attended/graduated from DFG A/B School District ▾  
**School Program:** <Choose One> ▾  
**EOF Enrollment Status:** <Choose One> ▾  
**EOF Approved:** <Choose One> ▾

Status	Certification Codes	Program	EOF Term Amount	Term Award	Term Paid	Annual Award
	<input type="text"/>	EOF	<input type="text" value="0"/>	\$0.00	\$0.00	\$0.00
	<input type="text"/>	TAG	<input type="text"/>	\$6,795.00	\$0.00	\$13,590.00

[Save](#)

## Discussion: What is the Gross Income and # in Household for this Dependent student


- Must look at the information listed in both the FAFSA and Agency Update columns
- Gross Income has not changed (\$45,087)
- # of Family Members has changed (Changed from 6 to 3)

	Student (and Spouse)		Parent(s)	
	FAFSA	Agency Update	FAFSA	Agency Update
Signatures Present	Both	<Choose One> ▼		
Marital Status *	1		2	
Marital Status Date				
Tax Return Completed *	1		1	
Tax Return Filing Status	1	<Choose One> ▼	4	<Choose One> ▼
Tax Return Type	1		1	
Filed Schedule 1			U	
Adjusted Gross Income *	5000	16252	45087	
U.S. Income Tax Paid	900	388	0	
Income Earned from Work (Student/Parent 1)	2500	16252		
Income Earned from Work (Student Spouse/Parent 2)			0	30176
Exemptions				
Number of Family Members *			6	3
Number in College			2	1
NJEI Simplified Needs Test	Y	<Choose One> ▼	Y	<Choose One> ▼
<b>Federal Benefit Programs</b>				
Medicaid or SSI Benefits			Y	
Food Stamp Benefits				
Free or Reduced Price School Lunch Benefits			Y	
TANF Benefits				
WIC Benefits				
<b>Untaxed Income</b>				
Payments to tax deferred plans	0		0	
IRA deductions/payments to qualified plans	0		0	
Child support received	0		0	
Tax exempt interest income	0		0	
Untaxed Portions of IRA Distributions and Pensions	0		0	
Military/Clergy allowances	0		0	
Veterans noneducation benefits	0		0	
Other untaxed income	0		0	
Money received or paid on student's behalf	0			
<b>Assets</b>				
Cash, savings, checking	Curr Yr: 200 Prior Yr: 650		Curr Yr: 500 Prior Yr: 0	
Investments	Curr Yr: 0 Prior Yr: 0		Curr Yr: 0 Prior Yr: 0	
Business/Investment Farm	Curr Yr: 0 Prior Yr: 0		Curr Yr: 0 Prior Yr: 0	

# REVIEW APPEAL FORM

*New form:*

NJHESAA ID#	Student First Name	Student Last Name	City/Town of Residence (NJ ONLY)	Year in College	Enrollment Status	Dependency Status	# in household	Adjusted Gross Income (\$)	Untaxed Income (\$)	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	Did the student participate in the NJ GEAR UP, College Bound Program, TRIO program? (Y/N)	Action Taken (EOF CENTRAL STAFF ONLY)	Comments (EOF CENTRAL STAFF ONLY)
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Two additional columns have been added to help clarify how Total Gross Income is calculated.

# 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)
- **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 conclusion 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.

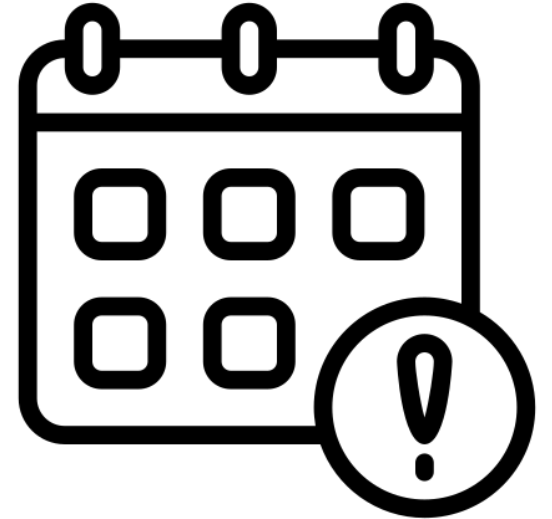
It is the responsibility of the EOF campus program to monitor and notify OSHE/EOF when a student successfully clears verification.

**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

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- Students who appear on your pending verification list must successfully clear verification and be requested for funding by **March 30, 2024** 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 30, 2024**.



# Reminder: Pending Verification Form

[illegible]



# Your Final Roster

## NOVEMBER

- Submit all Discretionary Appeals
- Submit Pending Verification list
- **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
- **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!**
- 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

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# Final Comments

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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.





A STUDENT-CENTERED VISION FOR HIGHER EDUCATION

# Thank You!

We look forward to working with you

