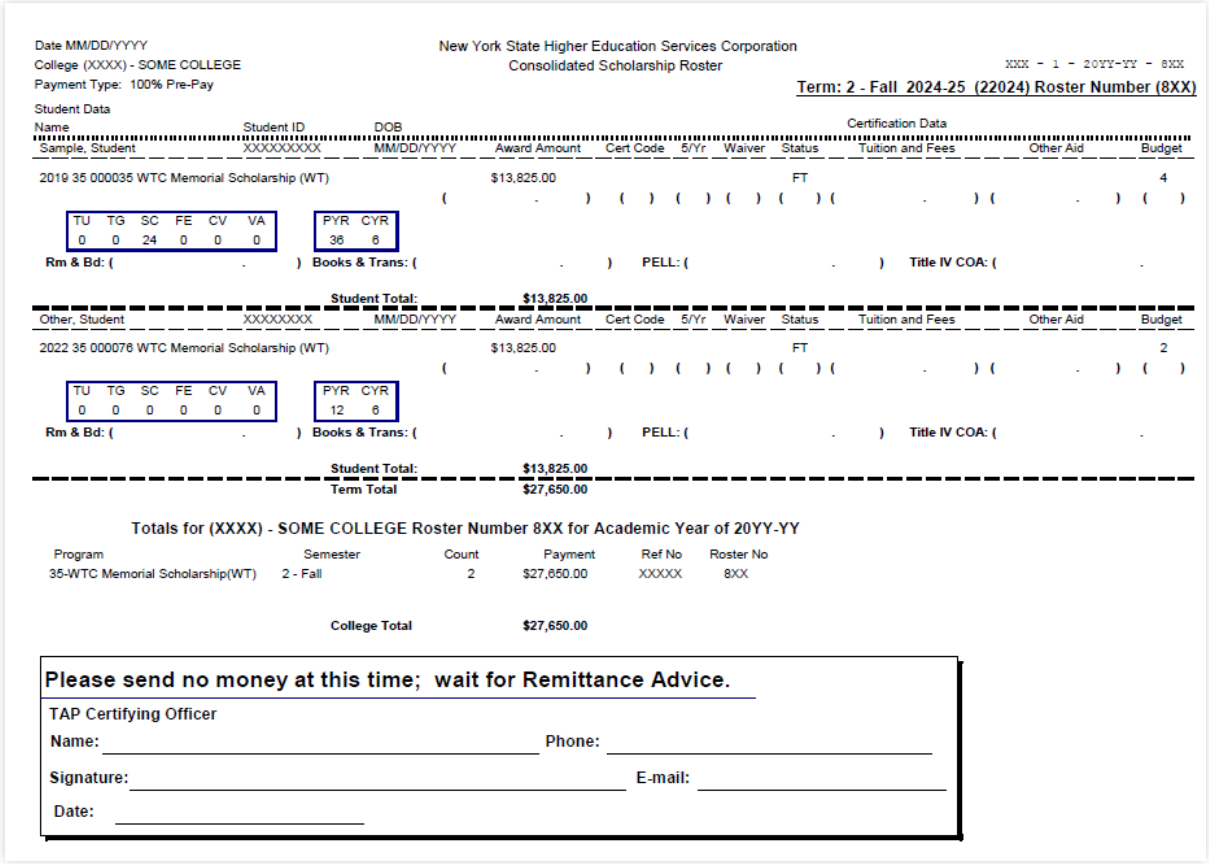
Consolidated Scholarship Roster Certification

Fall 2024

NEW YORK STATE OF OPPORTUNITY. Higher Education Services Corporation

Consolidated Scholarship Roster (CSR)

The **Consolidated Scholarship Roster**, or **CSR** for short, is a paper roster document for NYS grant and scholarships that require **manual certification** by schools



Date MM/DD/YYYY
College (XXXX) - SOME COLLEGE
Payment Type: 100% Pre-Pay

New York State Higher Education Services Corporation
Consolidated Scholarship Roster

XXX - 1 - 20YY-YY - 8XX

Term: 2 - Fall 2024-25 (22024) Roster Number (8XX)

Student Data

Name	Student ID	DOB	Certification Data							
Sample, Student	XXXXXXXX	MM/DD/YYYY	Award Amount	Cert Code	5/Yr	Waiver	Status	Tuition and Fees	Other Aid	Budget
2019 35 000035 WTC Memorial Scholarship (WT)			$13,825.00				FT			4
			(.)	( )	( )	( )	( )	(.)	(.)	( )

TU	TG	SC	FE	CV	VA
0	0	24	0	0	0

PYR	CYR
36	6

Rm & Bd: (.) Books & Trans: (.) PELL: (.) Title IV COA: (.

Student Total: $13,825.00

Other, Student	XXXXXXXX	MM/DD/YYYY	Award Amount	Cert Code	5/Yr	Waiver	Status	Tuition and Fees	Other Aid	Budget
2022 35 000076 WTC Memorial Scholarship (WT)			$13,825.00				FT			2
			(.)	( )	( )	( )	( )	(.)	(.)	( )

TU	TG	SC	FE	CV	VA
0	0	0	0	0	0

PYR	CYR
12	6

Rm & Bd: (.) Books & Trans: (.) PELL: (.) Title IV COA: (.

Student Total: $13,825.00
Term Total $27,650.00

Totals for (XXXX) - SOME COLLEGE Roster Number 8XX for Academic Year of 20YY-YY

Program	Semester	Count	Payment	Ref No	Roster No
35-WTC Memorial Scholarship(WT)	2 - Fall	2	$27,650.00	XXXXX	8XX

College Total $27,650.00

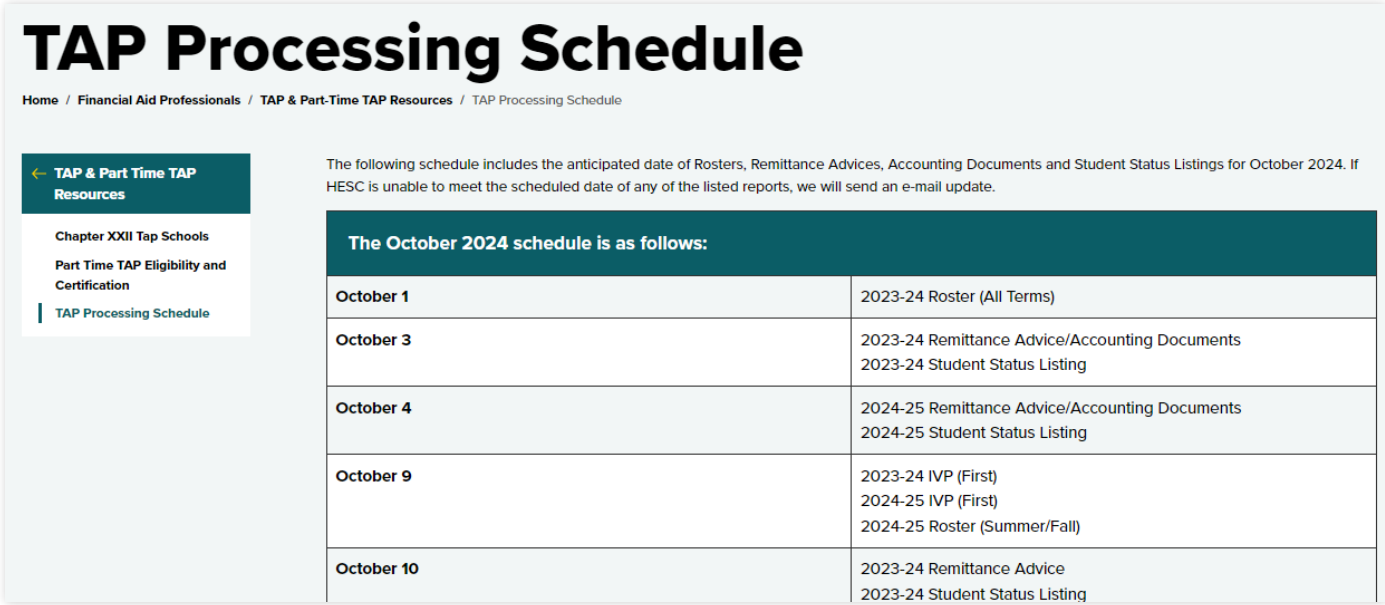
Please send no money at this time; wait for Remittance Advice.

TAP Certifying Officer
Name: _____ Phone: _____
Signature: _____ E-mail: _____
Date: _____

When are Consolidated Rosters Released?

Consolidated Scholarship Rosters are produced on the *same date as TAP Payment Rosters*

- Refer to dates published in the monthly **TAP Processing Schedule** on hesc.ny.gov



TAP Processing Schedule

Home / Financial Aid Professionals / TAP & Part-Time TAP Resources / TAP Processing Schedule

← TAP & Part Time TAP Resources

- Chapter XXII Tap Schools
- Part Time TAP Eligibility and Certification
- TAP Processing Schedule

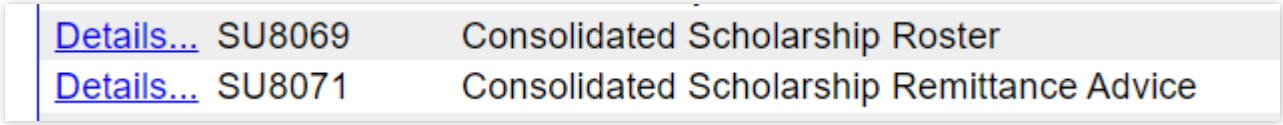
The following schedule includes the anticipated date of Rosters, Remittance Advices, Accounting Documents and Student Status Listings for October 2024. If HESC is unable to meet the scheduled date of any of the listed reports, we will send an e-mail update.

The October 2024 schedule is as follows:	
October 1	2023-24 Roster (All Terms)
October 3	2023-24 Remittance Advice/Accounting Documents 2023-24 Student Status Listing
October 4	2024-25 Remittance Advice/Accounting Documents 2024-25 Student Status Listing
October 9	2023-24 IVP (First) 2024-25 IVP (First) 2024-25 Roster (Summer/Fall)
October 10	2023-24 Remittance Advice 2023-24 Student Status Listing

Where Do You Find the Rosters & Remittance Advices?

Consolidated Scholarship Rosters and Remittance Advices are found in the **reports area on HESCweb**

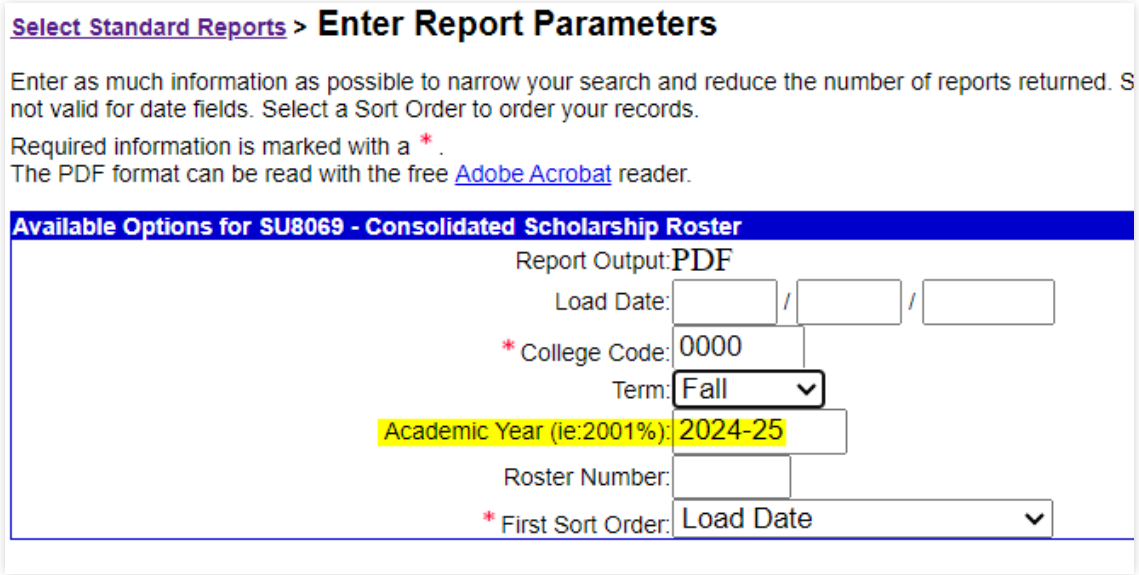
- Standard Reports
- **SU8069** - Consolidated Scholarship Roster
- **SU8071** - Consolidated Scholarship Remittance Advice



Running Consolidated Scholarship Roster Queries

When running the query for the Consolidated Scholarship Roster please be select the correct school code, term and **enter the <u>full</u> academic year.**

- Be sure to also **check your graduate-level school code(s)**, if applicable.



NYS Scholarships Awarded on the CSR

- World Trade Center Memorial Scholarship (WTC)
- Memorial Scholarship (MS)
- Military Service Recognition Scholarship / Military Enhanced Recognition Incentive & Tribute (MSRS/MERIT)
- Child of Veteran (CV)
- Math & Science Teaching Incentive (MSTI)
- Flight 587 Memorial Scholarship
- Patricia K. McGee Nursing Faculty Scholarship
- Child Welfare Worker Incentive Scholarship

TAP & Other Awards on the CSR

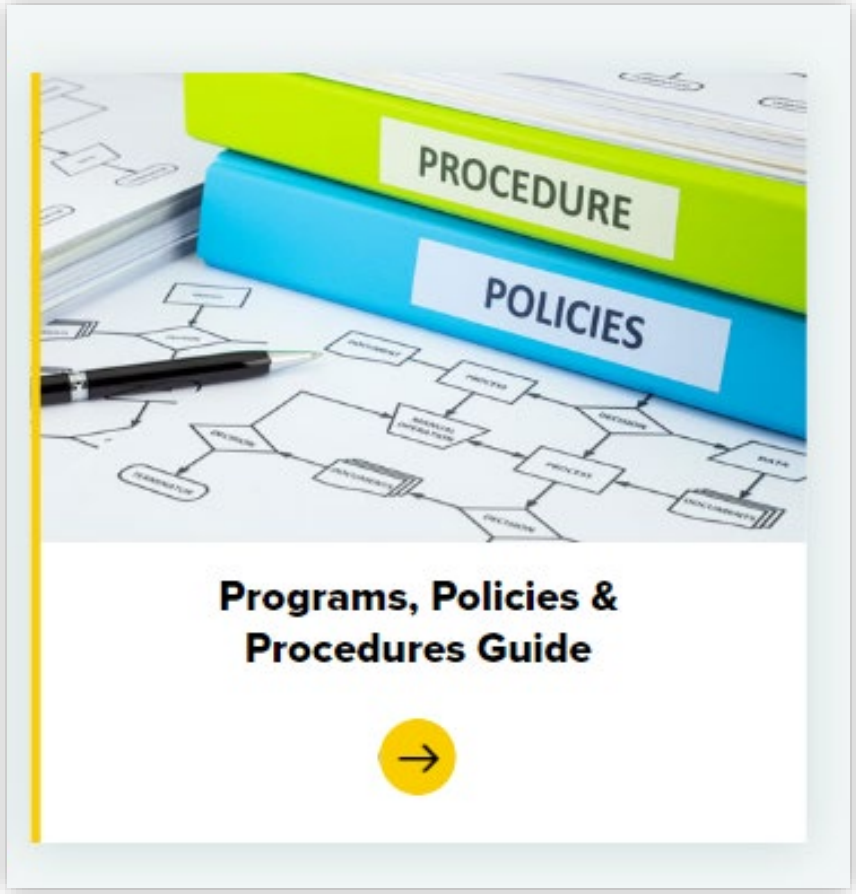
TAP, Scholarships for Academic Excellence (SAE), Veterans Tuitions Award (VTA), STEM Incentive Scholarship, Excelsior, APTS and other **awards traditionally awarded on the electronic TAP rosters may be included on a Consolidated Scholarship Roster**

- Usually **due to exception processing** when the award cannot be paid via the electronic roster (i.e., student receives multiple scholarships, Excelsior Scholarship Reduction in Credit (RIC) appeal approvals, etc.)
- **TAP and other awards previously on an electronic roster may be decertified by HESC** to move them to a Consolidated Scholarship Roster for payment.

Policies & Procedures Manual Appendices

Schools should **refer to Policy & Procedure Manual Appendices** and **scholarship information webpages** on HESC.ny.gov to learn about grant and scholarship eligibility and requirements

- *https://www.hesc.ny.gov/financial-aid-professionals/*

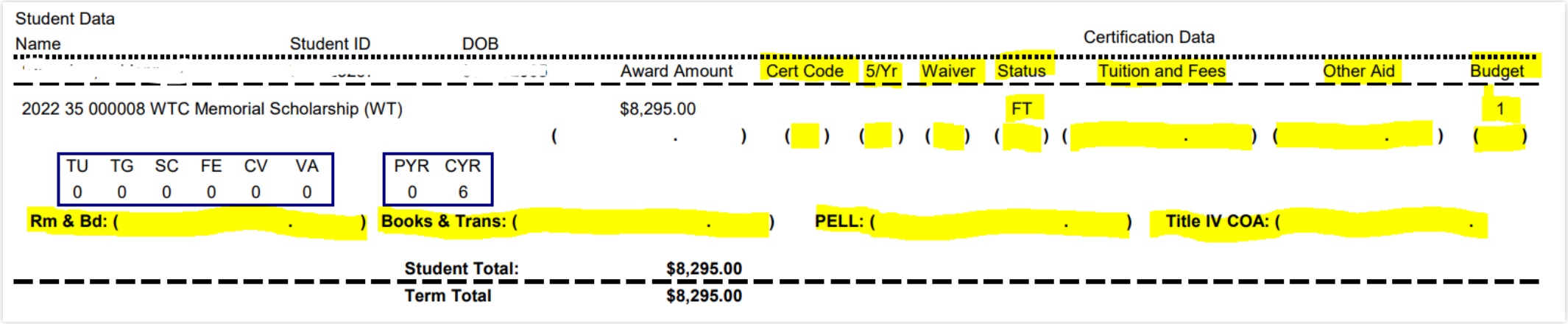


When to Certify: Certification Status Date

- For most programs schools cannot certify term until the **certification status date**, the date the **student incurs full tuition liability for the term**.
- For students are enrolled in a program of study that operates on a **"simulated semester" (modular term)** basis, students must register for and incur tuition liability for enough credits for full-time study at the outset of the term. Students **cannot be certified until they have begun study for the last module of the simulated term**.
- **Some programs may require end of term certification**. Schools should refer to Policy & Procedure Manual Appendices and scholarship information webpages on HESC.ny.gov to review program requirements

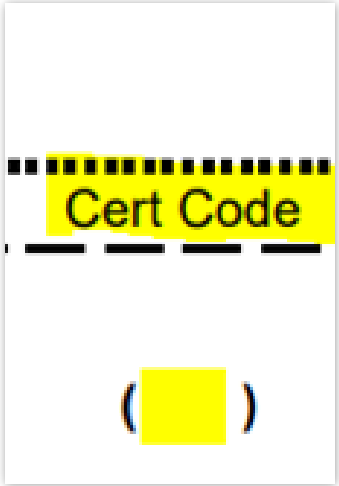
How to Certify Consolidated Scholarship Rosters

- Enter the requested information in all **spaces surrounded by parenthesis ( )**
- For **tuition-specific awards**, such as TAP, enter values for Certification Code, 5/Yr (if applicable), Waiver (if applicable), Enrollment Status, Tuition & Fees, and Other Aid (duplicative benefits)
- For **awards that cover Cost of Attendance**, such as the World Trade Center Memorial Scholarship, enter the values above in addition to Budget, Room & Board, Books & Transportation, Pell and Title IV COA



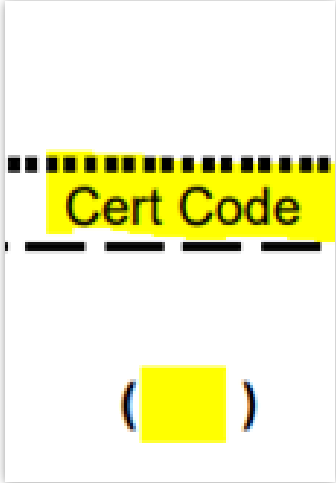
Certification (Cert) Codes: Payment Will Be Issued

- Students who are certified on the roster with one of the following certification codes will receive a payment of their award(s):
  - **1 – Eligible** – student has met all criteria and is still attending. This code is also used if a student withdrew from a class, incurred tuition liability for the class and is still in attendance.
  - **2 – Tap-No Scholarship** – student meets criteria for a TAP award but is not enrolled in an approved program for the Scholarship.
  - **3 – Withdrawn with Tuition Liability** – student has met all eligibility criteria but has withdrawn from all classes and has incurred a tuition liability for the twelve credits.



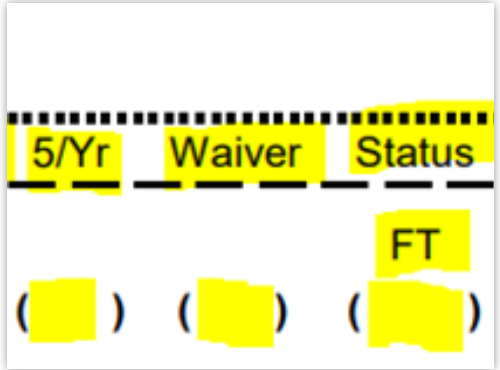
Certification (Cert) Codes: Payment Will Not Be Issued

- The following are decertification codes that will result in the student not receiving a payment of their award(s):
  - **4 – Not Registered –** student was not enrolled or has withdrawn without any tuition liability.
  - **5– Not Full-time** – student has not registered for sufficient credits to meet the full-time requirement as required by their grant or scholarship program.
  - **6 – Not Matriculated** – student is not considered to be a candidate for a degree.
  - **7 – Does not meet the Accelerated Study requirements** – Only used for accelerated terms
  - **8 – Not in Good Academic Standing** – student does not meet SAP, Program Pursuit or the academic requirements for their specific award
  - **9 – Miscellaneous** – used to decertify a student who is not eligible for any other reasons or not eligible for Excelsior/ETA purposes



5 YR, Waiver, Status

- These fields are defined in the same way as the electronic TAP roster
  - **5 YR** – Enter "5" to indicate student is in an approved five-year undergraduate degree program or in an approved opportunity program
  - **Waiver**: Enter "W" when certifying the use of a Good Academic Standing waiver
  - **Status**: Enter Enrollment Status (FT, HT or number of credits), "FT" (Full-time) is the default value
- Schools should refer to Policy & Procedure Manual Appendices and scholarship information webpages on HESC.ny.gov to review program requirements
  - Some programs follow the same requirements as TAP, including full-time status and SAP/POP requirements while others may have program-specific requirements.



What About Award Amount?

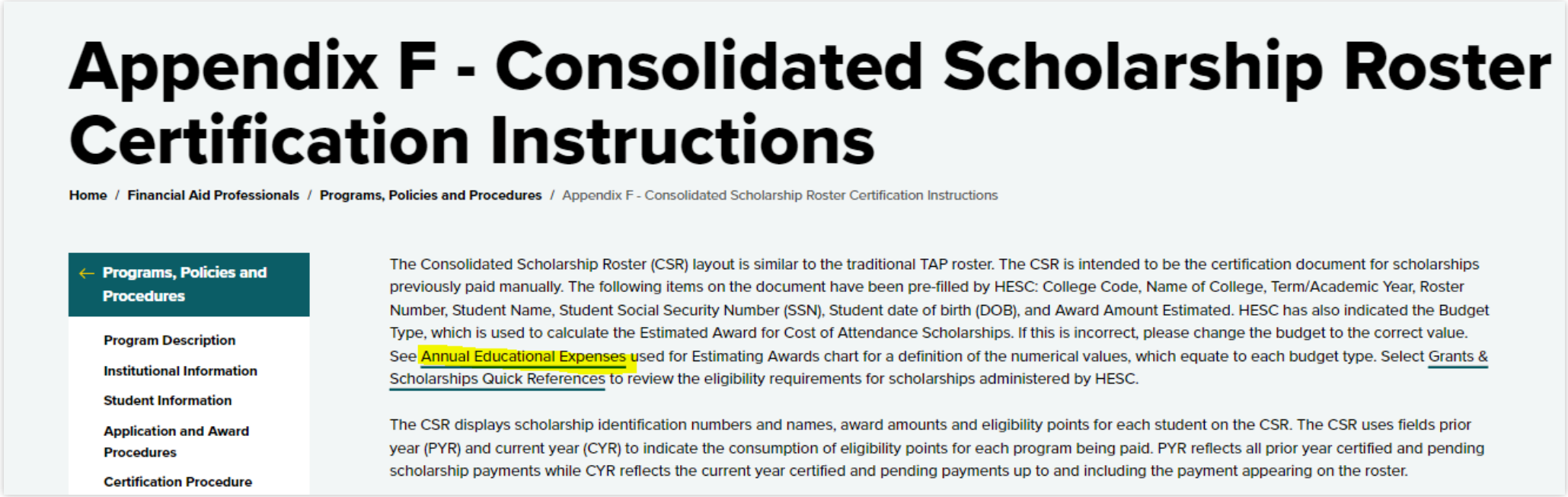
- **Award amounts** for grant and scholarships on the Consolidated Scholarship Roster are **ultimately determined by HESC**.
    - Determinations are based on information provided in College Data Survey (Tuition and Fees, for example), the *Annual Educational Expenses Used to Calculate Scholarship Awards* and values entered on the CSR, including the *Budget Type* coding

Maximum Award Amounts

- Legislation and program regulation governing NYS grants and scholarships dictate the **caps on the maximum award amount** for each program
    - **Tuition-specific awards**; capped at a set tuition amount based on the program limit, the average in-State tuition cost at SUNY or the student's actual tuition charges, ***whichever is less.***
    - **Cost of attendance awards;** capped at the average in-State cost of attendance for a commuter, on-campus or off-campus student for students at SUNY or the student's actual cost of attendance, ***whichever is less.***
- Schools should refer to the program information pages or **appendices in the Programs, Policies and Procedures: Guide to Grants and Scholarship Programs** to learn more about the requirements of the awards they are certifying

Appendix F: Annual Educational Expenses

Appendix F of the Programs, Policies and Procedures: Guide to Grants and Scholarship Programs HESC provides schools the *Annual Educational Expenses* used to calculate scholarship awards to be used for Cost of Attendance-based awards



Appendix F - Consolidated Scholarship Roster Certification Instructions

Home / Financial Aid Professionals / Programs, Policies and Procedures / Appendix F - Consolidated Scholarship Roster Certification Instructions

← Programs, Policies and Procedures

- Program Description
- Institutional Information
- Student Information
- Application and Award Procedures
- Certification Procedure

The Consolidated Scholarship Roster (CSR) layout is similar to the traditional TAP roster. The CSR is intended to be the certification document for scholarships previously paid manually. The following items on the document have been pre-filled by HESC: College Code, Name of College, Term/Academic Year, Roster Number, Student Name, Student Social Security Number (SSN), Student date of birth (DOB), and Award Amount Estimated. HESC has also indicated the Budget Type, which is used to calculate the Estimated Award for Cost of Attendance Scholarships. If this is incorrect, please change the budget to the correct value. See Annual Educational Expenses used for Estimating Awards chart for a definition of the numerical values, which equate to each budget type. Select Grants & Scholarships Quick References to review the eligibility requirements for scholarships administered by HESC.

The CSR displays scholarship identification numbers and names, award amounts and eligibility points for each student on the CSR. The CSR uses fields prior year (PYR) and current year (CYR) to indicate the consumption of eligibility points for each program being paid. PYR reflects all prior year certified and pending scholarship payments while CYR reflects the current year certified and pending payments up to and including the payment appearing on the roster.

Annual Educational Expenses Used to Calculate Scholarship Awards

- Charts for SUNY/CUNY and Independent schools provide **budget types (Commuter, Resident, Off-Campus)** and detail the maximum amounts for Tuition/Fees, Room/Board, Books/Supplies and Transportation
  - **Tuition & Mandatory Fees**: use the SUNY in-State amount or the actual tuition/fees charged, *whichever is less*
  - **Non-tuition Cost of Attendance**: use the amount indicated on the chart or the school's budgeted cost of attendance allocation, *whichever is less*

Educational Expenses for 2024-25 Academic Year

World Trade Center Memorial Scholarship (WTC), Memorial Scholarship for Families of Deceased Firefighters, Volunteer Firefighters, Police Officers, Peace Officers and Emergency Medical Service Workers (MS), Military Service Recognition Scholarship (MERIT), Flight 587 Memorial (FM), Flight 3407 Memorial (CF)

The following chart reflects the full-year cost of attendance.

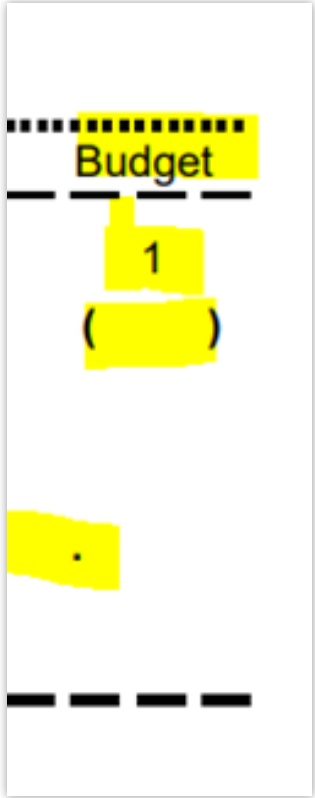
	Tuition & Mandatory Fees	Room & Board	Books & Supplies	Transportation	Estimated Totals
Resident Use these figures for Budget type 2					
SUNY/CUNY	Actual*	Actual*	$1,350	$ 1,060	Variable
Independent	$8,900**	$16,340	$1,350	$ 1,060	$27,650
Off Campus Use these figures for Budget type 4					
SUNY/CUNY	Actual*	$16,340	$1,350	$ 1,060	Variable
Independent	$8,900**	$16,340	$1,350	$ 1,060	$27,650
Commuter Use these figures for Budget types 1 and 3					
SUNY/CUNY	Actual*	$4,680	$1,350	$1,800	Variable
Independent	$8,900	$4,680	$1,350	$1,800	$16,730

* Use In-state Tuition

** Use Allowance shown or actual amount, whichever is less

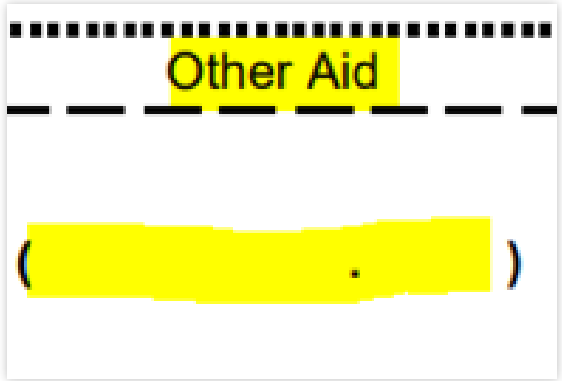
Budget Types & Codes

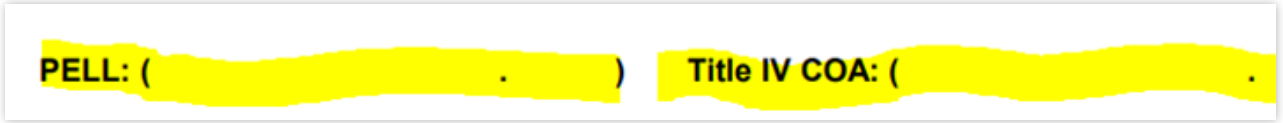
- Be sure to **review the Budget code** on the Consolidated Scholarship Roster
- There are **three budget types and four budget codes**:
  - **1 & 3 – Commuter** – Budget codes for students who reside with parents or **do not meet HESC's criteria to be considered off-campus**
  - **2 – Resident** – Budget code for students living in institutional housing.
  - **4 – Off-campus** – Budget code for students who do not live in institutional housing and do not live with parents or in a building owned or rented by their parent. Student must either meet TAP criteria for independence, or if dependent, be certified that they applied for but were *denied space in institutional housing (or the institution does not offer such housing) and his/her parents do not live within a reasonable commuting distance*.
- **HESC defaults all initial awardees under the Commuter budget (1)** and will only change the budget type based on school certification.



Award Reductions: Other Aid, Pell, Title IV COA

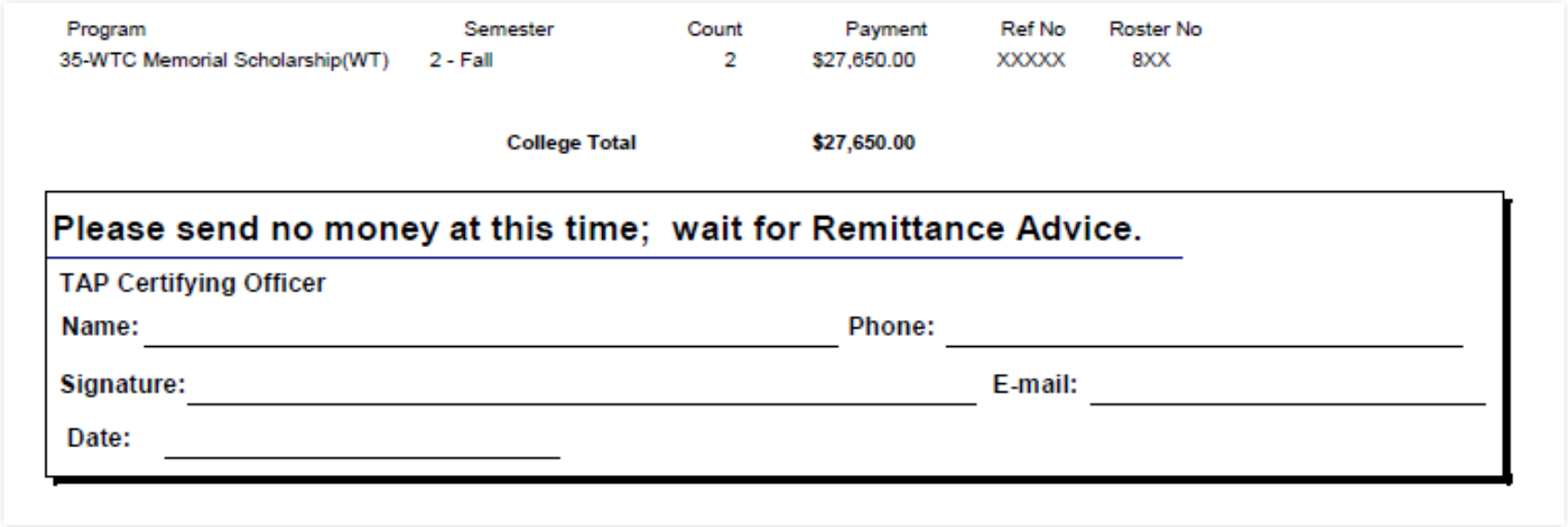
- **Receipt of other grants and scholarships, including Pell, may reduce awards** on the Consolidated Scholarship Roster.
- **Other Aid**: Enter any other grants & scholarships received for the term (do not include loans).
  - HESC will remove or offset TAP and other conflicting HESC-administered award to prevent overaward or duplicative benefit
- **Pell**: Enter the actual term amount federal Pell received.
- **Title IV Cost of Attendance**: Enter total term amount Title IV Cost of Attendance used for federal student aid purposes.
  - The total of all aid received cannot be greater than the student's Title IV cost of attendance





What's Next: Certification Submission

- Rosters must be signed by the school's TAP Certify Officer (TCO) on the bottom section of the roster.
- Completed rosters may be emailed to HESC's Payments Unit at **Payments@hesc.ny.gov**



Program	Semester	Count	Payment	Ref No	Roster No
35-WTC Memorial Scholarship(WT)	2 - Fall	2	$27,650.00	XXXXX	8XX
	College Total		**$27,650.00**		

Please send no money at this time; wait for Remittance Advice.

TAP Certifying Officer

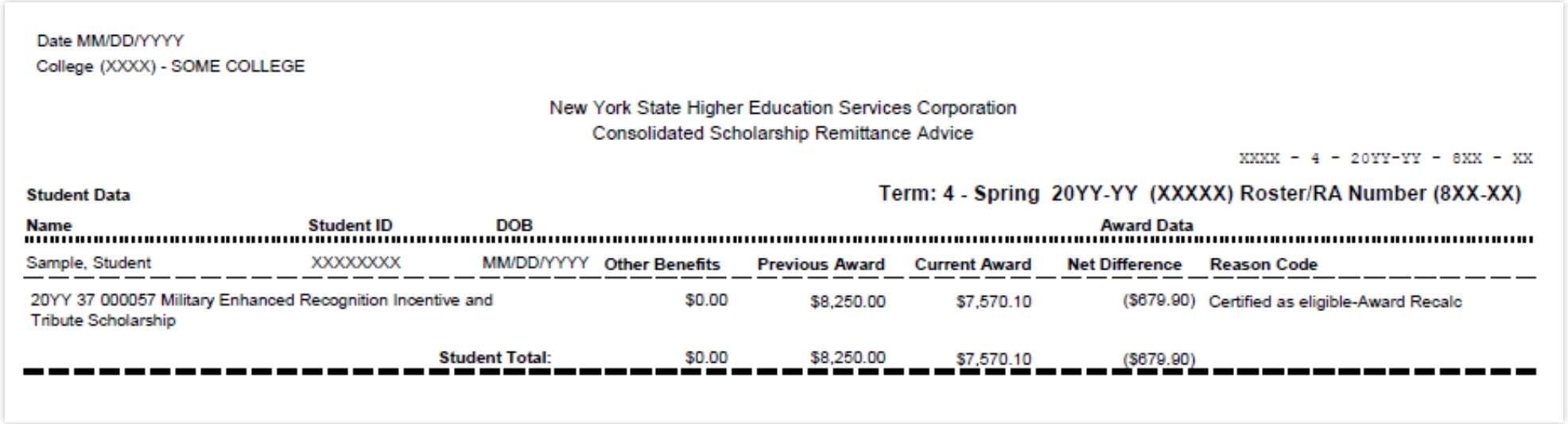
Name: _____ **Phone:** _____

Signature: _____ **E-mail:** _____

Date: _____

Remittance & Payment Processing

- All awards issued on the Consolidated Scholarship Roster are **100% Pre-paid**
  - Schools receive payment shortly after release of the roster
- **Consolidated Scholarship Remittance Advices** reports are produced bi-weekly to reflect certification processing and award amounts to be paid
  - Same dates as "Remittance Advice / Accounting Documents" on TAP Processing Schedule



Date MM/DD/YYYY
College (XXXX) - SOME COLLEGE

New York State Higher Education Services Corporation
Consolidated Scholarship Remittance Advice

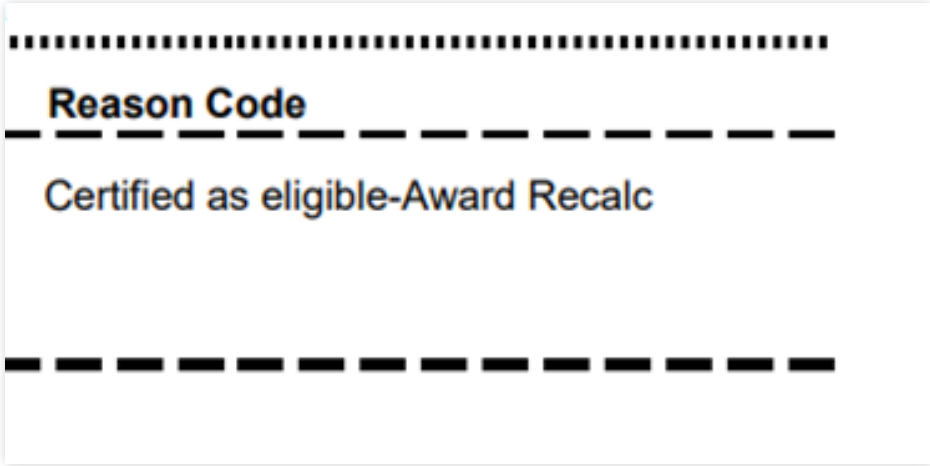
XXXX - 4 - 20YY-YY - 8XX - XX

Student Data **Term: 4 - Spring 20YY-YY (XXXXX) Roster/RA Number (8XX-XX)**

Name	Student ID	DOB	Award Data				
			Other Benefits	Previous Award	Current Award	Net Difference	Reason Code
Sample, Student	XXXXXXXX	MM/DD/YYYY					
20YY 37 000057 Military Enhanced Recognition Incentive and Tribute Scholarship			$0.00	$8,250.00	$7,570.10	($679.90)	Certified as eligible-Award Recalc
		Student Total:	$0.00	$8,250.00	$7,570.10	($679.90)	

Consolidated Scholarship Remittance Advice Reason Codes

- **"Reason Code" messaging** will be present on the roster indicating status of award payment.
- Common "Reason Code" messages include;
  - **Certified as eligible-No Change in Award**: Award is paid at the same amount indicated on the roster
  - **Certified as eligible-Award Recalc**: Award is paid but at a different amount than indicated on the roster or previous remittance advice.
  - **Not Registered-Decertified, Not in good academic standing-Decertified, Miscellaneous-Decertified**: Award was decertified for the reason indicated.

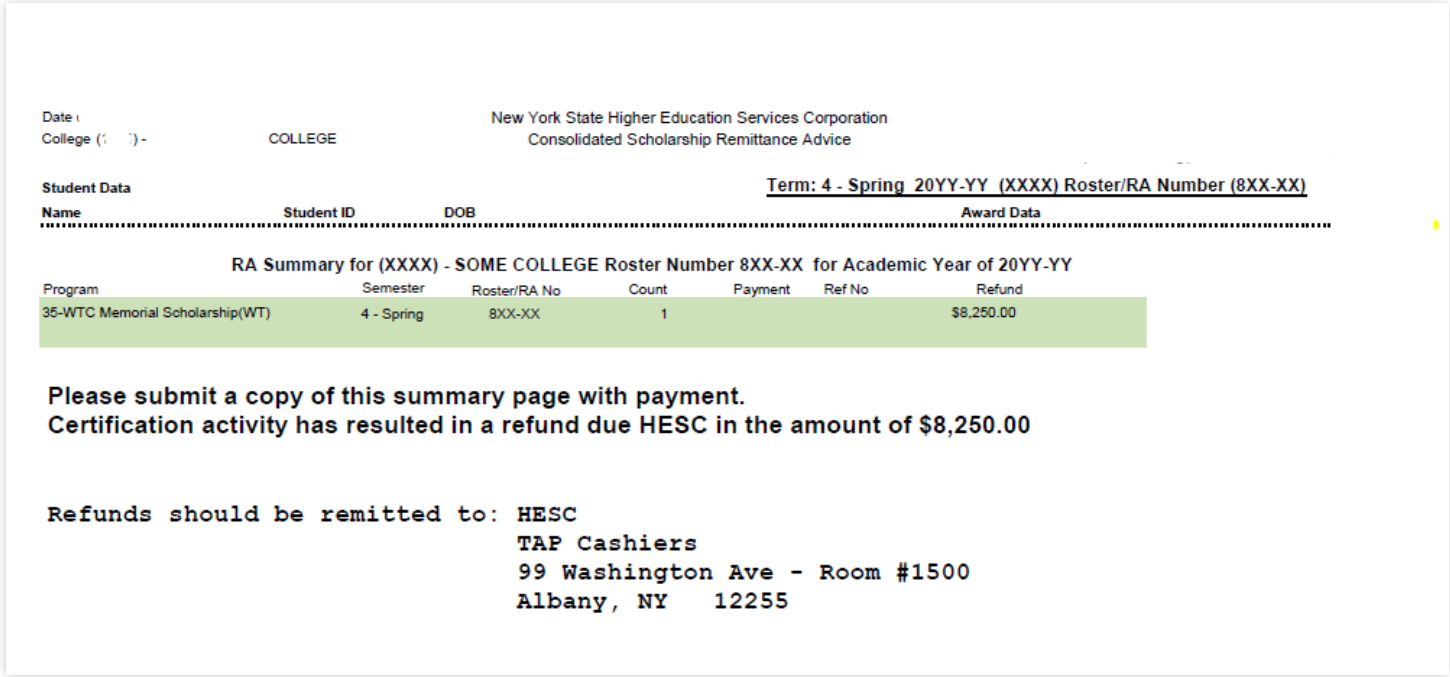


Certification Corrections

- Certifications on Consolidated Scholarship Rosters may be corrected by TAP Certifying Officers **resubmitting the roster with "AMENDED" or "REVISED"** written on a copy of the previously submitted roster
- **Incorrect values should be crossed out with new values entered** next to the crossed-out value.
- Amended/revised rosters may be emailed to HESC's Payments Unit at **Payments@hesc.ny.gov**

Refund Processing

- Schools must **reconcile payments upon receipt** of **Consolidated Scholarship Remittance Advices**
- **Refunds** created by award reductions or school decertification **must be sent to HESC upon receipt of the Consolidated Scholarship Remittance Advice** per the instructions on the document



Date (
College ( ) - COLLEGE

New York State Higher Education Services Corporation
Consolidated Scholarship Remittance Advice

Student Data Term: 4 - Spring 20YY-YY (XXXX) Roster/RA Number (8XX-XX)

Name **Student ID** **DOB** **Award Data**

RA Summary for (XXXX) - SOME COLLEGE Roster Number 8XX-XX for Academic Year of 20YY-YY

Program	Semester	Roster/RA No	Count	Payment	Ref No	Refund
35-WTC Memorial Scholarship(WT)	4 - Spring	8XX-XX	1			$8,250.00

Please submit a copy of this summary page with payment.
Certification activity has resulted in a refund due HESC in the amount of $8,250.00

Refunds should be remitted to: HESC
TAP Cashiers
99 Washington Ave - Room #1500
Albany, NY 12255

HESC Support for School Administrators

Priority Services

prioritysservices@hesc.ny.gov

(833) 789-0471 (voice-message only)

School-use only