Massachusetts Assistance for Student Success Program

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II. A  MASSACHUSETTS ASSISTANCE FOR STUDENT SUCCESS
PROGRAM GUIDELINES

PURPOSE:
The Massachusetts Assistance for Student Success Program (MASSGrant) is a grant assistance program funded by appropriations from the Massachusetts State Legislature in accordance with Massachusetts General Laws, Chapter 15, Section 19A. The MASSGrant program provides need-based financial assistance to undergraduate students who reside in Massachusetts and who are enrolled in and pursuing a program of higher education in any approved public or independent college, university, school of nursing or any other approved institution furnishing a program of higher education. The MASSGrant provides financial assistance to Massachusetts students demonstrating the greatest financial aid need.

DEFINITIONS:

ELIGIBLE INSTITUTION:
An eligible institution is defined as a state-approved public, private, independent, for profit or nonprofit, institution in the Commonwealth of Massachusetts authorized to offer undergraduate degrees, certificates or diploma programs and that is also approved by the U.S. Department of Education to administer Title IV programs. Massachusetts state-approved public, private, independent and non-profit Institutions located in states (NH, ME, CT, VT, RI, PA and the District of Columbia) that have reciprocity agreements with and approved by the Commonwealth: and award Associate and Bachelors Degrees are also eligible to participate.

ELIGIBLE PROGRAM:
Any eligible degree or certificate program offered by an institution.

ELIGIBLE STUDENT:
A student enrolled in an eligible program and meeting the following requirements:

a) a permanent legal resident of Massachusetts for at least one year prior to the opening of the academic year and a U.S. citizen or non-citizen eligible under Title IV regulations

b) in compliance with Selective Service Registration requirements

c) eligible for Title IV financial aid and not in default of any federal or state loan

d) does not owe a refund on any previously received Federal or State financial aid

e) demonstrates financial need as determined by the Federal Methodology need analysis criteria

f) has a documented Expected Family Contribution (EFC) between 0-4041 based on an eligibility index system approved by the Massachusetts Board of Higher Education

g) is enrolled as a full-time student (12 undergraduate credits or its equivalent) in an eligible undergraduate degree, certificate or diploma program and must have maintained the full-time status at the time of disbursement
h) not have reached the maximum semester of eligibility to continue to receive a MASSGrant award (eligibility is limited to a specific number of semesters based on the type of institution that the student attends)

i) is maintaining satisfactory academic progress in accordance with institutional and Federal standards

j) must not have received a prior bachelors degree or its equivalent

k) if enrolled in a clock hour program, the student must:
   1) complete a minimum of 24 clock hours per week
   2) complete a minimum of 320 hours during the period of July 1 – December 31 to qualify for a Fall disbursement
   3) complete a minimum of 320 hours during the period of January 1 – June 30 to qualify for a Spring disbursement

l) if enrolled in English as a Second Language (ESL) program courses, the student must be simultaneously enrolled in either a certificate, associate or bachelors degree program in order to be considered eligible for a MASSGrant. Credits a student earns for ESL program courses may be counted towards his/her full-time enrollment status.

m) must meet all institutional requirements

**STUDENT AWARD VALUES:**

Awards are determined by an indexing system approved by the Board of Higher Education that considers the federal expected family contribution (EFC), and type of institution the student attends. Individual awards for the academic year may not exceed a student’s demonstrated financial aid need. Eligibility for the MASSGrant is restricted to a maximum number of semesters as follows:

- 10 semesters if enrolled in an approved five-year undergraduate program
- 8 semesters if enrolled in a four-year undergraduate program
- 6 semesters if enrolled in a three-year undergraduate program
- 4 semesters if enrolled in a two-year undergraduate program
- 2 semesters if enrolled in a one-year certificate or diploma program

**INSTITUTIONAL DISBURSEMENT OF FUNDS:**

a) MASSGrant funds are disbursed to the institution in two payments for the fall and spring semesters for students who meet all eligibility criteria, as certified by the institution.

b) Payment of MASSGrant funds is sent directly to the institution from the Commonwealth’s Comptroller’s Office. One hundred percent of the funds from the MASSGrant award shall be used to credit the student’s account. Funds must be disbursed to students during the traditional academic year.

c) All refunds shall be sent to the Office of Student Financial Assistance and checks made payable to the Commonwealth of Massachusetts.
d) Refunds may occur as a result of adjustments to EFC, changes to dependency status, and/or changes to a student’s enrollment status. Refunds may also occur if the institution receives payment and becomes aware that a student has withdrawn, dropped below full-time status, taken an approved leave of absence, or otherwise fails to complete the period of enrollment as charged.

**AUDIT REQUIREMENTS:**

All financial books, records and documents pertaining to this program shall at all reasonable times be opened to inspection, review and audit by the Chancellor, the State Auditor or their authorized representatives who shall have access to the premises wherever such books, records and documents are located. The institution shall retain such financial records for a period of seven years.
II. B MASSGrant PROCESSING
HOW MASSGrant AWARDS ARE DETERMINED

Application/Receipt of Students’ Information

- Applicants file a completed Free Application for Federal Student Aid (FAFSA) with the Federal processing center. The 2008-2009 MASSGrant priority deadline date is May 1, 2008.

- The FAFSA data is transmitted electronically via Electronic Data Exchange (EDE) from the Federal Central Processing Service (CPS) to the Office of Student Financial Assistance (OSFA). OSFA is a destination point on the U.S. Department of Education Title IV Wide Area Network (WAN) system and receives fully formatted Institutional Student Information Records (ISIRs) of all applicants who file a 2008-2009 FAFSA and indicate Massachusetts as their state of legal residence.

- Subsequent ISIR transactions are also received via EDE and revised data automatically update the student’s record, with the exception of changes in residency information, up until the time he/she appears on a MASSGrant Certification Roster. Since the CPS does not differentiate between school corrections or student corrections, all ISIRs transactions will be received by OSFA electronically.

Schools can use the on-line MASSGrant Adjustment Form to fully submit and process changes to the following information:

- Enrollment Status
- Prior Bachelor
- Citizenship
- Drug Conviction
- NSLDS Reporting
- Ineligible School

Once the school enters all required information for any of the above ineligible conditions, it is able to perform instant re-determination of the student’s MASSGrant and No Interest Loan eligibility.

- Schools continue to have the ability to use paper Adjustment Forms (Exhibit 4), to submit corrections to records previously received by OSFA. Once a student has appeared on a MASSGrant Certification Roster, OSFA will not permit any electronically transmitted transactions (from CPS to update that record) Therefore, schools requiring a student record adjustment after that record has been placed on a certification roster, must complete an Adjustment Form (whether electronic or paper) to update the student’s MASSGrant record.

Eligibility Notification to Students and Schools

Schools receive a Cumulative Information Roster from the Office of Student Financial Assistance listing all applicants whose FAFSA application information has been received by OSFA, and who listed their school as their first choice.
• An applicant’s eligibility is based upon the calculated Expected Family Contribution (EFC). To be eligible, the applicant’s EFC must fall within the eligibility range established by the Office of Student Financial Assistance. The amount of the award is also dependent upon the type of school the applicant attends.

• Applicants receive written notices of eligibility status indicating whether or not they meet all eligibility criteria to receive a MASSGrant.

**Ineligible Students**

Students who are ineligible for a MASSGrant receive a letter that specifies the reasons for their ineligibility and information that can help them resolve it. Ineligible students also have a four-week period (from the date indicated on their first letter of ineligibility) to resolve their ineligible status. MASSGrant records that remain ineligible after the above four-week period are subject to cancellation and will be placed in an “INACTIVE” status for the remainder of the academic year. Inactive records can be re-considered for eligibility at different points during the academic year, should funding become available.

**Eligible Students**

An eligible applicant receives an Award Notification letter and acceptance information. The applicant is instructed to notify the Office of Student Financial Assistance if:
1) the offer is being declined; 2) the applicant will attend a school other than that listed on the award notification and/or 3) the applicant’s address has changed.

A MASSGrant eligible student who wishes to decline one or both semester awards, or update the school information that appears on his/her award notification letter may do so electronically on OSFA’s website, via the Student Information suite. At the point of submitting any of the above changes, OSFA’s system updates the student’s eligibility and issues a revised notification letter.

Alternatively, the Office of Student Financial Assistance updates records for all applicants returning the Award Notification Letter with the changes of information regarding declined awards, change of school(s) and change of address.

**MASSGrant Certification**

The school receives one copy of a Certification Roster listing all eligible applicants. Schools are encouraged to keep a copy of the completed Certification Roster on file. An applicant will not appear on a Certification Roster if the award was declined. At its choosing, the institution may also request and receive MASSGrant certification data files that it can modify and return to OSFA in accordance with very established specifications. Any institution that wishes to investigate such an option should contact OSFA.

The school determines whether or not each applicant on the Certification Roster is enrolled and satisfies the eligibility criteria to receive a MASSGrant. The school then certifies each applicant on the Certification Roster as eligible or ineligible for payment. If the student applicant is ineligible, the student’s award is deleted by OSFA. If the student is certified as pending, he/she will re-appear on subsequent Certification Rosters. A student’s award for a specific semester will only appear on a certification roster for a total number of two times. Should the school remain unable to report the student as being eligible or not on the second occasion, OSFA will automatically cancel that particular semester award. If the student applicant is certified as eligible for payment, the student will appear on the next Payment Roster.
**MASSGrant Payment**

- The Financial Aid Office receives two copies of the Payment Roster. One copy is to be used to report certification of disbursement of funds and the second copy is for the school’s records. We encourage schools to submit a photocopy of each payment roster to their Bursar’s Office.

- The Massachusetts Department of Higher Education’s Business Office prepares individual Payment Vouchers for the total amount of each school's Payment Roster. These vouchers are then entered into the state's computerized accounting system.

- The Comptroller's Office approves each payment and transmits this information to the Treasurer's Office. The Treasurer's Office processes and forwards payment to individual schools via electronic transfer or paper warrant.

- The school also has the responsibility to assure that an eligible student has met the MASSGrant program requirements at the time of disbursement. When the school is unable to disburse funds to a student or only issues a partial disbursement, it must indicate it on the payment roster. Monies that aren’t disbursed to students must be returned to OSFA as refunds.

**Correspondence/OSFA Contact Information**

- For timely processing, all correspondence sent to the Office of Student Financial Assistance on behalf of a student, must identify the student by name, social security number, and the school the student is attending.

- To contact the Office of Student Financial Assistance, institutions should call 617-727-1226. This number is exclusively for Financial Aid Officers. **Other calls are referred to the Office of Student Financial Assistance's main number, 617-727-9420.**
MASSGrant Processing Flow Chart 2008-2009

Load ISIR Records from U.S. Dept. Ed.

Determination and Packaging

Awarded?

Yes → Send Award Letter

No → Send Ineligible Letter

Cumulative Information Roster

Awards and Transfers (Reinstatement)

ISIR Corrections

Awards?

Yes → Certification Roster

No → Send Ineligible Letter

Award Cancelled

Eligibility Criteria Certified?

Yes → Payment Roster

Award Disbursement Verified?

Yes → Disbursement Retained

No → Payment Check

Disbursement Refunded

Pending

Pending 2 Times
The Expected Family Contribution (EFC) is derived from the Federal Methodology.

The MASSGrant Eligibility Index lists Expected Family Contribution (EFC) for the program.

To determine a MASSGrant award, the EFC is matched to a specific award amount as shown on the MASSGrant Program Award Schedule. Other determinant is school type.
## Office of Student Financial Assistance
### Massachusetts Assistance for Student Success

**TENTATIVE 2008-2009 MASSGrant PROGRAM AWARD SCHEDULE**

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<th>Mass Private</th>
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<th>Public State College</th>
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<th>Mass Proprietary</th>
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Note: The table above provides the tentative award schedule for the 2008-2009 MASSGrant program, showing the amounts awarded to different types of institutions based on the expected family contribution.
II. C CUMULATIVE INFORMATION ROSTER
ROSTER HIGHLIGHTS

The Cumulative Information Roster lists all students at an institution whose FAFSA records have been received by OSFA and who have been considered for a MASSGrant. This roster is provided to campuses for informational purposes only. Schools should review the Roster for changes that have occurred to students’ status or other information. Schools also have the option of creating/printing their own Cumulative Information Roster via the “School Information” section on OSFA’s website at: www.osfa.mass.edu. Additionally, institutions have the option of creating real time reports for individual MASSGrant ineligibility conditions via OSFA

- Dependency status – Students are identified as being either Independent (I) or Dependent (D).

- Status Codes and Reasons - The status codes on the Roster identify a student’s ineligible condition(s). (See Exhibit 15)

- PowerFAIDS Edits - In addition to the standard edits for determining eligibility, the PowerFAIDS system performs edit checks for students who:
  - are in default of a State of Massachusetts student loan;
  - reported a social security number on their 2008-2009 FAFSA that could not be matched in the federal social security database;
  - whose citizenship information reported on the 2008-2009 FAFSA could not be verified by the Federal Student Aid Program;
  - recipients of a Herter Memorial Scholarship;
  - are in default of a Federal Title IV loan or owe a refund on previously received financial aid;
  - answered “yes” to questions #31 on the 2008-2009 FAFSA;
  - reported less than full-time enrollment status in 2008-2009.

Students who have these conditions are not eligible for a MASSGrant and appear in “NA” or “AX” status on the Cumulative Information Roster.

- Award Amounts – Students who are not eligible for a MASSGrant will have a zero award value on the Roster. Semester specific award amounts are printed for all eligible students.

CUMULATIVE INFORMATION ROSTER MAILING SCHEDULE

First Anticipated Mailing: June 2008

Subsequent Scheduled Mailing: January 2009

Schools also have the option of directly producing and printing updated MASSGrant Cumulative Information Roster via OSFA’s web site at any point in time.
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<td>4</td>
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<td>NA</td>
<td>06/03/2007</td>
<td>$0.00</td>
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</tr>
</tbody>
</table>
II. D SCHOOL CERTIFICATION PROCESS
CERTIFICATION ROSTER HIGHLIGHTS

The Certification Roster includes all students who have received a MASSGrant Award Notification letter and remained eligible for the grant as of the date the roster is produced.

- Fall and Spring semester awards always appear on separate Certification Rosters and both semester rosters can be mailed together throughout the spring semester cycle.

- “EFC” refers to Expected Family Contribution.

- Students with adjustments reported directly on the Certification Roster may be checked “YES” if ALL eligibility criteria are met. These eligible students will appear on the institution’s next Payment Roster, if they remain eligible in spite of any adjustments.

OVERVIEW OF THE CERTIFICATION ROSTER

- Schools must verify all applicants selected for verification by the U.S. Department of Education. The required verification items include the items mandated by the U.S. Department of Education and include: EFC, DEPENDENCY STATUS, AGI, NON-TAXABLE INCOME, U.S. INCOME TAX PAID, NUMBER IN HOUSEHOLD, and NUMBER IN COLLEGE.

- Schools are required to notify OSFA of any changes to a student’s EFC that will affect the award being offered. The Office of Student Financial Assistance will notify students of any change to their award.

- Schools must then certify that applicants meet all of the additional criteria listed below:
  ~ FULL-TIME ENROLLMENT
  ~ SATISFACTORY ACADEMIC PROGRESS
  ~ MASSACHUSETTS RESIDENCY FOR AT LEAST TWELVE MONTHS PRIOR TO SEPTEMBER 1, 2008
  ~ SELECTIVE SERVICE COMPLIANCE REQUIREMENTS
  ~ NOT IN DEFAULT ON ANY FEDERAL OR STATE LOAN OR OWE A REFUND ON ANY FINANCIAL AID PREVIOUSLY RECEIVED
  ~ ELIGIBLE CITIZENSHIP STATUS
  ~ AWARD NOT EXCEEDING FINANCIAL NEED
  ~ STUDENT HAS A DOCUMENTED PELL GRANT EFC BETWEEN 0-4041

- Schools may check “YES” for only those applicants who meet the required eligibility and verification criteria. PLEASE NOTE: SCHOOLS CANNOT CERTIFY STUDENTS UNTIL ALL CRITERIA ARE VERIFIED.

Schools must check “NO” for all applicants who fail to meet the required eligibility and/or verification criteria.
• Schools may make changes directly on the Certification Roster or submit an Adjustment Form. Changes will be processed and students eligible for payment will appear on the next Payment Roster. All EFC revisions must include changes to other financial data such as adjusted gross income, taxes paid, family size, etc.

• Schools must return the fully completed and signed Certification Roster to the Office of Student Financial Assistance for processing. Schools are encouraged to retain a copy of the completed roster for their records. Unsigned rosters cannot be processed and will be returned to the institution.

• Institutions are also greatly encouraged to use the on-line MASSGrant certification process that is available on OSFA’s website. Schools that desire additional information about this feature should contact OSFA.
ELIGIBILITY CRITERIA DEFINITIONS

FULL-TIME STATUS
A student must be enrolled full-time (12 semester credit hours or the equivalent), to receive a MASSGrant. Enrollment is certified by the institutions during the Fall and Spring terms. Students in their last semester of study must also be enrolled full-time, regardless of the number of credits remaining to finish their program. If a student is unable to maintain "full-time status" due to extenuating circumstances, schools may forward a written appeal on behalf of the student to the Office of Student Financial Assistance.

SATISFACTORY ACADEMIC PROGRESS
As defined in both institutional and Federal polices.

MASSACHUSETTS RESIDENCY:
A recipient of a MASSGrant must be a Massachusetts resident for at least 12 months prior to the start of the traditional academic year, and continue to be a Massachusetts resident throughout the academic term.

In the case of dependent students, both parent and student must meet the 12 month residency requirement. Dependent students are considered legal residents of the state in which their parents are legal residents. All recipients MUST have permanent year-round resident status in Massachusetts.

PLEASE NOTE: School address is not acceptable for residency confirmation. Schools should not certify students who appear on any roster with a school address. In the event of extenuating circumstances, students should contact the Massachusetts Office of Student Financial Assistance. Parents of dependent students who move out of state during the academic year are not considered Massachusetts residents and the student is subsequently ineligible to receive a MASSGrant.

SELECTIVE SERVICE COMPLIANCE REQUIREMENTS:
Students must comply with Federal Selective Service registration guidelines in order to receive Massachusetts state aid.

DEFAULT ON ANY FEDERAL OR STATE LOAN OR OWE A REFUND ON ANY FINANCIAL AID PREVIOUSLY RECEIVED
Students in a current default status for any Federal or state loan, or owe a refund from any financial aid previously received are not eligible to receive Massachusetts state aid.

ELIGIBLE CITIZENSHIP STATUS
Student must be a U.S. citizen or eligible non-citizen in order to receive Massachusetts state financial aid.

AWARD NOT EXCEEDING FINANCIAL NEED
A student’s receipt of a MASSGrant award may not exceed the financial need calculated for the student.

STUDENT HAS A DOCUMENTED PELL GRANT EFC BETWEEN 0 - 4041
A student’s calculated EFC must fall within the eligibility range of 0 - 4041.
**ELIGIBILITY LENGTH**
The Office of Student Financial Assistance tracks and monitors each student's maximum number of semester of eligibility under the MASSGrant program. The maximum number of semesters of eligibility always takes into account the cumulative total number of semesters previously attended at all institutions during which a student received a MASSGrant award and does not revert to zero when a student transfers to another eligible school. The maximum semester of eligibility per institution type is as follows:

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<thead>
<tr>
<th>SCHOOL PROGRAM LENGTH</th>
<th>CUMULATIVE MAXIMUM SEMESTERS</th>
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</thead>
<tbody>
<tr>
<td>5 YEAR (Must be an OSFA approved program)</td>
<td>10</td>
</tr>
<tr>
<td>4 YEAR</td>
<td>8</td>
</tr>
<tr>
<td>3 YEAR</td>
<td>6</td>
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<tr>
<td>2 YEAR</td>
<td>4</td>
</tr>
<tr>
<td>1 YEAR</td>
<td>2</td>
</tr>
</tbody>
</table>

The Office of Student Financial Assistance maintains an appeal process for cases with extenuating circumstances.

**PARTIAL PAYMENTS**
A school may accept a partial payment for a student when he/she is ineligible for the total grant amount. Provided that the student meets all eligibility and verification criteria, a school is directed to check "YES" on the Certification Roster, cross out the award amount, and insert the new amount requested. **IN ADDITION, THE SCHOOL MUST WRITE "PARTIAL PAYMENT" UNDER YES/NO CERTIFICATION BRACKETS.**

**PLEASE NOTE:** A PARTIAL PAYMENT ACCEPTED BY A SCHOOL WILL COUNT AS A FULL SEMESTER PAYMENT TOWARD THE INDIVIDUAL STUDENT'S CUMULATIVE MAXIMUM NUMBER OF MASSGrant ELIGIBILITY.
CERTIFICATION ROSTER FIELD DEFINITIONS

Applicants who have received an award notification and indicated they will be in attendance at your institution will appear on this roster. Please identify any corrections to the following items:

**Applicant Name:** Last Name, First Name, Middle Initial

**Social Sec. #:** Student Social Security Number (Please attach a legible copy of the student's Social Security Card)

**Address:** Street, City, State, Zip Code

**AGI:** *Adjusted Gross Income - verify using Federal Tax Returns
PUT "P" AFTER CHANGED AGI IF USING PROJECTED INCOME

**Tax Pd:** *United States Income Tax Paid - verify using Federal Tax Returns

**Non-Tax:** *Non-Taxable Income - verify using documentation of non-taxable income. Report income from Worksheet A, B and C.

*Two separate columns have been provided for student/spouse and parent financial information. Please use the appropriate columns to make your changes.

**Dep:** Dependency Status
D = DEPENDENT
I = INDEPENDENT

**#HH:** Number in Household

**#Colg:** Number in College

**EFC:** Expected Family Contribution

**Yr Schl:** Grade level of the student

**Sem Pd:** Number of semesters of MASSGrant previously paid to the student
CERTIFICATION PROCEDURES:

1. Review the MASSGrant Certification Roster and make certain that you have verified all students selected by the U.S. Department of Education for verification. The required verification items mandated by the Federal Government for Title IV assistance include: EFC, dependency status, AGI, non-taxable income, U.S. income tax paid, number in household and number in college.

2. You may change any of the applicant data on the roster by reporting the correct information to the right of the preprinted data. You are required to provide an updated EFC when the data changes will affect the award. The Office of Student Financial Assistance will notify students of any award adjustment.

3. Certify that applicants meet all of the additional eligibility criteria listed below:
   - Continued full-time enrollment
   - Satisfactory academic progress
   - Massachusetts residency for at least twelve months prior to September 1, 2008 (Massachusetts residency requirement also applies to parents of dependent students)
   - Selective Service compliance requirements
   - Not in default of any federal or state loan or does not owe a refund on any financial aid previously received
   - Meet eligible citizenship status requirements
   - Award does not exceed financial need and
   - Enrolled in an eligible degree or certificate program

4. Report certification as “Yes” for students who meet all required certification and verification criteria. Adjustments to students’ application data may be made directly on the Certification Roster. Adjustment Forms may be used to report updates to student records after the Certification Roster has been returned to OSFA. Eligible students will appear on a MASSGrant Payment Roster.

5. Do not report certification as “Yes” for students who appear on any roster with a school address. All students must have permanent year-round residency status in Massachusetts. In the event of extenuating circumstances regarding residency, students should contact the Massachusetts Office of Student Financial Assistance. Students or parents who move out of the state during the academic year are not eligible to receive a MASSGrant.

6. Report certification as “No” for all students who are not enrolled or fail to meet the required eligibility and/or verification criteria.

7. Report certification as “pending” for any student whose verification has yet to be completed but meets all other criteria and you believe will become eligible. Students who you report as “pending” will automatically appear on your specific institution’s next Certification Roster. If the school is unable to certify the student on the second (2nd) certification roster as either “YES” (eligible) or “NO” (ineligible), the award will be cancelled for one or both semesters, as appropriate. However, the cancellation of one semester award does not prevent the other semester award from appearing on a certification roster. Should the school decide to reinstate the student’s eligibility after cancellation, it may due so via the MASSGrant Adjustment Form.
8. Students who are not enrolled in the Fall semester must be certified as “No” on the Fall MASSGrant Certification Roster. When a school reports a student as being ineligible for a fall award on a fall Certification Roster, OSFA will automatically cancel both the fall and spring awards. Using either the hard copy or on-line Adjustment Form, an institution may subsequently request a reinstatement of a spring semester award for a student who meets the MASSGrant program eligibility requirements. An Adjustment Form must be used to reinstate a Spring semester award for a student who subsequently notifies the institution of his/her intent to enroll for the Spring semester and meet the MASSGrant program eligibility requirements.

9. Complete, sign and date the final page of Certification Roster. Return the original copy of the Certification Roster to:

   The Commonwealth of Massachusetts
   Board of Higher Education
   Office of Student Financial Assistance
   454 Broadway, Suite 200
   Revere, MA 02151

Retain a copy of the completed Certification Roster for your records.
<table>
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<th>Name of Applicant</th>
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<th>Student AGI</th>
<th>Parent AGI</th>
<th>Dep #HH</th>
<th>Yr Schl</th>
<th>EFC</th>
<th>Award Amount</th>
<th>Certification Verification</th>
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Total Number of Students: 7
Total Dollar Amount: $2,150

I certify that the students listed above who are indicated as eligible for payment of a 2006-2007 MASS Grant, have completed all verification and eligibility requirements, including citizenship and academic progress, as specified in the program guidelines.

Signature
(Please Type or Print) Name
Title
Date
Phone

EXHIBIT 3
STUDENT RECORD ADJUSTMENTS

The Office of Student Financial Assistance (OSFA) uses the U.S. Department of Education Title IV Wide Area Network (WAN) system and receives updates to student records electronically through Electronic Data Exchange (EDE). OSFA receives fully formatted Institutional Student Information Records (ISIRs) of all applicants who indicate Massachusetts as their state of legal residence. Information (with the exception of changes to residency information) from corrected ISIR transaction records will automatically update and re-status the student’s record up until the record has been selected on a MASSGrant Certification Roster.

Schools may wish to use paper Adjustment Forms (Exhibit 4) or the web-based electronic Adjustment Form, as standard practice, to submit corrections to records previously received by OSFA. Since the CPS does not differentiate between school corrections or student corrections, all ISIR transactions will be received by OSFA electronically and will re-status the student’s record up to the point at which it appears on a certification roster.

Once students are selected on a certification roster, OSFA will not permit any electronically transmitted ISIR transactions to update the student’s record. Therefore, schools requiring a student record adjustment after that time, must complete and submit paper (Exhibit 4) or electronic Adjustment Forms.

Adjustment Forms, paper (Exhibit 4) or web-based, may be submitted to the Office of Student Financial Assistance to communicate changes to a student’s record. Reported changes to a student’s EFC must be supported by revised data element information. You should use these forms in the following cases:

- Change in Dependency Status
- File Verification
- Previously Ineligible Student is Now Eligible
- Fall and/or Spring semester reinstatement of award(s)
- Professional Judgment
- Change in Enrollment Status
- Reinstall a previously cancelled award by OSFA

Changes may also be submitted via the Certification Roster process.
2008-2009 MASSGrant PROGRAM ADJUSTMENT FORM

A CHANGE IS BEING MADE FOR THE FOLLOWING REASON(S):

- Change to Dependency Status
- NIL Application Not Accepted
- Reinstated Award: Fall _____ Spring _____
- Change Enrollment Status: Full-Time Fall _____ Full Time Spring _____
- Reinstated Pending Award: Fall _____ Spring _____

COMPLETE THIS FORM AND RETURN IT TO: Office of Student Financial Assistance
454 Broadway, Suite 200, Revere, MA 02151
Telephone: 617-727-9420 Fax: 617-727-0667

Institution's Name: __________________________________ OE Code: _______________________
Student's Name: __________________________________________ SS#: ___________________________
    (Last)   (First)   (MI)

Both the EFC and the Dependency status Must be reported or this form will be Returned to your institution. A reported change in EFC must be supported by revised data element information in Section I.

Original EFC: _________ Revised EFC: __________ Semester(s) Enrolled: Fall _____ Spring _____

Dependency status: Dependent (D): _____ Independent (I): ____ Household Size: _____ Number in College: _____

I. ONLY REPORT ITEMS WHICH REQUIRE A CHANGE.

A.G.I (Parent): _______________________ A.G.I (Student/Spouse): _______________________
Taxes Paid (Parent): ___________________ Taxes Paid (Student/Spouse): ___________________
Worksheet A (Parent): __________________ Worksheet A (Student/Spouse): __________________
Worksheet B (Parent): __________________ Worksheet B (Student/Spouse): __________________
Worksheet C (Parent): __________________ Worksheet C (Student/Spouse): __________________

II. DRUG-RELATED CONVICTION - QUESTION #31, 2008-2009 FAFSA

(    ) The student, for whom this form is being submitted, has resolved all matters concerning question #31 of the 2008-2009 FAFSA and is now eligible for Title IV financial aid during the academic year 2008-2009.

III. CITIZENSHIP STATUS

(    ) The student for whom this form is being submitted has resolved all matters concerning his/her citizenship status and is now eligible to receive Title IV aid during the academic year 2008-2009.

IV. USE THIS SECTION BELOW TO CHANGE ANY FIELD(S) NOT LISTED ABOVE:

Field Name:          Changed From:          To:
______________________ ____________________________     ______________________________
______________________ ____________________________     ______________________________

APPROVED BY: __________________________________________
Signature of Financial Aid Officer         Title            Date
CERTIFICATION ROSTER MAILING SCHEDULE

- First Fall Mailing: SEPTEMBER 2008
- First Spring Mailing: JANUARY 2009
- Final Anticipated Mailing: MAY 2009

An initial Certification Roster will be mailed to institutions in September that will include students who have received a MASSGrant award. Supplemental Certification Rosters are generally produced and mailed thereafter. Schools are generally given 2 weeks to return Certification Rosters. Failure to return the Certification Rosters within the required timeframe can result in a delay in payment to the school or cancellation of a student’s award.
II. E SCHOOL PAYMENT PROCESS

PAYMENT ROSTER

The Payment Roster is generated once the Certification Roster has been completed by the school and returned to the Office of Student Financial Assistance for processing. The Financial Aid Office receives two copies of the Payment Roster. One copy is to be used to report certification of disbursement of funds and the second copy is for the school to maintain on file. We encourage schools to submit a photocopy of each payment roster to their Bursar’s Office.

The Payment Roster will list only those students who were certified "YES" on the Certification Roster and who remained eligible. The Payment Roster should be used to reconcile the coinciding Certification Roster.

Payments are sent to the institution directly from the State Treasurer’s Office. Any refunds due must be returned to the Office of Student Financial Assistance IMMEDIATELY, along with a signed copy of the Payment Roster. Any refunds of MASSGrant which need to occur subsequent to the processing of the Payment Roster must be returned along with a completed 2008-2009 MASSGrant Program Refund Form (Exhibit 8). FAILURE TO RETURN ANY REFUNDS TO THE OFFICE OF STUDENT FINANCIAL ASSISTANCE MAY JEOPARDIZE FUTURE DISBURSEMENTS TO YOUR INSTITUTION. The Payment Roster must be returned to the Office of Student Financial Assistance.

PAYMENT ROSTER PROCEDURES

The MASSGrant Payment Roster lists only those students who were certified as “Yes” on the Certification Roster. With receipt of your Payment Roster, you are required to certify that students listed on the roster have, in fact, been paid MASSGrant funds at your institution. OSFA recommends institutions wait for receipt of funds prior to completing and returning the Payment Roster. To certify payment, institutions must complete the following:

1. Review each student’s information carefully.

2. Report any changes to the students’ EFC and awards. Line out the incorrect EFC then write the correct value to the right of it. New award amounts must be reported in the “Amount Paid” column. Indicate the difference in the “Amount Refunded” column.

3. Check “Yes” in the “Paid” column for students to whom you have paid either a full or partial MASSGrant award. If you have made a partial payment of funds to a student, indicate the partial award amount in the “Amount Paid” line and the amount to be returned in the “Amount Refunded” column.

4. Check “No” in the Paid column for students you have not paid a MASSGrant and for whom you will return the full amount of the Grant. Indicate the amount to be returned in the “Amount Refunded” column.

5. Add all full and partial refunds of MASSGrant funds to be returned and write the amount on the line next to “Total Amount Refunded”.

6. A check for the total of all full and partial refunds for students who were not paid, must be returned to the Office of Student Financial Assistance along with a signed copy of the completed Payment Roster. If no refunds are due, sign and return a copy of the Roster. Be sure that you have thoroughly completed the certification page before returning it. Incomplete rosters will be returned to the institution.
**GRANT PAYMENT CHECK**

A school will receive a Grant Payment check or electronic funds transfer (EFT) after the Certification Roster has been completed and returned to the Office of Student Financial Assistance and a Payment Roster has been generated by the Office of Student Financial Assistance. The Office of Student Financial Assistance prepares individual Payment Vouchers for the total amount of each school's Payment Roster. The Payment Vouchers are then entered into the state's computerized accounting system. The State Comptroller's Office approves each payment and transmits the information to the Treasurer's Office. The Treasurer's Office then forwards Payment checks to individual schools.

Financial Aid Offices may want to notify the Bursar's Office, when to expect the grant payment check/EFT and the amount to be disbursed, once the Payment Roster has been received.
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<th>Name of Applicant</th>
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<th>State</th>
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<th>Award Amount</th>
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<td></td>
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</tr>
</tbody>
</table>

Total Scholarship Funding for
Total Number of Students 9
Total Dollar Amount $2,150

I certify that MASSGrant funds have been paid to students as indicated. Further, all full or partial refunds have been processed and returned to the Commonwealth of Massachusetts with this roster.

Signature ________________________________
(Please Type or Print) Name ________________________________
Title ________________________________
Date ________________________________
Phone ________________________________
THE PAYMENT SUMMARY SHEET

The Payment Summary Sheet provides current Payment Roster information and cumulative details of payment activity for both the MASSGrant Program. The Sheet will accompany each Payment Roster and is provided to assist schools with reconciling disbursements and refund activities throughout the processing cycle. Below is a general guide as to how to interpret the Payment Summary Sheet. Each section references a coded area on the sample copy of the Payment Summary Sheet (Exhibit 6).

How to Interpret the Payment Summary Sheet

Section A – Summary of the Current Payment Roster

A1 – Total Students
Total number of students and dollar value of awards listed on the current Payment Roster.

A2 – Prepayment Amount
Prepaid amount of MASSGrant funds for either the fall or spring semester to be deducted from the dollar value of the current Payment Roster (A1). The deduction only appears on the first fall and spring semester Payment Rosters.

A3—Prior Year Adjust/Bal Carry Forward
Refunds due OSFA at the end of the academic year that are not returned at the time of Reconciliation will be carried forward to the following academic year and deducted from the dollar value of an institution’s first payment roster. If it is determined that OSFA owes an institution funds after the close of the fiscal year on June 30, an adjustment will be made and the funds will be carried forward to the institution’s first payment roster of the new academic year and disbursed at that time. A positive number indicates OSFA is deducting funds, a negative number indicates OSFA is including additional funds.

A4 – Refunds Owed from Previous Rosters
A negative value may be the result of refunds received from the institution (D3) less than the value of student awards reversed (E). A negative value may also be the result of a prepaid amount of MASSGrant funds (A2) greater than the total dollar value of awards on the current roster (A1).

A positive value in (A4) may be the result of refunds received from the institution (D3) greater than the value of the student's award reversed (E).

A5– Total this Payment Roster
Grand total of funds either to be paid to the institution (positive value) or to be returned by the institution (negative value) after all adjustments [i.e. awards reversed (E), prepayments (C), checks received (D3), negative amounts owed from previous rosters etc.] have been calculated.

Section B – Payment Roster Details – “Previous Rosters”

Roster
Total dollar value of all awards from each Payment Roster previously sent to the institution.

Actual Paid
Total amount of funds actually paid to the institution with each Payment Roster. A zero value indicates no funds were paid to the institution with the Payment Roster.
Section C – Payment Roster Details – “All Prepayments for Current School Year”

The date and the amount of MASSGrant funds prepaid to the institution. Prepayments occur twice within the academic year period; once in the fall semester and once in the spring semester.

Section D – Payment Roster Details – “Refunds”

D1 – Refunds Deducted
The difference between the total dollar value of all awards from each Payment Roster (B1) and the total amount of funds actually paid to the institution for each Payment Roster previously sent (B2).

D2 – Refunds Reversed
Dollar value of funds returned to an institution, due to an incorrect payment for refunds owed to that institution.

D3 – Refunds Received
Dollar value of refunds received from an institution.

Section E – Payment Roster Details – “Awards Reversed for Current School Year”

A cumulative list of all students reported as “not paid” from previous Payment Rosters, Refund Forms or other institutional documentation. Awards appear as negative values for either full or partial refunds. The type of award, reversal date, social security number, student’s name, semester, and grant amount reversed are indicated.
# Summary of Current Payment Roster
## 2007-2008

<table>
<thead>
<tr>
<th>Roster ID : 5282</th>
<th>This Payment Roster</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Students</strong></td>
<td><strong>Total $400</strong></td>
</tr>
<tr>
<td>1 Prepayment Amount</td>
<td>Total $0</td>
</tr>
<tr>
<td>2 Prior Year Adjust / Bal Carry Forward</td>
<td>Total $0</td>
</tr>
<tr>
<td>3 Refunds Owed from Previous Rosters</td>
<td>Total $419</td>
</tr>
<tr>
<td>4 Total this Pay Roster</td>
<td>Total $-19</td>
</tr>
</tbody>
</table>

*Any negative amount must be returned immediately.*

## Payment Roster Details (Cumulative)

<table>
<thead>
<tr>
<th>Previous Rosters</th>
<th>Date</th>
<th>Roster ID</th>
<th># of Students</th>
<th>Roster</th>
<th>Actual Paid</th>
</tr>
</thead>
<tbody>
<tr>
<td>MASSGRANT</td>
<td>Sep 26, 2007</td>
<td>5247</td>
<td>238</td>
<td>$2,025</td>
<td>$2,025</td>
</tr>
<tr>
<td>MASSGRANT</td>
<td>Oct 18, 2007</td>
<td>5263</td>
<td>8</td>
<td>$425</td>
<td>$425</td>
</tr>
<tr>
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<td>Oct 25, 2007</td>
<td>5255</td>
<td>2</td>
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<td>$1,725</td>
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<tr>
<td>MASSGRANT</td>
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<td>5263</td>
<td>9</td>
<td>$775</td>
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</tr>
<tr>
<td>MASSGRANT</td>
<td>Dec 18, 2007</td>
<td>5269</td>
<td>3</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

All Prepayments for Current School Year:

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$0</td>
</tr>
</tbody>
</table>

All Prior Year Adjust / Bal Carry Forward:

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sep 18, 2007</td>
<td>$283</td>
</tr>
</tbody>
</table>

Refunds:

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>Dec 06, 2007</td>
<td>$425</td>
</tr>
<tr>
<td>Dec 06, 2007</td>
<td>$425</td>
</tr>
<tr>
<td>Dec 06, 2007</td>
<td>$4,034</td>
</tr>
<tr>
<td>Dec 19, 2007</td>
<td>$4,140</td>
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<tr>
<td>Jan 04, 2008</td>
<td>$1,114</td>
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<td>Feb 12, 2008</td>
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<tr>
<td>Feb 12, 2008</td>
<td>$50</td>
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<tr>
<td>Feb 12, 2008</td>
<td>$92</td>
</tr>
<tr>
<td>Feb 12, 2008</td>
<td>$197</td>
</tr>
<tr>
<td>Feb 13, 2008</td>
<td>$142</td>
</tr>
<tr>
<td>Feb 13, 2008</td>
<td>$9,075</td>
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</table>

Awards Reversed for Current School Year:

<table>
<thead>
<tr>
<th>Date</th>
<th>SSN</th>
<th>Name</th>
<th>Semester</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec 18, 2007</td>
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<td></td>
<td>Fall</td>
<td>$425</td>
</tr>
<tr>
<td>Dec 18, 2007</td>
<td></td>
<td></td>
<td>Fall</td>
<td>$250</td>
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<td>Fall</td>
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<tr>
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<td></td>
<td>Fall</td>
<td>$150</td>
</tr>
<tr>
<td>Dec 18, 2007</td>
<td></td>
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<td>Fall</td>
<td>$425</td>
</tr>
<tr>
<td>Dec 18, 2007</td>
<td></td>
<td></td>
<td>Fall</td>
<td>$250</td>
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<tr>
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<td>Dec 18, 2007</td>
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<td></td>
<td>Fall</td>
<td>$425</td>
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<tr>
<td>Dec 18, 2007</td>
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<td></td>
<td>Fall</td>
<td>$425</td>
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</tbody>
</table>

Roster ID : 5282

EXHIBIT 6
<table>
<thead>
<tr>
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<th></th>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td>MASSGRANT</td>
<td>Dec 18, 2007</td>
<td>Fall</td>
<td>$425</td>
<td></td>
</tr>
<tr>
<td>MASSGRANT</td>
<td>Dec 18, 2007</td>
<td>Fall</td>
<td>$250</td>
<td></td>
</tr>
<tr>
<td>MASSGRANT</td>
<td>Dec 18, 2007</td>
<td>Fall</td>
<td>$142</td>
<td></td>
</tr>
<tr>
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<td>$142</td>
<td></td>
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<tr>
<td>MASSGRANT</td>
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<td></td>
</tr>
<tr>
<td>MASSGRANT</td>
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<td>Fall</td>
<td>$83</td>
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<td>$50</td>
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<td>MASSGRANT</td>
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<td>$142</td>
<td></td>
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<tr>
<td>MASSGRANT</td>
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<td>$63</td>
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<tr>
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<td>$142</td>
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<td>Fall</td>
<td>$50</td>
<td></td>
</tr>
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<td>MASSGRANT</td>
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<td>Fall</td>
<td>$142</td>
<td></td>
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<td>Fall</td>
<td>$142</td>
<td></td>
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<td>Fall</td>
<td>$142</td>
<td></td>
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<tr>
<td>MASSGRANT</td>
<td>Feb 21, 2008</td>
<td>Fall</td>
<td>$50</td>
<td></td>
</tr>
<tr>
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<td>Fall</td>
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<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td>$6,235</td>
</tr>
</tbody>
</table>

EXHIBIT 6
II. F STUDENT DISBURSEMENTS/REFUNDS/APPEALS/TRANSFERS

**DISBURSEMENT:**

At times when actual disbursements of funds to institutions are delayed, we ask schools to do their best to assist certified eligible students on payment rosters who, as a result, may be barred from registration, classes, finals or graduation. In those cases, financial aid offices are strongly encouraged to contact the Massachusetts Office of Student Financial Assistance, prior to taking actions that might adversely impact a student’s enrollment status.

**REFUNDS:**

Refunds may occur as a result of adjustments to EFC, change to dependency status, and/or student’s transfer.

Refunds of MASSGrant funds may also occur if the school receives payment and then becomes aware that a student has withdrawn, dropped out, was expelled, takes an approved leave of absence or otherwise fails to complete the period of enrollment as charged.

Institutions are required to apply current State Financial Aid Refund Policy in their calculation of a MASSGrant refund calculation, for period of non-enrollment. A worksheet has been developed to assist institutions in calculating students Massachusetts State Financial Aid refunds (Exhibit 7).

All refunds must be submitted to the Office of Student Financial Assistance within 30 days of the change in the student’s eligibility for a MASSGrant and must be accompanied by a completed Refund Form (Exhibit 8). Subsequent certification and payment rosters will not be sent until the refund has been received.

**APPEALS:**

Either the student or the financial aid office may submit a letter of appeal on the student’s behalf. Whenever the institution is submitting a letter of appeal, it is advised that it includes an Adjustment Form to reflect new/updated information. The Office of Student Financial Assistance reserves the right of final approval on all appeals.

**TRANSFERS:**

If a Massachusetts student transfers to an institution, the student and/or the institution must notify the Office of Student of Financial Assistance in writing. The student is given instructions on how to properly notify OSFA in their MASSGrant award/ineligible letter. An institution must complete and submit a paper (Exhibit 9) or electronic Transfer Form. Once the transfer is processed the student appears on the institution’s next Cumulative Information Roster. If the student is MASSGrant eligible he/she will appear on the school’s next Certification Roster.
STUDENT NAME  

_________________________________________ 

SOCIAL SECURITY NUMBER 

_____________________________ 

STUDENT NAME     SOCIAL SECURITY NUMBER 

A. Student Withdrawal Date _______________ 

Payment Period/Period of Enrollment Start Date ___________ End Date ___________ 

B. Percentage of Title IV Aid earned by Student B. % 

C. Amount of Title IV Aid Earned by Student C. $ 

D. Total State Financial Aid for Payment Period or Period of Enrollment (List Aid Sources and Amounts Below) 

$ 

$ 

$ 

$ 

$ 

$ 

TOTAL $_________________ D. $ 

E. Percentage of State Financial Aid Earned by Student 

List the percentage of Title IV Aid earned by the student, as shown in B. If the student did not receive any Title IV funds during the payment period or period of enrollment, the institution shall use the Return of Title IV Funds Policy formula in the determination of the percentage of State aid earned by the student. 

Percentage of State Financial Aid Earned by Student E. $ 

F. Amount of Earned State Financial Aid 

Total State Aid (D) $ __________________ X (multiplied by) (E) Percentage of State Aid 

Earned % __________________ = F. $
G. Unearned State Aid
Total State Aid (D) $_________ \times (100\% \text{ - Percentage of Earned State Aid}) = G.$

H. Amount to be refunded to State Financial Aid Programs
(List the result from section G)
H. $_________

I. Actual Tuition and Mandatory Fees Charges for the Payment Period or Period of Enrollment
(Mandatory fees may include charges for book vouchers issued by the institution for period of enrollment or payment period. Health insurance is not considered a mandatory fee in this instance.)
Tuition $_________ Mandatory Fees $_________
Tuition and Mandatory Fees Charges $_________

J. Student’s Unpaid/Remaining Tuition and Mandatory Fees Charges (As a result of the application of Return of Title IV Funds Policy)
Tuition and Mandatory Fees Charges for Payment Period or Period of Enrollment (I) $_________
Institutional Financial Aid (minus) $_________
Scheduled Cash Payment (minus) $_________
Earned Federal Title IV Aid (D) (minus) $_________
Earned State Financial Aid (G) (minus) $_________
Other Financial Aid (minus) $_________

UNPAID TUITION AND MANDATORY FEES BALANCE = J. $_________

If balance in section J is greater than zero, then go to section K. If balance in section J is zero or less, go to section N and refund the entire unearned State aid amount as shown in section H.

K. Additional Earned State Aid
Additional State aid can be “earned” by student only if he/she has an unpaid tuition and mandatory fees balance, as a result of the application of Return of Title IV Funds Policy. Schools can use part or the entire unearned portion of State financial aid (G) toward the payment of unpaid tuition and mandatory fees balance; so long as all other sources of financial aid as well as all scheduled cash payments have already been used in the payment of the student’s tuition and mandatory fees charges, prior to the determination of the unpaid/remaining tuition and mandatory fees balance. Further, schools cannot make any unauthorized post-withdrawal award and/or disbursement of State financial aid to cover any unpaid/remaining tuition and mandatory fees balance.
If Unpaid/Remaining Tuition and Mandatory Fees Balance (J) is greater than or equal to Unearned State Aid (G) then Additional State Aid (K) that can be “earned” by student equals %100 of Unearned State Aid. If, however, Unearned State Aid is greater than Unpaid Tuition and Mandatory Fees Balance, then Additional Earned State Aid has to be equal to the value of the Unpaid/Remaining Tuition and Mandatory Fees Balance.

a) Unearned State Aid (as listed in Section G) $________________

b) Unpaid Tuition and Mandatory Fees Balance (as listed in section J) $_______________

If (a) is greater than (b), then Additional Earned State Aid equals the value of (b)

If (a) is less than (b), then Additional Earned State Aid equals the value of (a)

Additional Earned State Aid (list the appropriate value from above) $___________ = K.

L. Actual Earned State Aid

Earned State Aid (F) $______________ + Additional Earned State Aid (K) $_____ = L. $___________

M. Actual Amount to be refunded to State Financial Aid Programs

This amount is to be calculated if Additional Earned State Aid (K) is greater than zero.

Total State Aid (D) $______________ - (minus) Actual Earned State Aid (L) = M. $___________

N. State Financial Aid Refund Distribution

Tuition Waiver (Need Based and Categorical) $________________
Massachusetts No Interest Loan $________________
Tomorrow’s Teachers Scholarship $________________
General Scholarship (MASSGrant) $________________
Performance Bonus $________________
Christian Herter Scholarship $________________
Foster Child Grant $________________
Gilbert Grant $________________
Public Service Scholarship $________________
Cash Grant (Access grant Program) $________________
Part Time Grant Program $________________
Massachusetts Educational Rewards Grant $________________

EXHIBIT 7
<table>
<thead>
<tr>
<th>Scholarship</th>
<th>Amount</th>
</tr>
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<tbody>
<tr>
<td>Math &amp; Science Teachers Scholarship</td>
<td>$____________</td>
</tr>
<tr>
<td>Scholar-Internship Match Fund</td>
<td>$____________</td>
</tr>
<tr>
<td>Massachusetts GEAR UP Scholarship</td>
<td>$____________</td>
</tr>
<tr>
<td>National Guard Tuition &amp; Fee Assistance</td>
<td>$____________</td>
</tr>
</tbody>
</table>

**TOTAL REFUNDED** $____________

Today’s Date: _____________________
All refund checks submitted to the Office of Student Financial Assistance must be accompanied by a completed copy of this form. **Checks should be made payable to The Commonwealth of Massachusetts.**
Please mail both the check and refund form to:

**MASSACHUSETTS OFFICE OF STUDENT FINANCIAL ASSISTANCE**
454 Broadway, Suite 200
Revere, MA 02151

<table>
<thead>
<tr>
<th>Student Name and SS #</th>
<th>Amount of Refund</th>
<th>Applicable Semester</th>
<th>Reason for Return</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$</td>
<td></td>
<td></td>
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<tr>
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<td>$</td>
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<tr>
<td></td>
<td>$</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**CHECK INFORMATION:**
Amount of Refund: $_________________ Date: _______________ Number: _______________

SIGNATURE ______________________ TITLE ______________________ DATE ______________________

SCHOOL ______________________ OE CODE ______________________ TELEPHONE #
MASSACHUSETTS OFFICE OF STUDENT FINANCIAL ASSISTANCE
2008-2009 TRANSFER REQUEST FORM

This form may be used to request a transfer of a MASSGrant and/or No Interest Loan eligibility for a student who is in the process of transferring to your institution or has already transferred to your institution.

Student Name: _______________________________________________________

Social Security #: ____________________________________________________

School Attending Fall 2008 ____________________________________________ OE Code __________________

School Attending Spring 2009 __________________________________________ OE Code ______________

Other Information ______________________________________________________
_____________________________________________________________________
_____________________________________________________________________

______________________________________________________________ Signature of Financial Aid Officer

_____________________________ ______________________
Print Name Date

_____________________________ ______________________
School Name OE Code

_____________________________ ______________________
Telephone # Fax #

Please forward completed form to:

OFFICE OF STUDENT FINANCIAL ASSISTANCE
454 BROADWAY, SUITE 200
REVERE, MA 002151
(T) 617-727-9420
(F) 617-727-0667

EXHIBIT 9
July 20, 2008

Mr. JOHN E SMITH
100 MAIN STREET
WOBURN MA 01801

Dear JOHN:

NOTICE OF AWARD

The Commonwealth of Massachusetts is pleased to inform you of your eligibility for a MASSGrant for the 2008-2009 academic year. This award is subject to certification of your eligibility by your educational institution, full-time attendance, appropriation of funds by the Massachusetts Legislature, your compliance with the enclosed Award Terms and Conditions and your institution's eligibility to participate in Massachusetts State financial aid programs. This award notice supersedes any prior notices you may have received from this office about the MASSGrant program, for the above academic year. DO NOT RETURN THIS NOTICE IF YOU ACCEPT THE AWARD AS PRINTED BELOW.

Fall: 002161 UNIVERSITY OF MASSACHUSETTS-LOWELL
Spring: 002161 UNIVERSITY OF MASSACHUSETTS-LOWELL

Source: Fall Spring Total
MASSGRANT 350 350 700

Total Awards: 350 350 700

YOU MUST COMPLETE, SIGN AND RETURN THIS FORM IF YOU ARE CHANGING SCHOOLS OR DECLINING THIS AWARD. PLEASE NOTIFY THIS OFFICE IN WRITING OF ANY CHANGE TO YOUR PERMANENT ADDRESS.

Section I: CHANGE OF INSTITUTION REQUEST -- (Complete this section only if the institution you plan to attend is not identified above.) You may also submit a change of institution on the web site at http://www.osfa.mass.edu under "Student Information".

FALL SEMESTER: ____________________________
Institution City State

SPRING SEMESTER: __________________________
Institution City State

Section II: DECLINE AWARD -- (Complete this section if you will not accept this award.) I wish to decline the award offered for the semester(s) indicated: FALL____ SPRING____

Mr. JOHN E. SMITH

Signature: ____________________________ Date:_________
STUDENT ELIGIBILITY CRITERIA

To be eligible for a MASSGrant award, a student must:

- Not have received a prior Bachelor’s Degree; or its equivalent.
- Enroll as a full-time undergraduate student (at least 12 semester hours or equivalent) in an eligible certificate or degree program at an eligible institution.
- Be a Massachusetts resident for other than educational purposes, for at least twelve months prior to the start of the academic year for which aid is awarded (recipient and/or parents must remain residents throughout the entire academic year).
- Maintain satisfactory academic progress in accordance with the standards of the school the student attends.
- Comply with Selective Service Registration requirements.
- Be eligible for Title IV funds and not in default of any educational loan, or owe a refund.

STUDENT RESPONSIBILITIES

As a recipient of the MASSGrant, you are responsible for:

- Notifying the Massachusetts Office of Student Financial Assistance of any change in your financial or family circumstance that could affect your award.
- Notifying the Massachusetts Office of Student Financial Assistance in writing of any change in name, address or social security number. Social security changes must be accompanied by a copy of your social security card.
- Repaying any portion of a grant received by you as a result of misrepresentation or improper certification or verification.
- Providing true and accurate information on the Free Application for Federal Student Aid (FAFSA). False statements or misrepresentations on the financial aid application may subject you to a fine or imprisonment or both under the provisions of the U.S. criminal code.

VERIFICATION

Verification is a federally mandated process to confirm the information reported on the Free Application for Federal Student Aid (FAFSA). If selected for verification, you must provide the requested information to the financial aid office at your institution in a timely manner.

- Grant funds will not be forwarded to your school until the verification process is completed.
- As a result of verification, your award may be revised or canceled at any time.
- Failure to complete the verification process in a timely manner at your school will result in the cancellation of your MASSGrant award.

ACCEPTANCE PROCEDURES

Your MASSGrant award will automatically be sent to the school listed on your Award Notification letter unless the Massachusetts Office of Student Financial Assistance otherwise notifies you. You do not need to notify our office if you accept this grant as it appears on your award letter.

Return your award notice ONLY if you wish to:

1. CHANGE INSTITUTION

   (COMPLETE SECTION 1 OF YOUR LETTER)

   Students may also transfer their MASSGrant award from one eligible institution to another, online at http://www.osfa.mass.edu. When you access the Massachusetts Office of Student Financial Assistance’s website, select the “STUDENT INFO” option.

   Since the amount of a MASSGrant depends on the cost of attendance and the type of institution you attend, your award may be revised when a change of institution occurs. If you are transferring to an eligible out-of-state school, it is likely that your award will change. Eligible schools include most accredited post-secondary institutions in Massachusetts as well as approved Bachelor’s and Associate degree-granting schools in the states that have reciprocity agreements with Massachusetts. Those states are CONNECTICUT, DISTRICT OF COLUMBIA, MAINE, NEW HAMPSHIRE, PENNSYLVANIA, RHODE ISLAND and VERMONT.

2. DECLINE AWARD – COMPLETE SECTION II

   Check the appropriate semester award(s) that you are declining and return the signed letter to our office.

   Alternatively, a student can decline his/her MASSGrant award for one or both semesters on-line at OSFA’s website at http://www.osfa.mass.edu. When the student declines both semester awards on-line, our system automatically processes the change and generates a printable confirmation report for the awards’ cancellation.

   If the student only cancels one semester award and chooses to retain the other, our system can generate a revised and printable notification letter of the remaining semester award.

AMOUNT/TERRMS OF AWARD

MASSGrant awards vary each academic year and cannot exceed your calculated financial need, when combined with all other financial assistance received at the institution. Eligibility is restricted to 10 semesters (for pre-approved programs only) if you are enrolled in a five-year undergraduate program; 8 semesters for a four-year program; 6 semesters for a three-year program; 4 semesters for a two-year program and 2 semesters for a one-year program. Any previous award of MASSGrant awards received counts against your remaining eligibility.

RIGHT OF APPEAL

If extenuating circumstances (i.e. death of a parent or spouse, unemployment, etc.) have occurred since you filed the 2008-2009 Free Application for Federal Student Aid, an appeal may be submitted to the financial aid office at your institution. An appeal may result in an adjustment to your MASSGrant award.

MASSGrants are awarded for one academic year. Students must apply each year to receive consideration for grant assistance.
The Massachusetts Office of Student Financial Assistance has received your 2008-2009 Free Application for Federal Student Aid (FAFSA). After careful review, we have found that you currently are not eligible to receive a MASSGrant for the 2008-2009 academic year, for the following reason(s):

DENIED BASED ON FINANCIAL AID NEED CRITERIA

Enclosed with this mailing is a MASSGrant Ineligible Conditions pamphlet, which explains each reason (listed above) that made you ineligible and provides instructions that can help you resolve the discrepancies contained in your application. We also are enclosing a MASSGrant Reply Form that you can use to provide information to our office that may clear your ineligible status. You may also access your 2008-2009 MASSGrant record, and in some cases, correct your ineligible conditions on-line at http://www.osfa.mass.edu using your social security number and date of birth. All discrepancies must be resolved within four (4) weeks of the date of this letter. If discrepancies remain unresolved after a six-week period, your application will be moved to an "INACTIVE" status and will no longer be considered for a 2008-2009 MASSGrant award.

Please note that this letter only refers to your ineligibility status for the MASSGrant program. You may be eligible for financial aid from other sources such as the Federal government and the institution you plan to attend. You may contact the Massachusetts Office of Student Financial Assistance if you have any questions regarding your application for the MASSGrant program. You are also advised to contact the TERI College Access Hotline at 1-877-332-4348 to identify other sources of financial aid.

Office of Student Financial Assistance
MASSGrant Ineligible Conditions Information

The information below, describes each reason that may be listed on your 2008-2009 MASSGrant letter of ineligibility. Please read the descriptions carefully and follow the instructions to correct each discrepancy (on your letter), using the enclosed MASSGrant Reply Form, where possible. You may also access and, in some cases, correct information associated with your 2008-2009 MASSGrant record, on-line, by visiting the Massachusetts Office of Student Financial Assistance (OSFA) web site at http://www.osfa.mass.edu

Please be aware that you have four(4) weeks from the date on your MASSGrant letter of ineligibility to clear the discrepancies or provide any required additional information to the Massachusetts Office of Student Financial Assistance. Should you become eligible for a MASSGrant after you clear the discrepancies, you will receive an Award Notification letter from our office. Your school will also be notified of any changes in your eligibility status.

PRIOR BACHELOR’S DEGREE (Complete Section A on Reply Form OR correct on OSFA’s web site)
MASSGrant awards are made to students who have not received their first bachelor’s degree or its equivalent. If you do not have a prior bachelor’s degree or its equivalent and the information you reported on your 2008-2009 Free Application for Federal Student Aid (FAFSA) was incorrect, you may complete and sign Section A on the enclosed MASSGrant Reply Form and return it to our office. You may also access and review your 2008-2009 MASSGrant record information via OSFA’s website at http://www.osfa.mass.edu and instantly correct your “PRIOR BACHELOR’S DEGREE” discrepancy on-line. Our system will automatically use the new information that you provide with respect to your prior bachelor’s degree status to re-determine your eligibility for the MASSGrant program and issue a revised and printable notification regarding your eligibility. When you access OSFA’s website, select the “STUDENT INFO” option. Your “PRIOR BACHELOR’S DEGREE” discrepancy must be fully corrected within four (4) weeks of the date on your MASSGrant letter of ineligibility.

INELIGIBLE SCHOOL (Complete Section B on Reply Form OR correct on OSFA’s web site)
The institution listed as your first choice on your 2008-2009 FAFSA is not currently eligible to participate in the MASSGrant program. To receive a MASSGrant, you must attend a participating school in Massachusetts or an approved school in a state that has reciprocity agreement with the Commonwealth. States that have reciprocity agreements with Massachusetts include CT, NH, PA, RI, VT, ME and the District of Columbia. If you are planning to attend another institution in 2008-2009, please complete and sign Section B of the MASSGrant Reply Form and return it to our office. You may also correct your “INELIGIBLE SCHOOL” discrepancy on-line at http://www.osfa.mass.edu When you access OSFA’s web site, select the “STUDENT INFO” option. When you report your new school information on-line, our system can automatically re-determine your eligibility for the MASSGrant program and provide you with a revised and printable notification regarding your eligibility. Your “INELIGIBLE SCHOOL” discrepancy must be fully corrected within four(4) weeks of the date on your MASSGrant letter of ineligibility.

NAME/SOCIAL SECURITY NUMBER MISMATCH
We have received information from the Federal processor that they were unable to match the name and Social Security number that you reported on your 2008-2009 Free Application for Federal Student Aid (FAFSA) through the Federal Social Security database. You may access and correct your 2008-2009 FAFSA data at http://www.fafsa.ed.gov When you access the Department of Education’s web site, simply click the “Make Corrections to a Processed FAfSA” option and follow the instructions. If you need assistance with making FAFSA corrections on-line, you can contact the Federal Student Information Center at 1-800-433-3243. Our office will continue to electronically receive corrections to your 2008-2009 FAFSA directly from the Federal Processor to update your record. Your “SOCIAL SECURITY” discrepancy must be fully corrected within four (4) weeks of the date on your MASSGrant letter of ineligibility.

STUDENT/PARENT NOT CURRENTLY MEETING MASSACHUSETTS RESIDENCY REQUIREMENTS
(Complete Section D1 or D2 on Reply Form, accordingly)
Massachusetts residency information provided on the 2008-2009 Free Application for Federal Student Aid (FAFSA) by parent and/or student was either discrepant or insufficient. To prove Massachusetts residency, the student and/or parent must provide evidence that they have lived in the state of Massachusetts for a period of at least twelve (12) months prior to August 31, 2008. For academic year 2008-2009, students and/or their parents are required to submit signed copies of both their 2005 and 2006 state tax returns as proof of their residency in Massachusetts. In cases where actual 2005 and 2006 state tax returns are not available, OSFA may accept alternate forms of documentation (see Section D1 and D2 of MASSGrant Reply Form). The student and/or parent should complete Section D1 and/or D2 of the MASSGrant Reply Form and return it to OSFA with the appropriate documentation. In addition, the student and/or parents must continue to meet the above residency requirements throughout the entire academic year 2008-2009. The above information must be submitted to the Massachusetts Office of Student Financial Assistance within four (4) weeks of the date on your MASSGrant letter of ineligibility.
DENIAL BASED ON FINANCIAL AID NEED CRITERIA
Grant letter of ineligibility. Your eligibility. "Make Corrections to a Processed FAFSA" option and follow the instructions. If you need assistance with making FAFSA corrections on-line, you may contact the Federal Student Information Center at 1-800-433-3243. Our office will continue to electronically receive corrections to your 2008-2009 FAFSA directly from the Federal Processor to update your record. Please be aware that all corrections that may impact your eligibility for a MASSGrant must be received by OSFA within four(4) weeks of the date on your MASSGrant letter of ineligibility.

MISSING INFORMATION
The information that our office received from your 2008-2009 FAFSA was not sufficient to determine your eligibility for a MASSGrant. You may contact the Federal Student Information Center at 1-800-433-3243, for assistance. You may also access and update your 2008-2009 FAFSA on-line at http://www.fafsa.ed.gov. When you access the Department of Education’s web site, simply click the “Make Corrections to a Processed FAFSA” option and follow the instructions. If you need to apply for a PIN number for the first time or change an existing one, you can do so at http://www.pin.ed.gov. If you need assistance with making FAFSA corrections on-line, you may contact the Federal Student Information Center at 1-800-433-3243. Our office will continue to electronically receive corrections to your 2008-2009 FAFSA from the Federal Processor and update your record. Please be aware that all corrections that may impact your eligibility for a MASSGrant must be received by the Massachusetts Office of Student Financial Assistance within four(4) weeks of the date on your MASSGrant letter of ineligibility.

LATE APPLICATION
The Federal processor did not receive your 2008-2009 Free Application for Federal Student Aid (FAFSA) by the May 1, 2008 deadline established for the MASSGrant program. If the FAFSA receipt date is incorrect, you must write to our office to request a review of your FAFSA record. Your letter must be accompanied by a copy of your first (transaction 01) Student Aid Report proving that your completed FAFSA record. The above information must be received by the Massachusetts Office of Student Financial Assistance within four(4) weeks of the date on your first MASSGrant letter of ineligibility.

RECEIVED MAXIMUM NUMBER OF SEMESTERS OF ELIGIBILITY
MASSGrant awards are limited to a specific number of semesters of eligibility, based on the type of institution and program the student is enrolled in and as follows:

<table>
<thead>
<tr>
<th>School Program Length</th>
<th>Cumulative Semesters of Eligibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 years (only for pre-approved programs)</td>
<td>10</td>
</tr>
<tr>
<td>4 years</td>
<td>8</td>
</tr>
<tr>
<td>3 years</td>
<td>6</td>
</tr>
<tr>
<td>2 years</td>
<td>4</td>
</tr>
<tr>
<td>1 year</td>
<td>2</td>
</tr>
</tbody>
</table>

The cumulative number of semesters of eligibility represents the total number of MASSGrant awards a student can receive for attendance at any particular school type and/or program. Any previous MASSGrant awards received, count against any remaining eligibility. You can review your MASSGrant award history on OSFA’s web site at http://www.osfa.mass.edu/. When you access OSFA’s web site, select the “STUDENT INFO” option.

CURRENTLY IN DEFAULT OF A MASSACHUSETTS NO INTEREST LOAN
Students who are in default of a Massachusetts No Interest Loan (NIL) are not eligible to receive assistance from state financial aid programs, until such a status is cleared. A No Interest Loan is considered in default when a borrower fails to make payment on such a loan to the loan-servicing agency for one hundred-twenty (120) days or more, after the loan has gone into repayment. Please contact Affiliated Computer Service (ACS) at 1-800-826-4470 for further information regarding your No Interest Loan default. Students who wish to resolve their default status must do so within four (4) weeks of the date on their MASSGrant letter of ineligibility.
**DRUG QUESTION (#31) ON 2008-2009 FAFSA**
You are currently ineligible to receive a MASSGrant for the academic year 2008-2009 because you did not answer question #31 on the 2008-2009 FAFSA form OR the answer that you provided was “YES”. Please contact the Federal Student Aid Information Center at 1-800-433-3243. You may also contact the financial aid office at the institution you plan to attend, for assistance. **The above matter must be resolved within four (4) weeks of the date on your MASSGrant letter of ineligibility.**

**FEDERAL STUDENT LOAN DEFAULT AND/OR REFUND OWED ON FEDERAL/STATE FINANCIAL AID**
Our records show that you are either in default of a Federal student loan or owe a refund on Federal/State financial aid that you previously received. As such, you are ineligible to receive a MASSGrant or assistance from any other State financial aid programs for the academic year 2008-2009. If you are in default of a Federal student loan or owe a refund on a Federal grant, contact the financial aid office at the institution you plan to attend. If you owe a refund on previously received Massachusetts State financial aid, contact the Massachusetts Office of Student Financial Assistance at 617-727-9420. **You have four (4) weeks from the date on your MASSGrant letter of ineligibility to resolve this matter.**

**CITIZENSHIP STATUS**
The citizenship status information that you reported on your 2008-2009 Free Application for Federal Student Aid (FAFSA) could not be verified by the Federal processor. Because of this discrepancy, you currently are ineligible to receive Assistance from Massachusetts State financial aid programs. Please contact the financial aid office at your school or the Federal Student Aid Program at 1-800-433-3243 for assistance. **You have four (4) weeks from the date of your first MASSGrant letter of ineligibility to resolve this citizenship status discrepancy in order to receive further consideration for the MASSGrant program.**
2008-2009 MASSGrant Reply Form

Student Name: ________________________________________________________
Social Security # ___________________________

Permanent Address: _____________________________________________________
Telephone # (______ )_________________
City: _____________________________________________________
State: ____________
Zip: ____________________________

Complete only the section(s) that apply to the conditions listed on your letter. Be advised that you may not be able to resolve some condition(s) using this Reply Form. Refer to the enclosed Ineligible Conditions Information Pamphlet for instructions. ALL DISCREPANCIES MUST BE RESOLVED WITHIN FOUR (4) WEEKS FROM THE DATE ON YOUR LETTER.

Section A – PRIOR BACHELOR’S DEGREE (COMPLETE ONLY IF THIS DISCREPANCY IS LISTED ON YOUR LETTER)

YOU MUST ANSWER BOTH QUESTIONS IN ORDER FOR YOUR DISCREPANCY TO BE RESOLVED.

I hereby certify that I have not received my first bachelor’s degree, nor do I have a degree from a college in another country that is equal to a bachelor’s degree.

In 2008-2009, I will be an undergraduate student and working towards (check only one):

_______ Associate’s Degree
_______ First Bachelor’s Degree
_______ Certificate

During the 2008-2009 academic year I will be enrolled as a (check only one):

_____ 1st year/Freshman
_____ 2nd year/Sophomore
_____ 3rd Year/Junior
_____ 4th Year/Senior

_____ 5th Year/other undergraduate

Signature___________________________________________________________________Date__________________________

Section B – INELIGIBLE SCHOOL (COMPLETE ONLY IF THIS DISCREPANCY IS LISTED ON YOUR LETTER)

To receive a MASSGrant, you must attend a participating school in Massachusetts or an approved school in a state that has a reciprocity agreement with Massachusetts. Those states are: CT, NH, PA, RI, VT, ME, and the District of Columbia. If you are attending a school that is not in Massachusetts or in one of the above states you will not be eligible to receive a MASSGrant.

For the 2008-2009 academic year, I will attend the following school(s):

Fall 2008: ___________________________________________
Spring 2009: ___________________________________________

(cities)                      (states)                      (cities)                      (states)

Signature:___________________________________________________________________Date: ________________________

Section C – LESS THAN FULL-TIME ENROLLMENT (COMPLETE ONLY IF THIS DISCREPANCY IS LISTED ON YOUR LETTER)

Please indicate your enrollment plans for the 2008-2009 academic year:

Fall 2008: _______ Full Time (12 credits)     _______ Part Time (6 credits)    _______ Less than Part Time (less then 6 credits)

School:   ______________________________________________________________________________________________

Spring 2009: _______ Full Time (12 credits)     _______ Part Time (6 credits)    _______ Less than Part Time (less then 6 credits)

School:   ______________________________________________________________________________________________

Signature:___________________________________________________________________Date: ________________________
SECTION D – MASSACHUSETTS RESIDENCY

D-1 STUDENT RESIDENCY
STUDENT NOT CURRENTLY MEETING MASSACHUSETTS RESIDENCY REQUIREMENTS
(COMPLETE ONLY IF THIS DISCREPANCY IS LISTED ON YOUR LETTER)
PLEASE CHECK THE DOCUMENTATION YOU ARE SUBMITTING AS PROOF OF MASSACHUSETTS RESIDENCY FOR THE STUDENT.

________ Student’s signed copies of Massachusetts State tax returns for both 2006 and 2007

________ Student’s 2006 and 2007 W2 Forms (W2 Forms from campus work study employment are not acceptable)

________ Letter verifying student’s employment in Massachusetts which includes the period of 8/1/07 to 8/31/08; letter must be on official letterhead and signed by a supervisor.

________ Copy of a lease/mortgage or a Notarized letter from a landlord verifying student’s address for the period of 8/1/07 through 8/31/08. (Documentation must include the student’s name).

________ Copies of student’s city/town real estate tax bills from 2006 and 2007

________ Statements from Massachusetts Department of Transitional Services, or other service agencies verifying continuous income/benefits received in Massachusetts by the student in 2006 and 2007.

________ Student’s signed copies of Federal tax returns for both 2006 and 2007; indicating a Massachusetts residence

________ Dependent Students only. Copies of custodial parent(s) 2006 and 2007 Federal tax returns; indicating a Massachusetts residence; on which the student is itemized as a dependent

D-2 PARENT(S) RESIDENCY
PARENT(S) NOT CURRENTLY MEETING MASSACHUSETTS RESIDENCY REQUIREMENTS
(COMPLETE ONLY IF THIS DISCREPANCY IS LISTED ON YOUR LETTER)
PLEASE CHECK THE DOCUMENTATION YOU ARE SUBMITTING AS PROOF OF MASSACHUSETTS RESIDENCY FOR THE PARENT(S).

________ Parent’s signed copies of Massachusetts State tax returns for both 2006 and 2007

________ Parent’s 2006 and 2007 W2 Forms

________ Letter verifying parent’s employment in Massachusetts which includes the period of 8/1/07 to 8/31/08; letter must be on official letterhead and signed by a supervisor.

________ Copy of a lease/mortgage or a Notarized letter from a landlord verifying parent’s address for the period of 8/1/07 through 8/31/08. (Documentation must include the parents’ names)

________ Copies of parent’s city/town real estate tax bills from 2006 and 2007

________ Statements from Massachusetts Department of Transitional Services, or other service agencies verifying continuous income/benefits received in Massachusetts by the parent in 2006 and 2007.

________ Parent’s signed copies of Federal tax returns for both 2006 and 2007; indicating a Massachusetts residence

NOTE: BIRTH CERTIFICATES AND DRIVERS LICENSE ARE NOT ACCEPTABLE AS PROOF OF RESIDENCY