

CHE OFFICE HOURS

Claiming and Disbursing State Financial Aid

Angel McAllister, *State Director for Financial Aid*

October 15, 2025



INDIANA COMMISSION for
HIGHER EDUCATION

October 15, 2025

**Indiana
Commission for
Higher Education
State Financial Aid
Office Hours**

OVERVIEW

- ▶ Fall 2025 Claims
- ▶ Claiming Rules
- ▶ How to Insert Claims in ScholarTrack
- ▶ Questions

FALL 2025 CLAIMS

- ▶ All claims for Frank O'Bannon and Tuition and Fee Exemption (CVO) Fall 2025 must be inserted in ScholarTrack by Oct. 17, 2025.
 - ▶ *21st Century Scholarship, Workforce Ready Grant, Adult Student Grant*
- ▶ Any schools with non-traditional terms should send their Fall 2025 projections to CollegeFA@che.in.gov
- ▶ It is imperative that claims are entered in ScholarTrack so we can:
 - ▶ Calculate and create the Frank O'Bannon Schedule of Awards.
 - ▶ Review 21st Century Scholars budget
 - ▶ Decide if we can prorate additional CVO dollars



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CLAIMING RULES

Verify Eligibility

- ▶ Institutions should verify a student meets the eligibility requirements of the specific award prior to claiming.
- ▶ A student must meet the enrollment status requirements for the award at the “state financial aid census date” for the given academic term.
- ▶ If the student does not meet requirement on that date, treat the last day of the academic term as a second census date.
- ▶ Students must be meeting satisfactory academic progress (SAP), and degree-seeking or certificate-seeking in a Title IV-eligible program during academic term.



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CLAIMING RULES

Allowable Expenses

- ▶ State financial aid may be applied toward a student's Title IV aid eligible courses.
 - ▶ Courses with applied state financial aid, should be a part of the student's degree program.
- ▶ Out-of-state or overseas study will only be covered when the student is enrolled for credits at the eligible institution, and the bills are charged from and paid to the eligible institution.
- ▶ Most state financial aid programs may only be applied toward tuition and regularly assessed fees.



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CLAIMING RULES

Award Start Statuses In ScholarTrack

- ▶ The award status in ScholarTrack must be “Ready to Claim” or Award Offered” prior to an institution claiming an award.
- ▶ The award offer must start before the academic term ends and the academic term must start before the award expires.
- ▶ The amount of the claim must be disbursed or scheduled to be disbursed to the student before an institutions claims an award.



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CLAIMING RULES

Award Start and Expiration Dates:

- ▶ If the student has never previously used state aid, or used state aid more than one award year ago:
 - ▶ Initially set as 7/1/2025 – 6/30/2026
 - ▶ Will adjust to (term start date of the first term claimed) – (1 year – 1 day) once claimed
- ▶ If student used state aid last award year:
 - ▶ Initially set as (the day after the last award year's expiration date) – 6/30
 - ▶ Will adjust to (term start date of first term claimed) – (1 year – 1 day) once claimed
- ▶ Exception: CVO and William A. Crawford Minority Teacher Scholarship always run 7/1 – 6/30



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Claiming State Aid

- ▶ Institutions may claim up to 50% of the award balance for the following programs during the first claim of an award year:
 - ▶ Frank O'Bannon Grant
 - ▶ 21st Century Scholarship
 - ▶ Adult Student Grant
 - ▶ William A. Crawford Minority Teacher Scholarship
 - ▶ Next Generation Hoosier Educators Scholarship
- ▶ CVO can be claimed up to the tuition amount at public colleges and up to \$5000 at private colleges (up to \$2500 in the first term).
- ▶ Institutions may claim the remaining balance of the award offer in subsequent terms.
- ▶ Institutions may claim up to the remaining balance of the award offer in the first term of the award year if the student is in the final term of their academic degree program.



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CLAIMING RULES

Claiming in ScholarTrack

- ▶ Institutions have multiple ways to insert claims in ScholarTrack:
 - ▶ With a claim file
 - ▶ Individually via the student's account
- ▶ On Hold claims:
 - ▶ On Hold claims occur when the claim is inserted after the reconciliation deadline.
 - ▶ CHE staff reviews the on hold claims before approving or denying.
 - ▶ The reconciliation deadline is the last day of the month following the term end date.



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CLAIMING RULES

Claim File

IMPORT A CLAIM

Upload

Upload

Download

Request File

- ▶ You can request a claim file which displays the award amount students at your institution are eligible for.
- ▶ Standard generic columns for each institution:

SSN	FirstName	MiddleInitial	LastName	DateOfBirth	ScholarID	ISIRYear	InstitutionCode	AcademicYear	Calendar	Term	StateAidEligibilityRemaining
111111111	Michelle	C	Obama	1/10/2007	12121212	2025	4444	2025	Standard	Fall 2025	400

- ▶ Upload statuses will appear once your file has finished processing: Performance statistics, original file, success file, on hold, error file.



CONTACT INFORMATION

Angel McAllister

State Director for Financial Aid

Catilin Mahoney

Director, Financial Aid Support Center

CollegeFA@che.in.gov



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