

Financial Aid Satisfactory Academic Progress

SFA Staff Training



May 15, 2017

Financial Aid Satisfactory Academic Progress (SAP)

- Term used to define successful completion of degree requirement to maintain eligibility for federal and state (and some institutional) financial aid programs.
- SAP evaluation for undergraduate students occurs at the conclusion of each payment period, which is at the end of the fall semester, spring semester, and summer terms.
- SAP evaluation for graduate students occurs annually at the conclusion of the spring semester.
- Students who are placed on Financial Aid Probation are always evaluated at the end of the semester/term the student is placed on Financial Aid Probation.
- Visit www.marshall.edu/fasap to review SAP Policies, Appeal Forms, deadlines.



SAP UG Requirements

- Qualitative – 2.0 MU and overall GPA
- Quantitative – complete 67% of coursework attempted
- Maximum Timeframe – not attempt 150% or more of coursework needed to complete program (typically 180 credit hours)
- Not be on academic probation
- Not be on academic suspension



SAP GR Requirements

- Qualitative – 3.0 MU and overall GPA
- Quantitative – complete 67% of coursework attempted
- Maximum Timeframe – Certificate & Master Degree not to exceed 7 year; Doctorate not to exceed 10 years
- Not be on academic probation
- Not be on academic suspension



ROASTAT – SAP Status

File Edit Options Block Item Record Query Tools Help

Applicant Status ROASTAT 8.22.1 (BanProd)

Aid Year: 1718 ID: 901774907 Adrienne Barbara Asaro

Applicant Status Period Status **Eligibility Status**

Satisfactory Academic Progress

Term	Calculated SAP Status	New SAP Status	Lock Indicator	User ID	Activity Date	Calculation	New
201801	S-HP	R-UG	<input type="checkbox"/>	BIALKK	10-MAY-2017	Health Prof. Maj Exceeds	FA SAP Eligible - UG
201702	R-UG	R-UG	<input type="checkbox"/>	SIGMA	20-DEC-2016	FA SAP Eligible - UG	FA SAP Eligible - UG
201701	I-UG	P-UG	<input type="checkbox"/>	BIALKK	17-AUG-2016	FA Ineligible - UG	FA Probation - UG
201606		I-UG	<input checked="" type="checkbox"/>	SIGMA	12-MAY-2016		FA Ineligible - UG

Admissions Status Detail

Term	Level	Decision	Significant Decision	Institution Acceptance	Student Acceptance	Inactive Application
201601	01 Undergraduate	99 Fully admitted	Y	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



MISC. SAP Codes that really aren't SAP Codes

- **I-PROG**: Graduated, Enrolled in same program
- **S**; Special, Transient, Non-degree, or Superior & Talented
- **S-MAJ**; Undecided Major who earned 45 credit hours or more
- **S-HP**; Pre-Health Profession Major who exceed 4 semesters of enrollment
- **S-CERT**; Enrolled in a Graduate Certificate Program that is not Title IV eligible
- **S-COE**; Pre-education major who earn 90 credit hours or more



Most Common SAP Status Codes

Code	Description
R-FR	FA SAP Eligible – FTF (first-time freshman)
R-UG	FA SAP Eligible – UG (Undergraduate)
R-TR	FA SAP Eligible – Transfer
W-FR	FA Warning- FTF (first-time freshman)
W-UG	FA Warning – (Undergraduate)
I-UG	FA Ineligible – UG (Undergraduate)
P-UG	FA Probation – UG (Undergraduate)
PUHT	FA Probation – UG Required to Enroll Half-time
PCUG	FA Continued Probation – UG (Undergraduate)
D-UG	FA Appeal Denied – UG (Undergraduate)



SAP Code “R” – Reviewed and Meeting SAP

- Undergraduate student meets the following academic requirements/measures:
 - Earned at least a 2.0 Marshall and overall GPA
 - Has successfully completed 67% or more of coursework attempted
 - Has not attempted 150% of the coursework needed to complete degree, e.g., has not yet attempted 180 credit hours for a 4-year degree
 - Not on academic probation or suspension



SAP Code “W” – Financial Aid Warning

- Undergraduate student failed one or more SAP measures
- Given a grace semester/term of financial aid eligibility without having to appeal
 - If student does not enroll, he or she forfeits the Financial Aid Warning Semester/Term status requiring the student to appeal when the student re-enrolls
- Does not apply to graduate students



SAP Code “I” – Financial Aid Ineligible

- Student failed one or more SAP measures
 - Undergraduate student was given a grace semester/term of financial aid eligibility without having to appeal, but at the end of the FA Warning Semester/Term the student still did not meet one or more of the SAP measures (graduate students aren't given a warning semester/term)
- Students who are ineligible have the right to appeal for financial aid reinstatement by the published deadlines
 - **Fall 2017 – August 14, 2017 (one week prior to 1st day of classes)**
 - **Spring 2018 – January 2, 2018 (6 days prior to 1st day of classes)**
 - **Summer 2018 – June 29, 2018 (last business day of Financial Aid Fiscal Year)**



Procedures for Appeal

- FAFSA must be filed; Cannot be in student loan default or owe a repayment of Title IV (federal) student aid funds
- Explain and (document) reason for failure
- Attach Student Graduation Plan (Degree Works) indicating courses completed and courses yet to complete for Program of Study
- If GPA is less than 2.0 (or 3.0 for graduate), attach copy of Academic Improvement Plan
- Provide a detailed explanation of what has changed that will now allow the student to comply with SAP, a statement of academic objects, and a corrective action plan
- Meet and discuss the appeal with an academic advisor or dean and obtain his or her signature
- Submit “typed” SAP Appeal with all required documents by published deadline



SAP Code “P” – Financial Aid Probation

- Student successfully appealed SAP
- Student is placed on Financial Aid Probation for one semester/term
 - Given a Financial Aid Academic Plan
 - Required to read & sign a Financial Aid Probation Agreement
- If student meets SAP at the end of the FA Probation semester/term, the student resumes financial aid eligibility
- If student does not meet SAP but meets the Financial Aid Academic Plan, the student is placed on “continued” Financial Aid Probation for one semester/term
- If students does not meet SAP or the terms of the Financial Aid Academic Plan, the student is ineligible for aid but has the right to appeal again by the published deadlines



Financial Aid Academic Plan

- Must earn at least a 2.1 GPA (3.1 graduate students) for the semester/term the student is placed on Financial Aid Probation and
- Must successfully complete 80% of the coursework attempted (100% if student failed maximum timeframe measure)



NEW: Financial Aid Probation Agreement

- Requirement codes: **PROBUG** & **PROBGR**
- Attempt to further educate students about their SAP Probation status and the terms of the Financial Aid Academic Plan
- Federal Aid will not disburse until student signs and submits the agreement

HOME COST APPLICATION PROCESS ELIGIBILITY ▾ TYPES OF AID FORMS & APPLICATIONS

Forms & Applications

Search Downloads:

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Verification & Eligibility Confirmation (30) « Downloads

Sort by: **Title** | Hits | Date

- 2016-17 Dependent Verification Worksheet
- 2016-17 Explanation of Parents' 2015 Means of Support
- 2016-17 Explanation of Student's 2015 Means of Support
- 2016-17 Identity and Statement of Educational Purpose
- 2016-17 Independent Verification Worksheet
- 2016-17 Letter of Support For Child or Legal Dependent
- 2016-17 Unusual Enrollment History
- 2016-17 Unusual Enrollment History Appeal
- 2016-17 Verification of 2015 Untaxed Income
- 2016-17 Verification of Child Support Paid
- 2016-17 Verification of Net Worth of Parents' Assets
- 2016-17 Verification of Net Worth of Student's Assets
- 2016-17 Verification of Receipt of SNAP Benefits
- 2017-18 Explanation of Parents' 2015 Means of Support
- 2017-18 Explanation of Students' 2015 Means of Support
- 2017-18 Identity Statement of Educational Purpose
- 2017-18 Letter of Support for Child or Legal Dependent
- 2017-18 SAP Financial Aid Probation Agreement - Graduate
- 2017-18 SAP Financial Aid Probation Agreement - Undergraduate
- 2017-18 Unusual Enrollment History Appeal Form

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NEW: Financial Awareness Counseling for FA Probation Students

- Requirement Code: **FAWA-C**
- <https://studentloans.gov/myDirectLoan/counselingInstructions.action?counselingType=fa>
- Provides tools and information to help students understand their financial aid and assist them with managing their finances
 - Understanding loans
 - Managing spending
 - Planning for repayment
 - Avoiding default
 - Planning for the future
- Although a requirement, will not prevent aid from disbursing if student does not participate in this counseling



SAP Code “D” – Financial Aid Appeal Denied

- Student unsuccessfully appealed SAP
- Student’s eligibility may be reinstated if in the future the student remedies the failed SAP measure(s)
- Student has the right to appeal for a future semester/term of enrollment



Financial Aid SAP Communications

- Initial Notice following semester/term grade processing (email)

Oracle Fusion Middleware Forms Services: Open > RUAMAIL

Applicant Mail RUAMAIL 8.2 (BanProd)

Aid Year: 1718 ID: Award Letter: N

System: R Aid Year: 1718 Module: R Letter: NO_SAP_UG_1 UG No SAP end of Sprg for Fall
Initiated: Print Date: 14-MAY-2017 Wait: Originator: E User: SIGMA Initials:

System: R Aid Year: 1718 Module: R Letter: FAFSA_REMINDER FAFSA Reminder Notification
Initiated: 29-MAR-2017 Print Date: 29-MAR-2017 Wait: Originator: E User: SIGMA Initials:

System: R Aid Year: 1718 Module: R Letter: RENEW_FAFSA Renew 17-18 FAFSA Notification
Initiated: 31-OCT-2016 Print Date: 31-OCT-2016 Wait: Originator: E User: SIGMA Initials:

System: Aid Year: Module: Letter:
Initiated: Print Date: Wait: Originator: User: Initials:

System: Aid Year: Module: Letter:
Initiated: Print Date: Wait: Originator: User: Initials:



Financial Aid SAP Communications

- Reminder Notice via Student Requirement Communication approximately a week after initial notice (email)
- 24/7 access to SAP information by logging into myMU and reviewing financial aid requirements and SAP records

Summary
 Tracking Group: V1-D Standard Dependent Ver.

Request Letter Unsatisfied Promissory Notes exist
 Lock Group Additional Requirements
 Holds exist Unsatisfied Period Requirements exist

All Requirements Complete:
 Packaging Requirements Comple
 Disbursement Requirements Con

Requirements

Requirement	Status	Status Date	Established Date	Satisfied	Perkins MPN	Fund	Per
ADMIT Admissions	S	11-MAY-2017	11-MAY-2017	Y	<input type="checkbox"/>		
DVWK17 Dep Verif Worksheet	E	11-MAY-2017	11-MAY-2017	N	<input type="checkbox"/>		
FAFSA FREE APPL. Fed Aid	S	11-MAY-2017	11-MAY-2017	Y	<input type="checkbox"/>		
PTAX15 2015 Tax Transcript	E	11-MAY-2017	11-MAY-2017	N	<input type="checkbox"/>		
SAP8FA SAP Appeals Form	E	4-MAY-2017	14-MAY-2017	N	<input type="checkbox"/>		201801
STAX15 2015 Tax Transcript	E	11-MAY-2017	11-MAY-2017	N	<input type="checkbox"/>		
					<input type="checkbox"/>		
					<input type="checkbox"/>		



SAP Incomplete Tracking Mnemonics

- DEGWKS – Undergraduate Plan of Study/Degree Works
- EDPLAN – Graduate Education Plan of Study
- ACIMPR – Undergraduate Academic Improvement Plan
- ACILFR – Graduate Academic Ineligible Form



Subsequent SAP Reminders

- Final Reminder Notice in October/November and in July (email and snail-mail)
- Bursar Office SAP Letter (email, snail-mail, & Ca\$hTrack)



SAP Appeal Review & Processing

- Appeals received Thursday – Wednesday are reviewed by Missy on Thursday
 - Missy approves or the appeal is moved to full committee
- Matthew preps appeals to go to committee on Friday, not to be sent to committee any later than noon on Monday
- SAP Appeals Committee meets typically on Wednesday
- SAP Appeal Committee decision is coded by Thursday
- SAP appeal decision notifications are sent the evening of the day that the decision is coded in the student's ROASTAT record

In general, students should expect a decision on their appeal within 10 to 15 days of receipt.



Visit

**[www.marshall.edu/
fatrainning](http://www.marshall.edu/fatrainning)**

for access to this presentation and
other financial aid training references



