

New Jersey Financial Aid Management System (NJFAMS)



Conducted by:

Office of the Secretary of Higher Education (OSHE)

Educational Opportunity Fund (EOF)

OSHE/EOF Central Office Staff

Dr. Hasani Carter

Hasani.Carter@oshe.nj.gov

(609) 341-3808

Peter Collazo

Peter.Collazo@oshe.nj.gov

(609) 273-9090

Hema Patel

Hema.Patel@oshe.nj.gov

(609) 984-3751

Catherine Sackey

Catherine.Sackey@oshe.nj.gov

(609) 633-6090

Dr. Stephanie Shanklin

Stephanie.Shanklin@oshe.nj.gov

(609) 984-3751

Purpose of the Training

- General Overview of EOF and NJFAMS
- NJFAMS: Introduction and New Verification Screens
- The EOF Portal: Instructions for Selecting and Awarding
- The Financial Aid Portal: Certifying and Requesting Payment for Eligible EOF Candidates
- Discretionary and Non-funded Appeals
- Pending Verification Form
- Disbursement of Academic Year Funds

Overview

OSHE/HESAA

RESOURCES

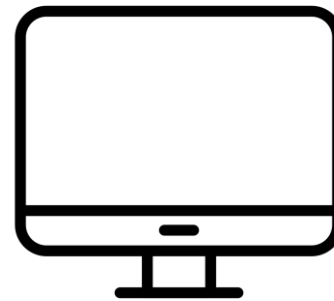
Important Reminders



Awarding and roster management is the responsibility of each institution



The EOF campus program and financial aid office will work together to complete the selection, awarding, certification and payment request process



Programs must use the EOF portal to select and award the EOF Article III undergraduate grant to a student's account

- The EOF portal is a separate part of NJFAMS.
- Access to the EOF portal is facilitated by OSHE/EOF.

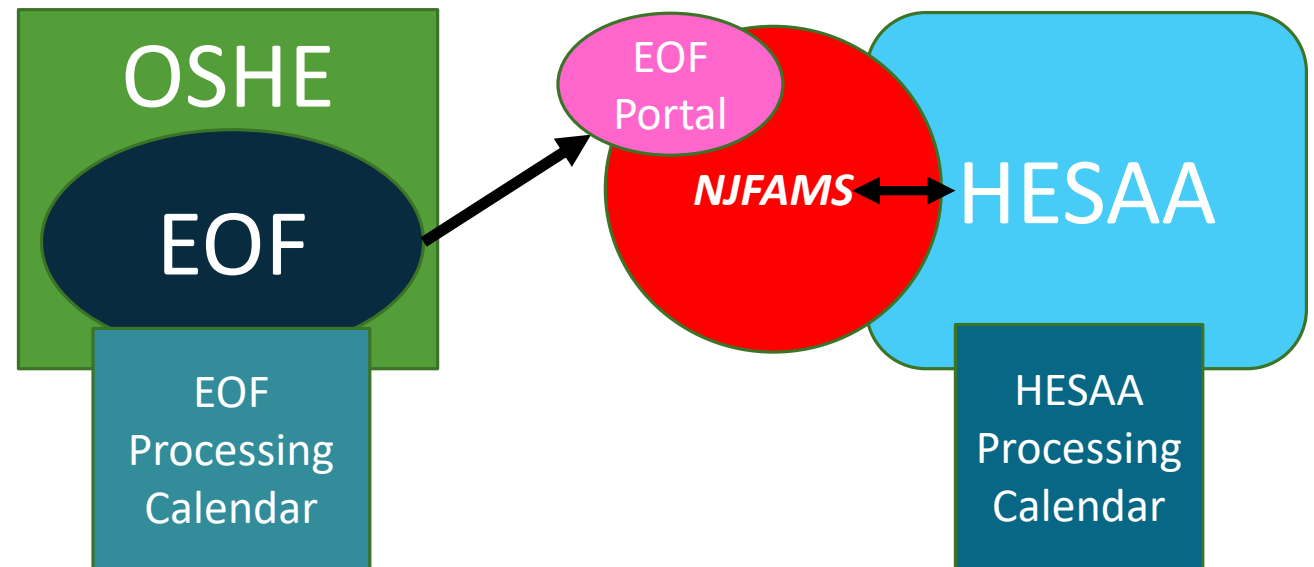


The Financial Aid Office uses the Financial Aid portal of NJFAMS to certify and request payment

Clarification Regarding EOF & HESAA

- EOF does not operate under the authority of the Higher Education Student Assistance Authority (HESAA).
- EOF is a part of the Office of the Secretary of Higher Education (OSHE) which is a separate agency.
- EOF refunds must be sent to OSHE. Do not send them to HESAA.




Relationship Between OSHE/EOF & HESAA



EOF Campus Program Resources Webpage

https://www.nj.gov/highereducation/EOF/EOF_Program_Resources.shtml

— EOF Forms and Other Reports

- EOF Contract Attachment B1 - Program Goals & Objectives 
- EOF Contract Attachment B2 - Summer Program 
- EOF Contract Attachment B3 - AY Art. IV Program Support 
- EOF Special Project B4 - Budget Application 
- EOF Special Project Application - Narrative Form 
- EOF Contract Attachment B5 – Winter Session 
- NJFAMS EOF ACCESS FORM 
- NJFAMS EOF Approved and Eligible Roster Processing Request Form
- EOF Student Appeal Form 
- EOF Pending Verification Form 

Forms and Other Reports

- NJFAMS Access
- Roster Processing
- Appeal Form
- Pending Verification

— EOF Trainings and Instructions

- Amendments to the EOF Regulations and EOF Admission 
- Fiscal Year EOF Contract Budget Instructions 
- EOF B2 Summer Budget Training 
- EOF B3 Academic Year Program Support Budget Training 
- EOF Undergraduate Eligibility Training 
- EOF NJFAMS Selection Awarding Certifying and Payment Request Training 
- EOF Graduate Grant Application Training 
- OSHE/EOF Supplemental FY 2024 Special Project Training 
- EOF Winter Session Budget Application Instructions 
- EOF Annual Report 
- EOF Summer Program Narrative Report 
- Roster Management Workshop 

Trainings and Instructions

- NJFAMS
- Undergraduate Eligibility
- Graduate Grant Application
- Roster Management
- All other trainings

— EOF Undergraduate Grants

Undergraduate

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

Undergraduate Grants

- Instructions for Roster Selection, Awarding, Certification and Payment in NJFAMS
- Undergraduate Roster Processing Calendar
- Award Tables



**OFFICE OF THE SECRETARY OF HIGHER EDUCATION
EDUCATIONAL OPPORTUNITY PROGRAM (EOF)
STUDENT SELECTION, AWARDING, & PAYMENT PROCESSING CALENDAR
FOR THE 2024-2025 ACADEMIC YEAR****

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

EOF Campus Programs <u>Selecting and Awarding Students</u> (This process is facilitated by the Campus EOF program. They are responsible for placing students on the EOF "Approved & Eligible Roster" within the NJFAMS EOF Portal)											
EOF Central Roster Processing Schedule: (The following dates are when programs must submit the EOF Roster Processing sheet to the EOF Central Office to have their Awarded students moved from "Qualified" to "Awarded" Status. Programs must award for both the Fall and Spring terms. Submissions must be received by 12pm.)	<table border="1"> <thead> <tr> <th>Fall 2024</th> <th>Spring 2025</th> </tr> </thead> <tbody> <tr> <td>September: 19th</td> <td>January: 9th, 23rd</td> </tr> <tr> <td>October: 3rd, 17th, 31st</td> <td>February: 6th, 20th</td> </tr> <tr> <td>November: 7th, 21st</td> <td>March: 6th, 13th</td> </tr> <tr> <td>December: 5th</td> <td></td> </tr> </tbody> </table>	Fall 2024	Spring 2025	September: 19 th	January: 9 th , 23 rd	October: 3 rd , 17 th , 31 st	February: 6 th , 20 th	November: 7 th , 21 st	March: 6 th , 13 th	December: 5 th	
Fall 2024	Spring 2025										
September: 19 th	January: 9 th , 23 rd										
October: 3 rd , 17 th , 31 st	February: 6 th , 20 th										
November: 7 th , 21 st	March: 6 th , 13 th										
December: 5 th											
Fall 2024 Term	DEADLINE										
EOF Discretionary and Non-Funded Appeals	November 7, 2024										
Last Day to Award All EOF Students	December 5, 2024										
Spring 2025 Term	DEADLINE										
EOF Discretionary and Non-Funded Appeals	February 20, 2025										
Last Day to Award All EOF Students	March 13, 2025										

College/University Financial Aid Office <u>Certification and Payment Request</u> (This process is facilitated by the Campus Financial Aid Office within the institutional portal of NJFAMS). Institutions may not certify and request payment until the Monday following each of the above identified EOF Campus Program Roster processing dates. December 16 th is the final date to request payment for the Fall 2024 term; March 24 th is the final date to request payment for the Spring 2025 term.)	
Fall 2024 Term	Final Time Period to Certify and Request Payment
ALL EOF Students	December 9 th – December 16 th
Spring 2025 Term	Final Time Period to Certify and Request Payment
All EOF Students	March 17 th – March 24 th

** Programs must refer to the HESAA Deadline and Processing Calendar for:

FAFSA FILING DEADLINE

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

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

Fall 2024/Spring 2025 – September 15, 2024

Spring 2025 Consideration Only – February 15, 2025

Deadlines: Institutional Accountability

- All participating institutions must adhere to the EOF processing deadlines.
- Institution's that do not adhere to the EOF processing calendar must provide (in writing):
 - An explanation for why this error/oversight occurred.
 - Remediation plans to address and ensure that this does not happen again.
 - Demonstration of how the institution will hold the students harmless (i.e., use institutional funds to cover the EOF grant amount that the institution failed to properly process and request in accordance with the EOF processing guidelines.)

EOF AY UG Grant Award Range

EOF Undergraduate Awards for Full-time and Part-time students (2024-2025 Academic Year)

Minimum semester award = \$100

* = award amount is based on whether the student is a residential or commuter student

	Full-time Maximum Annual/Semester	Part-time (9-11 credits) Maximum Annual/Semester	Part-time (6-8 credits) Maximum Annual/Semester
Community Colleges	\$1,600 annual max./ \$800 semester max.	\$1,312 annual max./ \$656 semester max.	\$1,026 annual max./ \$513 semester max.
Independent College and Universities	\$3,050 annual max./ \$1,525 semester max.	\$2,400 annual max./ \$1,200 semester max.	\$1,750 annual max./ \$875 semester max.
State & Research Colleges and Universities (Commuter and Residential)	\$1,950 annual max./ \$975 semester max.	\$1,650 annual max./ \$825 semester max.	\$1,350 annual max./ \$675 semester max.
	\$1,950 annual max./ \$975 semester max.	\$1,650 annual max./ \$825 semester max.	\$1,350 annual max./ \$675 semester max.

The EOF Undergraduate Article III Grant Award Process

EOF CAMPUS PROGRAM(S)

- ONLY has the ability to select and award an EOF Undergraduate Article III Grant to an eligible student.
- Funding is limited
- Programs are responsible for ensuring all candidates are reviewed and awarded properly and the appropriate documentation to determine eligibility is kept on file (See EOF regulations).

CAMPUS FINANCIAL AID OFFICE

- Must ensure EOF Enrollment matches institutional FA Enrollment Status
- Must certify EOF students
- Must request payment by the EOF Deadline
- If a refund is due, funds must be sent to OSHE.
- **DO NOT SEND EOF FUNDS TO HESAA**

NJFAMS: Introduction

LOGGING IN, ALLOCATION INFORMATION, EOF ROSTERS

EOF Portal Access

EOF Campus Director must manage who is given EOF portal access

HESAA
HIGHER EDUCATION STUDENT ASSISTANCE AUTHORITY

NJ FAMS

Log in to your account.

Please identify yourself with a valid username and password.

Students:
Have you:

1. Created a NJFAMS student log-in (below)? This action will create your student account.
2. Clicked the link in the new activation email sent to you after creating your account?
3. Checked your spam filter if you didn't see the activation email in your inbox?

Once you have done steps 1-3, you are ready for your first login.
If you are having trouble logging in, contact [New Jersey Higher Education Student Assistance Authority](#).

User Name:

Password:

[Login](#)

[Create a Student Login](#)

[Forgot your username or password?](#)

To return to the main page of the NJ HESAA NJGRANTS web site, [click here](#).

Note: This site requires the use of JavaScript and Cookies. Please be sure to enable JavaScript and Cookies in your web browser in order to access the full functionality of the site.

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Higher Education Student Assistance Authority

OPRA Open
Public Records Act

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Main Menu – EOF Portal View

The screenshot shows the EOF Portal Main Menu. At the top left, there are logos for HESAA (Higher Education Student Assistance Authority) and NJ FAMS. A search bar with a 'Go' button is located in the top navigation bar. The user is logged in as 'Hello, Doug Test - EOF Campus Director'. The main menu is divided into three sections: Institution, Students, and Options. The 'Institution' section includes 'Institution Information'. The 'Students' section includes 'Search For Student' and 'Rosters'. The 'Options' section includes 'Edit Your Profile'. Two red arrows point from text boxes to the 'Institution Information' and 'Rosters' links. A green bar is visible at the bottom left of the page.

SEARCH Search:

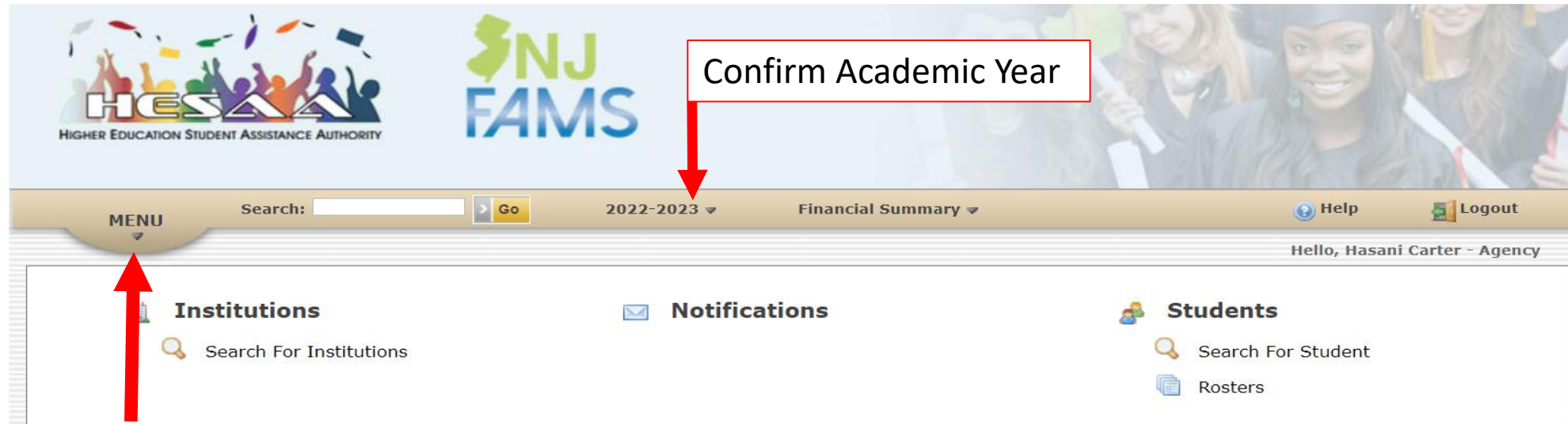
Hello, Doug Test - EOF Campus Director

- Institution**
 - Institution Information
- Students**
 - Search For Student
 - Rosters
- Options**
 - Edit Your Profile

Program Undergraduate Art. III Allocation and Available Funds

Locate, award or un-award students via the rosters. Also, you can look up each student to see what is going on with them.

Main Menu Notables



- The Main Menu provides access to all the options that are available to the user. Access is based on system permissions established for the user. If you have “READ ONLY” permission, you will only be able to view the data on the screen.
- You can access all the regions via the “Menu” drop down option.
- Confirm the Academic Year you need to work within.

EOF Allocation and Available Funds

The screenshot displays the NJ FAMS website interface. At the top left, there are logos for HESAA (Higher Education Student Assistance Authority) and NJ FAMS. The main navigation bar includes a search field with a 'Go' button, the current academic year '2022-2023', and a 'Financial Summary' dropdown menu. On the right side of the navigation bar, there are links for 'Help' and 'Logout'. Below the navigation bar, the user is logged in as 'Hello, Hasani Carter - Agency'. The main content area is divided into three sections: 'Institutions', 'Notifications', and 'Students'. Under 'Institutions', there is a 'Search For Institutions' link with a magnifying glass icon. A red arrow points to this link. Under 'Students', there are links for 'Search For Student' and 'Rosters'.

HESAA
HIGHER EDUCATION STUDENT ASSISTANCE AUTHORITY

NJ FAMS

MENU Search: Go 2022-2023 Financial Summary Help Logout

Hello, Hasani Carter - Agency

Institutions

- Search For Institutions

Notifications

Students

- Search For Student
- Rosters


Institutional Information

The screenshot displays the NJ FAMS (New Jersey Financial Aid Management System) interface. At the top, there are logos for HESAA (Higher Education Student Assistance Authority) and NJ FAMS, alongside a banner image of graduates. The navigation bar includes a search field, a 'Go' button, and links for 'Contact Us', 'Help', and 'Logout'. A user greeting reads 'Hello, Hasani Carter - EOFCentralDirector'. The breadcrumb trail is 'HOME > Search Institutions > Edit Institution'. The main content area is titled 'BERGEN COMMUNITY COLLEGE' with the ID '004736'. A list of menu items is shown, with 'Educational Opportunity Fund Grant (EOF) Allocations' highlighted by a red arrow. A red-bordered box contains the text 'View Program Allocation and Available funds here.' pointing to the highlighted menu item. The footer contains copyright information for 2018, the HESAA logo, the OPRA (Open Public Records Act) logo, and a list of links: 'Contact Us | Sitemap | FAQs | Technical Help | Terms & Conditions | Privacy Notice'.

BERGEN COMMUNITY COLLEGE 004736

- [Institutional Information](#)
- [Contact Information](#)
- [Payment Information](#)
- [Budget Summary](#)
- [Tuition Aid Grant \(TAG\) Award Table](#)
- [Educational Opportunity Fund Grant \(EOF\) Allocations](#)

View Program Allocation and Available funds here.

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EOF Allocation

Educational Opportunity Fund Grant (EOF) Allocations

EOF

Program Setup

School Program Name: EOF
School Program Code:
School Program Accounting Code:

Fund Management

Original Appropriation:	\$ 347,802
Supplemental Appropriation:	\$ <input type="text"/>
Rescinded Appropriation:	\$ <input type="text"/>
Total Appropriation:	\$ 347,802
Overaward Percentage:	0 %
Overaward Amount:	\$ <input type="text"/>
Overaward Level:	\$ 347,802
Total Awarded:	\$ <input type="text"/>
Adjusted Appropriation Available:	\$ 347,802

Comment:
EOF Allocations Comment

Save

Available \$ to award to students



Search for Students

HESAA
HIGHER EDUCATION STUDENT ASSISTANCE AUTHORITY

NJ FAMS

MENU Search: 2022-2023

Hello, Hasani Carter - Agency

Institutions
Search For Institutions

Notifications

Students
Search For Student
Rosters










Click on "Rosters"

Informational Rosters

EOF Approval Rosters - Action Required

		View and Print (PDF)	Approve Online	Download File (CSV)
	EOF Approval	PDF	Online	Download

Informational Rosters

		View and Print (PDF)	View Online	Download File (CSV)
	Approved and Eligible	PDF	Online	Download
	State Verification Not Complete	PDF	Online	Download
	Approved, Eligible and Certified	PDF	Online	Download
	Certified and Not Paid	PDF	Online	Download
	Paid	PDF	Online	Download
	Refund Due	PDF	Online	Download
	Ineligible	PDF	Online	Download
	Incomplete	PDF	Online	Download
	All Students	PDF	Online	Download

EOF Roster Management

There is action you must take for the rosters in the Certification Rosters section. The rosters in the Informational Rosters section are for reference and reporting purposes.

School Program:

Term:

SSN:

First Name:

Last Name:

Student ID:

EOF Approval Rosters - Action Required

	View and Print (PDF)	Approve Online	Download File (CSV)
 EOF Approval	PDF	Online	Download

Informational Rosters

	View and Print (PDF)	View Online	Download File (CSV)
 Approved and Eligible	PDF	Online	Download
 State Verification Not Complete	PDF	Online	Download
 Approved, Eligible and Certified	PDF	Online	Download
 Certified and Not Paid	PDF	Online	Download
 Paid	PDF	Online	Download
 Refund Due	PDF	Online	Download
 Ineligible	PDF	Online	Download
 Incomplete	PDF	Online	Download
 All Students	PDF	Online	Download

Look for eligible Initials and Renewals who were not on the program's roster as of the Fall term of the previous Academic Year. Also a source to find students who may already be enrolled at your school.



Renewal students who appeared on a program's roster during the Fall term of the previous Academic Year & who remain eligible should appear here.



\$ ineligible students BUT EOF discretionary eligible students will appear here.



Awarding and Verifying Students

Roster: EOF Approval
Campus: NEW JERSEY CITY UNIVERSITY
Program: All Programs
Academic Year: 2021-2022
Term: All Terms

Click here to open profile to award student.

Click here to see more information regarding the student's status

Previous Page 1 Next [\(expand all\)](#) [\(contract all\)](#)

<input checked="" type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Fall)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Spring)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Fall)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Spring)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Fall)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Spring)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Fall)	DA - (view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Spring)	DA - (view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Fall)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Spring)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Fall)	(view)

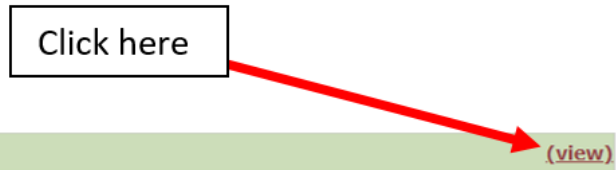
NJFAMS: Verification

DEPENDENCY

NEW FTIM/SELF-REPORTED SCREENS

NJFAMS Verification

From the EOF roster, you must click on the “View” link that appears in the upper right hand corner to see the tabs needed to verify a student’s eligibility,



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

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

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

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

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

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

[Save](#)

NJFAMS Verification

GENERAL INFORMATION: provides basic student information (address, email)

ACADEMIC PERIOD INFORMATION: section that allows the Financial Aid Office to code data such as enrollment (credits must match “EOF Enrollment Status” credits for certification), enter TAG/CCOG/GSG award amounts, etc.), certify your roster, etc.

FAFSA INFORMATION: Shows date of FAFSA submission. You can access ISIR for family size

VERIFICATION: *THIS IS WHERE YOU CHECK EOF ELIGIBILITY.* view the financial information needed to complete the Discretionary/Non-Funded appeal form

DOCUMENT TRACKING: Shows documents are that are missing or have been submitted to HESAA for verification

PAYMENT HISTORY: Shows a history of EOF and TAG payments

NOTIFICATIONS: Allows you to view notifications sent to student from HESAA

Click here

General Information DOB: 11/1/2000

Academic Period Information

Add Campus Add Program Award Student Override Student Award Eligibility Override

On Hold No Save Hold Status

Expand All

RIDER UNIVERSITY

FAFSA Information Receipt Date: 10/25/2021


Verification Not Selected for State Verification

Document Tracking

***Please note: If the student has been selected by the State for verification, you can not submit an appeal for them until this process has been completed.**

NJFAMS Overview

FAFSA Information


[View All ISIR Records](#) 

Transaction #:	01	Transaction Date:	06/14/2024	Application Date:	06/14/2024
ISIR Dependency Status:	D	SAR C Flag:		Student Filed Joint Return w/ Curr. Spouse:	
SSN Match Flag:	4	SSN Change Flag:		Parent Filed Joint Return w/ Curr. Spouse:	
SSA Citizenship Match Flag:	B	DHS Match:	Y	Secondary DHS Match:	
Name ID:		Year in College:	1	NSLDS Match Flag:	
Federal School Code 1:	002643	Federal School Code 2:	007107	Federal School Code 3:	002622
Federal School Name 1:	Union College	Federal School Name 2:	ESSEX COUNTY COLLEGE	Federal School Name 3:	Kean University
Primary EFC:					
SAI:	-1500				

Verification

ISIR Transaction No.	NJEI	TAG Award Amounts	Tax Verification Indicator
01	250	Fall 0	<Choose One>
No Override <input type="button" value="v"/>		Spring 0	

Type of Change	Projected Year Reason	Projected Tax Year
<Choose One> <input type="button" value="v"/>	<Choose One> <input type="button" value="v"/>	<Choose One> <input type="button" value="v"/>



Dependency Status	Dependency Status Questions	
	FAFSA	Update
Active Duty in U.S. Armed Forces?	Dependent	<Choose One> <input type="button" value="v"/>
Veteran of U.S. Armed Forces?		<Choose One> <input type="button" value="v"/>
Child or Other Dependents?		<Choose One> <input type="button" value="v"/>
Orphan?	Verified? <input type="button" value="v"/>	<Choose One> <input type="button" value="v"/>
Ward of Court?	Verified? <input type="button" value="v"/>	<Choose One> <input type="button" value="v"/>
In Foster Care?	Verified? <input type="button" value="v"/>	<Choose One> <input type="button" value="v"/>
As of today, an emancipated minor?		<Choose One> <input type="button" value="v"/>
As of today, in legal guardianship?		<Choose One> <input type="button" value="v"/>
Unaccompanied Homeless Youth, or is Unaccompanied, At Risk of Homelessness, and Self-Supporting?	No	<Choose One> <input type="button" value="v"/>
Unaccompanied and Homeless (General)?		<Choose One> <input type="button" value="v"/>
Unaccompanied and Homeless (HS)?		<Choose One> <input type="button" value="v"/>
Unaccompanied and Homeless (TRIO)?		<Choose One> <input type="button" value="v"/>
Unaccompanied and Homeless (FAA)?		<Choose One> <input type="button" value="v"/>
Other Circumstances: None of the Above		<Choose One> <input type="button" value="v"/>
Unusual Circumstance?	No	<Choose One> <input type="button" value="v"/>

Student (and Spouse)	Parent(s)
-----------------------------	------------------



- Similar to old screen.
- Shows if/when FAFSA has been submitted.
- ❖ **NEW:** May need to go to [View All ISIR Records](#) to look up family size.

- Similar to old screen to check Dependency Status
- ❖ **NEW:** Student with “Unusual Circumstance?” appeal may be noted here



NJFAMS Overview: New Verification Screens

	Student (and Spouse)		Parent(s)	
	FAFSA	Agency Update	FAFSA	Agency Update
Federal Tax Information (FTIM) - CUI//SP-TAX				
Returned Tax Year (Student/Parent)	2022		2022	
Returned Tax Year (Student Spouse/Parent Spouse)				
Filing status code (Student/Parent)		<Choose One> ▼	Head of household	<Choose One> ▼
Filing status code (Student Spouse/Parent Spouse)		<Choose One> ▼		<Choose One> ▼
Adjusted Gross Income (Student/Parent)			15768	
Adjusted Gross Income (Student Spouse/Parent Spouse)				
Number of exemptions (Student/Parent)			2	
Number of exemptions (Student Spouse/Parent Spouse)				
Number of dependents (Student/Parent)			0	
Number of dependents (Student Spouse/Parent Spouse)				
Total income earned amount (Student/Parent)			15768	
Total income earned amount (Student Spouse/Parent Spouse)				
Total tax paid amount (Student/Parent)			0	
Total tax paid amount (Student Spouse/Parent Spouse)				
Untaxed IRA distributions (Student/Parent)			0	
Untaxed IRA distributions (Student Spouse/Parent Spouse)				
IRA deductible and payments (Student/Parent)			0	
IRA deductible and payments (Student Spouse/Parent Spouse)				
Tax exempt interest (Student/Parent)			0	
Tax exempt interest (Student Spouse/Parent Spouse)				
Untaxed pensions amount (Student/Parent)			0	
Untaxed pensions amount (Student Spouse/Parent Spouse)				
Schedule C net profit/loss (Student/Parent)			0	
Schedule C net profit/loss (Student Spouse/Parent Spouse)				
Filed Schedule C? (Student/Parent)	No	<Choose One> ▼	No	<Choose One> ▼
Filed Schedule C? (Student Spouse/Parent Spouse)	No	<Choose One> ▼	No	<Choose One> ▼
Schedule A indicator (Student/Parent)		<Choose One> ▼	No	<Choose One> ▼
Schedule A indicator (Student Spouse/Parent Spouse)		<Choose One> ▼		<Choose One> ▼
Schedule B indicator (Student/Parent)		<Choose One> ▼	No	<Choose One> ▼
Schedule B indicator (Student Spouse/Parent Spouse)		<Choose One> ▼		<Choose One> ▼
Schedule D indicator (Student/Parent)		<Choose One> ▼	No	<Choose One> ▼
Schedule D indicator (Student Spouse/Parent Spouse)		<Choose One> ▼		<Choose One> ▼
Schedule E indicator (Student/Parent)		<Choose One> ▼	No	<Choose One> ▼
Schedule E indicator (Student Spouse/Parent Spouse)		<Choose One> ▼		<Choose One> ▼
Schedule F indicator (Student/Parent)		<Choose One> ▼	No	<Choose One> ▼
Schedule F indicator (Student Spouse/Parent Spouse)		<Choose One> ▼		<Choose One> ▼
Schedule H indicator (Student/Parent)		<Choose One> ▼	No	<Choose One> ▼
Schedule H indicator (Student Spouse/Parent Spouse)		<Choose One> ▼		<Choose One> ▼
IRS response code (Student/Parent)	214-No Return on File		200-Successful Request	
IRS response code (Student Spouse/Parent Spouse)				



Student may have submitted FAFSA in 2 ways:

- **FTIM: Federal Tax Information** pulled from IRS retrieval tool *(left image)*
- **Self-Reported Information** Student put in values on FAFSA manually, as done in the past *(right image)*



- ❖ In FTIM section, IRS code matters for income calculations
 - 200: Use FTIM data
 - No 200 code (i.e. 214, etc.): Use **Self-Reported Information**
- ❖ 2 rows for data points
 - “**Student/Parent**” and “**Student Spouse/Parent Spouse**” indicates which column is reference point, based on dependency status

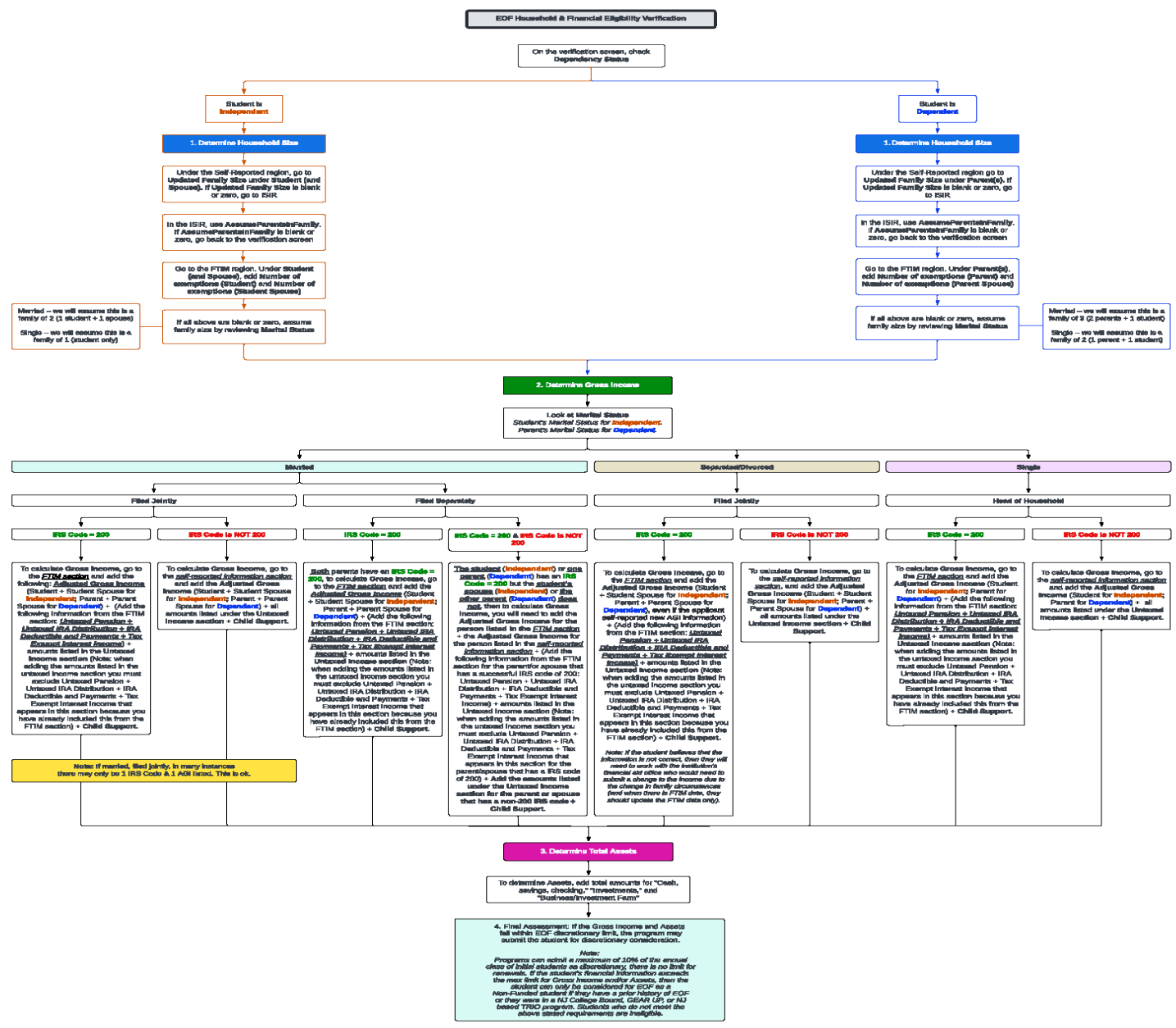
Schedule H indicator (Student/Parent)		<Choose One> ▼		<Choose One> ▼
Schedule H indicator (Student Spouse/Parent Spouse)		<Choose One> ▼		<Choose One> ▼
IRS response code (Student/Parent)	214-No Return on File		214-No Return on File	
IRS response code (Student Spouse/Parent Spouse)			214-No Return on File	
Self-Reported Information				
Signature (Student/Parent)	Signed	<Choose One> ▼	Signed	<Choose One> ▼
Signature (Student Spouse/Parent Spouse)		<Choose One> ▼	Signed	<Choose One> ▼
Marital Status	Single (Never married)		Married (not separated)	
Marital Status Date				
Filed 1040 or 1040NR (Student/Parent)	No	<Choose One> ▼	No	<Choose One> ▼
Filed 1040 or 1040NR (Student Spouse/Parent Spouse)		<Choose One> ▼	No	<Choose One> ▼
Filed Non-U.S. Tax Return (Student/Parent)	No	<Choose One> ▼	8	<Choose One> ▼
Filed Non-U.S. Tax Return (Student Spouse/Parent Spouse)		<Choose One> ▼	8	<Choose One> ▼
Tax Return Filing Status		<Choose One> ▼		<Choose One> ▼
Tax Return Filing Status (Student Spouse/Parent Spouse)		<Choose One> ▼		<Choose One> ▼
Filed Schedule A, B, D, E, F or H? (Student/Parent)		<Choose One> ▼		<Choose One> ▼
Filed Schedule A, B, D, E, F or H? (Student Spouse/Parent Spouse)		<Choose One> ▼		<Choose One> ▼
Schedule C amount (Student/Parent)				
Schedule C amount (Student Spouse/Parent Spouse)				
Filed Schedule C? (Student/Parent)	No	<Choose One> ▼	No	<Choose One> ▼
Filed Schedule C? (Student Spouse/Parent Spouse)	No	<Choose One> ▼	No	<Choose One> ▼
Adjusted Gross Income (Student/Parent) *				
Adjusted Gross Income (Student Spouse/Parent Spouse) *				
U.S. Income Tax Paid (Student/Parent)				
U.S. Income Tax Paid (Student Spouse/Parent Spouse)				
Income Earned from Work (Student/Parent)				
Income Earned from Work (Student Spouse/Parent Spouse)				
Updated Family Size			8	
Number in College			1	





Due to the change in the FASFA for AY 2024-2025, the process to determine household size and financial eligibility now may require several additional steps.

The following flow diagram has been created to provide Institutions/EOF campus programs with a visual representation of the process that must be followed to properly determine household size and EOF financial eligibility.



NJFAMS Verification: Dependency - Step 1

1) Check the student's dependency status.

- For Dependent students, focus on the Parent's column.
 - We do not include the student's financial information. (Note: this rule may be different for other state and federal grant programs).
- For Independent student, focus on the Student and Spouse column.
 - Parental information may appear in this situation, but should not be included in the review of an Independent student.


FAFSA Information


Verification

ISIR Transaction No. 02 No Override <input type="button" value="v"/>	NJEI 2286	TAG Award Amounts Fall 4587 Spring 4587	Tax Verification Indicator <Choose One>
Type of Change <input type="button" value="v"/>	Projected Year Reason <Choose One>	Projected Tax Year <input type="button" value="v"/>	

Dependency Status Questions	
FAFSA	Update
Dependent	<input type="button" value="v"/>
Active Duty in U.S. Armed Forces?	<Choose One> <input type="button" value="v"/>
Veteran of U.S. Armed Forces?	<Choose One> <input type="button" value="v"/>
Child or Other Dependents?	<Choose One> <input type="button" value="v"/>
Orphan?	Verified? <Choose O> <input type="button" value="v"/>
Ward of Court?	Verified? <Choose O> <input type="button" value="v"/>
In Foster Care?	Verified? <Choose O> <input type="button" value="v"/>
As of today, an emancipated minor?	<Choose One> <input type="button" value="v"/>
As of today, in legal guardianship?	<Choose One> <input type="button" value="v"/>
Unaccompanied Homeless Youth, or is Unaccompanied, At Risk of Homelessness, and Self-Supporting?	No <Choose One> <input type="button" value="v"/>
Unaccompanied and Homeless (General)?	<Choose One> <input type="button" value="v"/>
Unaccompanied and Homeless (HS)?	<Choose One> <input type="button" value="v"/>
Unaccompanied and Homeless (TRIO)?	<Choose One> <input type="button" value="v"/>
Unaccompanied and Homeless (FAA)?	<Choose One> <input type="button" value="v"/>
Other Circumstances: None of the Above	<Choose One> <input type="button" value="v"/>
Unusual Circumstance?	No <Choose One> <input type="button" value="v"/>

Student (and Spouse) FAFSA Agency Update	Parent(s) FAFSA Agency Update
---	--


 Student column for
Independent students


 Parent column for
Dependent students

28

NJFAMS Verification: Household Size - Step 2

2) Check Household Size

a. Under the **Self-Reported** region, go to **Updated Family Size**.

- For Dependents, look under Parent column
- For Independents, look under Student(and Spouse) column.
 - If Updated Family Size is blank, go to "View All ISIR Records"

b. In the ISIR, use **AssumedParentsInFamily** (for Dependents and Independents).

- If this is blank, go back to the verification screen and go to FTIM region

c. In the **FTIM** region, check **Number of Exemptions (Student/Parent)**

- For Dependents: Under Parent(s), add Number of exemptions (Parent) and number of exemptions (Parent Spouse)
- For Independents: : Under Student (and Spouse), add Number of exemptions (Student) and number of exemptions (Student Spouse)
 - If blank, look at Marital Status

d. If all of the above are blank, determine family size by reviewing Marital Status.

- For **Dependent**: If parent is married, assume family size is 3 (i.e. 2 parents + 1 student). If parent is single, assume family size is 2 (i.e. 1 parent + 1 student).
- For **Independent**: If married, assume family size of 2 (1 student + 1 spouse). If single, assume family size of 1 (student only)

(Note: If a # appears in the "Agency Update" column, you must use this information instead of the # in the "FASFA" column.)

a

Self-Reported Information

Updated Family Size

b

FAFSA Information

[View All ISIR Records](#)


Transaction #: 01 Transaction Date: 02/25/2024 Application Date: 02/25/2024
 ISIR Dependency Status: D SAR C Flag: Student Filed Joint Return w/ Curr. Spouse

Look at "**AssumedParentsInFamily**" information on the ISIR:

AsOfTodayInLegalGuardianship
 AssetProtectionAllowance
AssumedParentsInFamily
 AssumedParentTwoIncomeFromWork
 AssumedStudentNumberInFamily

c

	Student (and Spouse)		Parent(s)	
	FAFSA	Agency Update	FAFSA	Agency Update
Federal Tax Information (FTIM) - CUI//SP-TAX				
Returned Tax Year (Student/Parent)	2022		2022	
Returned Tax Year (Student Spouse/Parent Spouse)				
Filing status code (Student/Parent)	Single	<Choose One> ▼	Married - filing jointly	<Choose One> ▼
Filing status code (Student Spouse/Parent Spouse)		<Choose One> ▼		<Choose One> ▼
Adjusted Gross Income (Student/Parent)	14967		15600	
Adjusted Gross Income (Student Spouse/Parent Spouse)				
Number of exemptions (Student/Parent)	1		4	
Number of exemptions (Student Spouse/Parent Spouse)				
Number of dependents (Student/Parent)	0		0	
Number of dependents (Student Spouse/Parent Spouse)				



NJFAMS Verification: Financial Eligibility - Step 3

2) Once you have established dependency and family size, determine **Gross Income**:

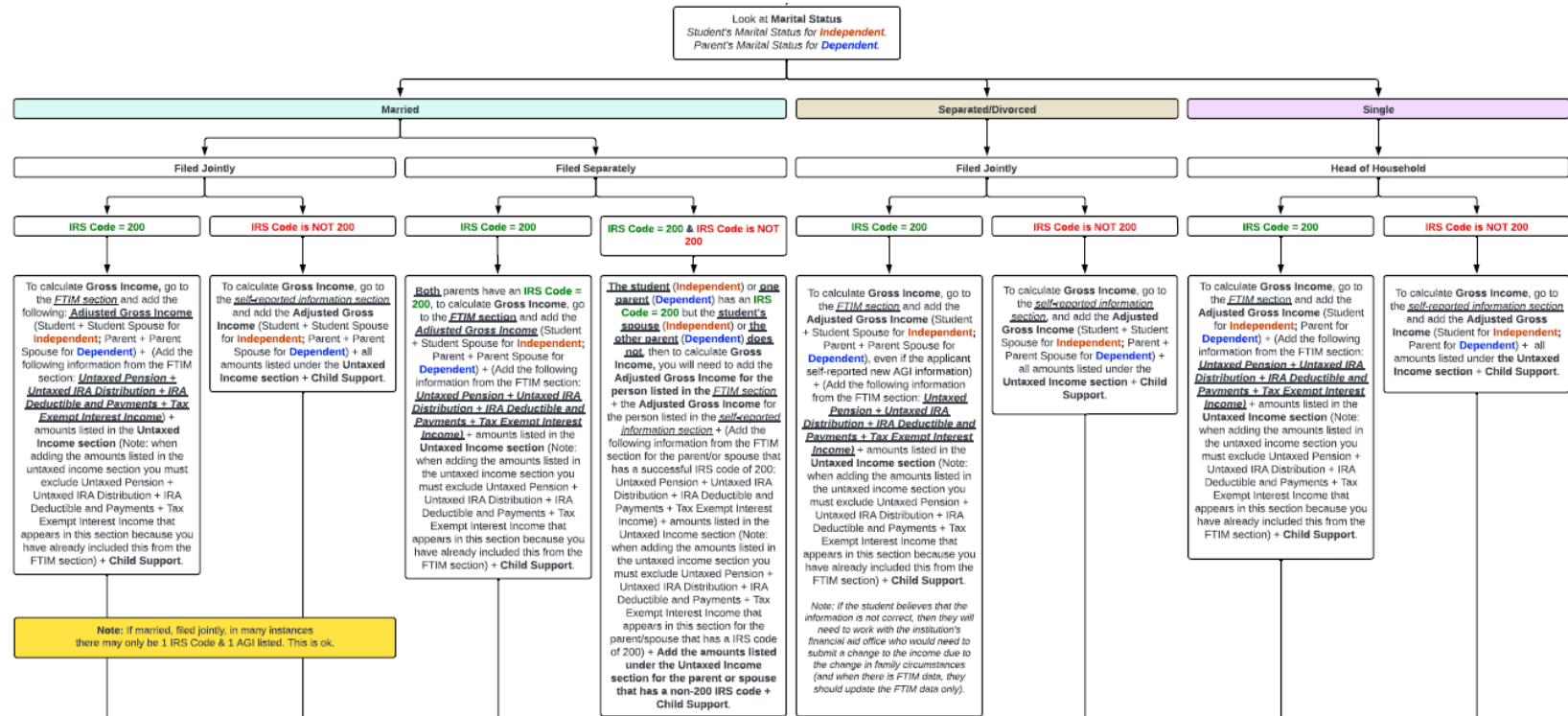
- Review the **IRS response code** and **marital status**.
 - For **Dependent**: Check under Parent(s) Column. If IRS response code = 200, use FTIM info. If other than 200 or blank, use Self-reported.
 - For **Independent**: Check under Student(and Spouse) column. If IRS response code = 200, use FTIM info. If other than 200 or blank, use Self-reported.

For EOF purposes to calculate Gross Income the process may slightly vary based on the above indicated information. Please see the EOF Family Size and Financial Eligibility review chart for additional guidance.

[EOFFamilySizeandFinancialEligibilityReviewChart.pdf \(nj.gov\)](#)

Note: EOF does not use NJEI to determine eligibility; Additionally, if a # appears in the "Agency Update" column, you must use this information instead of the # in the "FASFA" column.)

	Student (and Spouse)		Parent(s)	
	FAFSA	Agency Update	FAFSA	Agency Update
Federal Tax Information (FTIM) - CUI//SP-TAX				
Returned Tax Year (Student/Parent)	2022		2022	
Returned Tax Year (Student Spouse/Parent Spouse)				
Filing status code (Student/Parent)	Single	<Choose One> ▼	Married - filing jointly	<Choose One> ▼
Filing status code (Student Spouse/Parent Spouse)		<Choose One> ▼		<Choose One> ▼
Adjusted Gross Income (Student/Parent)	14967		15600	
Adjusted Gross Income (Student Spouse/Parent Spouse)				
Number of exemptions (Student/Parent)	1		4	
Number of exemptions (Student Spouse/Parent Spouse)				
Number of dependents (Student/Parent)	0		0	
Number of dependents (Student Spouse/Parent Spouse)				
Schedule F indicator (Student Spouse/Parent Spouse)		<Choose One> ▼		<Choose One> ▼
Schedule H indicator (Student/Parent)	No	<Choose One> ▼	No	<Choose One> ▼
Schedule H indicator (Student Spouse/Parent Spouse)		<Choose One> ▼		<Choose One> ▼
IRS response code (Student/Parent)	200-Successful Request		200-Successful Request	
IRS response code (Student Spouse/Parent Spouse)				



NJFAMS

Verification: Financial Eligibility - Step 4

4) Review Assets for Current Year

Add total amounts “Cash, savings, checking,” “Investments,” and “Business/Investment Farm.”

Assets				
Cash, savings, checking	Curr Yr: <input type="text"/>	Prior Yr: <input type="text" value="250"/>	Curr Yr: <input type="text"/>	Prior Yr: <input type="text" value="1200"/>
Investments	Curr Yr: <input type="text"/>	Prior Yr: <input type="text" value="0"/>	Curr Yr: <input type="text"/>	Prior Yr: <input type="text" value="0"/>
Business/Investment Farm	Curr Yr: <input type="text"/>	Prior Yr: <input type="text" value="0"/>	Curr Yr: <input type="text"/>	Prior Yr: <input type="text" value="0"/>

NJFAMS Verification: Payment History

To locate the number of EOF payments a student has received, you can either view this information from the EOF roster or from the “Payment History” tab from the financial aid view.

EOF Roster:

Grade Level: 2nd year/sophomore	Dependency Status: Independent	Previous College: PASSAIC COUNTY COMMUNITY COLLEGE	Term of Fir Fall 2021-20
EOF Full-time Awards: 3	EOF Part-time Awards: 0	TAG Full-time Awards: 7	TAG Part-ti 0
Housing Status: Commuter	Admission Type: EOF Renewal	Ethnicity: Asian American	Gender: Female
Historical Poverty Code: Attended/graduated from DFG A/B School District	School Program: <Choose One>	EOF Enrollr Full-time > 11	

Status	Certification Codes	Program	EOF Term Amount	Term Award	Term Paid	Annual Award
	<input type="text"/>	EOF	<input type="text" value="800"/>	\$800.00	\$0.00	\$800.00
	<input type="text"/>	TAG	<input type="text"/>	\$1,200.00	\$0.00	\$2,400.00

Financial Aid view:

Payment History

Legacy Points (Prior to 11-12)	
Program	Legacy Points
CCOG	0
EOF	0
TAG	0

GSG Reported:

Total Terms GSG Reported: 0

First Term GSG Reported: N/A

Enrollment-based awards:

Institution Name	Program	Payment Request Date	Process Payment Date	Process Payment Amount	Year	Term	Check Date	Check Number	Points
PASSAIC COUNTY COMMUNITY COLLEGE	TAG	12/05/2022	12/20/2022	\$1,200.00	2022-2023	Fall			0.50
PASSAIC COUNTY COMMUNITY COLLEGE	EOF	11/14/2022	12/19/2022	\$800.00	2022-2023	Fall			0.50
PASSAIC COUNTY COMMUNITY COLLEGE	TAG	03/04/2022	04/11/2022	\$1,009.00	2021-2022	Spring			0.50
PASSAIC COUNTY COMMUNITY COLLEGE	EOF	03/04/2022	03/20/2022	\$650.00	2021-2022	Spring			0.50
PASSAIC COUNTY COMMUNITY COLLEGE	EOF	10/28/2021	12/15/2021	\$650.00	2021-2022	Fall			0.50
PASSAIC COUNTY COMMUNITY COLLEGE	TAG	10/15/2021	11/15/2021	\$1,009.00	2021-2022	Fall			0.50
PASSAIC COUNTY COMMUNITY COLLEGE	TAG	02/25/2021	03/09/2021	\$1,317.00	2020-2021	Spring			0.50
PASSAIC COUNTY COMMUNITY COLLEGE	TAG	10/16/2020	10/20/2020	\$1,317.00	2020-2021	Fall			0.50
PASSAIC COUNTY COMMUNITY COLLEGE	TAG	02/26/2020	03/09/2020	\$1,317.00	2019-2020	Spring			0.50
PASSAIC COUNTY COMMUNITY COLLEGE	TAG	10/07/2019	10/28/2019	\$1,317.00	2019-2020	Fall			0.50

Program Points Totals

Program	Total Points
CCOG	0
EOF	1.5
TAG	3.5

NJFAMS: EOF Portal

AWARDING STUDENTS

Awarding and Verifying Students

Roster: EOF Approval
Campus: NEW JERSEY CITY UNIVERSITY
Program: All Programs
Academic Year: 2021-2022
Term: All Terms

Click here to open profile to award student.

Click here to see more information regarding the student's status

Previous Page 1 Next [\(expand all\)](#) [\(contract all\)](#)

<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Fall)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Spring)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Fall)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Spring)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Fall)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Spring)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Fall)	DA - (view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Spring)	DA - (view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Fall)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Spring)	(view)
<input type="checkbox"/>	NEW JERSEY CITY UNIVERSITY (Fall)	(view)

Expand the “+” to award a student

Institutions with multiple EOF programs will need to identify which program the student is affiliated with here.

Grade Level: 1st year, never attended college
Dependency Status: Independent
Previous College:
Term of First Entry:
Last Funded:

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

Housing Status: <Choose One>
Admission Type: <Choose One>
Ethnicity: <Choose One>
Gender: Female

Historical Poverty Code: <Choose One>
School Program: <Choose One>
EOF Enrollment Status: <Choose One>
EOF Approved: <Choose One>

Status	Certification Codes	Program	EOF Term Amount	Term Award	Term Paid	Annual Award
	<input type="text"/>	EOF	<input type="text" value="0"/>	\$0.00	\$0.00	\$0.00
	<input type="text"/>	TAG	<input type="text"/>	\$1,249.00	\$0.00	\$2,498.00

Save

DO NOT PRESS SAVE UNLESS YOU ARE ABSOLUTELY SURE THE CORRECT AMOUNT IS LISTED.

Enter the correct EOF Term Amount here.

Select the appropriate enrollment status.

To approve students, select the approval

Less Than Full-Time EOF Graduating Senior

BLOOMFIELD COLLEGE (Fall) [\(view\)](#)

Grade Level: 5th year/other undergraduate
Dependency Status: Dependent
Previous College: BLOOMFIELD COLLEGE
Term of First Entry: Fall 2014-2015
Last Funded: Spring 2017-2018

EOF Full-time Awards: 4
EOF Part-time Awards: 0
TAG Full-time Awards: 4
TAG Part-time Awards: 0
Tax Verification Indicator: N

Housing Status: Commuter
Admission Type: Less Than FT Graduating Senior
Ethnicity: Black
Gender: Female

Historical Poverty Code: First-generation college student
School Program: <Choose One>
EOF Enrollment Status: Full-time > 11 credits
EOF Approved: Eligible for EOF

Status	Certification Codes	Program	EOF Term Amount	Term Award	Term Paid	Annual Award
★		EOF	1300	\$0.00	\$0.00	\$1,300.00
★		TAG		\$6,343.00	\$0.00	\$12,686.00

[Save](#)

BLOOMFIELD COLLEGE (Fall) [\(view\)](#)

Grade Level: 5th year/other undergraduate
Dependency Status: Dependent
Previous College: BLOOMFIELD COLLEGE
Term of First Entry: Fall 2014-2015
Last Funded: Spring 2017-2018









EOF Full-time Awards: 4
EOF Part-time Awards: 0
TAG Full-time Awards: 4
TAG Part-time Awards: 0
Tax Verification Indicator: N

Housing Status: Commuter
Admission Type: Less Than FT Graduating Senior
Ethnicity: Black
Admission Type: Graduating Senior 3-5 credits
Ethnicity: <Choose One>
Historical Poverty Code: First-generation college student
School Program: <Choose One>
EOF Enrollment Status: Full-time > 11 credits
EOF Approved: Eligible for EOF

Status	Certification Codes	Program	EOF Term Amount	Term Award	Term Paid	Annual Award
★		EOF	1300	\$0.00	\$0.00	\$1,300.00
★		TAG		\$6,343.00	\$0.00	\$12,686.00

[Save](#)

Program Status and Certification Icons

-  **Qualified:** FAFSA or scholarship application received; student meets all eligibility requirements
-  **Incomplete:** FAFSA or scholarship application received, student has not answered NJ Additional Application questions or tasks are outstanding for scholarship application
-  **Ineligible:** student does not meet one or more eligibility requirements
-  **Selected:** student is qualified and has been selected for an award but the award has not been processed yet (HESAA Scholarship)
-  **Awarded:** student has been Qualified for an award
-  **Paid:** Award has been paid
-  **Refund Due:** Award was reduced or canceled after it was paid; funds have not yet been returned
-  **Certified:** Student has been certified by the school

Reminder: Funded vs. Non-Funded

There are only two types of students who participate in EOF, **Funded** or **Non-Funded**:

1. A student who receives Article III Academic Year grant funds is classified as a **Funded** student.
2. A student who has received an Academic Year Article III grant award during a previous academic year but was subsequently found to be financially ineligible can only be supported as a **Non-Funded** student.
3. NJ GEAR UP, NJ College Bound, and TRIO Students who do not meet the EOF financial criteria may also be classified and supported as a **Non-Funded** student.
4. All other students who do not meet the financial eligibility criteria to receive an initial EOF grant are deemed **ineligible** for EOF.
5. EOF Campus programs should consistently review NJFAMS to ensure that you are aware of any students under verification and continue to monitor their status.

“Awarding” of Non-Funded Students

- Select “**Non-funded**” from the **Admission Type**.
- **EOF Term Amount** must be zero.
- Select **Eligible for EOF** under **EOF Approved**.

Grade Level: 4th year/senior
Dependency Status: Dependent
Previous College: RAMAPO COLLEGE OF NEW JERSEY
Term of First Entry: Fall 2018-2019
Last Funded: Spring 2020-2021

EOF Full-time Awards: 6
EOF Part-time Awards: 0
TAG Full-time Awards: 6
TAG Part-time Awards: 0
Tax Verification Indicator: N

Housing Status: Commuter
Admission Type: Non-funded
Ethnicity: Hispanic
Gender: Female
Discretionary/Special Conditions: <Choose One>

Historical Poverty Code: First-generation college student
School Program: <Choose One>
EOF Enrollment Status: Full-time > 11 credits
EOF Approved: Eligible for EOF

Status	Certification Codes	Program	EOF Term Amount	Term Award	Term Paid	Annual Award
★		EOF	0	\$0.00	\$0.00	\$1,400.00
👤		TAG		\$4,350.00	\$0.00	\$8,700.00

> Save

Note: If the student is financially ineligible but is eligible for Non-funded consideration, an appeal must be sent to OSHE/EOF

NJFAMS: Troubleshooting

Verify & Check Student's Eligibility Status

Academic Period Information

> Award Student > Override Student Award

[Expand All](#)

MERCER COUNTY COMMUNITY COLLEGE

[Expand All](#)

Annual Award Summary:

Program	Major	Annual Award	Certified to Date	Paid to Date
EOF		\$575.00	\$0.00	\$0.00
NJGIVS		\$0.00	\$0.00	\$0.00
STARS		\$0.00	\$0.00	\$0.00
TAG		\$2,736.00	\$0.00	\$0.00
TOTAL Awards		\$3,311.00	\$0.00	\$0.00

Fall of 2017-2018 Academic Year

Grade Level: 2nd year/sophomore

ESL/Remedial: No

Graduating Th: No

Dependency Status:

Projected Year Change: Base Year Change

AP: es Prior BA: No Prior AA: No Campus ID:

Transfer Orders Verified: <Choose One>

NJEI: 250

R - Documents Received - Review Pending

Status Details

EOF:

- Student is ineligible:
- Application tasks not completed by cutoff date.

[Close](#)

Status	Certification Codes	Program	New Term Amount	Term Award	Term Paid	Annual Award
		EOF		\$0.00	\$0.00	\$575.00
	E.	NJGIVS		\$0.00	\$0.00	\$0.00
		STARS		\$0.00	\$0.00	\$0.00
		TAG		\$1,368.00	\$0.00	\$2,736.00

[Save](#)

Attempting to award a student on another institution's roster

Expand All

KEAN UNIVERSITY

Expand All

Annual Award Summary:

Program	Major	Annual Award	Certified to Date	Paid to Date
EOF		\$0.00	\$0.00	\$0.00
TAG		\$4,688.00	\$0.00	\$0.00
TOTAL Awards		\$4,688.00	\$0.00	\$0.00

Fall of 2017-2018 Academic Year

Grade Level: 3rd year/junior Degree Program: 1st bachelor degree Enrollment Status: Full-time SAP: Yes Prior BA: No Prior AA: No Campus ID:

ESL/Remedial: No Graduating This Term: No Type of Leave: None Course of Study: Other Transfer Orders Verified: <Choose One>

Dependency Status: NJEI: 2745

Projected Year Change: Tax Verification Indicator: D - Complete - Award Decreased

Status	Certification Codes	Program	New Term Amount	Term Award	Term Paid	Annual Award
		EOF		\$0.00	\$0.00	\$0.00
		TAG		\$2,344.00	\$0.00	\$4,688.00

Save

Spring of 2017-2018 Academic Year

Grade Level: 3rd year/junior Degree Program: 1st bachelor degree Enrollment Status: Full-time SAP: Yes Prior BA: No Prior AA: No Campus ID:

ESL/Remedial: No Graduating This Term: No Type of Leave: None Course of Study: Other Transfer Orders Verified: <Choose One>

Dependency Status: NJEI: 2745

Projected Year Change: Tax Verification Indicator: D - Complete - Award Decreased

Status	Certification Codes	Program	New Term Amount	Term Award	Term Paid	Annual Award
		EOF		\$0.00	\$0.00	\$0.00
		TAG		\$2,344.00	\$0.00	\$4,688.00

Save

BROOKDALE COMMUNITY COLLEGE

ROWAN UNIVERSITY

MONTCLAIR STATE UNIVERSITY

WILLIAM PATERSON UNIVERSITY

Show Additional Campuses

Status Details

EOF:

- Student is ineligible:
- EOF award not approved
- EOF Not Approved At This Campus

Close

Email previous institution's EOF Director to ask them to remove student from their roster.

“EOF Award Not Approved”

Awarding a student with this as their ONLY ineligibility reason

- If “EOF award not approved” is the only reason that a student appears as ineligible, you may be able to award this student.
 - Check the student’s profile to ensure that they meet all eligibility requirements (e.g., financial eligibility, residency, completed application, etc.).
 - If you have verified that the student appears to be eligible in NJFAMS, then change the status in EOF Approved to “Eligible for EOF” and award the student.
 - Awarding of the student will force the system to re-screen the student.
 - If everything is in order, then the student’s status should switch to “qualified,” and their award should appear on their account.
- If it does not go through, then contact your EOF program liaison and we will investigate the matter further.

The screenshot displays the NJFAMS system interface for KEAN UNIVERSITY. It shows an 'Annual Award Summary' table with columns for Program, Major, Annual Award, Certified to Date, and Paid to Date. The summary includes EOF, TAG, and TOTAL Awards. Below this, there are sections for 'Fall of 2017-2018 Academic Year' and 'Spring of 2017-2018 Academic Year', each with various dropdown menus for Grade Level, Degree Program, Enrollment Status, etc. A 'Status Details' dialog box is open, displaying the message: 'EOF: Student is ineligible; EOF award not approved; EOF Not Approved At This Campus'. The dialog box has a 'Close' button.

Program	Major	Annual Award	Certified to Date	Paid to Date
EOF		\$0.00	\$0.00	\$0.00
TAG		\$4,688.00	\$0.00	\$0.00
TOTAL Awards		\$4,688.00	\$0.00	\$0.00

Status	Certification Codes	Program	New Term Amount	Term Award	Term Paid	Annual Award
✖		EOF		\$0.00	\$0.00	\$0.00
👤		TAG		\$2,344.00	\$0.00	\$4,688.00

EOF Financial Eligibility Notables:

- A **dependent student's** income and assets shall not be considered in the gross household income.
- Ineligibility for TAG should not be automatically associated with ineligibility for EOF.
- An applicant whose household receives Temporary Assistance for Needy Families (TANF) and/or Supplemental Social Security Income (SSI) as the sole means of support are eligible regardless of the amount of such support.
- In determining financial eligibility for an Article III student grant, **separation or divorce, or the disability or death of a wage earner for the academic year for which eligibility is being determined**, with a concomitant decrease in household income below the EOF Income Eligibility Scale, **does not automatically satisfy the financial eligibility requirement.**
- **If an applicant believes that their reported household income and/or assets do not accurately reflect their current financial profile, they will need to work with the institution's Financial Aid Office and HESAA** to rectify this matter. OSHE/EOF does not make or review any adjustment appeals.


Roster Submission

Roster Certification Submission Process





- Ensure that all students have been awarded
- Students must appear on your “EOF Approved and Eligible” Roster. Download this file and remove all columns except:

1) HESAA ID	9) EOF Term Amount
2) Academic Year	10) Grade Level
3) Term Description	11) Dependency Status
4) School Code	12) # of EOF Full-time Awards
5) School Name	13) # of EOF Part-time Awards
6) Last Name	14) Admission Type
7) First Name	15) Housing Status
8) Birth Date	16) Historical Poverty Code
- Send this CSV file and your EOF Roster Certification form to EOF@oshe.nj.gov w/ a copy to your program liaison

EOF Approval Rosters - Action Required

	View and Print (PDF)	Approve Online	Download File (CSV)
 EOF Approval	PDF	Online	Download

Informational Rosters











	View and Print (PDF)	View Online	Download File (CSV)
 Approved and Eligible	PDF	Online	Download
 State Verification Not Complete	PDF	Online	Download
 Approved, Eligible and Certified	PDF	Online	Download
 Certified and Not Paid	PDF	Online	Download
 Paid	PDF	Online	Download
 Refund Due	PDF	Online	Download
 Ineligible	PDF	Online	Download
 Incomplete	PDF	Online	Download
 All Students	PDF	Online	Download



EOF Roster Processing Form

https://www.nj.gov/highereducation/EOF/EOF_Program_Resources.shtml

— EOF Forms and Other Reports

- EOF Contract Attachment B1 - Program Goals & Objectives 
- EOF Contract Attachment B2 - Summer Program 
- EOF Contract Attachment B3 - AY Art. IV Program Support 
- EOF Special Project B4 - Budget Application 
- EOF Special Project Application - Narrative Form 
- EOF Contract Attachment B5 – Winter Session 
- NJFAMS EOF ACCESS FORM 
- NJFAMS EOF Approved and Eligible Roster Processing Request Form 
- EOF Student Appeal Form 
- EOF Pending Verification Form 



EDUCATIONAL OPPORTUNITY FUND (EOF)
NEW JERSEY FINANCIAL AID MANAGEMENT SYSTEM (NJFAMS)
EOF CAMPUS PROGRAM UNDERGRADUATE APPROVED AND ELIGIBLE ROSTER
PROCESSING REQUEST FORM
Office of the Secretary of Higher Education
PO Box 542
Trenton, New Jersey 08625

All documents must be submitted via email to the EOF Central Office. This form may be submitted in either a PDF, MS Word or JPEG image format to all identified individuals below. In addition to this form, programs must submit an electronic copy of your EOF "Approved and Eligible" roster. This roster should include all students with whom you are requesting for the EOF Central Office to move from a "qualified" to "awarded" status within NJFAMS. The EOF "Approved and Eligible" roster must be downloaded from the EOF portal within NJFAMS as a CSV file (Excel document) and must accompany the EOF Award Processing form. The excel document must be reviewed prior to submission and must reflect the accurate demographic and award information for all selected students. Students who are listed as either incomplete or under verification within NJFAMS should not be included.

Certifications must be received by 12:00 pm (EST) on the identified roster processing date.

A copy of the above described roster must be e-mailed to the OSHE/EOF Central Office with this form.

EMAIL TO: OSHE/EOF (EOF@oshe.nj.gov)

Please also copy your program liaison:

Dr. Hasani Carter (hasani.carter@oshe.nj.gov)
Peter Collazo (peter.collazo@oshe.nj.gov)
Hema Patel (hema.patel@oshe.nj.gov)
Dr. Stephanie Shanklin (stephanie.shanklin@oshe.nj.gov)

INSTITUTION: _____
PROGRAM: _____
DATE: _____

I hereby certify, as a representative of the educational institution named above, that the submitted roster has been reviewed for accuracy, processed in accordance with the instructions provided, and that payments requested for eligible students are in compliance with the Educational Opportunity Fund regulations. Any student requested to be approved as Non-Funded will have a zero (\$0) dollar amount within the grant award line. Students on this roster meet the standards of academic performance and progress required by this institution. Upon approval of the EOF Central Office, the above institution also recognizes that it is responsible for certifying and requesting payment by all indicated deadlines.

(EOF Director – E-Signature)

(EOF Director – Print)

(Financial Aid Director – E-Signature)

(Financial Aid Director – Print)

(Telephone Number)

(Date)

(Telephone Number)

(Date)



Financial Aid Office

FINANCIAL AID PORTAL




CERTIFYING AND REQUESTING PAYMENT

Institutional FAO have a region where they can certify and request payment for your students



Institutions

-  Search For Institutions
-  Manage High Schools

Notifications



-  View Notifications
-  Generate Notifications
-  Release Generated Notifications

Students



-  Search For Student
-  Rosters

FAO liaison must go here to locate the students that need to be certified.


File Transfers

-  Import a File
-  File Import/Upload History





Awarding

-  Selection
-  Process Awards



Reports

-  Standard Reports



Payments

-  Add Advance Payment
-  Process Payments
-  Download Payment Files
-  Enter Returned Funds

Settings

-  Program Settings
-  User Agreement

Options

-  Manage Users
-  Edit Your Profile

Institutional Financial Aid Office (FAO) Certification & Payment Request

- Each participating institution's Financial Aid Office (FAO) must certify all EOF students (**including Non-Funded**) before submitting a request for payment.
- We recommend that FAO complete this step on Monday or Tuesday, after Roster submission on Thursday.

[HOME](#) > [Institutional Request Payment](#)

Payment has been requested.

Payment Verification

Requested but Not Paid: \$625.00 - Not Yet Requested: \$0.00

<input type="checkbox"/>	Program	Term	Certified Amount	Refunds Pending	Net Payment Due	Request Date	Status	View Details
<input checked="" type="checkbox"/>	EOF	Spring	\$625.00	\$0.00	\$625.00	7/15/2020 8:52:27 AM	Requested	Details

Selected Payments

Total of payments currently selected for this request: \$0.00

[Request Payment](#)

[Return to Main Menu](#)

Once FAO has certified and requested payment – OSHE/EOF will move students to paid status.




<input type="checkbox"/> Process Payments All Programs Pending: \$112,835,846.00										
Payments Selected: You have selected \$0 in payments to be processed. Process Payments										
<input type="checkbox"/> ATLANTIC CAPE COMMUNITY COLLEGE 002596 Pending \$1,012,186.00										
Program	Term	Certified Amount	Refunds Pending	Amount Requested	Advance Payment Balance	Payment Amount	Requested Date	Method	Details	
<input type="checkbox"/> TAG	Spring	\$976,249.00	\$16,491.00	\$959,758.00	\$0.00	\$959,758.00	02/15/2018	Electronic Funds Transfer (EFT)	Details	
<input type="checkbox"/> EOF	Spring	\$35,937.00	\$0.00	\$35,937.00	\$0.00	\$35,937.00	02/15/2018	Electronic Funds Transfer (EFT)	Details	
<input type="checkbox"/> BERGEN COMMUNITY COLLEGE 004736 Pending \$2,060,986.00										
Program	Term	Certified Amount	Refunds Pending	Amount Requested	Advance Payment Balance	Payment Amount	Requested Date	Method	Details	
<input type="checkbox"/> TAG	Spring	\$1,800,260.00	\$857.00	\$1,799,403.00	\$0.00	\$1,799,403.00	02/28/2018	Electronic Funds Transfer (EFT)	Details	
<input type="checkbox"/> STARS	Spring	\$149,316.00	\$4,525.00	\$144,791.00	\$0.00	\$144,791.00	02/22/2018	Electronic Funds Transfer (EFT)	Details	
<input type="checkbox"/> EOF	Spring	\$111,410.00	\$0.00	\$111,410.00	\$0.00	\$111,410.00	02/28/2018	Electronic Funds Transfer (EFT)	Details	
<input type="checkbox"/> BERKELEY COLLEGE 007502 Pending \$6,614,884.00										
<input type="checkbox"/> BROOKDALE COMMUNITY COLLEGE 008404 Pending \$1,296,048.00										
<input type="checkbox"/> CALDWELL UNIVERSITY 002598 Pending \$2,907,284.00										
<input type="checkbox"/> CAMDEN COUNTY COLLEGE 006865 Pending \$176,750.00										
<input type="checkbox"/> CENTENARY UNIVERSITY 002599 Pending \$1,727,549.00										
<input type="checkbox"/> COLLEGE OF SAINT ELIZABETH 002600 Pending \$1,881,459.00										
<input type="checkbox"/> COUNTY COLLEGE OF MORRIS 007106 Pending \$423,908.00										
<input type="checkbox"/> CUMBERLAND COUNTY COLLEGE 002601 Pending \$235,603.00										

Students should show up as “Paid”

Grade Level: 1st year, never attended college ▾ Degree Program: Assoc. deg. (gen. ed./transfer) ▾ Enrollment Status: Full-time ▾ SAP: Yes ▾ Prior BA: No ▾ Prior AA: No ▾ Campus ID:

ESL/Remedial: No ▾ Graduating This Term: No ▾ Type of Leave: None ▾ Course of Study: Other ▾ Transfer Orders Verified: <Choose One> ▾

Dependency Status: Independent
Projected Year Change: Base Year Change
Tax Verification Indicator: N - Not Selected for State Verification
NJEI: 2150

Status	Certification Codes	Program	New Term Amount	Term Award	Term Paid	Annual Award
 	A. <input type="text"/>	 EOF	<input type="text"/>	\$525.00	\$525.00	\$525.00

> Save

- Students will be converted to Paid status at the end of each semester by OSHE EOF.
- Since OSHE has sent Article III grant funds to your Institution, students can receive funds after FAO certifies and requests payment.
- If this impacts a student's financial aid package, please contact your liaison.

Discretionary and Non-funded Appeals

DISCRETIONARY, NON-FUNDED, SAP APPEALS

EOF Financial Eligibility Notables (Discretionary Students)

- Per 9A:11-2.3(h) of the EOF regulations, **the EOF campus administrator/director has the discretion to admit, up to a maximum of 10 percent of the annual class of initial students as discretionary admits.** These admits can have family incomes as high as, but no more than, 281 percent of the Federal poverty guidelines and have assets that do not exceed 20 percent of the maximum income allowance as per the 281 percent of the Federal poverty guidelines per household size, as published annually by the Federal government.
- Discretionary admit students shall also meet all eligibility provisions of N.J.A.C. 9A:11-2.2.
- As noted within 9A:11-2.3 of the EOF regulations, if an applicant's reported household income and assets exceeds the maximum allowable limit for EOF for discretionary consideration, then by regulation, the student is financially ineligible to receive an EOF grant award.

EOF Non-Funded and Discretionary Appeals Form

— EOF Forms and Other Reports

- [EOF Contract Attachment B1 - Program Goals & Objectives](#)
- [EOF Contract Attachment B2 - Summer Program](#)
- [EOF Contract Attachment B3 - AY Art. IV Program Support](#)
- [EOF Special Project B4 - Budget Application](#)
- [EOF Special Project Application - Narrative Form](#)
- [EOF Contract Attachment B5 – Winter Session](#)
- [NJFAMS EOF ACCESS FORM](#)
- [NJFAMS EOF Approved and Eligible Roster Processing Request Form](#)
- [EOF Student Appeal Form](#)
- [EOF Pending Verification Form](#)



- All appeals must be sent directly to your EOF program liaison starting in August/January.
- Check the Roster Processing Calendar for Semester deadlines for Appeals
- Only an EOF program liaison or the EOF Executive Director has the authority to approve an appeal.
- Due to the number of appeals received, programs are limited to 25 students per appeal/per business day.

APPEAL FORM

Old form:

NJHESAA ID#	Student First Name	Student Last Name	City/Town of Residence (NJ ONLY)	Year in College	Enrollment Status	Dependency Status	# in household	Adjusted Gross Income (\$)	Untaxed Income (\$)	Total Gross Income (Adjusted Gross Income + Untaxed Income) (\$)	Total Assets (\$)	# of previous EOF Full-time Awards	# of previous EOF Part-time Awards	Requesting student to be coded as non-funded	Did the student participate in the NJ GEAR UP, College Bound Program, TRIO program? (Y/N)	Action Taken (EOF CENTRAL STAFF ONLY)	Comments (EOF CENTRAL STAFF ONLY)
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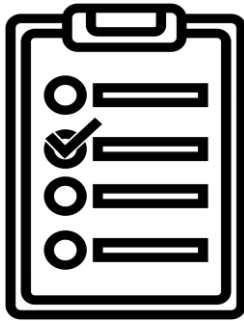
New form:

HESAA ID#	First Name	Last Name	Year in College	Enrollment Status	Dependency Status	# in household	Marital Status	Adjusted Gross Income Student/Parent (\$)	Adjusted Gross Income Spouse/Parent Spouse (\$)	FTIM Section: Untaxed Pension Only include this information if the IRS Response Code is 200	FTIM Section: Untaxed IRA Distribution Only include this information if the IRS Response Code is 200	FTIM Section: IRA Deductible and Payments Only include this information if the IRS Response Code is 200	FTIM Section: Tax Exempt Interest Income Only include this information if the IRS Response Code is 200	Untaxed Income Section (\$) (Note: If IRS Code is 200, the amounts listed for the areas highlighted columns L-0 on this form may be excluded from this total.)	Child Support	Total Gross Income (Adjusted Gross Income + Untaxed Income) (\$)	Total Assets (\$)	# of previous EOF Full-time Awards	# of previous EOF Part-time Awards	Requesting student to be coded as non-funded (Y/N)	Did the student participate in the NJ GEAR UP, College Bound, TRIO program? (Y/N)	Action Taken (EOF CENTRAL STAFF ONLY)	Comments (EOF CENTRAL STAFF ONLY)
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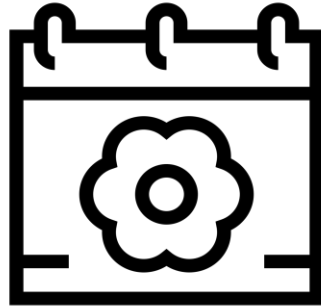
Additional columns have been added to help clarify how Total Gross Income is calculated.

Pending Verification

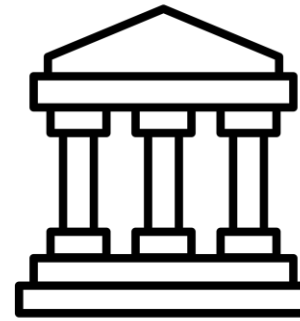
EOF Pending Verification Form



At the conclusion of each semester, if a student is pending verification (federal, state, institution) and has not cleared by the final roster deadline, submit the student's name and the appropriate information to OSHE/EOF on the Pending Verification Form.
Note: Do not send this form until the last roster processing date.



This is especially important during the Spring term due to the Fund's lack of carry forward ability and the need to sweep all accounts in March.



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



Programs that fail to properly submit the appropriate information are subject to covering the grant award for each student not properly accounted for.

ional Opportunity Fund - Students Pending Verification

t Appeal Form

(For any item that is highlighted in yellow, there is a dropdown option that you must select from.)

Program	
Submitter (Full Name):	
Submission:	

THE EOF office is not responsible for checking the status of students placed on this form. Students submitted on this form must be monitored by the EOF campus program/institution. If a student clears on or before the EOF deadline, campus program is responsible awarding the student accordingly within N,FAMS by the stated deadline. Any student who clears verification AFTER the EOF deadline, must be awarded before the final HESAA processing deadline for the term. [responsibility of the EOF campus program/director to contact the DSH/EOF office immediately if the latter situation arises.]

HESAA ID#	Student First Name	Student Last Name	City/Town of Residence (NJ ONLY)	Residence Status	Admission Type	Ethnicity	Gender	Historical Poverty Code	Enrollment Status	# of EOF Full-time Awards	# of EOF Part-time Awards	Fall Amount (\$)

EOF Pending Verification Form

Closing

Disbursement of AY Art. III Undergraduate Student Grant Funds

Institutions should divide their academic year Article III allocation in half (think Fall and Spring semester)

For the fall term, institutions will receive an advance payment = 75% of the first half of their allocation in the early portion of the Fall term. (Typically in September)

The Final Fall disbursement will be based on the campus program's "Paid" roster after the Final Roster Certification period. (Typically in January)

Spring semester advance payment will = 75% of the total Article III funds paid to the institution for the fall semester. (Typically in January)

Roster Processing Reminders

Unlike HESAA, **EOF does not have carry forward language**. This is why there are differences in our roster processing deadlines.

The **OSHE/EOF office must sweep all accounts during the Spring term** (End of March/Early April) and use the remaining balance of EOF Art. III and IV funds to help front fund the **EOF Summer Program**.

If an institution submits a payment request after the EOF payment request deadline for students who do not appear on the pending verification form, this payment may not be honored. ***The institution must provide in writing the justification for this late request.***

- If funds are available, the OSHE/EOF office will consider this request. However, this is not guaranteed. An institution may be held accountable for covering this payment due to failure to properly account for your students and adhere to the EOF payment processing procedures.

It is very important for an **institution to develop the appropriate internal process and procedures** to help prevent any roster processing errors.

Other Notables and Reminders

- When contacting OSHE/EOF for assistance with a student, **you must include:**
 - Student's HESAA ID#
 - Description of the issue
 - Any appropriate demographic & enrollment information
 - Amount (\$) to be awarded (if no amount is given, OSHE/EOF will only award \$100)
 - If an award needs to be cancelled after the roster has been closed, you must indicate if you want to make the student non-funded (if they are eligible for this allowance)
- Financial Aid should not use the EOF refund roster to accurately know the total amount owed to OSHE/EOF. This is due to how we remit payment using the "Paid" roster. Do not send any refunds for a particular academic year until after you have received your Academic Year Desk Audit.
- EOF vs. HESAA related issues that can be resolved by OSHE/EOF.
- NJFAMS is a useful tool for recruitment purposes. It should not be used as the primary source for recruitment.
- Participating institutions/EOF campus programs are responsible for accurate management of your program roster. This includes the accuracy of the roster (vs. institutional records) and the personnel who should have access.
- Submission of Pending Verification form is the responsibility of the EOF campus program Director.
- Final Enrollment Reports are used for the completion of the EOF Annual Report. These are typically sent to programs in August.



Questions



A STUDENT-CENTERED VISION FOR HIGHER EDUCATION

Thank You!

We look forward to working with you

nj.gov/highereducation

