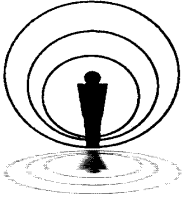


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Draft Minutes
NYSFAAA Executive Council
June 13-14, 2022
High Peaks Resort, Lake Placid, NY
Hybrid Meeting

Monday, June 13th

Call to Order & Roll Call

Adrienne King/Anne Sullivan Polino

President – Adrienne King
President - Elect – Patti Donahue
1st VP – Renee Swift
2nd VP – Brian Smith
Secretary – Anne Sullivan Polino
Treasurer – Shalena Clary
Treasurer- Elect – Joe Weglarz
Region 1: Nicole Griffio
Region 2 – Lucinda Snyder
Region 3 – Peg Stearns
Region 4 – Rochelle Filler
Region 5: Janice Hilbrink
Region 6 – Tom Zarkos
Region 7 – Erica Follick
Region 8 – Sonya Stein

Guest: Sean Sherwood
Lisa Simpson
Stacey Hawkins

A quorum exists and the meeting started at 12:17 PM.

A quorum exists

Adrienne introduced Janice Hilbrink as the new Region 5 Representative. Janice comes from Pace University. Welcome Janice.

Remote Votes

MOTION: A motion was made by Patti Donahue, seconded by Peg Stearns to encourage participation and attendance, by offering a reduced registration rate - \$50 discount off a 3-day registration (\$275 instead

of \$325) and a \$25 discount off a 1-day registration (\$150 instead of \$175) - for members who submit a presentation proposal by May 31st and have their proposal approved.

There was no discussion. A vote was called-the motion passes with 12 in favor, no opposition, and 1 abstention.

MOTION: A motion was made by Tom Zarkos, seconded by Sonya Stein to approve and sign the NYSFAAA Treasurer draft report for the Executive Council & the Draft of the Financial Statements and Supplemental Information for 2020 prepared by Tronconi Segarra and Associates

There was no discussion. A vote was called-the motion passes with 11 in favor, no oppositions, and 1 abstention.

MOTION: A motion was made by Patti Donahue, seconded by Renee Swift that as co-chair of the NYSFAAA 2022 Conference Committee, the organization agrees to reimburse Sonya Stein for airfare to attend the June 2022 EC meeting in Lake Placid, NY

There was no discussion. A vote was called-the motion passes with 11 in favor, no oppositions, and 1 abstention.

Approval of Minutes

Adrienne King/Anne Sullivan Polino

MOTION: A motion was made by Peg Stearns, seconded by Rochelle Filler to accept the minutes with noted changes

A vote was called and the motion passes with all in favor, no oppositions, and no abstentions.

Conference 2022

Stacey Hawkins/Sonya Stein

Sonya Stein presented the final draft of the conference agenda. The agenda includes a session on wellness that will be presented by Lucinda Snyder. The final version with presenter names will likely be completed in August.

An exception was made for one speaker to be remote.

MOTION: a motion was made by Peg Stearns, seconded by Rochelle Filler to approve the agenda.

A vote was called and the motion passed with all in favor, no opposition and no abstentions.

There was a discussion on stairwell/elevator and transportation concerns and the possible need for transportation from the airport or train station to help get attendees to the venue. Stacey and Sonya should be contacted to coordinate ride shares, etc. A message should go out to certain regions on this point.

A letter of solicitation for Raffle and Donation was reviewed and finalized. (See Exhibit section)

Regions are still being asked to provide donations to the raffle.

Conference technology will be reviewed with the hotel to ensure that we have proper connections in place. The committee will ensure that presenters and the conference technology committee is prepared for any issues that may arise.

MOTION: A motion was made by Lucinda Snyder, seconded by Patti Donahue to accepted letter from the entertainment committee with edits discussed. The motion passed with all in favor,

President's Update	Adrienne King
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EASFAA Report

EASFAA's annual Conference was held in Baltimore and a leadership retreat was held in Rhode Island.

The next EASFAA meeting will likely be held with the new President in the Fall. A survey will be done to gage opinion on timing. The Fall EASFAA meeting is always held at the site of the next annual conference which will be held in Manchester, New Hampshire.

Novice Workshop

The Novice Workshop began today with 139 attendees. The event is being conducted virtually via Whova. Adrienne will follow up with Sean Sherwood on how it is going at the end of today.

Scholarship and Mentorship Committees

The Scholarship and Mentorship Committees are in need of chairs and co-chairs.

We need to provide information on the scholarships that will be provided at the October conference.

Adrienne will send out an email from Janice and Crystal later today on this topic. Janice will continue to assist this year but would like someone new to take over the committee. Janice has been in this role for 7 years.

President- Elect's Update	Patti Donahue
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Election Committee

An update was provided on the election results. New officials and regional representatives were identified. New Executive Council members will be invited to the August meeting to help with orientation of new these new members

Patti plans to continue working on the website information as she moves into the presidency and will work with Howard :Leslie and Lea Nuwer on this endeavor.

First Vice President Update

Renee Swift

Membership

Renee Swift provided the following update on membership, noting that growth continues in this area and that she receives daily updates and sees approximately 20 members signing up per day, at this time. Membership application up and running for both active, associate, retired and affiliate members.

The Membership Committee has not met since the last Executive Council meeting.

Membership Numbers

To-date: 1221
June 2021: 1172

Renewal message has been sent and by the activity that she has seen (cc'ed on all renewals), folks are getting them in timely.

Second Vice President's Report

Brian Smith

TICC

The TICC Committee is working on filling the Chair position. Sonya Stein will be Co-Chair after the conference. Brian will step in if unable to fill that role.

SWT

We are on track for Fall training with a number of sessions planned, including a session on Needs Analysis for 2024-2025 and s plan for "SWT Comes to Your Region."

Secretary's Report

Anne Sullivan Polino

Anne reminded Executive Council members that the Annual Report template was sent out to council members for follow up with the Executive Council Regions, President and committees, along with a copy of last year's report for reference. Completed reports should be returned to Anne but mid-August so that she may put together the Annual Report.

Treasurer's Report

Shalena Clary/Joe Weglarz

2022-2023 Budget Approval

Shalena Clary provided the following updated account balances and indicated that investments are trending down due to market conditions but remain healthy and is in contact with Morgan Stanley on the

investment strategy. She will make an introduction of Joe Weglarz as the incoming Treasurer.

NYSFAAA Balances as of 6/08/2022		
Bank Accounts	1/30/2022	6/8/2022
004 Key Bank Checking	\$232,287.57	\$ 230,938.97
006 Key Bank Scholarship	\$33,014	\$ 33,015.00
007 Key Bank CD	\$53,029.97	\$ 53,090.85
TOTAL	\$318,331.54	\$ 317,044.82

Morgan Stanley	1/31/2022 Current Value	
Reserve Fund	\$ 408,486.00	\$ 367,658.10
Scholarship	\$ 307,488.00	\$ 276,751.55
	\$ 715,974.00	\$ 644,409.65

Joe and Shalena met to discuss budget, the effect of COVID on budget (positive) and the need to have a conversation on future considerations.

Joe asked if there is a finance committee -Shalena responded that it is in the policy and procedure and is currently made up of Shalena and Joe. It was recommended that Patti Donahue attend these meetings as incoming President and to discuss the use of current high balances in checking account. Shalena agrees that the finance committee should be reviewed, and membership updated. Shalena will contact Rob Bell at Morgan Stanley to set up a meeting.

A review of the 2022-2023 Budget was conducted with the following highlights noted:

- Revenue is down due to the Novice Workshop coming in significantly under budget. The \$66,000 plan was rolled over from last year with the idea that we would be in person and carry it forward from prior years.
- Expenses are also impacted for the same reason that results in an equalization of the budget.
- Scholarship dollars have tripled in the past year.
- The first revenue checks were sent to the regions. The second check will go out once regional quarterly reports are received by the Treasurer. Joe will send out an email reminder to send those reports.
- Professional services currently looks under budget but will be increased due to a bill of \$20,900 from the auditors. The \$20,900 made up of \$13,200 2020 for the audit and the balance \$7,500 for the second half of 2019 audit. The 2021 audit is almost done. This will catch us up on audits but put the expense category over budget for the year.
- Shalena plans to review and reclassify a handful of expenses to the proper general ledger category.
- Total expenses are currently \$120,226.92 under budget.

MOTION: A motion was made by Anne Sullivan Polino, seconded by Patti Donahue to accept the treasurer's report.

A vote was called-the motion passes with 13 in favor, no oppositions, and no abstentions.

Shalena sent out budget requests to all Executive Council members and chairs to develop a draft budget for the 2022-2023 budget.

The Executive Council continued to work through the budget on a line by line basis using the previously approved membership fee of \$70.00 and a conservative membership count of 1,150 to finalize the plan.

Follow up items include reviewing options for increasing insurance costs and bank service charges to see if these can be waived given our non-profit status. It was also decided to keep the cost for Whova in the budget as we plan for next year's Novice Conference. Mercy College may not be an option for in-person attendance and may require the continuation of use of that system for Novice and the annual conference.

Other topics discussed during the budget review process included the trademark renewal (complete), survey system options (GOOGLE vs. Survey Monkey), NASFAA SWT Training costs-(NASFAA \$500/session. We will only do 2 credential sessions this year) and a request from the DEI Committee asked for \$2,500 for training and other costs.

MOTION: A motion was made by Peg Stearns, seconded by Rochelle Filler to accept the 22-23 Budget as presented

A vote was called-the motion passes with all in favor, no oppositions, and no abstentions.

Tuesday, June 14th

9:00 a.m. The meeting resumed at 9: 00 AM with a quorum.

HESC Update	Lisa Simpson
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Lisa presented the HESC Update, a copy of this presentation can be found in the Exhibit Section of this report.

Conference 2023	Joe Weglarz
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Planning for the 2023 Conference needs to begin ASAP. Joe Weglarz indicated that he would be willing to work on this if the Albany Wolff Road Marriott was the location selected for the event and he had help from other regions. We've used this venue before which would make it easier to develop a plan then finding a new venue. Regions 3 and 4 offered to assist Joe with planning Region 1 is concerned about timing at this stage and would be open to future working on future events, specifically the 2024 conference. Region 2 offered to host the 2025 Conference. .

Adrienne indicated that we need to provide an update at the October meeting, so we need to make some decisions on locations and region.

Regional Updates

Regional updates for those submitted to the Executive Council can be found in the Exhibit Section of this report.

Old Business

Conference 2021

The Council continues to discuss the issue with the Long Island Hilton Hotel and the 2020/2021 conference deposit. A review of letter to Hilton Long Island requesting reconsideration of decision to hold deposit after COVID forced cancelation, was conducted. The letter will be edited and resent to the Executive Council for review within the next week.

New Business

Conference technology will be reviewed with the Hotel to ensure that we have proper connections in place.

MOTION: A motion was made by Peg Stearns, seconded by Erica Follick, to reimburse Sonya Stein for her travel expenses to the Executive Council meeting that precedes the 2022 Conference.

Next Meetings

August 8th 2:00-4:00 (Remote Meeting) **date will be finalized at meeting.* New EC members will be invited to attend.

October 24th High Peaks Resort, Lake Placid, NY NYSFAA pays for travel to and from hotel for NYSFAAA meetings during EC meetings.

Adjournment motion made by Rochelle Filler, seconded by Renee Swift to adjourn the meeting at 11:04 AM

Exhibits



September 1, 2022

Dear Friend,

The New York State Financial Aid Administrators Association (NYSFAAA) will be hosting its 53rd Annual NYSF AAA Conference in Lake Placid, NY from October 25th – 27th at the High Peaks Resort.

Established in 1968, NYSF AAA is a charitable, volunteer association of financial aid professionals advocating for and promoting equal access to post-secondary education for all students. Comprised of over 1,100 members, NYSF AAA offers education, professional development, and networking opportunities for its members and for colleagues in related educational, business, and governmental professions. Our annual conference is an opportunity for us to discuss the issues and trends currently facing financial aid and higher education in New York State.

During the conference we raffle off donations to our members for all the hard work and dedication they provide throughout the year promoting higher education to our youth. The proceeds from the raffle this year will benefit our Scholarship Committee, which sponsors scholarships for students from across New York State to assist in reducing the financial barriers associated with their college experience. We are requesting items from local Lake Placid businesses to raise money through a raffle. We are also putting together a list of businesses providing discounts to our conference attendees during the 25th – 27th to bolster sales in the downtown area and would like to include your business.

Thank you for your consideration. Please email me at decastaa@postdam.edu if you would like to contribute to this worthy cause, or to be included in our list of partners providing discounts. If I do not hear from you, I will be following up with you on Monday, September 12th. If you have any questions or need more information before this date, please feel free to contact me at 315-267-4300.

Sincerely,

Abby DeCastro

Financial Aid Advisor, 2022 NYSF AAA Conference Entertainment Committee

SUNY Potsdam

decastaa@potsdam.edu

Region #1 Report
NYSFAAA Exec Council Meeting
June 13-14, 2022

1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: May 5,2022 at Scoob's Restaurant, Lancaster NY

Attendees =8

Topics and Training details: HESC update; Discussion of update to Federal methodology and FAFSA changes for 2024-2025

- 2 Other Training events that Region was involved in: some attendees viewed FSA federal updated
- 3 Treasury update: Kathy Michalski \$3,753.11 in account
- 4 Committee Reports: Upcoming elections for 1st VP, 2nd VP, Treasurer and Secretary & Region 1 Chairperson and Treasurer
- 5 Conference news : N/A
- 6 Upcoming meetings and events: TBD
- 7 Regional comments/Recommendations: N/A

Submitted: 06/09/2022

Nicole Griffo

Region #2 Report
NYSFAAA Exec Council Meeting
Date May 6, 2022

2. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: May 6, 2022

Attendees = 14

Topics and Training details: None

3 Other Training events that Region was involved in : none

4 Treasury update: Balance 7312.43

5 Committee Reports: elections held for all positions except Treasurer. Want to have people in place by end of June.

6 Upcoming meetings and events : none

7 Regional comments/Recommendations: Region two is not interested in co-hosting 2023 conference at this time. Would like to host 2024 or 2025 on own in Rochester.

Region IV Report
NYSFAAA Exec Council Meeting
6/14/21 – 6/15/21

1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: 3/9/22 and 5/25/22

Attendees – 6 on 3/9/22 and 12 on 5/25/22

Topics and Training details: First “In person” meeting

2. Other Training events that Region was involved in : HESC Update

3 Treasury update: Andrea Wedler reports our account balance is \$7,388.81

4. Committee Reports: No committee reports

5. Conference news (If your region is involved in Conference planning): N/A

6. Upcoming meetings and events: TBD

7. Regional comments/Recommendations: N/A

**Region VII Quarterly Report
2021-2022**

1. Meetings held this year

Date and Location:

Topic: Scholarship Strategies

3/23/22 Region VII Meeting (ZOOM) 37 Attendees

Topic: HESC Update with Michael Turner and Lisa Simpson, Round Table
Discussion how institutions are serving students

Working on planning a Tri-Regional Meeting with regions 5 and 6 for
September

2. Other training events that Region was involved in: N/A

3. Treasury update: As of September 9th, 2021, \$4775.26,

As of June 2022, \$5,205.26.

4. Committee reports: N/A

5. Conference news (if your Region is involved in Conference planning) N/A

6. Upcoming meetings and events: Working on planning a Tri-Regional Meeting with regions 5 and 6 for
September

7. Regional comments/recommendations : N/A

SUBMITTED BY: Erica Follick

DATE: Jun 14, 2022

Region #8 Report
NYSFAAA Exec Council Meeting

Date: June 13, 2022

1. MEETINGS SINCE LAST EXEC COUNCIL MEETING

Date and Location: March 22, 2022 (Virtual)

Attendees = 22

Topics and Training details: Conference planning overview; HESC updates and Q&A

Date and Location: June 10, 2022 (Lake Placid, NY)

Attendees = 20: 12 (in person) + 8 (virtual)

Topics and Training details: HESC update & Conference planning

2. Other Training events that Region was involved in: N/A
3. Treasury update: Nicole Adner provided the update at March meeting; no June updates. Current balance is 3461.68 with the activity of 185.00 in revenue sharing.
4. Committee Reports from 6/10 meeting:
 - a. Membership update: Elyse Relyea- concerned about a recent email that showed Region VIII without representation. Please confirm Elyse is on record as Region VIII rep. Most recent regional membership was 42.
 - b. Awards Committee: Nicole Adner noted no updates
 - c. Novice update:
 - i. April: Courtney Rust provided updates on new Novice Co-chairs; Announced 2022 dates; Virtual format via Whova and Harry Potter themed (yay!)
 - ii. June: Theme changed to TV Shows; 116 registered; only 6 small group leaders so there's large online groups which may be challenging but is doable
 - d. Statewide Training:
 - i. April: Abigail DeCastro provided update on 2022 schedule and upcoming programming; reminder that trainings are always recorded and archived if someone misses them; request to forward training topics to Abby
 - ii. June: update on upcoming programming; Forward ideas and training requests to Abby
 - e. TICC: Sonya Stein no meetings, no updates; Still waiting for new leadership
 - f. Diversity Committee:
 - i. April: Todd Moravec provided updates on committees most recent meetings. They're planning hands on and interactive training for October conference. Will be hosting two upcoming SWT webinars.
 - ii. June: no updates; Will be staying on committee despite his change in position at PSU
 - g. EC Update: Sonya Stein provided highlights from April meeting
 - h. Elections (Hannah) provided updates on the four open positions and their outcomes
5. Conference news (If your region is involved in Conference planning)

- a. NASFAA Credential being offered Tuesday morning with no charge; Still deciding on topic (R2T4/SAP/DL); Need presenter- any volunteers from EC?
 - b. Since our last report, we launched a membership survey to help the Programming committee rank current list of offerings, solicit additional session ideas, and presenters. Based on the responses, the Entertainment Committee agreed to host trivia as evening entertainment and NOT to invest significant resources into pre-conference programming (although they will be providing low-cost/self-pay options). The Transportation Committee concluded there wasn't enough interest in chartering transportation and will be providing a ride share board instead. Our hope is that members unable to drive may be able to take public transportation to a nearby train station/airport and then use the rideshare board to get to LP.
 - c. The Programming Committee selected keynote speaker: Bethany Garretson. Bethany is a full-time instructor at Paul Smith's College, teaches at Clarkson University, and does work with Saint Lawrence University on climate at high altitude. She's a passionate mountain climber, social, advocate, and writer. She's fiercely committed to increasing diversity in the backcountry. She holds the record for unassisted thru hiking the ADK 46 (7 days, four hours, and 50 minutes).
6. Upcoming meetings and events: Conference committee co-chairs are meeting twice per month; Committee Chairs are meeting weekly; next full regional meeting. Next meeting will be at High Peaks in early/mid-September (date TBD)
 7. Regional comments/Recommendations: a few committee members have not heard from their committee chairs and have had no meetings since 2021. Can we encourage chairs to provide an email communication once per quarter?



HESC Update

June 2022

2022-23 NYS Enacted Budget Highlights



Full Support for HESC programs

- Continuing support for over \$1 billion in HESC administered financial aid programs
 - TAP
 - Excelsior
 - ETA
 - All other HESC programs

Part-time TAP

- Expands Part-time TAP program to cover all otherwise TAP-eligible students
- Must meet all eligibility requirements for TAP
- Enrolled in 6-11 credits
- Eliminates past eligibility requirement to have earned 12 credits or more in each of the two consecutive semesters, for a minimum total of 24 credits earned

Part-time TAP

- Expands eligibility to part-time students in non-degree training programs
 - Students attending community colleges in programs that directly lead to employment or advancement in a significant industry
 - Identified in NYS Department of Labor's Statewide Significant Industries Report

TAP for Incarcerated Individuals

- Provides incarcerated individuals an opportunity to gain an education by restoring TAP funding
- Certify TAP in same manner as other eligible students
- Schools must track and report to HESC number of incarcerated TAP recipients each term for 2022-23 academic year

Excelsior Scholarship

- Tuition rate charged for Excelsior recipients for 2022-23 is now set at current rate
 - All students will be charged current rate



STEM for Private College Students

- Funding expired in 2021-22 for new recipients attending private colleges
- No new awards for the 2022-23 year
- Current recipients with remaining eligibility will continue to receive all payments for which they are eligible



Other NYS Scholarships

- McGee Nursing Faculty Scholarship
 - \$2 million in additional funding
- Young Farmers Loan Forgiveness Program
 - \$500,000 in additional funding
- Spending and award caps permanently lifted for these programs



2022-23 Processing



2022-23 Student Status Listing (SSL)

- Only fully-approved students listed on SSL
- Students meeting initial requirements but pending verification per below will no longer be listed:
 - Income
 - Residency
 - Missing documentation
- Awards appearing on SSL will be placed on roster for processing
- Excelsior recipients will not appear on the SSL until fully verified and eligible to be placed on manifest

2022-23 Student Status Listing (SSL)

- Awards not contingent on income appear on SSL once application/renewal process is complete for these programs:
 - NYS Scholarship for Academic Excellence
 - World Trade Center Memorial Scholarship
- Students can have an award on SSL but TAP still pending IVP

2022-23 Student Status Listing (SSL)

- To review pending applications, use:
 - Application Status Report QGA010
 - Listed under customized reports
- Report identifies any errors, missing applications, and denials



2022-23 Income Verification

- HESC no longer accepts copies of NYS or Federal tax returns
- Students whose income cannot be verified receive instructions on how to review and resolve mismatches with NYS Tax & Finance



Earner and Income Information Form

The screenshot shows the Higher Education Services Corporation website. At the top, there is a navigation bar with links for 'My Account', 'My NYS Financial Aid', 'Loan Forgiveness', and 'Loans', along with a 'Sign Out' button. Below the navigation bar, there is a breadcrumb trail: 'HESC Home / Review My NYS Financial Aid Information / Excelsior Scholarship Program / Earner and Income Information'. The main heading is 'Update your Earner and Income Information'. Below this, it says 'Please select one of the options below:' followed by four radio button options:

- I was claimed on my parent/stepparent's 2020 tax return
- I was not claimed by parent/stepparent's 2020 tax return and filed a 2020 NYS tax return
- I did not file a 2020 NYS tax return, but filed a 2020 federal tax return or I was claimed on my parent/stepparent's federal tax return
- I did not file nor was claimed on a 2020 NYS tax return or federal tax return

New for 2022: Excelsior/ETA Appeals

- For repeat recipients, approval of appeals for break in attendance or reduced credits now determined by schools
- HESC will continue to determine for first time applicants

New for 2022: Excelsior/ETA Appeals

- Schools will indicate break as part of certification
 - New certification fields online and batch processing
 - Information listed on SSL, manifest, and reports
 - New screen with historical data
- More details to follow shortly

Applications open for 2022-23

- Excelsior and Enhanced Tuitions Award (ETA) applications:
 - Opened on May 24th
 - Application closes on August 31st
- Income verification began on May 25th for 2022 new and current recipients

TAP Updates

- TAP estimator available for 2022
- TAP prepayment percentages for summer and fall 2022-23 are now available on the HESC website.

Student College ID Request

- Student College ID request for 2022 in production
- Make sure to provide ID information so student information will be sent to schools
- Once processed at HESC drops off list
- Continuous process so run job often
- Respond with HE9752 or 9754 file

2021-22 Processing

2021-22 Excelsior/ETA Processing

- Prior grant recipients **MUST** complete NYS Payment Application as part of renewal process
 - Students have received multiple emails to complete the NYS Payment Application
 - Deadline to file: June 30th
- Students who have not completed the NYS Payment Application by the deadline will not receive award payments

Resolving Excelsior/ETA Income Verification

- All applicants are submitted to NYS Tax & Finance to verify income (IVP)
 - Students with mismatches were sent an Excelsior or ETA Income Questionnaire
 - Must be completed and uploaded for further processing
 - Multiple requests sent to students

Resolving TAP Income Verification

- HESC notifies applicants to review correct errors on their 2021-22 NYS Payment Application
- Common errors include:
 - Incorrect parent SSN or Tax ID
 - Reported last name of parent does not match name used to file tax returns
 - Incorrect tax return type or filing status for student or parent

QGE012 – Pending Income Verification Report

The screenshot shows the 'Enter Report Parameters' form for QGE012 - Pending Income Verification Report. The form includes a left-hand navigation menu with categories like 'Misc Reports', 'Application Processing', 'College ID Collection', 'Enhanced Tuition Awards', 'Excelsior', 'ITS Processing', and 'Part-Time Scholarship'. The main form area contains the following fields and options:

- Report Output: PDF Specialized (U)
- College Code:
- Academic Year:
- Program Type:
- SSN:
- Student ID:
- Print Set Order:

For more information see [Working with Grants & Scholarship Certifications](#).

Certification Errors on HESCWeb for TAP and Excelsior/ETA



The screenshot shows the 'View/Correct Student TAP Certification Transactions' form. The left-hand navigation menu includes 'Student Tasks' such as 'View Student Record', 'Student Processing History', 'View Rolling History Data', 'View Family Member Verification', 'View ISIR Information', 'Search ISIR Information by Student Name', 'View Income Verification Process', 'View Student Refund', 'Search by Student Name Student Record Maintenance', 'Student ID Maintenance', 'View/Submit Pending Certification', 'View/Correct Student Certification', 'View/Correct Excelsior Student Certification Transactions', 'View/Correct ETA Student Certification Transactions', 'View/Update APTS Transactions', and 'View TAP Inquiry'. The main form area contains the following fields and options:

- College Code:
- Academic Year:
- Term:
- Roster Number:
- Date Processed:
- SSN:
- Student ID:
- Status:
- Sort:

For more information see [Working with Grants & Scholarship Certifications](#).

HESC Excelsior/ETA Error Report

1 MISC REPORTS: Select Standard Reports

APPLICATION PROCESSING: Select Standard Reports

COLLEGE ID COLLECTION: Select Standard Reports

ENHANCED TUITION AWARDS: Select Standard Reports

EXCELSIOR: Select Standard Reports

IST & PROCESSING: Select Standard Reports

PART-TIME SCHOLARSHIP: Select Standard Reports

2 & 5 Customized Reports

Select Customized Reports

Enter Report Parameter

Select Customized Reports - Enter Report Parameters

Select the type of output then enter your report criteria. Select a Sort Order to order your records. Click the Submit button to run your report. A new browser window will open and your report will be displayed. Too many open report windows at the same time may cause lengthy wait times. For the best performance, close the report window when you are done.

Required information is marked with a *

The PDF format can be read with the free [Adobe Acrobat](#) reader.

Available Options for DCFEH - Faceless or ETA Certification Error Report

Report Output: PDF Spreadsheet (U)

* College Code:

* Academic Year:

Term:

Program Code:

* First Sort Order:

For more information see [Working with Enter Report Parameters](#).



Higher Education Services Corporation

Upcoming
Training
Opportunities



Higher Education Services Corporation

HESC Summer Training opportunities

- TAP eligibility and certification
- 2022 Excelsior training and updates
 - New user training
 - New initiatives
 - Program updates
- Consolidated Roster processing
- APTS program
- Payments