



# MEMORANDUM

TAB F

April 10, 2020

## **Adoption of Policy R623, *Free Application for Federal Student Aid***

[S.B. 256, Student Aid Amendments](#) requires completion of the Free Application for Federal Student Aid (FAFSA) to be eligible for certain state financial aid for higher education. The Regents' Scholarship already requires completion of the FAFSA and the USHE institution financial aid offices rely on completion of the FAFSA in determining student eligibility for the Utah Access Promise Scholarship. This legislation requires applicants to complete the FAFSA for the other state aid programs administered by the Utah State Board of Regents:

- New Century Scholarship
- Career and Technical Education Scholarships
- Terrel H. Bell Education Scholarship Program
- Success Stipend Program Act
- Veterans Tuition Gap Program Act

The legislation allows flexibility for students to opt out of this requirement as well as allows financial aid advisors to withhold the requirement where completion of the FAFSA may harm a student's overall financial aid opportunities.

### **Commissioner's Recommendation**

The Commissioner recommends the Board adopt the policy R623 in accordance with SB 256, Student Aid Amendments.

## R623, Free Application for Federal Student Aid<sup>1</sup>

**R623-1 Purpose:** Require applicants for certain state scholarships to complete the Free Application for Federal Student Aid to ensure applicants have leveraged all available federal financial aid to cover the cost of higher education, provide instruction for applicants to opt out of the requirements of this policy, and provide instructions to financial aid officers.

### R-623-2 References

- 2.1 Utah Code Title 53B Part 8, Chapter 8, Section 105—New Century Scholarships
- 2.2 Utah Code Title 53B Part 8, Section 115, Career and Technical Education Scholarships
- 2.3 Utah Code Title 53B, Part 8, Section 116—Terrel H. Bell Education Scholarship Program
- 2.4 Utah Code Title 53B, Part 13a, Section 104—Success Stipend Program Act
- 2.5 Utah Code Title 53B, Part 13b, Section 104—Veterans Tuition Gap Program Act

### R-623-3 Definitions

**3.1 Free Application for Federal Student Aid (FAFSA)** The financial reporting forms used for application and reapplication to determine the need and eligibility of a student for financial assistance as described in 20 USC 1089.

### R-623-4 Policy

**4.1** Institutions shall require applicants for the following scholarships to complete the FAFSA to the extent that it will benefit an individual student's ability to maximize financial aid opportunities:

- 4.1.1 Terrel H. Bell Education Scholarship Program—Regent Policy R621
- 4.1.2 New Century Scholarship—Regent Policy R604
- 4.1.3 Higher Education Success Stipend Program—Regent Policy R605
- 4.1.4 Veterans Tuition Gap Program—Regent Policy R611

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<sup>1</sup> Adopted

**4.1.5 Career and Technical Education Scholarship Program—Regent Policy R622**

**4.2 Applicant Opt Out:** An applicant may opt out of the requirement to complete the FAFSA due to:

**4.2.1** Financial ineligibility for any potential grant or other financial aid;

**4.2.2** Personal privacy concerns; or

**4.2.3** Advice of the institution based on its assessment of the factors that may impact a student's ability to access maximum financial aid opportunities.

**4.3** Institution advisors shall, to the extent practicable, encourage all of students to annually complete the FAFSA.

**4.4** Institutions shall ensure staff and faculty who advise students on financial aid are properly trained on the benefits of completing the FAFSA.