



Executive Policy Chapter: Chapter 6, Tuition, Financial Assistance, and Fees
Executive Policy: EP 6.204, Student Financial Assistance
Effective Date: ~~January 2015~~December 2022
Prior Dates Amended: May 2011, January 2015
Responsible Office: Office of the Associate Vice President for Student Affairs
Governing Board of Regents Policy: Chapter 6, Section 6-4
Review Date: ~~July 2017~~December 2025

I. Purpose

- A. To implement Regents Policy related to the Student Financial Assistance Program at the University of Hawai'i.
- B. To establish guidelines and promulgate procedures for campuses to implement the Student Financial Assistance Program in keeping with the following policy considerations outlined in Regents Policy, Chapter 6:
 1. The types of financial assistance to be awarded and paid to students;
 2. The appropriate share of tuition revenues that should be devoted to financial assistance;
 3. The appropriate share of financial assistance for need-based and non-need-based awards;
 4. The appropriate share of financial assistance earmarked for Hawai'i residents;
 5. The appropriate share of financial assistance earmarked for undergraduates;
 6. The extent to which shares should vary by campus, based on mission and programs.

II. Definitions

~~No policy specific or unique definitions apply.~~

A. Free Application for Federal Student Aid (FAFSA) - The FAFSA is a form completed by students (and parents of dependent students) to apply for federal grants, work-study, and loan options. Financial aid officers use FAFSA data to determine a student's federal aid eligibility. The basic eligibility requirements for completing a FAFSA are that a student must:

1. demonstrate financial need (for most programs);

2. be a U.S. citizen or an eligible non-citizen;
3. have a valid Social Security number (with the exception of students from the Republic of the Marshall Islands, Federated States of Micronesia, or the Republic of Palau);
4. be enrolled or accepted for enrollment as a regular student in an eligible degree or certificate program;
5. be enrolled at least half-time to be eligible for Direct Loan Program funds;
6. maintain satisfactory academic progress in college or career school;
7. sign the certification statement on the FAFSA form stating that
 - a. you are not in default on a federal student loan,
 - b. you do not owe money on a federal student grant, and
 - c. you will use federal student aid only for educational purposes; and
 - d. show you're qualified to obtain a college or career school education by:
 - 1) having a high school diploma or a recognized equivalent such as a General Educational Development (GED) certificate;
 - 2) completing a high school education in a homeschool setting approved under state law (or—if state law does not require a homeschooled student to obtain a completion credential—completing a high school education in a homeschool setting that qualifies as an exemption from compulsory attendance requirements under state law); or
 - 3) enrolling in an eligible career pathway program and meeting one of the "ability-to-benefit" alternatives.

Additional eligibility requirements can apply in certain situations including for non-U.S. citizens, students with criminal convictions, and students with intellectual disabilities.

B. FAFSA Eligible Non-Citizens - A U.S. national (includes natives of American Samoa or Swains Island), U.S. permanent resident (who has an I-151, I-551 or I-551C Permanent Resident Card), or an individual who has an Arrival-Departure Record (I-94) from U.S. Citizenship and Immigration Services (USCIS) showing one of the following designations:

1. "Refugee"
2. "Asylum Granted"
3. "Cuban-Haitian Entrant (Status Pending)"
4. "Conditional Entrant" (valid only if issued before April 1, 1980)
5. Victims of human trafficking, T-visa (T-2, T-3, or T-4, etc.) holder
6. "Parolee" (You must be paroled into the United States for at least one year, and you must be able to provide evidence from the USCIS that you are in the United States for other than a temporary purpose and that you intend to become a U.S. citizen or permanent resident.)

C. Cost of Attendance (COA) - Types of costs included in a student's COA are determined by law under the Higher Education Act, Sec. 472. Each school must

determine the appropriate and reasonable amounts to include for each eligible COA category. COA is the sum of a student's tuition, fees, allowances for books and supplies, transportation, miscellaneous personal expenses, and allowance for room and board/meals.

D. UH Classified Student - Those students who have been accepted through the formal admissions process and are candidates for an approved academic degree or academic certificate.

III. **Executive Policy**

A. Types of Financial Assistance

1. Consistent with Board of Regents policy, campuses use a portion of their tuition revenues to provide financial assistance to students.
2. The campuses are authorized to use tuition revenues to provide the following awards pursuant to BOR policy:
 - a. UH Opportunity Grants and sub-categories thereof;
 - b. UH Achievement Scholarships and sub-categories thereof including UH International Scholarships, UH Pacific Islander Scholarships;
 - b.c. Graduate (GA), teaching (TA) and research (RA) assistants as a function of their appointment to an assistantship;
 - e.d. Certain others as determined by the chancellors or their designee(s) based on the mission of their campuses and programs.
3. UH Opportunity Grants – are need-based grants intended to protect the access of low-income students to higher education.
 - a. Eligibility
 - 1) To be eligible for an Opportunity Grant, an individual must:
 - a) Be a classified new or continuing, full-time or part time, resident or non-resident, undergraduate or graduate or post-baccalaureate student in a teacher preparation program at any campus or participate in a recognized pre-admission program maintained by various professional schools;
 - b) Complete the Free Application for Federal Student Aid (FAFSA).
 - 2) Continuing students must be making satisfactory academic progress, per federal guidelines, in any particular certificate or degree program.

2)3) Preference may be given to residents of Hawai'i and those who enroll half-time or greater.

b. Length of Grant

Grants shall be awarded for a regular academic year or a semester thereof, per federal financial aid guidelines.

c. Amount of Grant

The total value of this grant should not exceed the difference between the cost of attendance, which includes the cost of tuition and fees, books and supplies, housing, meals, personal costs and transportation, and the expected family contribution, after eligible Federal aid is applied. The authority to determine exceptions to the Federal Financial Aid guidelines for need-based aid is delegated to the chancellors or their designee(s).

4. UH Second Century Scholarships – are need-based grants intended to increase Native Hawaiian students' participation in post-secondary education.

a. Eligibility

1) To be eligible for a Second Century Scholarship, an individual must:

- a) be of Native Hawaiian ancestry, self-declared on admissions application (using raceethnicity and/or legacy codes);
- b) demonstrate financial need as determined by the completion of the Free Application for Federal Student Aid (FAFSA);
- c) be a classified new or continuing, undergraduate or graduate or post-baccalaureate student in a teacher preparation program at any campus or participate in a recognized pre-admission program maintained by various professional schools.

2) Preference will be given to residents of Hawai'i, and those who enroll half-time or greater.

b. Length of Scholarship

Scholarships shall be awarded for a regular academic year or a semester thereof, per federal financial aid guidelines.

c. Amount of Scholarship

The total value of this scholarship should not exceed the difference between the cost of attendance, which includes the cost of tuition and fees, books and supplies, housing, meals, personal costs and transportation, and the expected family contribution, after eligible Federal aid is applied. The authority to determine exceptions to the Federal Financial Aid guidelines for need-based aid is delegated to the chancellors or their designee(s).

5. UH Achievement Scholarships – are based on merit, service and other achievements that reflect University or campus missions. These would include the Regents and Presidential Scholarship Program, which has its implementation guidelines in BOR Policy, Chapter 6.

- a. Eligibility

- 1) To be eligible for an Achievement Scholarship, an individual must be a classified new or continuing, full-time or part-time, resident or non-resident, undergraduate or graduate or post-baccalaureate student in a ~~teacher preparation degree or certificate~~ program at any campus ~~or participate in a recognized pre-admission program maintained by various professional schools.~~
- 2) In all cases where there are equally qualified candidates, preference will be given to Hawai'i residents.
- 3) The responsibility for setting additional requirements and guidelines is delegated to the chancellors or their designee(s), who may increase or expand criteria based on the mission of their campuses and programs.
- 4) All recipients of Achievement Scholarships who are eligible to complete the Free Application for Federal Student Aid (FAFSA) are highly encouraged to complete it in order to ensure maximum eligibility for financial assistance from all sources.
 - a) For Regents and Presidential Scholarship recipients, any federal student financial aid grants may supplement current levels of grant and scholarship aid up to total cost of attendance.
 - b) For all other Achievement Scholarships, any federal student financial aid grants may replace or supplement current levels of aid, but such that the student will receive more than the amount of grant and scholarship aid initially received.

- b. Length of Scholarship

Scholarships shall be awarded for a regular academic year or a semester thereof. A student remains eligible while pursuing any approved particular certificate or degree program, as long as the student makes satisfactory academic progress.

c. Amount of Scholarship

The total value of this scholarship is determined by the chancellors or their designee(s) based on the mission of their campuses and programs.

6. UH International Student Scholarships – are intended to encourage highly qualified international students to attend and complete a degree or certificate at University of Hawai'i campuses.

a. Purpose

The purpose of the International Student Scholarship is to support the University of Hawai'i's recognized mission to provide relevant education and training to those who will assume positions of leadership and service in the Pacific and Asia region and around the world.

b. Eligibility

1) To be eligible for an International Student Scholarship, an individual must be a classified new or continuing, full-time, undergraduate or graduate student in a non-immigrant status at any campus or participate in a recognized pre-admission program maintained by various professional schools.

2) Award distribution is provided to students:

- a) From the Asia/Pacific region, excluding those eligible for Pacific Islander Scholarships described below;
- b) Studying the Asia/Pacific region, or
- c) Who provide international diversity, in keeping with the campus mission.

c. Amount and Length of Scholarship

The total value of this scholarship is determined by the chancellors based on the mission of their campuses and programs. The amount and length of the award may vary; and the maximum award is the difference between non-resident tuition and 150 per-cent of resident tuition, unless an

exchange agreement exists with another international institution of higher education.

7. UH International Exchange Scholarships – are based on agreements made by a campus, several campuses, or the UH System with an international institution. They are fundamentally different from the UH International Student Scholarships in that they do not apply to students who are seeking a degree or certificate.
 - a. Student exchange agreements are reciprocal in nature, i.e., UH students register and pay tuition to their UH home campus and then attend a partner institution on a waived tuition basis. In turn, students from partner institutions pay their home institution and attend the UH campus tuition-free.
 - b. System exchange agreements are basic agreements only that do not commit any campus resources.
 - c. Authority is delegated to the chancellors or their designee(s) to develop mutually beneficial international exchange agreements per campus mission and goals.
8. UH Pacific Islander Scholarships – may be given to citizens of certain Pacific Island jurisdictions to augment their total financial assistance package.

- a. Background

The University is committed to providing relevant education and training to those in the Pacific who will assume positions of leadership, responsibility and service in the Pacific region. Thus, students from this region may be eligible to be charged a subsidized rate of 150 percent of resident tuition. As specified in Board Policy, Chapter 6, Section 6-8d, the Office of the President updates and distributes the list of eligible Pacific Island jurisdictions in conjunction with the system senior student affairs officer

- b. Eligibility

To be eligible for a Pacific Islander scholarship, an individual must be a citizen of one of the eligible Pacific Island jurisdictions. ~~They~~He or she must be a classified new or continuing, full-time or part-time, undergraduate or graduate or post-baccalaureate student in a teacher preparation program at any campus or participate in a recognized pre-admission program maintained by various professional schools.

- c. Amount and Length of Scholarship

The amount and length of the scholarship is left to the discretion of the chancellors or their designee(s) based on campus mission and goals.

B. Share of Tuition Revenue Set Aside

The share of UH tuition revenues that may be allocated to student financial assistance shall vary by institutional type.

1. Share of tuition assistance for need-based aid

a. ~~By AY 2016-2017, the following allocations~~ for need-based aid shall occur:

- 1) At UH Mānoa, a minimum of 10% of the average of the actual tuition revenues from the previous three completed academic years shall be awarded in need-based aid.
- 2) At UH Hilo and UH West O'ahu, a minimum of 12% of the average of the actual tuition revenues from the previous three completed academic years shall be awarded in need-based aid.
- 3) At the UH Community Colleges, a minimum of 8.8% of the average of the actual tuition revenues from the previous three completed academic years shall be awarded in need-based aid.

~~2. Share of tuition assistance for non-need based aid~~

~~b. Starting in AY 2015-2016, Chancellors are to determine the amount of tuition assistance for non-need based aid. The amount awarded for non-need based aid shall be not less than what was awarded in AY 2013-2014.~~

~~3.b.~~ Of the minimum set-aside for need-based aid (i.e. UH Opportunity Grants), a portion will be used to fund the UH Second Century Scholarships. The portion will be determined by the Chancellors working in conjunction with the system student affairs officer.

2. Share of tuition assistance for non-need based aid

a. Each campus leader may determine the amount of tuition assistance for non-need-based aid based on campus missions and goals including, but not limited to, purposes outlined in Regents Policy developing high-quality academic programs and fostering diverse and stimulating campus environments.

b. Campus leaders are to determine the appropriate distribution of funding among the UH Achievement Scholarships, UH International Student Scholarships, and/or UH Pacific Islander Scholarships in consultation with enrollment management leadership.

4.3. Tuition assistance that is provided as a function or benefit of employment is not included in the foregoing amounts (i.e., such assistance may be above and beyond the amounts stipulated).

~~5. Chancellors are to determine the appropriate distribution of funding among the UH Achievement Scholarships, UH International Student Scholarships, and/or UH Pacific Islander Scholarships in consultation with faculty and student bodies.~~

~~Pacific Islands students who enroll before Fall 2007 will be allowed to continue paying resident tuition (per prior policy) as long as they maintain their eligibility and remain continuously enrolled in their current degree or program. The Office of the President, in conjunction with the system senior student affairs officer, updates and distributes the list of eligible Pacific Island jurisdictions.~~

C. Share of tuition assistance earmarked for residents

The portion of tuition revenues allocated to Hawai'i residents and non-residents toward student financial assistance shall vary by institutional type:

1. UH Opportunity Grants – The maximum share of the total amount of financial assistance available for UH Opportunity Grants to non-residents is 35 percent at the baccalaureate campuses and 15 percent at the community colleges. This is in keeping with Executive Policy on campus ceilings for non-resident undergraduate enrollment, EP 5.208. Eligibility for need-based aid is determined according to federal financial aid guidelines, but Chancellors are given the latitude to adjust the determination of need in special cases.
2. UH Achievement Scholarships – In all cases where there are equally qualified candidates, preference will go to Hawai'i resident students. Campuses may create UH Achievement Scholarships in keeping with their mission and program priorities.

D. Share of tuition assistance earmarked for undergraduates

The portion of UH tuition revenues that shall be awarded to undergraduates and the share that shall be awarded to graduate students shall be determined by the Chancellor in keeping with the mission and program priorities of the campus.

- E. The extent to which grants or scholarships are available for summer session or continuing education programs is delegated to the Chancellors.
- F. Students may receive more than one source of financial assistance. All financial assistance must be reported to the campus financial aid office, and if students if, however, they receive any need-based aid, their total award must be coordinated by the campus financial aid office to ensure compliance with federal regulations.
- G. Annually, the University Officers Council of Chancellors shall complete a systematic review of all financial aid awarded using a report prepared by the Office of the Vice President for Academic Strategy. This review shall include, but is not limited to, dollars amounts awarded for need- and non-need-based aid, all sources of financial aid (institutional, state, federal, external sources, etc.), foregone tuition and adherence to this policy.

IV. Delegation of Authority

Authority to oversee and manage the student financial assistance program at a campus is delegated to the campus chancellor.

V. Contact Information

Office of the Associate Vice President for Student Affairs at telephone number 808-956-8753 or by email at avpsajavinar@hawaii.edu.

VI. References

Hawai'i Revised Statutes, Chapter 304A-501 and Chapter 304A-502

Approved:

David Lassner
President

Date