



# State of Wisconsin Higher Educational Aids Board

P.O. Box 7885  
Madison, WI 53707-7885  
E-mail: [HEABmail@wisconsin.gov](mailto:HEABmail@wisconsin.gov)

Telephone: (608) 267-2206  
Fax: (608) 267-2808  
Web: <http://heab.state.wi.us>

**Tony Evers**  
Governor

**Connie Hutchison, PhD**  
Executive Secretary

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## Monthly Memo December 2019

**Happy Holidays!**

In this issue:

- 2020-2021 Wisconsin Grant – Tribal Formula
- Second semester vouchering
- Refund Processing
- Notification list 2020-2021
- Grant Updates – Committed and Spent
- Upcoming Events

### 2020-2021 Formula

The 2020-2021 formula for the Wisconsin Grant – Tribal was approved by the Higher Educational Aids Board on December 4, 2019 teleconference board meeting.

#### **Wisconsin Grant – Tribal**

$(\$6,560 - \text{EFC}) \times 32.01\% = \text{Award}$

$(\text{Student Budget} - \text{Expected Family Contribution}) \times \text{Student Award Percentage} = \text{Award}$

$(\$6,560 - \text{EFC}) \times 32.01\% = \text{Award}$

Maximum Award: \$2,100

Minimum Award: \$250

### Second Semester Vouchering

Second semester vouchering requests began on December 3, 2019.

## Sending Refund lists securely via e-mail

Please use these instructions when sending refund lists electronically.

### 1. Create your refund list

- Always create your list of refunds with the following columns in an excel spreadsheet:

Last name, First name, SSN#, Disbursement Code, School #, Voucher #, Refund Amount, and include the Check # and Check Date if available.

- Columns will autoformat where necessary when using our template

CELL NAME	EXPLANATION
Last Name	
First Name	
Social Security #	Enter numbers only, no spaces or hyphens (ie 123456798)
Disbursement Code	10=WG-UW, 15=WG-TC, 20=TIP, 30=WG-PNP, 35=WG-PNP-Aviation Grant, 45=Handicapped, 50=Indian, 55=WG-TR, 60=Minority Grant, 65=Minority Teacher Loan, 75=TVI Loan, 78=WI Covenant Foundation Grant, 79=Wisconsin Covenant Grant, 80=Nursing Student Loan, 90=AES, 92= TES, 95=Teacher Loan
School Code	Your 3-digit school code assigned by HEAB
Semester	Semester to which refund applies: Fall/Spr or 1/2; trimester schools = Fall/Win/Spr or 1/2/3
Academic Year	Academic Year to which refund applies (ie 97-98)
Voucher Number	Voucher number of original disbursement from HEAB
Refund Amount	whole dollars only [unless 0607 or prior]
Check Date*	mm/dd/ccyy
Check Number**	Number on check being returned

2. Draft an email to HEAB and attach your list using the secure site

Here is an image of what the secure email interface looks like:

- There must be text in both the subject line and in the body of the email before the system will allow a message to be sent.
- Please remember to sign your secure message with your name, email address and phone #. The default email addresses for the secure IDs are generally those of the Directors of Financial Aid and you will need to obtain the password information to use the site.
- Only one file may be attached to an email message.
- Send the refund file to the HEAB email address: [HEABmail@wisconsin.gov](mailto:HEABmail@wisconsin.gov)
- You may send information securely to any staff member and CC any other staff member.
- All email use is tracked in your activity history and records when an email was sent and if there was an attachment.

If you have any questions about how to send a secure email for an electronic refunds list, contact Brenda Stoffels at 608-267-2206 or [Brenda.Stoffels@wisconsin.gov](mailto:Brenda.Stoffels@wisconsin.gov)

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<b>Wisconsin Grant – Private, non-profit</b>		
<i>Committed</i>	. TdP. dX#	. S+P++X#
<i>Spent</i>	MSP+dX#	MTPOTX#
<b>Wisconsin Grant - Tribal</b>		
<i>Committed</i>	+, WPO+X#	. WdP+dX#
<i>Spent</i>	MdP+TX#	WMPSEX#
<b>Wisconsin Grant – UW</b>		
<i>Committed</i>	. WSPO, X#	. WWP+SX#
<i>Spent</i>	MdPTWX#	T. PTMX#
<b>Wisconsin Grant – Technical</b>		
<i>Committed</i>	. eeP, eX#	. eMPMdX#
<i>Spent</i>	MOPO+X#	MTPW+X#

## Upcoming Events

**Scheduled HEAB board meetings:** February 14, April 10 and July 17, 2020.

**HEAB training dates:** January 16, 2020.

HEAB conducts one-day training programs for new and continuing financial aid administrators. The training session covers all aspects of the programs administered by HEAB, including:

- Goals of State Aid
- *Eligibility for State Aid*
- The Notification List
- *The Voucher Process*
- Return of State Funds
- *Submitting and Receiving Data to/from HEAB*
- Overviews of the Individual HEAB Programs

The program begins at 10:00 a.m. and ends no later than 3:00 p.m. It is held at the HEAB offices at 4822 Madison Yards Way, 7<sup>th</sup> floor North, Madison, WI [[google map](#)]. We have room for up to 6 people at each session. Please let us know if you are coming to training as materials are printed based on the number of people attending. To register for a session or for more information, please contact Brenda Stoffels at (608) 267-2206 or by email at [Brenda.stoffels@wi.gov](mailto:Brenda.stoffels@wi.gov).

If you have any questions, concerns or comments please contact Connie Hutchison at (608) 267-2206 or by email at [connie.hutchison@wi.gov](mailto:connie.hutchison@wi.gov). Thank you!