

Santa Rosa Junior College Financial Aid Guidance for Reporting Other Financial Aid (OFA)

SRJC has created this guidance for SRJC programs to provide some direction on frequently asked questions regarding what needs to be reported as direct aid to students and counted as other financial aid (OFA) and counted towards the student’s unmet financial aid need. This is informed by how other community college districts handle OFA and guidance from the Chancellor’s Office, and federal resources

The overarching premise is that if something has a cash value (i.e. gift card) or can be easily tracked per student, is related to their education (i.e. a textbook given to a student), and is something that the student would normally be obligated to pay then it should be tracked and reported as OFA. Additionally, we are seeing that schools are moving away from gift cards, supplies, promotional items, and moving towards cash stipends which can be used by the student for their immediate needs for direct benefit and is easier to account for.

Below is some guidance for specific items that have been brought up for clarification:

Item	Examples	Does this need to be reported as direct aid?	Rationale	Object Code and Description to Use
Gift Cards, Stipends, Grants	Grants, Loans, Scholarships	Yes	Direct aid	7511 (Any Student Aid Paid through Bank Mobile)
	Book Grants: EOPS provides a book grant for each student each semester.	Yes	Direct aid	7512 (Book Grants)
	Emergency Financial Assistance: Emergency financial assistance includes any payment of grant or loan aid to a student for unexpected expenses such unexpected	No, but it still needs to be tracked but will not be included as financial assistance.	Exempted per Legislation must be reasonable as determined by SRJC. *	7513 (Emergency Financial Aid – Paid Through Bank Mobile as Aid)

Gift Cards, Stipends, Grants	expenses for food, housing, course materials or equipment, or transportation.			
	Gift Cards: Gas cards, Visa gift cards, Amazon gift cards, all gift cards	Yes	Cash value.	7677 (Gift Cards)
Textbooks, including book vouchers, paying for textbook rental fees (Note: programs approved to operate a lending library, i.e. textbooks retained by department, are not reported as direct aid)	EOPS provides a book voucher for each student each semester.	Yes	Can be tracked and related to their education. Is direct aid.	7674 (Books/Supplies)
	Buying the Books Supplies and giving them to the students.	Yes	Cash Value. Can be tracked and related to their education. Is direct aid.	7674 (Books/Supplies)
	Buying or renting textbooks for the student.	Yes	Can be tracked and related to their education. Is direct aid.	7674 (Books/Supplies)
	Providing Book/Supplies Vouchers for students through SRJC Bookstore	Yes	Can be tracked and related to their education. Is direct aid.	7674 (Books/Supplies)
Lending Library	Programs approved to operate a lending library, i.e. textbooks retained by department	No	Books are not retained by the student	4230 (Dept. Based Lending Library)
Instructional materials, lab fees,	Easels and paint supplies for an art class, graphic	Yes	Can be tracked and related to their education. Is direct aid.	7674 (Books/Supplies)

or other items students are expected to purchase	calculator for math class, etc.			
	Student Fees, Instructional materials, lab fees: Paying for any Student Fees (paid as a journal entry, not as a check in Bank Mobile).	Yes	Cash value. Can be tracked and related to their education. Is direct aid.	7671 (Student Fees)
	Other: Buying other items for students that are not listed in any of the above categories. Example: A program buys caps and gowns (regalia) for their students.	Yes	Cash Value. Can be tracked and related to their education. Is direct aid.	7679 (Other)
Basic Needs Resources	Items easily tracked. Food Voucher, laptop, etc.	Yes	Cash Value. Can be tracked and related to their education. Is direct aid.	Appropriate 767x code 7670 (Transportation/Parking) 7675 (Food/Meals) 7674 (Books/Supplies) 7677 (Gift Cards) 7679 (Other)
	Self-service food pantry / clothing closet	No	Item is not easily tracked per student	4394 (Student related supplies)
	Transportation/Parking Paying for a Student's Parking (paid as a journal	Yes	Cash value.	7670 (Transportation/Parking)

Basic Needs Resources	entry, not as a check in Bank Mobile).			
	Student Fees, Instructional materials, lab fees Paying for any Student Fees (paid as a journal entry, not as a check in Bank Mobile).	Yes	Cash value. Can be tracked and related to their education. Is direct aid.	7671 (Student Fees)
	Medical/Dental/Vision Paying a third Party for a Medical/Dental or Vision Bill/Fee *The preference would be to pay the student through Bank Mobile (student aid) and have the student pay the provider directly.	Yes	Cash Value. Can be tracked and related to their education. Is direct aid.	7672 (Medical/Dental/Vision)
	Child Care Paying a third Party for a Child Care *The preference would be to pay the student through Bank Mobile (student aid) and have the student pay the provider directly.	Yes	Cash Value. Can be tracked and related to their education. Is direct aid.	7673 (Child Care)

Basic Needs Resources	Books/Supplies, Other items students are expected to purchase for a class Buying the Books or Supplies and giving them to the students. Easels and paint supplies for an art class, graphic calculator for math class, etc.	Yes	Cash Value. Can be tracked and related to their education. Is direct aid.	7674 (Books/Supplies)
	Buying or renting textbooks for students. Textbooks, paying for textbook rental fees (Note: programs approved to operate a lending library, i.e. textbooks retained by department, are not reported as direct aid)	Yes	Can be tracked and related to their education. Is direct aid.	7674 (Books/Supplies)
	Book/Supplies Vouchers through SRJC Bookstore Providing Book/Supplies Vouchers for students through SRJC Bookstore	Yes	Can be tracked and related to their education. Is direct aid.	7674 (Books/Supplies)

Basic Needs Resources	Gift Cards, Gas cards, Visa gift cards, Amazon gift cards, all gift cards.	Yes	Cash value.	7677 (Gift Cards)
	GED/Trainings/Testing Buying or paying for GED/Trainings/Testing	Yes	Cash Value. Can be tracked and related to their education. Is direct aid.	7678 (GED/Trainings/Testing)
	Other Buying other items for students that are not listed in any of the above categories. Example: A program buys caps and gowns (regalia) for their students.	Yes	Cash Value. Can be tracked and related to their education. Is direct aid.	7679 (Other)
	Other Emergency Financial Aid Buying or paying for Other Emergency Financial Aid that should not be considered Aid under the new legislation.	Yes	Cash Value. Can be tracked and related to their education. Is direct aid.	7680 (Other Emergency Fin Aid)
	Not Reported – Clothing closet with items donated by the community, food pantry where students			

	can get items and not every item is priced or tracked per student (i.e. a single apple.)			
Emergency Financial Assistance	Emergency financial assistance includes any payment of grant or loan aid to a student for unexpected expenses such unexpected expenses for food, housing, course materials or equipment, or transportation.	No, but it still needs to be tracked but will not be included as financial assistance.	Exempted per Legislation, must be reasonable as determined by SRJC. *	7513 (Emergency Financial Aid Paid Through Bank Mobile)
	Other Emergency Financial Aid: Buying or paying for Other Emergency Financial Aid that should not be considered Aid under the new legislation.	Yes	Cash Value. Can be tracked and related to their education. Is direct aid.	7680 (Other Emergency Fin Aid)
Promotional Items with SRJC Program/District Logo	Counseling hosts a time management workshop and provides planners with SRJC logo as a part of the workshop.	No, however, must be reasonable.	If the item is promotional (i.e. has a logo), it does not need to be reported.	4394 (Student related supplies)

	EOPS provides backpacks with the EOPS or SRJC logo.			
General supplies for a student workshop/event	NextUp hosts a stress relief activity during finals week and utilizes non-instructional supplies as part of the workshop.	No	Non-instructional supplies, promotional/outreach, and is not direct aid.	4390 (Other Supplies)
Food provided at an event/workshop	Food provided at an event/workshop that does not have a contract/service	No	Unable to quantify the amount of food each student took/ate.	4390 (Supplies)
*Insurance must be on file for vendor to come on property *In House Food Vendor has first right of refusal.	Student Life provides a taco bar during the first week of school to welcome back students.	No	Unable to quantify the amount of food each student took/ate.	5690 (Other contracts/rent/leases)
Graduation regalia and program stoles	A program buys caps and gowns (regalia) for their students.	Regalia – Yes	Regalia – can be tracked, related to their education	7679 (Other) for things that are tracked
	Umoja buys stoles with the Umoja logo for commencement.	Program Stoles – No (however must be reasonable)	Program Stoles – promotional, outreach	4394 (Student related supplies) for promotional items like program stoles
College Tours, including in-state,	Puente takes a group of students to visit Sonoma	No (if no money is given)	Not part of the students' educational requirements, and	5220 (Student Travel)

out-of-state, overnight trips that include transportation, food and lodging	State and provides transportation and lunch.	directly to the student)	not direct aid, if the school covers the expenses directly and no direct aid is provided to the student	
Cost of students attending conferences, including transportation, conference fee, food and lodging	SGA members attend a state-wide student leadership conference.	No (if no money is given directly to the student)	Not part of the students' educational requirements, and not direct aid, if the school covers the expenses directly and no direct aid is provided to the student	5220 (Student Travel)
A travel per diem or cash advance given directly to the student	Any cash/money given directly to the student – i.e. per diem, does need to be reported as direct aid.	Yes	Any money that is given directly to the student is aid.	7675 (Food/Meals)
Donated Items	Laptops donated to SRJC would be reported. Clothing donated to SRJC for a clothing closet would not be reported. In-kind items from an external organization and given directly to students might not be reported. **	It Depends	If the item is donated to SRJC and is easily tracked (i.e. laptops given to SRJC), then yes.	Donated items would not have an expense object code.

Expenses made from Student Government trust accounts, club fees	SGA uses their account to host a welcome day event.	No	Fees are paid by students, and not direct aid.	Club trust Runs through Melissa in Student Life SGA – 71, 72, 73 runs through the processes listed above.
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** Reasonable means that the expense was unexpected, documented, and retained by our office: Prior to providing emergency financial assistance to a student, an institution should document the student's request for assistance, including the unexpected expense that prompted the request. The institution should retain such documentation in the student's file for the normal record retention period.*

*** Gifts made to the SRJC Foundation and provided to students because they are a student are counted. The SRJC Foundation's purpose is to support the students and programs of SRJC. "It depends" is a good answer to this question regarding gifts from outside organizations. Cash support includes money and gifts for housing, food, clothing, car payments or expenses, medical and dental care, college costs, and money paid to someone else or paid for on the student's behalf (such as a friend or relative paying the student's electric bill or part of the student's rent). The basic rule is: if someone pays a cost the student is obligated to pay, the amount counts as cash support. In-kind support (such as food or clothing) from an outside entity would not be counted.*

FAQs:

1. Is there a dollar amount limit of when a supply should be counted against financial aid? For example, the cost of a pencil vs. backpack.
 - a. No. The department of education does not have a "de minimis" value for what is considered other financial aid (OFA.)

2. Do testing vouchers, payments for students' OSHA certification, CPR certification, and parking passes need to be reported as direct aid?
 - a. Yes. If we are paying for something the student would have normally paid for and they are receiving it because they are a student, then it typically needs to be reported as direct aid.

3. Does this only apply to students who are eligible for financial aid?
 - a. No, this applies to all students, regardless of if they are eligible for, or receiving, federal financial aid.

4. If a student is a high school dual enrollment student, do we still need to report OFA?
 - a. Yes. We must report OFA regardless of if the student is eligible for or receiving federal financial aid.

5. Are students required to sign a form stating they understand the value of the item they are receiving will be added to their financial aid award every time they receive an item?
 - a. If the item has a cash value (i.e. a gift card), then yes. However, students must acknowledge that items counted as direct aid will be reported to Financial Aid and included in their aid package.