



# **Supporting NM Students Transferring from a 2-year to a 4-year Institution**

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Do you, or have you, worked at a 2-year institution?



Do you, or have you, worked at a 4-year institution?



Did you attend a 4-year institution or a 2-year institution?

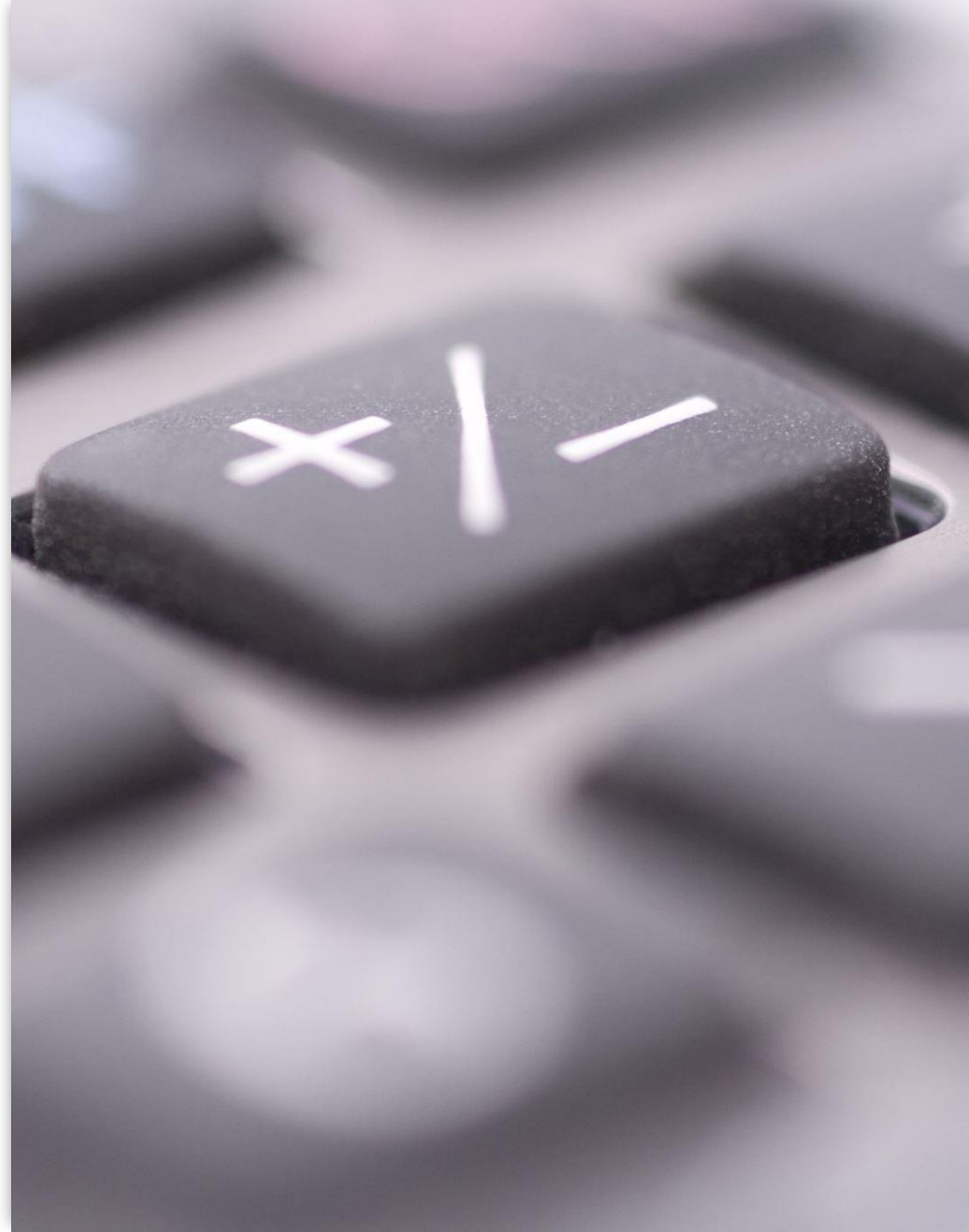
# Demographics of a 2-year Campus

- 1st Generation Students
- Rural Communities
- Low income/Underserved populations
- Non-Traditional students
- Dual Credit Students



# Financial Aid at a 2-year campus

- ✓ Dual Credit students
- ✓ Certificate Programs
- ✓ GED/Ability to Benefit Programs
- ✓ FAFSA Outreach at High Schools
- ✓ Student Employment
- ✓ Federal Verification/Processing
- ✓ Scholarship Awards/Applications
- ✓ Loans- Counseling and Monitoring
- ✓ SAP and Scholarship Petitions
- ✓ Transfer Support/Student Success events
- ✓ Donor Relations







## What that means for us. . . . .

- Our students are generally high-need
  - Opportunity to teach some financial literacy components
- No area of expertise, must be experts in ALL areas
- Can feel siloed from 4-year institutions
  - Network and connect for resources and tools to help us support our students
- More cases of fraud 2-year institutions
  - Open enrollment- not open financial aid

# What else that means for us. . . .



**Our interactions with students are different,  
so let's use that to our advantage**

How can we be intentional in our work?



**Coaching approach vs. Mentor approach**

Focus on the student and not their choices

How can we make our interactions meaningful?

# Financial Aid Transfer Process

- Students must apply to the school they will be transferring to
  - Send transcripts
- Complete Financial Aid Transfer Forms/Cancellation Forms for Federal Aid
  - Add transfer school to FAFSA
  - May get selected for Verification
  - Check Priority Dates
- Complete NM Scholarship Transfer Transcript
  - Pay attention to deadlines
- Should Contact Financial Aid Office at transfer school to review awards



# Transferring Federal Aid

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- Fast & (Fairly) Easy Process
- Financial Aid Cancellation Form
- Financial Transfer Form
  - New MPN/Counseling for loans
- Student awards may not look the same at new school
- Federal Databases to track students
  - COD, NSLDS





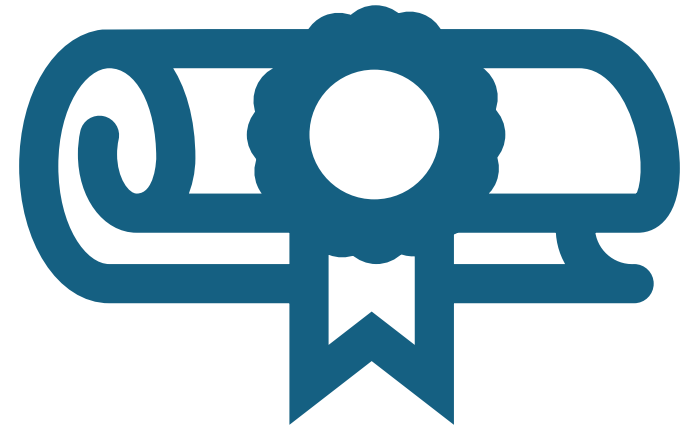
# Transferring NM Scholarships

- NM Scholarship Transfer Transcript
- No Scholarship databases to track usage
- Relies Heavily on accuracy of FA Officer who is completing form
- Form is complicated and tedious for FA Officers to complete
- Requirements from 2 year to 4 year are different



# Supporting NM Student Transfers

- Working with advisors to make sure students are preparing to transfer early, not at the end of their last semester
- Make sure they have sent transcripts, FA Transfer Forms and NMSTT
- FA Networking so that we can reach out to NM institutions for support and clarification
- Help alleviate stresses/fears about moving to a 4-year institution
  - Helping student sign up for transfer orientation
  - Campus Tours
  - Referring them to support programs/student groups
  - Providing resources/support as they transition



## New Mexico Scholarship Transfer Transcript

If student ever attended another New Mexico public post-secondary institution and received a New Mexico Scholars, Legislative Endowment, Lottery Success Scholarship, the institution the student is transferring from will, upon request, submit this form to the Financial Aid/Scholarship Office of the institution the student is planning to transfer to. The student should also make sure to request academic **transcripts** from each NM public post-secondary institution they have previously attended. The transcript(s) should be sent to the financial aid office the student is planning to transfer to.

\_\_\_\_\_  
Student's Printed Name

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
High School/GED Grad Date

**Institution Transferring To:**

The University of New Mexico  
Scholarship Office  
1155 University Blvd SE \* MSC11 6320  
Albuquerque, NM 87131-001  
Ph. 505.277.8900 \* Fax 505.277.6326

**Institution Transferring From:**

\_\_\_\_\_  
Attended from: \_\_\_\_\_ to: \_\_\_\_\_

To be completed by the Financial Aid/Scholarship Office of the Institution Transferring From:

Please check the appropriate box and indicate the academic year

Our records indicate the student received the following state scholarships:

New Mexico Scholar  Legislative Endowment

*Maximum award is 4 academic years or 8 terms*

Terms awarded:

Fall \_\_\_\_\_ Spring \_\_\_\_\_  
Fall \_\_\_\_\_ Spring \_\_\_\_\_  
Fall \_\_\_\_\_ Spring \_\_\_\_\_  
Fall \_\_\_\_\_ Spring \_\_\_\_\_  
Fall \_\_\_\_\_ Spring \_\_\_\_\_

Legislative Lottery Success

*8 terms maximum*

Terms awarded:

Fall \_\_\_\_\_ Spring \_\_\_\_\_  
Fall \_\_\_\_\_ Spring \_\_\_\_\_  
Fall \_\_\_\_\_ Spring \_\_\_\_\_  
Fall \_\_\_\_\_ Spring \_\_\_\_\_  
Fall \_\_\_\_\_ Spring \_\_\_\_\_

NM Opportunity Scholarship

Terms awarded:

Fall \_\_\_\_\_ Spring \_\_\_\_\_  
Fall \_\_\_\_\_ Spring \_\_\_\_\_  
Fall \_\_\_\_\_ Spring \_\_\_\_\_  
Fall \_\_\_\_\_ Spring \_\_\_\_\_  
Fall \_\_\_\_\_ Spring \_\_\_\_\_

Please list below all other New Mexico public, post-secondary institutions the student has previously attended:

\_\_\_\_\_  
\_\_\_\_\_

Additional Comments:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Is student still eligible for state based program listed above?  Yes  No

# New Mexico Scholarship Transfer Form

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Typed Name and Title

\_\_\_\_\_  
Name of Institution

\_\_\_\_\_  
Address

\_\_\_\_\_  
Telephone No./Email Address

Transferring TO UNM

# Tips for NMSTT

- Comment section is crucial!
  - Indicate if student has waivers
  - Include attempted hours
  - If NMSTT was not necessary, indicate that
- Do not send before grades are complete
- Should be send prior to semester starting
  - Pay Attention to State Drawdown Dates
- Keep in mind eligibility changes when moving schools
  - Student may have completed all terms at 2-year but is still eligible at a 4-year institution
  - Saying “No” to the question : Is student still eligible for state-based program listed above?
    - This can result in student losing NM Scholarships

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|  |                     |   |
|--|---------------------|---|
| Student's Printed Name _____   | Date of Birth _____ | High School/GED Grad Date _____   |
| <b>Institution Transferring To:</b><br>The University of New Mexico<br>Scholarship Office<br>1155 University Blvd SE * MSC11 6320<br>Albuquerque, NM 87131-6011<br>Ph. 505.277.8900 * Fax 505.277.6326 |                     | <b>Institution Transferring From:</b><br>_____<br>_____<br>Attended from: _____ to: _____ |

To be completed by the Financial Aid Scholarship Office of the Institution Transferring From:  
 Please check the appropriate box and indicate the academic year.

Our records indicate the student received the following state scholarships:

|   |  |  |   |
|---|--|--|---|
| <input type="checkbox"/> <b>New Mexico Scholar</b><br><small>Minimum award is 4 semesters years or 8 terms</small><br><small>Terms awarded:</small> | <input type="checkbox"/> <b>Legislative Endowment</b><br><small>4 terms maximum</small><br><small>Terms awarded:</small> | <input type="checkbox"/> <b>Legislative Lottery Success</b><br><small>4 terms maximum</small><br><small>Terms awarded:</small> | <input type="checkbox"/> <b>NM Opportunity Scholarship</b><br><small>Terms awarded:</small> |
| Fall _____ Spring _____   | Fall _____ Spring _____  | Fall _____ Spring _____  | Fall _____ Spring _____   |
| Fall _____ Spring _____   | Fall _____ Spring _____  | Fall _____ Spring _____  | Fall _____ Spring _____   |
| Fall _____ Spring _____   | Fall _____ Spring _____  | Fall _____ Spring _____  | Fall _____ Spring _____   |
| Fall _____ Spring _____   | Fall _____ Spring _____  | Fall _____ Spring _____  | Fall _____ Spring _____   |
| Fall _____ Spring _____   | Fall _____ Spring _____  | Fall _____ Spring _____  | Fall _____ Spring _____   |

Please list below all other New Mexico public, post-secondary institutions the student has previously attended:

\_\_\_\_\_

\_\_\_\_\_

Additional Comments:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Is student still eligible for state based program listed above?  Yes  No

|                            |                                    |
|----------------------------|------------------------------------|
| Authorized Signature _____ | Date _____                         |
| Typed Name and Title _____ | Name of Institution _____          |
| Address _____              | Telephone No./Postal Address _____ |



**Go to  
playspent.org  
on your phone**

**select "continue to spent" and play  
the game**



# What is your story?

- Money means different things to different people
- Money is a personal and touchy subject
- Learned financial habits, students need resources
- So, how do we still support students when we have difficult news to deliver?

- Think about the ways you relay information
  - What words do you use?
  - Do you listen?
- Small changes can completely change the interaction
- . . . .Why did you fail your Academic plan vs. what happened that semester?
- . . . I am sorry I know this is not the news you want to hear but I must deny your financial aid, let's talk about a plan for you to get it back

- Use your campus resources and community resources
- Network!
- Get other staff on board, have a consistent message in your office
  - Listen to feedback from staff and student employees

- Can not do it all, but can connect students to resources elsewhere
  - Warm hand offs
  - Support Campus/community events



Questions?