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| **WS 13-12** |
| **March 19, 2013** |
| **Financial Aid** |
| **Expires: Continuing** |

To: All Contractors

# From: Rodney Bradshaw

 Mike Temple

 Lucretia Hammond

Subject: Managing Financial Aid/Continued Funding

Purpose

Clarify rules for continued financial aid to a customer as she/he moves through her/his employment plan (see attached chart)

This Issuance replaces 11-25 Financial Aid/Continued Funding

Background

We want to be sure that customers use our financial aid to meet the goals they agreed to in their individual employment plans.

We do not want to continue funds to customers who are not making acceptable progress in meeting those goals or who have not made good use of financial aid they have received.

Scholarships

Although we *reserve* money for a scholarship through the expected course of a customer’s training, we *fund* a scholarship by semester, quarter or other unit.

Workforce Solutions’ scholarships include tuition/fees, books, supplies and other related education support expenses as described in our financial aid issuances and manual. We fund transportation expenses and child care expenses for customers who are going to school in addition to the scholarship. [See Issuance 13-06]

* We do not guarantee a customer continued funding through his or her expected course of training.
* We evaluate continued funding at the beginning of each segment of a customer’s training, such as a semester or quarter.
* To continue funding a scholarship and related transportation and child care expenses, we must have money available and the customer must have:
1. Reported to us as required;
2. Maintained grades/made progress in training; and
3. Limited changes in courses of training.

The Customer Requirements for Continued Scholarship Funding chart attached to this issuance provides detailed information about each of these requirements and staff procedures.

Products or Services

1. We limit the purchase of the same product or service for education, work search or work support.
2. Generally the dollar limits on financial aid by category and type [Issuance 13-06] provide acceptable guidance.
3. If a customer has not reached the limit in a particular category, but asks us to pay for a product or service we have already purchased for him or her, staff must document the reasons why the customer needs the product or service again.
* If the customer says the product was stolen, he/she must provide us with a copy of a police report or insurance claim to substantiate the theft.
* If the customer cannot provide a good explanation, staff will deny the request for additional financial aid to purchase the same product or service again.
* Staff will document the request for repurchase of a product or service, the customer’s explanation, and the staff determination in a counselor note.

Action

1. Make sure staff is aware of and use the new rules for continued financial aid
2. Personal Service Representatives must visit with customers to assure returning customer’s meet all the requirements for continued funding.
3. Personal Service Representatives must document the customer reported as required, maintained her grades and met the course change requirements.
4. Before allowing continued funding, call center staff must check customer files for grades and counselor notes showing the customer meets requirements for continued funding.
5. Call center staff must send a denial letter to any customer who does not meet the standards in this Issuance.

Questions

Staff should ask questions of their supervisors first. Direct questions for Board staff through the [Issuance](http://www.wrksolutions.com/staff-resources/issuances) Q&A.

Attachments

Workforce Solutions Customer Requirements for Continued Scholarship Funding

Revised Financial Aid Award Letter

| **Workforce Solutions****Customer Requirements for Continued Scholarship Funding** |
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|  | **Report as required** | **Maintain grades/Make progress** | **Course Changes** |
| Requirements | 1. Customers must inform the designated career office staff within 5 work days of the following events:
2. Training start date;
3. Course drops, course changes, changes in course of study (major);
4. Withdrawal from school.
5. Customers must report attendance :
6. as often and in the form we require if his/her eligibility depends upon cooperating with us to maintain benefits; or
7. as often as we have negotiated in the employment plan.
8. Customers receiving financial aid for transportation expenses must report attendance at least once every 2 weeks to continue receiving assistance.
9. Customers must report grades to us within 10 work days of the end of a training segment (semester, quarter, or course).
 | 1. Customers must make acceptable progress to continue receiving a scholarship. They
2. Must have a C (usually 2.0) average from the all previous period’s course work. The grade average includes all course work regardless of who paid for the course.
3. Must not be on academic probation of any kind.
 | 1. A customer may change to a different course of study only once prior to the completion of her course of study.
2. We consider a change in the course of study to apply to changes in the same occupational field (such as switching from training to be a nurse to training as a respiratory therapist) and to changes to a completely different field of study.
3. Once a customer completes her coursework or training, we will not pay for education in another field unless the customer is no longer able to work in the field of training. For example, if the customer is injured and cannot perform the work she originally trained for.
4. We will only allow only one drop for each student after the date the school allows full tuition refund for dropping a class.
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| Penalties & Exceptions | 1. Customers who fail to report as required may have their scholarships and all other financial aid discontinued.
2. Customers who have received but not reported grades to us for a prior period or who failed to report course changes, course drops or withdrawals are not eligible for continued scholarship and related financial aid.

*Note: When prior period grades are not available at the time we must issue a voucher for upcoming courses, check the most recent period’s grades before allowing continuing financial aid*. 1. Only an office manager may allow exceptions to the reporting requirements for extraordinary personal circumstances. The manager must document each exception and explain the reason for each exception in a counselor note.
 | 1. Staff will void all future commitments for a student who does not have a C (2.0) average at the end of any segment of training.

*Note: The student denied for poor grades may apply again when her grades meet this standard.* 1. Only an office manager may allow an exception for extraordinary personal circumstances. The manager must document the exception in a counselor note.
 | 1. A student who drops a class after the final drop date will not receive further scholarship financial aid for a full year.
2. Only an office manager may allow an exception for late drops for extraordinary circumstances. The manager must document and explain the exception in a counselor note.
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| Staff may not penalize a customer for not meeting any of these requirements until there is a signed award letter in the office files indicating the customer has been apprised of the requirements and possible penalties. |
| Notification | We will include these requirements in the award letter authorizing a scholarship and related education expenses. |
| Appeals | Customers tagged as WIA Adult, WIA Dislocated Worker, WIA Youth, TANF/Choices, TANF/NCP, CCDF or SNAP E&T may appeal the denial of financial aid using the Workforce Solutions appeals process. |