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| **WS 13-21 Update** |
| **November 4, 2013** |
| **FINANCIAL AID** |
| **Expires: Continuing** |

To: All Contractors

# From: Mike Temple

 Lucretia Hammond

Subject: Managing Financial Aid - Scholarship Registry/Wait List/Scholarship Contribution Limits

Purpose

Add directions for contacting customers about available funds.

This Issuance updates Issuance 13-21 Managing Financial Aid/Scholarship Registry/Wait List/ Scholarship Contribution Limits dated 7/3/2013

Background

When we determine we no longer have sufficient funds available in a particular fund stream for new financial aid commitments, we notify the system in the weekly funding alert to tell customers how to apply for a place on our Scholarship Registry.

Customers must prove eligibility for the closed fund stream/s before we enter them on the Registry. We maintain these customers’ eligibility until the time the aid is available to them. The Payment Office uses Registry information to estimate the amount of future financial aid these people are requesting and likely to use.

When the number of customers on the Registry becomes so large we believe the requests are likely to consume all our funds for a full year, we stop processing financial aid applications and tell our customers we will notify them when/if funds become available.

New - Notify customers when financial aid over $200 becomes available to new customers.

1. When we notify customers on the Registry that financial aid is available, we give them time to let us know if they still want the aid. We work with each customer to estimate how much financial aid she/he needs to achieve employment plan goals.
2. If funds remain for new customers after Registry customers respond, we begin to take applications from people requesting financial aid over $200.
3. We will send letters to all customers who have asked us to notify them when/if aid becomes available.
4. We will accept applications for financial aid funded by all our funding sources beginning on October 1, 2013
5. Staff will follow the instructions on the chart “ Serve a Customer Applying for Financial Aid over $200” at <http://wrksolutionsdss.ingeniuxondemand.com/staff-resources/services-we-offer/charts-on-financial-aid-process>
6. We will change the weekly fund alert to include two messages about the time for the call center to contact a customer about her/his financial aid application. One line will tell staff the time for a customer who asks for child care financial aid and another line will tell staff the time for a customer who applies for other financial aid. We expect customers applying for a scholarship will need to apply six weeks before they expect to begin school.

Establishing the Registry

When we close one or more funds and expect to have those funds available in the near future, we will add eligible people to our Scholarship Registry. Customers must apply and prove eligibility for a closed fund stream before entry on the Registry.

* Explain to customers who are not obviously eligible for other funds and want to apply for our financial aid that they must complete an application and provide proof of eligibility to a financial aid call center so that we can notify them when funds are available.
* Give any customer asking about financial aid the Notice of Closed Funds flyer on the web at <http://wrksolutionsdss.ingeniuxondemand.com/staff-resources/services-we-offer/scholarship-registry-letters>
* Forward the application to the call center as usual and follow the usual process for TWIST entry FAMS pre-commitment entry.
* Tell the customer to expect a call from someone in the call center and tell her when to expect the call. Call center staff will help the customer establish eligibility and place the customer on the Registry.
* Call center staff will determine eligibility for all available funds and move anyone who meets eligibility for the closed fund or funds from pre-commitment to the Scholarship Registry. They will mail the customer a letter telling her she is on the Registry.
* Call center staff will close the customer’s pre-commitment and send a denial letter if the customer is not eligible for any fund source.

Create a customer wait list for over $200 financial aid when the Registry is full

When we close the Registry, we tell customers not obviously eligible for an open fund we will notify them when/if funds become available. We only do this when we estimate so many customers are on the Registry we will not have funds for more people for a year. When we stop adding customers to the Registry, we do the following:

1. We do not determine WIA eligibility for customers requesting financial aid over $200.
2. We do not offer these customers a financial aid application.
3. We do add the customer’s name and contact information to a wait list.
4. We will send these customers a letter asking them to contact us if they want to apply for financial aid at the time aid becomes available.
* Explain to any customer who is not obviously eligible for open funds and wants to apply for our financial aid over $200 that we will enter her/his name and contact information on a list. Tell her we will notify her by mail when funds are available. The letter will ask her to contact us if she wants to apply.
* Enter the customer directly onto the wait list or ask her to provide her information on the form found at the link below titled “Form used to add customers to the wait list for financial aid over $200” so that a staff member can enter her name on the list
* Tell the customer your best information about when she may expect to get the letter announcing available funds. The weekly funding alert will provide staff current information.
* Give the customer the Financial Aid Customer Handout. You may provide the paper hand out or email the one found at <http://wrksolutionsdss.ingeniuxondemand.com/for-individuals/financial-aid-support>
* Ask the customer what course of study she wants to pursue and offer to help her to understand and use our labor market information found at <http://wrksolutionsdss.ingeniuxondemand.com/for-individuals/training-and-education> *Pay particular attention to the Focus On information about good jobs for the future.*
* Give the customer information about how to apply for other financial aid and help her with the FASFA if she wants that help.
* Tell the customer to keep her contact information up to date by calling or emailing you if it changes.

Scholarship Rules

Workforce Solutions helps people build careers so they can participate in the global economy: we help people get a job, keep a job, or get a better job. One of the ways we do this is to provide scholarships that support individuals’ education, training or re-training in high-skill, high-growth occupations.

Although we help any customer find the resources to go to school in his or her chosen field, we reserve our own scholarship funds for those occupations which support our area’s key industries and provide our customers with good jobs for the future.

This issuance includes rules applicable to scholarships using Workforce Solutions funds, except for those paid with Trade Act dollars.

1. A customer must apply for a scholarship, and staff must determine the customer as eligible, before we grant a scholarship.
2. **No employment need.** A customer may receive a scholarship for training in the Gulf Coast Workforce Board’s high-skill, high-growth occupations supported by scholarship without demonstrating a lack of skills in those occupations if:
	1. The customer is otherwise eligible for our funds; and
	2. Tests or work background indicate that the customer has a good chance of succeeding in class and later in his or her job; and
	3. He or she agrees to an employment plan and makes progress toward the goals listed in that plan.
	4. He or she meets the responsibilities listed in the award letter
3. **Dollar limits.** See Issuance 13-06 Managing Financial Aid/ Limits for the maximum amounts available to eligible customers:
4. **High-Skill, High-Growth Occupations/Vendor Network.** Scholarships using Workforce Solutions funds are available to customers who:
	1. Are training in one of the Gulf Coast Workforce Board’s high-skill, high-growth occupations supported by scholarship; and
	2. Are attending training with a vendor in the Workforce Solutions network.

Find the current list of high-skill, high-growth occupations supported by scholarship at <http://wrksolutionsdss.ingeniuxondemand.com/for-individuals/career-planning/occupations-in-demand>.

1. **Bachelor’s Degree.** For educational programs that award a bachelor’s degree, Workforce Solutions will only award scholarships to help finance the last two years of school.
2. **Master’s Degree in Nursing.** Individuals officially enrolled full-time in program tracks leading to a Master’s of Science in Nursing and committed to teaching at least two years in programs leading to initial RN licensure in a Gulf Coast nursing school upon graduation are eligible for scholarship support to help finance all courses required to complete their Master’s Degree in Nursing.
3. **Trade Adjustment Assistance.** Trade Act funds provide scholarships only for individuals specifically identified as eligible for this assistance. Separate rules apply to scholarships funded with Trade Act dollars, and we are issuing separate guidance for these funds.

Vendor Network

We use a network of approved vendors and programs to provide education and training services. Workforce Solutions will only provide financial aid for customers to attend a program or receive a service that is approved and listed in the network.

You can access the network for basic skills vendors and occupational skills vendors through the Workforce Solutions website at [http://wrksolutionsdss.ingeniuxondemand.com/for-individuals/training-and-education](%20http%3A/wrksolutionsdss.ingeniuxondemand.com/for-individuals/training-and-education).

Schools interested in becoming part of Workforce Solutions vendor network may apply [online](http://wrksolutionsdss.ingeniuxondemand.com/about-us/business-opportunities/become-a-vendor).

Action

1. By Wednesday November 6, 2013 each career office contractor must email the spreadsheet wait list of customers asking for notice of available financial aid to Angela.Nickerson@wrksolutions.com, Jessica.Reyes@wrksolutions.com, Nicole.Quintero@wrksolutions.com, Kevin.Rodney@wrksolutions.com
2. On Friday November 8, the call center will send the “Notice of Available Funds” letter to all customers on the lists.
3. On Monday November 4, FAPO will send the Fund Alert telling staff funds are available for scholarships.
4. Career office staff may begin to submit Financial Aid Applications for customers requesting aid over $200 to the call center immediately on receiving this Issuance.
5. Make sure all staff are thoroughly familiar with their individual responsibility to help customers requesting financial aid.
6. Make sure all staff also understands how the system works together to help the customer get what she wants and needs. Staff must know who is responsible for each function so they can tell the customer what to expect.
7. Make sure Personal Service Representatives and others who counsel our customers are thoroughly familiar with and use our labor market information found at the links below.

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.

Links to Attachments

Notice of available funds letter

<http://wrksolutionsdss.ingeniuxondemand.com/staff-resources/services-we-offer/financial-aid-services>

How we work together

[http://wrksolutionsdss.ingeniuxondemand.com/staff-resources/services-we-offer/financial-aid-letters-and-forms](http://wrksolutionsdss.ingeniuxondemand.com/staff-resources/services-we-offer/charts-on-financial-aid-process)

Adding a customer to the wait list <http://wrksolutionsdss.ingeniuxondemand.com/staff-resources/services-we-offer/financial-aid-letters-and-forms>

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1. Form used to add customers to the wait list for financial aid over $200
2. Spreadsheet for entry on the list asking for notice of available financial aid

Adding a customer to the Registry <http://wrksolutionsdss.ingeniuxondemand.com/staff-resources/services-we-offer/scholarship-registry-letters>

1. Customer Notice of Closed Funds
2. Scholarship Registry Entered Letter

<http://wrksolutionsdss.ingeniuxondemand.com/for-individuals/training-and-education>

1. Our Region’s best job opportunities
2. How will you pay? Where to apply for financial aid
3. Workforce Solutions training provider network
4. Workforce Solutions Training Provider Report Card

More about Workforce Solutions Financial Aid

<http://wrksolutionsdss.ingeniuxondemand.com/for-individuals/career-planning/occupations-in-demand>

1. Workforce Solutions Financial Aid Customer Information
2. High Skill High Growth Occupations/eligible for scholarships