WS 11-22
September 19, 2011
Financial Aid
Expires: Continuing

TO: Career Office Contractors
Financial Aid Payment Office

FROM: Rodney Bradshaw
Mike Temple
Lucretia Hammond

SUBJECT: New Financial Aid Application

Purpose

Introduce a new financial aid application and associated forms for requests over $200

This issuance does not change eligibility requirements or the process we use to approve and record financial aid in TWIST or FAMS.

Background

Workforce Solutions provides financial assistance to help people get a job, keep a job or get a better job. We help people prepare for a good job by supporting education and training with scholarships, and we provide work and work search support by subsidizing child care expenses and paying some transportation expenses, helping with some emergency housing expenses, paying some health related costs, buying specialized clothing, tools or equipment and paying for some licenses, and documents.

A workgroup of career office operations staff and Board staff developed the new application and all the associated documents. The application helps you and the customer identify her or his financial aid needs and collect the necessary information to document eligibility for all possible sources available to support those needs.

What has changed

- This application replaces the current Workforce Solutions Financial Aid Application and all the associated forms.
- It also replaces the signed 2050 for customers applying for child care financial aid who are not currently receiving that financial aid.
- When we say "Financial Aid Application" we mean the combination of all the forms used by the customer to apply for Workforce Solutions Financial Aid.
- These forms are the only customer forms authorized for use by Workforce Solutions offices when helping our customers access our financial aid.
- You will receive applications from customers who find the information on the web site and may not have spoken to us before sending the completed application. You should immediately contact the customer to let her/him know you have the information, answer questions and tell her/him the next step in the process.

When to use the application

- Use the application when a customer not currently receiving over $200 applies for a scholarship or any other aid expected to exceed $200 during any 12-month period.
- When we ask a customer to recertify eligibility for continuing financial aid, it is not necessary to complete a new application if it is easier for the customer to provide information to a staff member for direct data entry into our MIS.

  We expect that many customers recertifying eligibility for child care financial aid will not complete the application.

Where to find the application

- The complete list of forms will be available for order in the COIN and we will send an initial supply to your office
- A revised financial aid section of the web site is available for customers at http://www.wrksolutions.com/aid/aid-home.html
- Follow the Left side links of the page above to find the application in fillable PDF http://wrksolutions.com/staff/fin_aid_app_inst/application/Fillable_PDFs/1%20Financial_Aid_Application_Fillable.pdf
- Other portions of the application, for you to send to those customers who need them, are available in the staff resources section at

http://wrksolutions.com/staff/Financial_Aid_App_Instruction.html
- The staff resources section also contains desk aids for staff use with the application

How to maintain records

- When a customer wants to leave an incomplete application with us, keep it for 60 days so that the customer can add to her paperwork during that time

- Once the customer completes and signs the application she has 45 days to provide proof of eligibility unless rules limit her to a shorter period (most often a shorter period relates to child care financial aid applicants coming off a wait list)

- Keep all paperwork related to the application in the customer's paper file unless you have an electronic file

- Keep the appropriate information about the amount of financial aid in TWIST and FAMS

- Continue to keep clear and complete counselor notes concerning the customers next step in applying for financial aid, her/his employment plan and progress toward the goals in the plan

- It is unnecessary to keep a competed paper application if you have the documents saved in an electronic file

- When the customer's file is electronic be sure that you include all application pages with the customer signature or initials

- Assure that all electronic files are clear enough to easily read

- When information changes add a new page or document to the electronic file and explain in the customer's TWIST counselor notes

Action

1. Career office contractors must make sure that all office managers, supervisors, and staff are aware of and implement use of the new application.
2. Read the web information at http://www.wrksolutions.com/aid/aid-home.html so you will know what we are telling our customers about when we will contact them and how long it will take us to process the application. Adhere to the stated schedule.
3. Do not require a customer to start over if she has an application pending using the old forms.
4. Use the fillable PDF forms found at http://wrksolutions.com/staff/Financial_Aid_App_Instruction.html for all customers until the paper forms are available. You will then use paper if the customer prefers.

5. Do not give any old forms to a customer after **9/26/11.**
6. Follow all instructions for using the new application by Monday September 26. Process any new applications sent to you from the web information as soon as you get them.

7. Email Betty Drake betty.drake@wrksolutions.com with problems or suggestions for improving the new application

Questions

Staff should ask questions of their supervisors. Direct questions to the Board staff through the electronic Q&A posted with the policy on the website at http://www.wrksolutions.com/staff/policiesandprocedures.html

Attachment

- Summary of New forms (page 5-6 of this document)

Summary of New Forms	
Financial Aid Application	Every customer initiating a new request for more than $200 in financial aid over a 12-month period must complete the application. *Keep pages 4 and 5 in the customer's paper or electronic file.* The application is not required for child care recertification. If a customer returns an incomplete application, the Career Office contractor must keep it on file for 60 days from the date of the application. If the customer waits more than 60 days from the application date, she will need to update her information, including providing income information for a different time period.
Family Income Form	Customer will submit one sheet for each family household member who receives income, including the applicant. Customers eligible for TANF or SNAP are determined low income by HHSC and therefore not required to complete the family income form.
Document Checklist	Review this list with the customer and make sure she understands exactly which documents she must submit to prove her eligibility. Include the due date. Also, note that the application information is valid for 45 days. (Remember that you will keep a copy of an incomplete application on file for 60 days.)
Self Certification Form	When a customer is unable to provide documentation and self-attestation is an acceptable form of verification, use this form.
Self-Employment Verification Form	If a customer is self-employed but doesn't have a profit/loss statement, use this form to show how much a person earned from their own business.
Income Reconstruction Worksheet	When a customer doesn't have pay stubs, use this form to show how much she earned over the designated period.
Parental Agreement	All customers applying for child care financial assistance – including for eligibility recertification must sign this form.
Referral/Cost Obligation Form	The training provider will complete this form so that you know the amount of financial aid a customer needs to complete her education.

Summary of New Forms	
Progress Report	We want to know that customers are attending school/training and making satisfactory progress toward a credential that will help them get a job.
Monthly Expenses Worksheet	We want to make sure that a customer can afford to live while she is in school. Use this form to help a customer understand how much income she will need to support herself while in school.
Income Verification Form	When we need an employer to verify a customer's income, have the employer complete this form. It is available in electronic format for you to send by email.