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| **Re-Issued WS 13-04** |
| **January 29, 2013** |
| **Financial Aid** |
| **Expires: Continuing** |

# To: Career Offices

Financial Call Centers

Financial Aid Payment Office

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Subject: Managing Financial Aid – How Staff Work Together

Purpose

Describe how staff helps a customer with financial aid under $200.

This issuance replaces Issuance 12-19

Background

Some people who are trying to get a job or keep a job need service Workforce Solutions does not provide. In some cases we may be able to provide financial aid to help these customers pay for the service they need.

A Financial Aid Call Center determines customers eligible for our financial aid.

The Financial Aid Payment Office (FAPO) pays the vendors who provide service to our eligible customers. FAPO also keeps track of our financial aid funds and tells the system what funds are available.

* **To ensure the highest level of customer service, staff from all parts of our system must communicate with each other clearly, concisely and regularly.**

Who Does What

Career Office staff is responsible for helping individuals meet their career goals.

* Career office staff is the face of Workforce Solutions to the public. Staff provides information about all our services including financial aid.
* Career office staff provides professional career advice and helps individuals develop their employment goals. Staff helps people stay on track in meeting their goals.
* Career office staff is available to help customers navigate through our system. Our job is to understand what a customer wants and then help her obtain it.
* Career office staff communicates customer financial aid eligibility issues to the appropriate call center.
* Career office staff determines eligibility for financial aid up to $200, enters all required eligibility documents into the MIS, and distributes cash substitutes.

Financial Aid Call Center staff work with customers to collect all the necessary proof to determine customers eligible for our financial aid over $200.

* Call Center staff uses TWIST, FAMS and FACS to communicate with Career Office staff and FAPO about a customer’s application and eligibility status.
* Call Center staff tells the customer if she is eligible and let her know how to appeal if she is not eligible.
* Call Center staff notifies FAPO that a customer received the approved service so that FAPO can pay the bill for the service.

The Financial Aid Payment Office (FAPO) staff is responsible for working with vendors who deliver service to our customers. They are also responsible for tracking our funds to let the system know what financial aid is available.

* FAPO staff pays vendors when the call center staff tells them the customer is eligible for financial aid, the category of financial aid, and how much we approved.
* FAPO notifies the vendor when we are going to discontinue payment for a customer before the expected end date.
* FAPO changes the vendor providing child care at the customer’s request
* FAPO approves a vendor to receive our funds and assures information on the vendor’s published costs is current.
* FAPO monitors vendor eligibility and costs.
* FAPO notifies a vendor when the vendor does not meet the criteria for receiving our funds.
* FAPO informs a vendor of appeal rights and hears vendor appeals.
* FAPO estimates funding availability and provides those funding estimates to everyone in the system on a regular basis.
* FAPO communicates with Call Center staff about an individual customer’s financial aid to provide information about the customer or her financial aid, ask questions about the customer, or present a concern about the customer.

Communication Guidelines

* **Customers.** We communicate with our customers in person, on the telephone, and electronically. To provide good service it is important to keep in touch.
* We must use approved communication posted on our website at [Contract Management](http://www.wrksolutions.com/staff-resources/system-resources/contract-management) when we communicate an action we are taking that may result in denying or reducing someone’s Workforce Solutions financial aid.
* You must send letters by US Postal Service unless the customer has requested another method. You may chose to send letters by both email and mail.
* All letters must be in both English and Spanish
* You must enter the appropriate notice in TWIST to inform the system of the communication
* **Staff.** We use our own electronic management information systems (WorkInTexas.com, TWIST, FAMS and FACS) to communicate internally.
* You must note all customer communication in the appropriate MIS so that it is available to all employees of WFS who may need it to help our customers.
* You must never send a customer a letter asking her to contact WFS without entering a TWIST note available to staff who might be asked to discuss it with the customer.
* Internal MIS include: TWIST, WIT.com, FAMS, FACS

Process Charts

We posted charts at [Financial Aid Services](http://www.wrksolutions.com/staff-resources/services-we-offer/financial-aid-services) (Charts on Financial Aid Process) to show where in the system staff have responsibility for communicating with our customers and each other about Workforce Solutions financial aid.

Action

1. Make sure all office managers, supervisors, and staff is aware of these divisions of responsibility.
2. Make sure that all staff who works with customers have sufficient knowledge of the system to direct customers to the person/s who can best meet the customer’s request.
3. Consider the functions listed on the charts. Coordinate with Workforce Security to identify staff who need a FAMS license. Note: At some point, there may be a cost to adding additional staff with access to FAMS.
4. Managers and supervisors must make sure that PSRs attend a training session related to the information in this Issuance
5. This Issuance is effective immediately with these exceptions.
   1. Call Centers will send letters to customers for financial aid recertification beginning January 28, 20113 and letters warning of excessive absences and non-swipes beginning February 4.
   2. Career office staff will be fully responsible for all functions related to financial aid of $200 and under on February 4, when sufficient cash substitute cards and inventory instructions are available.

Questions

Staff should ask questions first of their supervisors. Direct questions to the Board staff through the electronic Q&A posted with the policy on the website at [Contract Management](http://www.wrksolutions.com/staff-resources/system-resources/contract-management)

List of Charts

* Serve a Customer Asking for Financial Aid Under $200.00
* Serve a New Customer Applying for Financial Aid Over $200.00
* Call a Customer from the Wait List/Registry
* Contact a Customer Receiving WFS Financial Aid about Continuing/Discontinuing Financial Aid

[Financial Aid Services](http://wrksolutionsdss.ingeniuxondemand.com/staff-resources/services-we-offer/financial-aid-services)