



WS 13-24
September 6, 2013
Financial Aid
Expires: Continuing

To: Career Offices
Financial Aid Payment Office

FROM: Mike Temple
Lucretia Hammond

SUBJECT: Managing Financial Aid – Notifying Registry Customers of Available Financial Aid

Purpose

Provide guidance on notifying Registry customers of available financial aid. This issuance is linked to Issuance WS 13-21 Managing Financial Aid - Scholarship Registry/Wait List/Scholarship Contribution Limits. The guidance in WS 13-21 remains in effect. We will provide additional guidance for notifying customers on the wait list for scholarships in October 2013.

Background

Several months ago, we stopped providing financial aid paid from Workforce Investment Act funds to new customers.

We determined eligibility for customers asking for this financial aid and added them to a list, the Registry, if they were eligible to receive the requested aid. We told these customers we would contact them when we received additional funds.

Current Situation

We will have funds available in all our regular funding sources on October 1, 2013. We will begin contacting Registry customers on September 10, to confirm the customer's continued interest, update employment plans and confirm the costs for providing these customers' financial aid.

Action

1. Payment office staff must send the first letters on September 10, 2013. They will follow the schedule in the instruction sheet below until we contact everyone on the Registry.

2. All WFS staff will understand and implement their responsibilities as outlined in the instruction sheet by September 9, 2013

Questions

Staff should first ask questions of their managers or supervisors. Direct questions for Board staff to Sharron Powell at sharron.powell@wrksolutions.com or Betty Drake at betty.drake@wrksolutions.com

CALLING CUSTOMERS FROM THE REGISTRY

1. Call center staff will have completed all pending applications for entry on the Registry no later than end of August.
2. FAPO staff will begin sending letters informing customers of October 1 funds availability.
 - a. FAPO staff will send letters weekly as scheduled here until the Registry is exhausted :
 - i. 9-10-13 – WIA youth, all priority group customers, and others by entry on Registry date to total one third of the total Registry list.
 - ii. 9-17-13 – one half of the remaining customers in order of Registry entry date
 - iii. 9-24-13 – all remaining Registry customers
 - b. FAPO staff will use the “Scholarship Call-In Letters” found at http://www.wrksolutions.com/staff/Scholarship_Registry_Letters.html
 - d. Call center and career office staff will know who received letters by reviewing scheduler with the title “Call from Registry”
3. Customers have 10 business days from letter date to respond to a career office. *Note: The letter date is day “0” in counting the days to respond.*
 - a. Customer wants financial aid and responds within the allowed time
 - i. The customer may respond to any office.
 - ii. Career office staff in the office the customer contacts will refer the customer to a PSR who will help her fully develop an employment plan.
 - iii. Career office staff will send a FACS issue titled “Response to Registry” to the call center telling the call center to move the customer from the Registry to commitment status. A TWIST counselor note entered by career office staff will state:
 - 1) The customer wants financial aid
 - 2) The customer has chosen a course of study supported by the Board’s list of Demand Occupations Supported by Scholarships
 - 3) The estimated start date for the customer
 - 4) A note referencing any cost information provided by the customer.

- 5) If the PSR has discussed transportation assistance with the customer, the note will include a summary of the conversation.

iv. The PSR will tell the customer when to expect contact from WFS

- 1) When the call center will contact the customer to confirm her choice of vendor and request the cost information we need
- 2) When the career office will contact the customer to pick up her voucher and discuss and sign her award letter

v. Call center contacts the customer

- 1) Call center staff will review FACS issues and contact customers for cost information. The customer may submit a Cost Obligation Form, fee statement or other vendor information related to course tuition, fees, and supplies. Staff may use ETPS information to estimate costs.
- 2) Call center staff will review the TWIST notes to determine if the customer is to receive transportation financial aid in addition to her/his scholarship.
- 3) Call center staff will include the best estimate of transportation expenses in all current and future commitments.
- 4) Call center staff will move the customer from the Registry to a commitment in FAMS with an accurate expected start date and expected future commitments.
- 5) Call center staff will enter TWIST notes summarizing customer conversation

b. Customer does not want financial aid

- i. Career office staff will send a FACS issue titled “Response to Registry” to the call center stating the customer does not want financial aid.
- ii. PSR will talk to the customer to determine if the customer needs other services, change the employment plan or close the TWIST service record.
- iii. Call center staff will close the Registry entry for the customer.

- c. Customer does not respond within 10 business days
 - i. FAPO will close the registry records each week for customers who remain open on the Registry 15 business days after they sent a letter.
 - ii. FAPO will know which FAMS records to close by comparing the FAMS “scholarship registry report with record status” to the scheduler list of customers who received a letter. They will close the FAMS record for any customer with an open FAMS Registry status 15 business days past the date we sent the letter.
 - iii. Career office staff will use the same process to determine the next step for offering services to the customers who did not respond.
 - iv. Career office contractors will provide guidance to staff about when to continue the effort to offer service to these customers and when to close the customer’s TWIST program detail because the customer has not I contacted us to indicate a need for further help.
- d. Customer responds late
 - i. Customer responds between 10 business and 15 business days
 - 1) The customer’s TWIST and FAMS record are still open
 - 2) Proceed as you would if the customer reported timely.
 - 3) Send a the FACS issue “Response to Registry” to the call center and update the TWIST record
 - ii. Customer responds after 15 business days
 - 1) The FAMS record is closed
 - 2) The PSR will work with the customer to update the employment plan.
 - 3) If the plan includes financial aid, the PSR will tell the customer she/he must reapply for financial aid and the PSR will provide the customer a new financial aid application.
- e. Customer not on the Registry asks for financial aid during the time we are contacting Registry customers
 - i. Tell the customers we are contacting people waiting for financial aid because funds were unavailable when they applied. Give the customer a financial aid application and ask her to submit it after October 1.