



<b>WS 14-04</b>
<b>April 22, 2014</b>
<b>Financial Aid</b>
<b>Expires: Continuing</b>

To: All Contractors

From: Mike Temple  
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Subject: Managing Financial Aid/Continued Funding

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## Purpose

Clarify rules for continued financial aid to a customer as she/he moves through her/his employment plan (see attached chart) and to issue a revised Financial Aid Award letter.

This Issuance replaces 13-12 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 at least monthly 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 revised 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 Q&A here <http://www.wrksolutions.com/staff-resources/system-resources/contract-management>.

## Attachments

Customer Requirements for Continued Financial Aid Over \$200.00 Chart

<http://www.wrksolutions.com/staff-resources/services-we-offer/charts-on-financial-aid-process>

Revised Financial Aid Award Letter

<http://www.wrksolutions.com/staff-resources/services-we-offer/financial-aid-services>