

Scholarship Registry Desk Aid

A. Adding to the Registry Process

1. Financial Aid Support Center

- a. Determine eligibility for all funds. Update TWIST Intake Common with all required information.
- b. If the customer is eligible for an **open fund source**, staff should create the appropriate Program Detail and provide services accordingly. Counselor notes should identify all funds the customer is determined eligible for.
- c. If the customer is only eligible for a **closed fund source**, staff should create the appropriate Program Detail and take the following actions:
 - Enter a counselor note in TWIST with subject line ***'Scholarship-Added to Registry.'*** Counselor notes should include the standard information regarding the customer's eligibility. Staff must also include in their notes the customer is only eligible for a closed fund source (identify fund) and will be added to the Registry.
 - Send the customer the [Scholarship Added to Registry letter](#) regarding the determination.
 - In DocuWare:
 - Stamp the file **'Add to Registry.'** **Do not use the 'Approve' stamp.** **'Add to Registry'** changes the status of the document to **'Added to Registry'** and adds a completion date.
 - Select the **'Type of Request'** from the dropdown menu: Occupational Training, Basic Skills Training, Work-Based Learning, or On the Job Training.
 - Select the **'Fund'** you are placing the customer on the waiting list for (typically Adult, unless other funds become unavailable). Options are Adult, Dislocated Worker and Youth.
 - Select the **'Location'** determined by the zip code listed on the customer's application. Use the [zip code list](#) to determine location (career office).
 - If the customer is not eligible for Workforce Solutions funds or is eligible for alternative funding, staff will follow the usual process using the **Approve or Deny** stamps in DocuWare.



2. Career Offices

- a. Customers placed on the Registry will be directed to schedule an appointment with a local career office within ten (10) business days of the date on the [Scholarship Added to Registry letter](#).
- b. Career Advisors will discuss alternative funding options that may be available, assess for other services and maintain monthly contact with the customer.
- c. To keep the eligibility period active, staff must provide and document a monthly service in TWIST Service Tracking.

B. Registry: Removing Unresponsive Customers

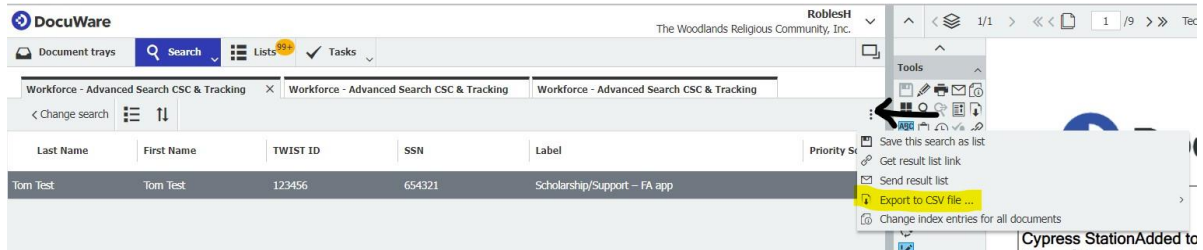
Tracking Units

1. Workforce Solutions staff will remove customers who have not responded to the [Scholarship Added to Registry letter](#) and have not made any other contact with Workforce Solutions staff 45 days after the date eligibility was determined. This process will occur on Monday of each week. See Appendix A: **Registry - Failure to Respond Chart** for date of review and date range for DocuWare search.
2. Using the Advanced Search option in DocuWare, search by Registered Date and enter the date range you are looking for.

Example: On January 10th, search for customers added to the registry from November 29, 2021 – December 3, 2021. (45 days from eligibility determined date)

The screenshot shows the DocuWare Advanced Search interface. The 'Registered Date' field is highlighted in yellow, indicating the selected search criteria. The date range is set from 11/29/2021 12:00 AM to 12/03/2021 11:59 PM. Other search criteria include 'Moved Date', 'Relabeled Date', 'Completed Date', 'Deleted Date', 'Ready Date', 'TAA File Comp Date', 'Scanned Location', 'Waitlisted By', 'Waitlisted Date', 'Removed from Registry By', 'Removed from Registry Date', 'Called from Registry By', and 'Called from Registry Date'. The interface also includes a 'Search' button and a 'Reset' link.

3. Export a “complete result list” as a CSV file



4. Using the export list (Excel) sort by status and completed date. Filter the career offices needed.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Last Name	First Name	TWIST ID	SSN	Label	Priority Sch	Priority ChCare	Location	Labeled Date	Assigned To	Status	Completed Date	Notes	Type of Reque
Tom Test	Tom Test	123456	654321	Scholarship/Support - FA app			Cypress Station	12/1/2021		Added to Registry	12/1/2021		Work Based Le

5. Review each customer record with a status of ‘**Added to Registry**’ and close the Program Detail for those with no response or other activity noted.

6. Enter a case note in TWIST indicating the action(s) taken.

7. For those records closed, stamp file as ‘**Remove from Registry**’ in DocuWare. This will change the status to ‘**Removed from Registry**’.

C. Scholarship Registry Call-in Process

1. Notification received from Board staff regarding available funds via the Fund Alert

2. **Financial Aid Support Center**

- Management will work with Board staff to determine when customers will be called from the Registry.
- In consultation with Board staff, determine how many customers to pull from the Registry.
- Identify those on the Registry first by priority and then by oldest date placed on Registry and compile a list. Customers will be identified by ‘**Registered Date**’ and by status ‘**Added to Registry**’.

- d. Send the list to all career office contractor designees

3. Tracking Unit

- a. Upon receipt of list from the Financial Aid Support Center, Tracking Units will review each case to see if notes indicate financial aid is needed.
Example: Entered into employment or decided not to return to or start school.
(If case notes do not clearly indicate the customer is no longer interested, send a letter to the customer.)
- b. For customers still needing financial aid, send the '[Scholarship Registry Call in Letter](#)' within two (2) business days.
- c. Save a copy of the letter sent to the customer in DocuWare.
- d. For each application reviewed: Update the file in DocuWare. Stamp Application as '**Called from Registry.**' This will change the status to '**Called from Registry**' and remove the customer from the registry list.
- e. Trackers will enter a case note with a subject line – **Called from Registry** and indicate on (date) a letter was sent informing the customer of the availability of funds.

4. Career Office

- a. Career Advisors will follow-up with customers on the list via email or phone and inform them of the available funding.
- b. When a customer responds to the letter or Career Advisor follows-up, continue normal process of assessing training needs and collecting necessary information to request a future voucher.
- c. Enter a TWIST Counselor Note documenting the conversation and next steps.
- d. Customers will have ten (10) business days from the date of the letter to respond back to the career office.

Appendix A: Registry - Failure to Respond Chart

Date of Review	Date Range Search-DocuWare
1/10/2022	November 29, 2021 - December 3, 2021
1/18/2022	December 6, 2021 – December 10, 2021
1/24/2022	December 13, 2021 – December 17, 2021
1/31/2022	December 20, 2021 – December 24, 2021
2/7/2022	December 27, 2021 – December 31, 2021
2/14/2022	January 3, 2022 – January 7, 2022
2/21/2022	January 10, 2022 – January 14, 2022
2/28/2022	January 17, 2022 – January 21, 2022
3/7/2022	January 24, 2022 – January 28, 2022
3/14/2022	January 31, 2022 – February 4, 2022
3/21/2022	February 7, 2022 – February 11, 2022
3/28/2022	February 14, 2022 – February 18, 2022
4/4/2022	February 21, 2022 – February 25, 2022
4/11/2022	February 28, 2022 – March 4, 2022
4/18/2022	March 7, 2022 – March 11, 2022
4/25/2022	March 14, 2022 – March 18, 2022
5/2/2022	March 21, 2022 – March 25, 2022
5/9/2022	March 28, 2022 – April 1, 2022
5/16/2022	April 4, 2022 – April 8, 2022
5/23/2022	April 11, 2022 – April 15, 2022
5/31/2022	April 18, 2022 – April 22, 2022
6/6/2022	April 25, 2022 – April 29, 2022
6/13/2022	May 2, 2022 – May 6, 2022
6/20/2022	May 9, 2022 – May 13, 2022
6/27/2022	May 16, 2022 – May 20, 2022
7/5/2022	May 23, 2022 – May 27, 2022
7/11/2022	May 30, 2022 – June 3, 2022
7/18/2022	June 6, 2022 – June 10, 2022
7/25/2022	June 13, 2022 – June 17, 2022
8/1/2022	June 20, 2022 – June 24, 2022
8/8/2022	June 27, 2022 – July 1, 2022
8/15/2022	July 11, 2022 – July 15, 2022
8/22/2022	July 18, 2022 – July 22, 2022
8/29/2022	July 25, 2022 – July 29, 2022
9/6/2022	August 1, 2022 – August 5, 2022
9/12/2022	August 8, 2022 – August 12, 2022
9/19/2022	August 15, 2022 – August 19, 2022
9/26/2022	August 22, 2022 – August 26, 2022