

Using the Online Financial Aid Application

STAFF

The purpose of this document is to help you become familiar with navigating the online financial aid application so you can assist your customers. The <u>online application e-learning</u> is also a good tool for you to reference when you need a refresher. If you need additional assistance, please reach out to your Supervisor or Subject Matter Expert (SME).

To apply for financial aid, customers must complete the following steps:

A. Agree to Speak with a Workforce Solutions Professional about their request for financial aid. We will conduct an assessment to help identify their goals and begin the development of their employment plan.

1. Refer the customer to <u>https://www.wrksolutions.com/instructions</u>.

The Apply for Financial Assistance screen displays.

Work	force Solutions
Apply	r for Financial Assistance
Instructio	ons
E you are ap Solutions Ca	pyrig te Financial Ad from Wuklocc Schulturs, you must have discussed your request to financial act with a Wuklocc Professional at a Work ever Office
	Locate Career Office
By che	cking this box, I confirm that I have read the above statements.
	Crystallin Percilian

2. Customers must check the box agreeing to discuss their request with a workforce professional at a Workforce Solutions office for the "Create Profile" button to activate. Once the statement box is checked, customers must click the **Create Profile** button.

Workforce Solution	ns
Apply for Financia	al Assistance
Instructions	
Fytte www.applying.to Financial Add toor v Building Career Office.	Worknow Solutions, you must have discussed your request for financial and with a Workhow Professional at a Workh
	Locate Career Office
By sheaking this lose, I confirm that I	have read the above sometherin.
	Create Profile
	(All second s

www.wrksolutions.com 1.888. 469.JOBS (5627)

Workforce Solutions is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. (Please request reasonable accommodations a minimum of two business days in advance.) **Relay Texas:** 1.800.735.2989 (TDD) 1.800.735.2988 (voice) or 711

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B. Create a Profile

The Profile screen displays.

Personal Information		
First Name	Last Name	
Primary Phone	Phone Type	
	Nothing selected	~
Email Address	onal email (i.e. Gmail, Outlook, Yahoo), etc.). The me, in the application process, and for all commun	email you enter tications
Email Address Do not enter a work email. Enter a persi- here will be used as your profile usernar surrounding your application. An email a Gmail, Outlook and Yahool. Re-enter Email	onal email (i.e. Gmail, Outlook, Yahool, etc.). The me, in the application process, and for all commun scoount can be set up using a free email service p	email you enter nications rovider such as
Email Address Do not enter a work email. Enter a persi- here will be used as your profile usernar surrounding your application. An email a Gmail, Outlook and Yahoot. Re-enter Email Site Login Information	onal email (i.e. Gmail, Outlook, Yahool, etc.). The me, in the application process, and for all commun scoount can be set up using a free email service p	email you enter nications rovider such as
Email Address Do not enter a work email. Enter a person here will be used as your profile usernar surrounding your application. An email a Gmail, Outook and Yahool. Re-enter Email Site Login Information Password	onal email (i.e. Gmail, Outlook, Yahoot, etc.). The me, in the application process, and for all commun scoount can be set up using a free email service p	email you enter nications rovider such as
Email Address Do not enter a work email. Enter a person here will be used as your profile usernari surrounding your application. An email a Gmail, Outlook and Yahool. Re-enter Email Site Login Information Password	onal email (i.e. Gmail, Outlook, Yahool, etc.). The me, in the application process, and for all commun eccount can be set up using a free email service p	email you enter nications rovider such as

Customers must enter the required contact information:

- Name
- Phone number
- Email address

NOTE: Customers without an email address can create one by clicking on the link to their preferred email provider below the email address field and completing the setup process for the provider.



This field is require	d.
Do not enter a work em your profile username, i can be set up using a fro	ail. Enter a personal email (i.e. Gmail, Outlook, Yahool, etc.). The email you enter here will be used as n the application process, and for all communications surrounding your application. An email account ee email service provider such as Gmail, Outlook and Yahool.
Re-enter Email	

A secure password must contain at least:

- eight (8) characters
- one uppercase letter
- one lowercase letter
- one number
- one special character (! @ # \$ % ^ & *)

When all information is entered, customers click the **Create Profile** button. The **Verify Email Address** screen displays.

	Update Profile
Workforce Solutions	Save & Logout
Verify Email	
Please verify your email to continue using the site	
Send Verific	ation Email



To confirm and verify their email address, customers must:

• Click the **Send Verification Email** button. A verification email is sent to the email address listed on the customer's profile.

Workforce Solutions	Update Profile Save & Logout
The verification email has been sent. Please check your email	and click on the link.

- Login to their email address.
- Retrieve the verification email from <u>WFSFinancialAid@wrksolutions.com</u>. Note: If the email is not in the inbox, ask the customer to check their Spam folder.
- Click the **VERIFY** link in the verification email.

Workforce Solutions	Angelique Roberts
Welcome	
Your account has been created. Please verify your email a site.	address to use this
VERIFY	
Once you are verified you will be able to login using the cre during the profile creation process. This link will lead you b	edentials you set back to the <u>login</u>
page.	
If you are still unable to login please find a career office log provide further assistance.	<u>cation</u> near you to
Sincerely,	
Workforce Solutions	



• The Email Verified screen displays.

~~~		Jpdate Profile
Workforce Solutions		Save & Logout
Your email is now verified. You can continue u	using the site.	

• Customers click the **Continue** button. The **Welcome/Services** page displays.

Workforce Solutions	U
Welcome, Angelique	
Services	
What are the primary services you are hoping to receive from us? (Select all that apply.)	
Help with paying for school or training	
Help with child care expenses	
Help with paying for transportation, clothing, etc., to accept or keep a job	
Help with getting work experience or training on the job	
Other:	
Next	

To continue the application profile, customers:

- Check the applicable box(es) to identify the services they need
- Agree to an assessment within 14 days by clicking, I Agree
- Answer the questions on the Financial Assistance page and click Next.



### C. Complete the application and upload supporting documents.

The **Financial Assistance – Getting Started** page displays.



At this point, customers may choose to logout and return to complete the application at a later time.

# IMPORTANT NOTE: If an application is not submitted within 14 days, the customer will have to reenter their application information in their profile.

To continue, customers click **Application Progress**. The Application Progress screen displays seven steps to complete. For each step, customers must answer a series of questions and click **Next** at the end of each page. Once the customer completes a section, the **Complete Section** button displays. At this point, customers can click on the **Save & Logout** button, save what they've done, and return to complete the application at a later date.

Note: If a step has been completed, a link to **'Edit'** the information displays in place of the **Start** button.

Once all sections have been completed, the customer clicks the **Complete Section** button to save the information.



Por	uguese, Russian):
0	African languages (e.g., Swahili, Wolof):
0	Other (e.g., American or Spanish Sign Language):

**NOTE:** If the customer is a Veteran, the Veteran Addendum must be completed.

The **Family Information** screen displays. Customers can choose to logout and return to the application at a later time by clicking the **Save & Logout** button at the top of the screen.

#### Family Information

Customers must provide information about their household members and their own and family members' employment, income, and public assistance.

If a family member requires childcare, the **Addendum for Childcare Assistance** page displays for customers to enter their selected child care provider information. If they haven't chosen a provider, they have the option to click **Next** to continue.

The Addendum for Child Care Assistance (Parent Agreement) displays.

The Parent Agreement is made up of two pages. For each page, customers must read and agree to each statement by clicking the check box next to **"I Agree"** and clicking the **I Accept** button at the bottom of each page. The **Documentation** page displays.



Workforce Solutions	Save & Logout
0	66
Documentation	•
Uploading Documents	
Your application requires documents. You may upload multiple files for files are preferred. Microsoft Word files are not accepted.	each document by clicking the "Add File" link. PDF and JF
A list of acceptable sources for proof of documentation is available for do	wnload here.
rour changes have been saved, but you are still missing some required o	locuments. Please upload at least one document to each
Cour changes have been saved, but you are still missing some required of document request below to proceed.	locuments. Please upload at least one document to each
Tour changes have been saved, but you are still missing some required of document request below to proceed.	locuments. Please upload at least one document to each
Tour changes have been saved, but you are still missing some required of document request below to proceed.  Documents required for Angelique Roberts  Proof of authorization to work	locuments. Please upload at least one document to each test document.p
Tour changes have been saved, but you are still missing some required of document request below to proceed. Documents required for Angelique Roberts Proof of authorization to work Proof of residency in the thirteen counties	locuments. Please upload at least one document to each fitst document.p Accomp
Tour changes neve been saved, but you are still missing some required of document request below to proceed.  Documents required for Angelique Roberts  Proof of authorization to work  Proof of residency in the thirteen counties  Proof of Unemployment Insurance	locuments. Please upload at least one document to each test document.p Accorr Accorr Accorr
Tour changes have been saved, but you are still missing some required of document request below to proceed. Documents required for Angelique Roberts Proof of authorization to work Proof of residency in the thirteen counties Proof of Unemployment Insurance Proof of employment (wages / salary) for John's drilling; dates ranging fro	locuments. Please upload at least one document to each fest document.p Accor m 01/05/2020 to 04/24/2020
Tour changes have been saved, but you are still missing some required of     document request below to proceed.     Documents required for Angelique Roberts      Proof of authorization to work      Proof of residency in the thirteen counties      Proof of Unemployment Insurance      Proof of employment (wages / salary) for John's drilling: dates ranging fro     Additional Supporting Documents	locuments. Please upload at least one document to each fest document.p accorr accorr m 01/05/2020 to 04/24/2020 accorr accorr accorr accorr
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Tour ranges neve bein saved, but you are still missing some required of documents required for Angelique Roberts  Proof of authorization to work  Proof of residency in the thirteen counties  Proof of Unemployment Insurance  Proof of employment (wages / salary) for John's drilling: dates ranging fro Additional Supporting Documents  Documents required for Spencer Patrick  Proof of citizenship and age	locuments. Please upload at least one document to each test document.p accorr m 01/05/2020 to 04/24/2020 accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accorr accor accorr accorr accorr accor accorr acc
Troof of authorization to work  Proof of authorization to work  Proof of Company of the English and the Engli	locuments. Please upload at least one document to each fest document, p 100 100 100 100 100 100 100 10

#### 1. Documentation

Based on the services requested, customers must upload documentation which supports the information they've provided in the application. A list of required documents displays on the page.

**Note:** Only .pdf and .jpg versions of documents can be uploaded. If customers are unable to upload their documents, ask the customer to email their documents to you or the office's general email address.

#### To add a file:

Click **Add File** next to the document type. The file navigator pop-up window displays, allowing a customer to locate the document on the computer. Customers must select the document by double-clicking on it or clicking the Open button. The document is uploaded and displays to the right of the document type. Customers will need to complete the steps to add files over until



they have uploaded all required documents. When all documents are uploaded, the customer clicks **Next** to continue the application.

NOTE: To continue the application, required documentation must be uploaded. A customer may click the **Save & Logout** button to stop the application, gather the documents, and return later. To see a list of acceptable documents for child care, click <u>here</u>. To see a list of acceptable documents for child care, click <u>here</u>.

The **Orientation to Discrimination Complaint Procedures** page displays.

#### 2. Orientation to Discrimination Complaint Procedures

The **Orientation to Discrimination Complaint Procedures** form addresses discrimination complaint procedures for the programs and services Workforce Solutions offers, including:

- Workforce Innovation and Opportunity Act (WIOA)
- Temporary Assistance for Needy Families (TANF)/CHOICES
- Supplemental Nutrition Assistance Program Employment & Training (SNAP E&T)
- Child Care Services (CC)
- Trade Adjustment Assistance (TAA) and Trade Readjustment Allowances (TRA)

Customers must click **I Accept** to acknowledge they have read and agree to the information in the document. The **Disclaimers** page displays.

#### 3. Disclaimer

Customers must read and agree to the disclaimers on the page by clicking the box next to each statement and choosing the date. Statements include:

- I understand that providing false information or failing to disclose information in order to appear eligible for financial aid is considered fraud. A person, who obtains, or attempts to obtain by fraudulent means, services to which the person is not entitled, may be prevented from receiving future financial aid from Workforce Solutions, must pay back financial aid received, and may be prosecuted under applicable state and federal laws.
- I give permission to Workforce Solutions to contact third parties to verify information pertaining to my application for financial aid.
- I certify that my answers are true and complete to the best of my knowledge.
- I read and signed the Orientation to Discrimination Complaint Procedures form.

By selecting the "I Accept" button, customers are signing the Agreement electronically. They agree their electronic signature is the legal equivalent of their manual signature on this Agreement.

#### Customers must click the I Accept button to continue.



### D. Submit application for approval.

The Final Review page displays.

Workforce Solutions	Logout
0	66
Final Review	
Completion	
Completion You have completed each of the sections. Please review all of your information be you may choose to have your finished application emailed to you or download it fi	efore submitting the form. After you submit your application or your records.
Completion You have completed each of the sections. Please review all of your information by you may choose to have your finished application emailed to you or download it fi Step 1 - Personal Information	efore submitting the form. After you submit your application or your records.
Completion You have completed each of the sections. Please review all of your information be you may choose to have your finished application emailed to you or download it fin Step 1 - Personal Information Step 2 - Family Instructions	efore submitting the form. After you submit your application or your records. Edit C Edit C
Completion You have completed each of the sections. Please review all of your information be you may choose to have your finished application emailed to you or download it fin Step 1 - Personal Information Step 2 - Family Instructions Step 3 - Veterans Addendum	efore submitting the form. After you submit your application or your records. Edit Edit C
Completion You have completed each of the sections. Please review all of your information by you may choose to have your finished application emailed to you or download it fin Step 1 - Personal Information Step 2 - Family Instructions Step 3 - Veterans Addendum Step 4 - Child Care Addendum	efore submitting the form. After you submit your application or your records. Edit d Edit d Edit d
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Completion You have completed each of the sections. Please review all of your information by you may choose to have your finished application emailed to you or download it fin Step 1 - Personal Information Step 2 - Family Instructions Step 3 - Veterans Addendum Step 4 - Child Care Addendum Step 5 - Documentation Step 6 - Orientation to Discrimination	efore submitting the form. After you submit your application or your records. Edit Edit Edit Edit Edit Edit Edit Edit

Customers have the option to review all the information entered by clicking the **Edit** link next to each step. When a customer is satisfied all information is complete, they click the **Submit Application** button.

The Social Security Number pop-up displays.

Providing a Social Security Number (SSN) is optional. Customers can enter their SSN and click **Submit** or click on **Skip**.





Social Security Number (SSN) (optional)	×
SUBMIT	
SKIP	

The **Application Submitted** page displays, informing the customer their application has been submitted. Customers may choose to download a copy of the application or have it emailed for their records.

Workforce Solutions	Update Profile   Home
	Logout
Thank you, Angelique	
Your financial aid application has been submitted.	
Please allow at least 10 days for us to process your application. If additional in decision for your application, a Workforce Solutions professional will contact your application.	formation is needed from you, or when we make an eligibil ou.
Email Applicat	tion

#### **Remember:**

• Follow the current financial aid process.

# Workforce Solutions

- For customers applying for substantial financial aid, an assessment is required prior to an eligibility determination by the Financial Aid Support Center.
- Use the Validating and Entering Qualifications for Workforce Solutions Financial Aid (VEQ) to help your customer gather the necessary supporting documents prior to completing the online Financial Aid Application.
- This is the new normal.
  - Familiarize yourself with the online application. Watch the eLearning *Financial Aid Application: Assisting Customers with the Online Process*, available on the LMS.
  - Ask questions and notify the contact person at your office or your assigned Subject Matter Expert (SME) if you encounter problems.
- Provide excellent customer service.
  - Be patient with customers as they complete the online Financial Aid Application.
  - Follow-up with customers once you've referred them to apply online to answer any questions.