



WS 11-07 REISSUED
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FINANCIAL AID

To: All Contractors

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Subject: Managing Financial Aid/Scholarship Contribution Limits/Scholarship Registry

Purpose

Add a process for keeping a customer's place on the Scholarship Registry when he or she is no longer eligible for some, but not all, of the fund sources for which he or she is tagged.

Background

In February of this year, we changed our Scholarship Registry procedures to require a customer to prove eligibility for scholarship funds before we enter her on the Registry. Since then several of you have asked us how to keep a customer's place on the Scholarship Registry when we contact her and she is no longer eligible for an open fund but doesn't want to lose her place on the Registry when other funds open.

For example, we place a customer eligible for both SNAP E&T and WIA Adult funding for her education on the scholarship registry. SNAP E&T funds become available, and we send the customer a letter and an email asking her to contact us about a scholarship. When she calls, she is no longer receiving food stamps and is not eligible for SNAP E&T scholarship funds.

She remains eligible for WIA Adult scholarship dollars, but that fund is closed when she calls. We want her to keep her place in the Registry even though we are removing her tag for SNAP E&T funds.

Changes

Use the desk aid attached to this issuance to help you update a customer's information on the Scholarship Registry. We highlighted the changes below.

Helping a Customer Qualify

Customers must complete a Workforce Solutions Financial Aid Application and provide acceptable proof of eligibility for financial aid before staff enters them on the Scholarship Registry. Staff must explain the application process, give customers information about occupations eligible for scholarship and approved training vendors, and ask them if they want to complete an application.

When a customer has provided all the needed information and staff knows she or he is eligible:

1. Give the customer the new Scholarship Registry letter, attached to this issuance, titled “Scholarship Registry Entrance”.
2. Open a TWIST record for the customer tagging her for all possible fund sources. Put her in the appropriate service or services. You may use “planned gap in service” if she does not need any help while she waits for an available scholarship. This will maintain her eligibility until scholarship funds become available.
3. In TWIST, assign the customer to a staff member.
4. Financial Aid Payment Office staff mails the customer a call-in letter – attached here and titled “Scholarship Registry Call-In Letter” – and sends also send the customer an email, when funds are available.
5. When the customer responds to a Call-In letter or email, career office staff enters the appropriate financial commitments in both TWIST and FAMS. If you are unsure of the commitment amount until close to the course start date, estimate as closely as possible.
6. Occasionally you will see a customer who is no longer eligible for the funds that become available, but remains eligible for other funds. Tell the Payment Office if you know of the change before it sends the customer a letter about possible funding. If you talk to a customer who gets a letter and is not eligible, explain why you cannot give her the scholarship and tell her she will keep her place on the list and we will contact her when other money is available. Staff will follow the directions on the attached desk aid, Scholarship Registry – FAMS Data Entry Desk Aid section on Updating Scholarship Registry - to assure the customer does not lose her place on the Registry.
7. If the customer does not respond to the call-in letter or email within 10 calendar days, career office staff assigned to the customer in TWIST must contact the customer to get the information necessary to close her TWIST record or provide other services.

We will continue to follow our earlier process of determining financial aid eligibility for customers on the Registry until the current list is exhausted. These customers will receive the old Call-In letter and will complete the Financial Aid Application when they respond to the letter.

Scholarship Rules

Workforce Solutions helps people build careers so they can participate in the global economy: we help people get a job, keep a job, or get a better job. One of the ways we do this is to provide scholarships that support individuals' education, training or re-training in high-skill, high-growth occupations.

Although we help any customer find the resources to go to school in his or her chosen field, we reserve our own scholarship funds for those occupations which support our area's key industries and provide our customers with good jobs for the future.

This issuance includes rules applicable to scholarships using Workforce Solutions funds, except for those paid with Trade Act dollars.

1. A customer must apply for a scholarship, and staff must determine the customer as eligible, before we grant a scholarship.
2. **No employment need.** A customer may receive a scholarship for training in the Gulf Coast Workforce Board's high-skill, high-growth occupations supported by scholarship without demonstrating a lack of skills in those occupations if:
 - a. The customer is otherwise eligible for our funds; and
 - b. Tests or work background indicate that the customer has a good chance of succeeding in class and later in his or her job; and
 - c. He or she agrees to an employment plan and makes progress toward the goals listed in that plan.
3. **Dollar limits.** The following limits apply to amounts for Workforce Solutions scholarships:
 - a. For basic skills training an eligible customer may receive a scholarship up to **\$3,000** in a 12-month period for tuition, fees, books and supplies.
 - b. For occupational skills training, an eligible customer may receive a scholarship up to **\$6,000** in a 12-month period for tuition, fees, books and supplies.
4. **Education support.** Workforce Solutions provides education support to customers only if they are training in one of the Gulf Coast Workforce Board's high-skill, high-growth occupations supported by scholarship, or are receiving a scholarship with Trade Act funds. This support can include financial assistance for child care expenses, transportation or other support.

Through December 31, 2010, we also provide education support for customers enrolled in Training for Jobs projects.

Education support financial aid is in addition to the amounts available for tuition, fees, books and supplies.

5. **High-Skill, High-Growth Occupations/Vendor Network.** Scholarships using Workforce Solutions funds are available to customers who:
 - a. Are training in one of the Gulf Coast Workforce Board’s high-skill, high-growth occupations supported by scholarship; and
 - b. Are attending training with a vendor in the Workforce Solutions network. Find the current list of high-skill, high-growth occupations supported by scholarship at <http://wrksolutions.com/jobs/occupationindemand.html>.
6. **Bachelor’s Degree.** For educational programs that award a bachelor’s degree, Workforce Solutions will only award scholarships to help finance the last two years of school.
7. **Master’s Degree in Nursing.** Individuals officially enrolled full-time in program tracks leading to a Master’s of Science in Nursing and committed to teaching at least two years in programs leading to initial RN licensure in a Gulf Coast nursing school upon graduation are eligible for scholarship support to help finance all courses required to complete their Master’s Degree in Nursing.
8. **Trade Adjustment Assistance.** Trade Act funds provide scholarships only for individuals specifically identified as eligible for this assistance. Separate rules apply to scholarships funded with Trade Act dollars, and we are issuing separate guidance for these funds.

Scholarship Registry

When the Financial Aid Payment Office notifies the system that a particular fund is closed to new scholarship commitments, staff can register the customer on a scholarship wait list in the Financial Aid Management System (FAMS) under a category labeled “Scholarship Registry”.

The registry ensures we serve customers on a first-come, first-serve basis when funds become available. It is our policy to check a customer’s eligibility for all fund sources, including sources outside Workforce Solutions, before adding the scholarship request to the Scholarship Registry.

The Scholarship Registry does not apply to Trade Act-funded scholarships.

Using the Scholarship Registry. Customers must complete a WFS Financial Aid Application and provide acceptable proof of eligibility for financial aid before you put them on the Registry. Explain the application process to the customer, give her information about our occupations eligible for scholarship, and approved training vendors. Ask her if she wants to complete the application.

When the customer has provided all the needed information and you know she or he is eligible:

1. Give the customer the new Scholarship Registry letter, attached to this issuance, titled “Scholarship Registry Entrance”.
2. Open a TWIST record for the customer tagging her for all possible fund sources. Put her in the appropriate service or services. You may use “planned gap in service” if she does not need any help while she waits for an available scholarship. This will maintain her eligibility until scholarship funds become available.
3. In TWIST, assign the customer to a staff member.
4. Financial Aid Payment Office staff mails the customer a call-in letter – attached here and titled “Scholarship Registry Call-In Letter” – and sends also send the customer an email, when funds are available.
5. When the customer responds to the Call-In letter, career office staff enters the appropriate financial commitments in both TWIST and FAMS. If you are unsure of the commitment amount until close to the course start date, estimate as closely as possible.
6. If the customer’s situation has changed such that she no longer qualifies for a particular fund source, update her information on the Registry so she will not lose her place and we will let her know when other funds are available.
7. If the customer does not respond in ten days to the call-in letter or email correspondence, career office staff assigned to the customer in TWIST must contact the customer to get the information necessary to close her TWIST record or provide other services.

Priority. Workforce Solutions gives priority first to veterans and qualified spouses of veterans and then to foster youth when there is a wait list for scholarships.

The FAMS Scholarship Registry Process Flowchart and FAMS Scholarship Registry Data Entry Desk Aid are available online in the Desk Aid section of Staff Resources Policies and Procedures <http://wrksolutions.com/staff/deskaid.html> .

The letter to a customer letting her know we’ve placed her on the scholarship registry wait list and the call-in letter we use we let a customer know we have money to fund a scholarship off the wait list are in the Financial Aid Scholarship Letters and Forms section of Staff Resources Policies and Procedures <http://wrksolutions.com/staff/scholarshiplettersandforms.html> .

Vendor Network

We use a network of approved vendors and programs to provide education and training services. Workforce Solutions will only provide financial aid for customers to attend a program or receive a service that is approved and listed in the network.

You can access the network for basic skills vendors and occupational skills vendors through the Workforce Solutions website at http://wrksolutions.com/aid/fin_aid_train_ed.html#tpn.

Schools interested in becoming part of Workforce Solutions vendor network may apply online. Direct them to <http://wrksolutions.com/about/vendorapplications.html>.

Action

- Make sure all staff is aware of the change in Scholarship Registry procedures scholarships.
- Make sure staff has removed all copies of Issuance 10-11 and replaced Issuance 11-07 with 11-07 Reissued.

Questions

Staff should ask questions of their supervisors first. Direct questions for Board staff through the Issuance Q&A at <http://wrksolutions.com/staff/policiesandprocedures.html>.

Attachments

1. Scholarship Registry Entered Letter
2. Scholarship Registry Call-In Letter
3. Scholarship Registry Data Entry Desk Aid