WS 11-23
September 28, 2011
Financial Aid
Expires: **9/30/12**

To:	Career Offices Financial Aid Payment Office
From:	Rodney Bradshaw Mike Temple Lucretia Hammond
Subject:	Notifying Customers that Financial Aid is Available

Purpose
Transmit procedures for notifying customers of financial aid availability

Background
For several months, we have had a shortage of financial aid. This resulted in the interruption of aid for some current customers and a wait list for new customers.

Priority for Notice
On October 1, 2011, we will again have funds available for customers requesting all categories of financial aid over $200. We will begin notifying customers who have requested scholarship assistance in the following order:

1. Customers who were receiving financial aid and stopped receiving the aid because we did not have funds available for that customer

2. Customers on the Scholarship Registry in order of date entered on the registry and according to the existing priority order (veterans and qualified veterans' spouses, foster youth, etc.)

Process

- **Contacting customers whose financial aid was interrupted (Career Offices)**

1. Check TWIST customer records to identify those customers who were receiving financial aid that we stopped, or did not renew, due to lack of funds.

2. Complete the attached spreadsheet, Customer Commitments for Scholarships, entering all the customer information you have for those identified in the step above. Email your completed spreadsheet to sharron.powell@wrksolutions.com on or before **October 3, 2011**.

3. On **October 3, 2011,** send the attached letter (Interrupted Financial Aid) to all customers on the spreadsheet. The letter asks customers to respond to us before October 17, 2011.

4. Talk to customers who respond to the letter and determine if their employment goals and financial needs have changed. Adjust both TWIST and FAMS, if necessary, to reflect the customers' goals and our financial commitments to them. Make sure all of the following records are updated and in agreement if necessary:

    a. TWIST employment plans
    b. TWIST counselor notes
    c. TWIST Support Services and/or ITA Financial Assistance
    d. FAMS commitments with accurate dates for expected expenditures

5. Update information in the Customer Commitments for Scholarships spreadsheet as you speak with customers to make sure the spreadsheet has current and accurate information. In the comments section of the sheet, summarize any changes you may make to a customer's information from previous versions of the spreadsheet.

    NOTE: Be sure to complete the box at the bottom of the spreadsheet to show who is responsible for having completed the spreadsheet and which version is the current one.

6. Send updated spreadsheets to sharron.powell@wrksolutions.com by **October 18, 2011**.

7. If a customer whose financial aid we interrupted responds to the letter after the deadline in his or her call-in letter and requests continued financial aid, process his or her request if funds are available.

- **Contacting customers on the Scholarship Registry (Career Offices and FAPO)**

1. Provide contact information for each office so that FAPO can insert it in the Financial Aid Registry Call-In Letters to sharron.powell@wrksolutions.com by **October 18, 2011**. (Career Office)

2. FAPO will begin sending letters to customers on the scholarship registry using the contact information for each office. FAPO will send the first group of letters on October 24, 2011. (FAPO)

3. We will give customers 10 working days to respond to the letter and 10 more working days to prove eligibility. Count the days beginning on the day after the date of the call-in letter and the day after the customer contacts the office. Working days exclude Saturdays, Sundays and Workforce Solutions holidays.

   Example: A Scholarship Registry Call-In letter sent on October 24, 2011 allows the customer until the end of the day November 7, 2011 to contact an office. We would allow the customer until November 21, 2011 to prove his or her eligibility.

   Managers should use their judgment in allowing exceptions to the deadlines for proving eligibility. Be aware that the longer it takes to complete an eligibility determination, the less likely funds will be available and that we cannot hold funds for customers who are unable to respond within the deadlines. (Career Office)

4. Talk to customers who respond to the call-in letters to (a) develop or confirm their employment plans and (b) determine eligibility if not already done. Check that any previous eligibility determination continues to apply (e.g. does a customer continue to receive SNAP and/or TANF benefits). Remember that Project RIO funds are no longer available.

   Adjust both TWIST and FAMS, if necessary, to reflect the customers' goals and our financial commitments to them. Make sure all of the following records are updated and in agreement if necessary:
   a. TWIST employment plans
   b. TWIST counselor notes
   c. TWIST Support Services and/or ITA Financial Assistance
   d. FAMS commitments with accurate dates for expected expenditures (Career Office)

5. If a customer from the scholarship registry contacts you beyond the 10 working day deadline noted in the call-in letter, tell the customer that you will place him or her at

back on the registry. Take the necessary steps to re-enter the customer on the registry.

Action

1. Make sure all staff understands that we are notifying customers about financial aid.

2. Make sure staff read the call-in letters because they provide timelines for customers and staff.

3. Make sure everyone can give accurate information to customers asking about financial aid or can quickly connect the customer with the appropriate staff member to help the customer.

4. Make sure Personal Service Representatives and Financial Aid Specialists know how to talk to the customer about her financial aid request

5. Make sure all staff understands how to enter and then does enter the required information in TWIST and FAMS

Questions

Staff should direct questions to their immediate supervisors. Direct questions to the Board staff through the electronic Q&A posted with the policy on the website at http://www.wrksolutions.com/staff/policiesandprocedures.html.

Attachments

1. Interrupted Financial Aid Call-In Letter
2. Scholarship Registry Letter Call-In Letter
3. Customer Commitment for Scholarships Spreadsheet (with instructions)