

Using the Online Financial Aid Application

STAFF

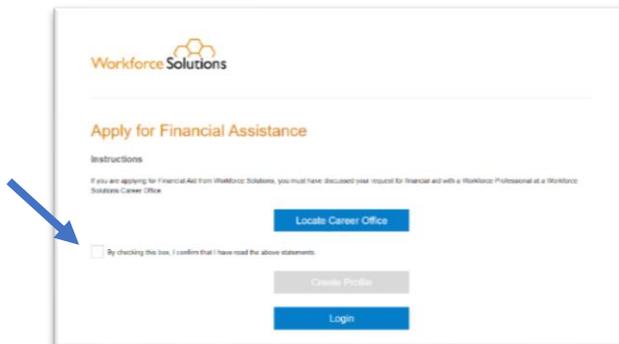
The purpose of this document is to help you become familiar with navigating the online financial aid application so you can assist your customers. The [online application e-learning](#) is also a good tool for you to reference when you need a refresher. If you need additional assistance, please reach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

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

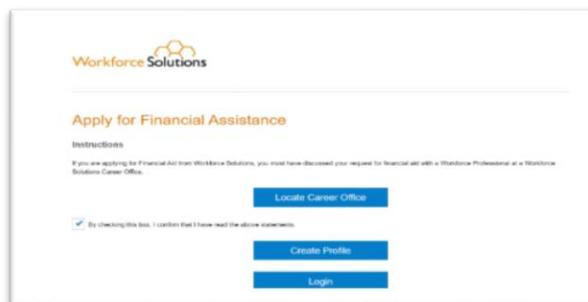
A. Agree to Speak with a Workforce Solutions Professional about their request for financial aid. We will conduct an assessment to help identify their goals and begin the development of their employment plan.

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

The **Apply for Financial Assistance** screen displays.

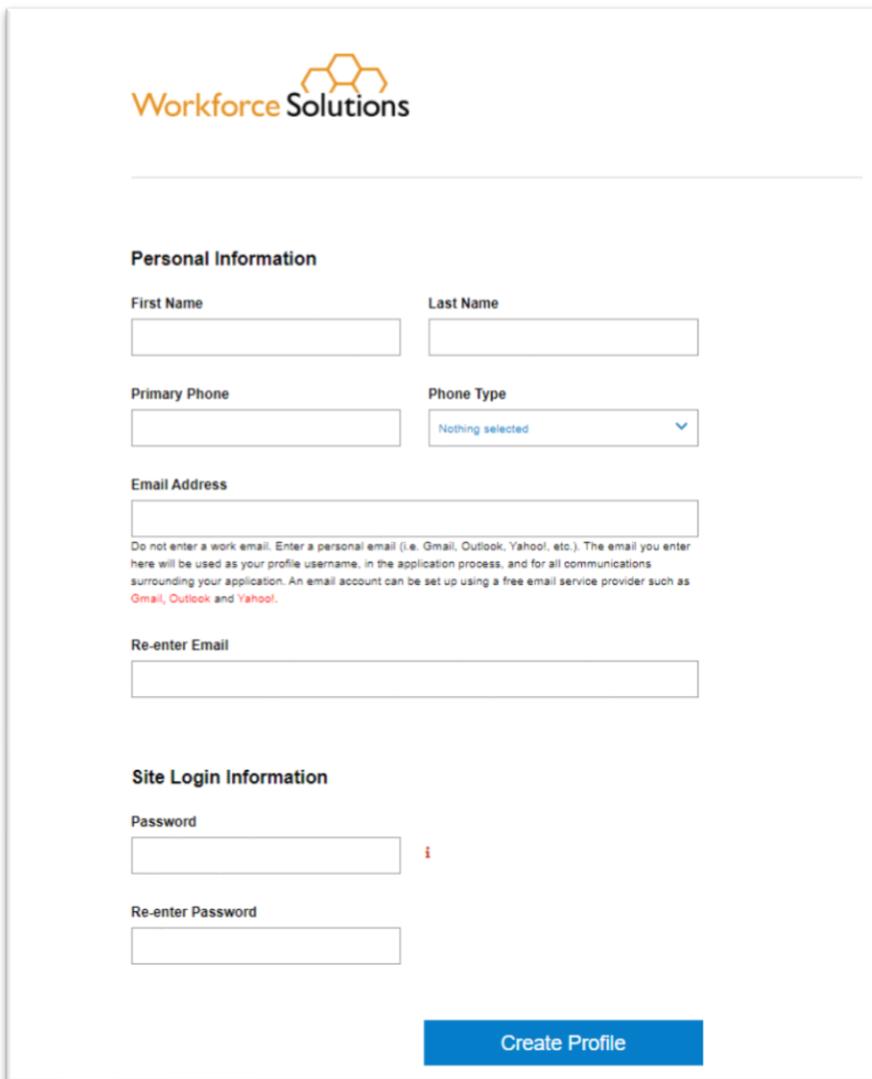


2. Customers must check the box agreeing to discuss their request with a workforce professional at a Workforce Solutions office for the "Create Profile" button to activate. Once the statement box is checked, customers must click the **Create Profile** button.



B. Create a Profile

The Profile screen displays.



The screenshot shows the 'Create Profile' form on the Workforce Solutions website. At the top is the Workforce Solutions logo. Below it is a horizontal line. The form is divided into two main sections: 'Personal Information' and 'Site Login Information'.
Personal Information:
- 'First Name' and 'Last Name' are text input fields.
- 'Primary Phone' is a text input field.
- 'Phone Type' is a dropdown menu with 'Nothing selected' and a downward arrow.
- 'Email Address' is a text input field with a note below it: 'Do not enter a work email. Enter a personal email (i.e. Gmail, Outlook, Yahoo!, etc.). The email you enter here will be used as your profile username, in the application process, and for all communications surrounding your application. An email account can be set up using a free email service provider such as [Gmail](#), [Outlook](#) and [Yahoo!](#).'
- 'Re-enter Email' is a text input field.
Site Login Information:
- 'Password' is a text input field with a red 'i' icon to its right.
- 'Re-enter Password' is a text input field.
At the bottom right of the form is a blue button labeled 'Create Profile'.

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.



Email Address

This field is required.

Do not enter a work email. Enter a personal email (i.e. Gmail, Outlook, Yahoo!, etc.). The email you enter here will be used as your profile username, in the application process, and for all communications surrounding your application. An email account can be set up using a free email service provider such as **Gmail, Outlook and Yahoo!**.

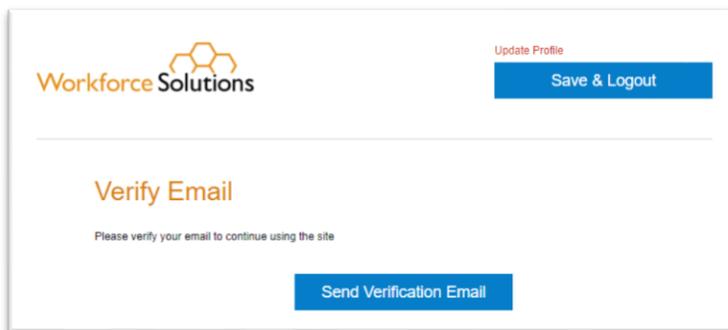
Re-enter Email

This field is required.

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.



Workforce Solutions

Update Profile

Save & Logout

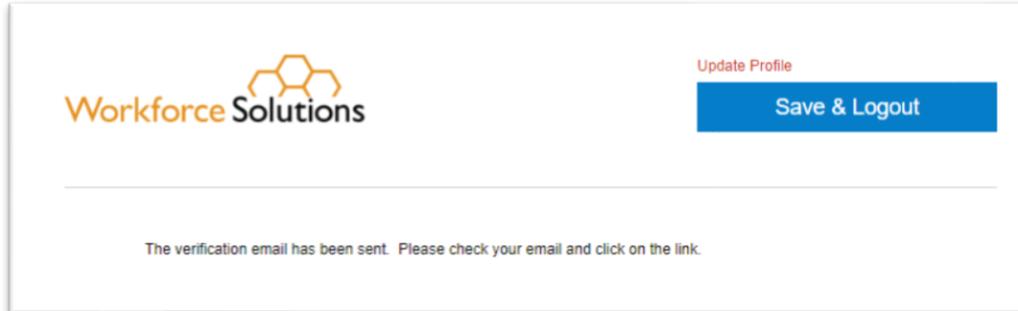
Verify Email

Please verify your email to continue using the site

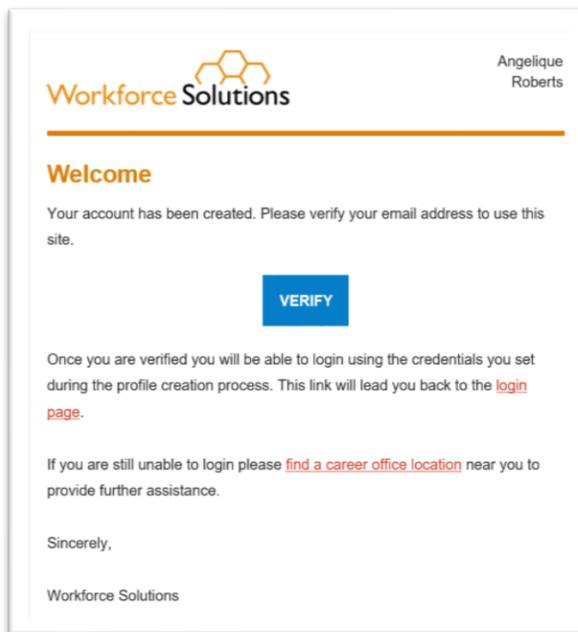
Send Verification Email

To confirm and verify their email address, customers must:

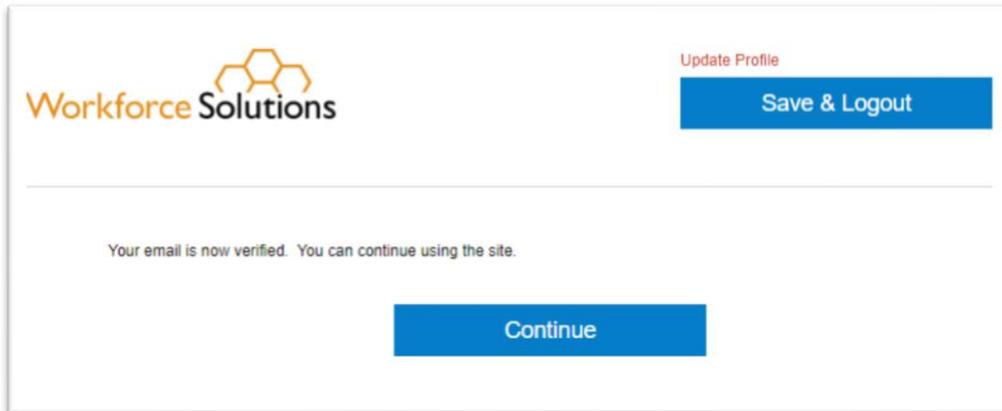
- Click the **Send Verification Email** button. A verification email is sent to the email address listed on the customer's profile.



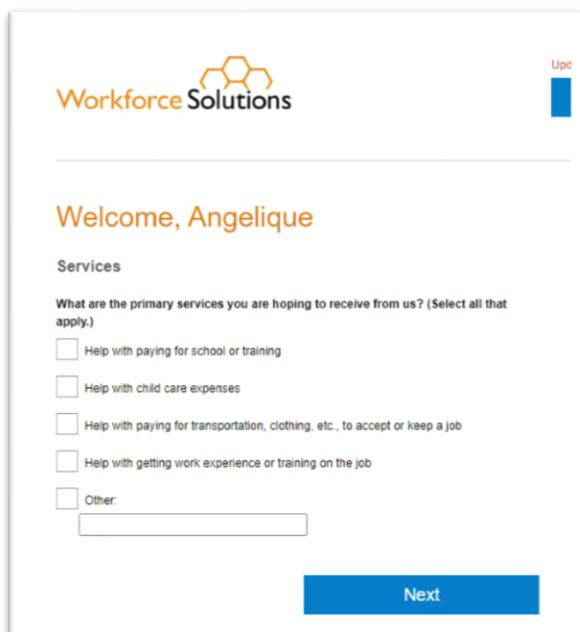
- Login to their email address.
- Retrieve the verification email from WFSFinancialAid@wrksolutions.com.
Note: If the email is not in the inbox, ask the customer to check their Spam folder.
- Click the **VERIFY** link in the verification email.



- The **Email Verified** screen displays.



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

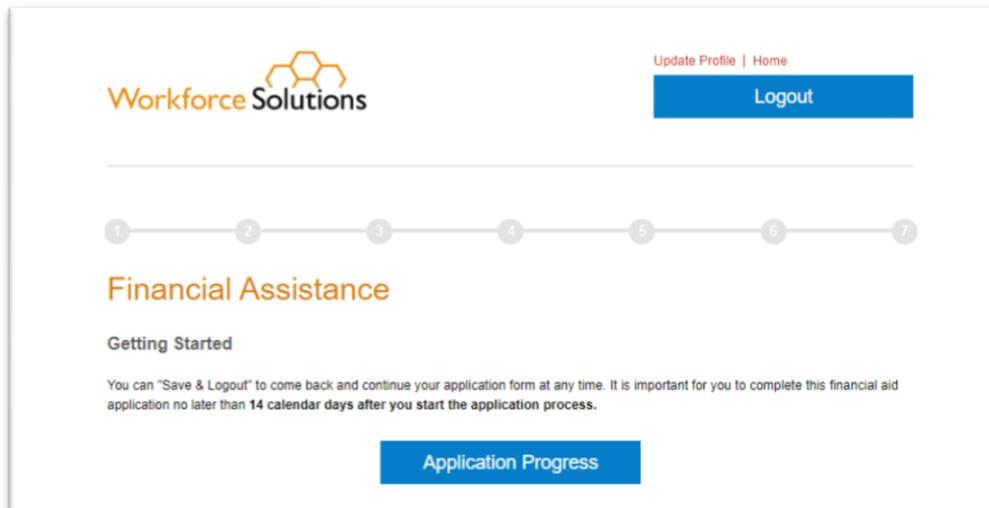


To continue the application profile, customers:

- 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.



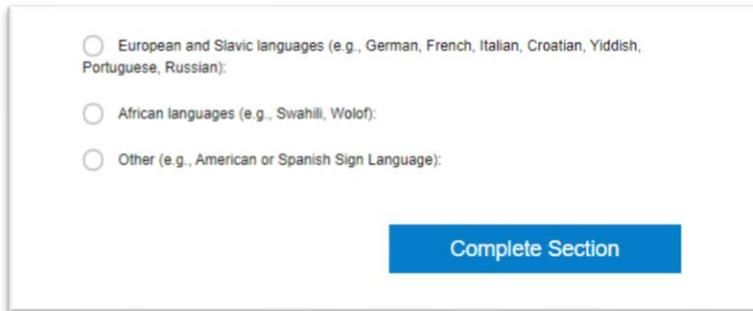
At this point, customers may choose to logout and return to complete the application at a later time.

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.

A screenshot of a web form. It contains three radio button options: "European and Slavic languages (e.g., German, French, Italian, Croatian, Yiddish, Portuguese, Russian);", "African languages (e.g., Swahili, Wolof);", and "Other (e.g., American or Spanish Sign Language);". Below these options is a blue button labeled "Complete Section".

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.

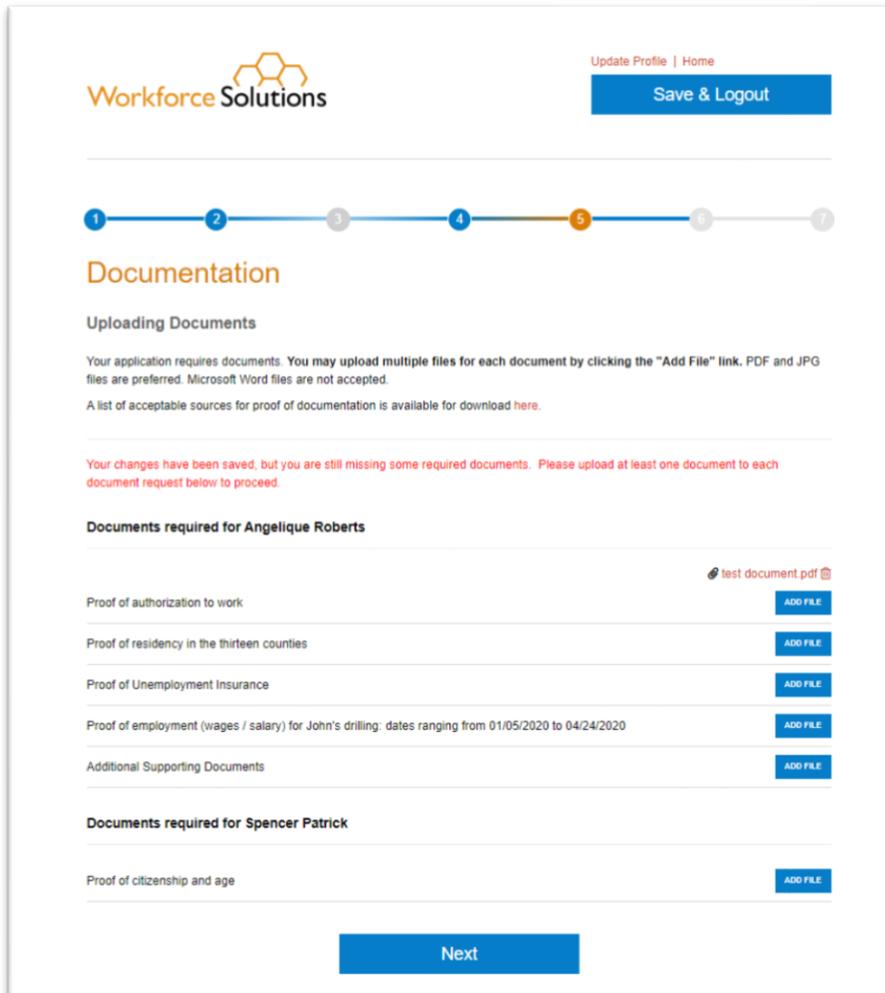
Family Information

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.



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 [here](#). To see a list of acceptable documents for scholarship, click [here](#).

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:

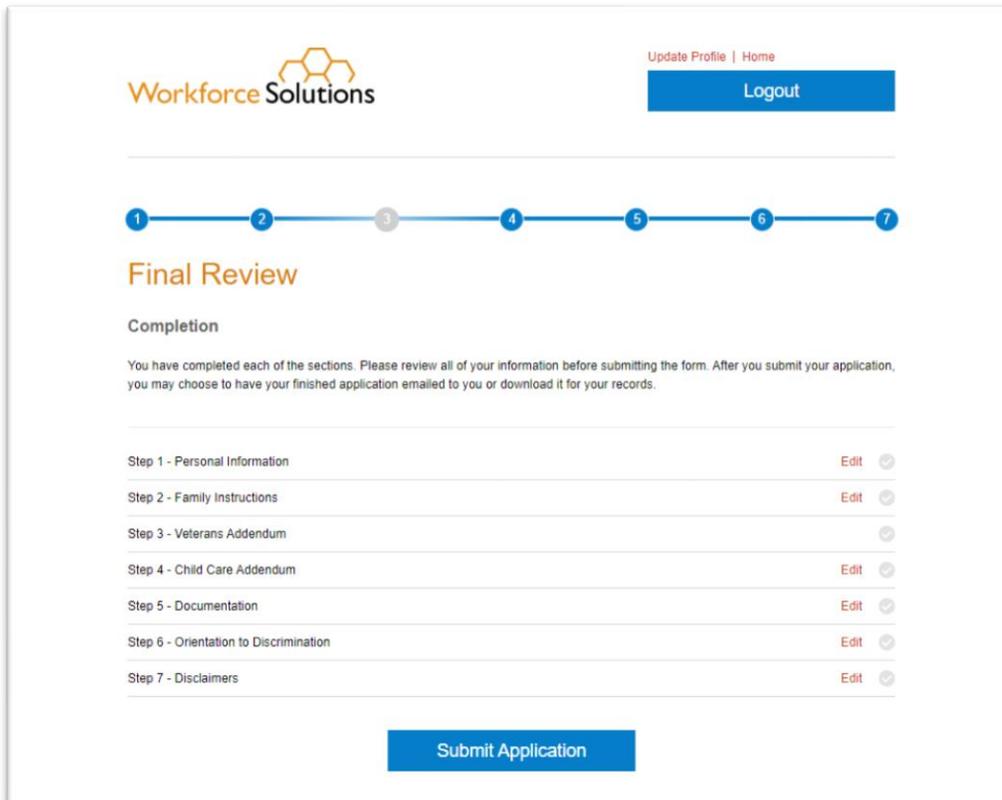
- I understand that providing false information or failing to disclose information in order to appear eligible for financial aid is considered fraud. A person, who obtains, or attempts to obtain by fraudulent means, services to which the person is not entitled, may be prevented from receiving future 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.



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)

 Hide SSN

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.



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 information is needed from you, or when we make an eligibility decision for your application, a Workforce Solutions professional will contact you.

Email Application

Download Application

Remember:

- Follow the current financial aid process.

- 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.