

## **Instructions for Calculating Financial Aid Contribution ND Division of Vocational Rehabilitation**

Refer to VR's Policy Manual NDAC 75-08-01-30 for the complete policy on postsecondary training.

The starting point for calculating VR's participation in postsecondary training is the Financial Aid Award Notice/3<sup>rd</sup> Party Notification from the Financial Aid Offices. Students must obtain this information and provide it to the counselor.

### **1. Introduction**

This worksheet is straightforward for schools that offer financial aid. See the instructions on page 7 regarding summer school. See the instructions starting on page 8 for non-traditional training programs, such as cosmetology, truck driver training, welding schools, or the ASTEP program.

The worksheet **must** be completed in Excel using a computer. Due to the embedded formulas, it cannot be done by hand on paper.

The Excel worksheet is located at: <P:\So Vocational Rehabilitation\VR Policies-Procedures-TAGs\SP 16-01 Higher Ed Worksheet.xlsx>. Enter data in the blue cells only. Data cannot be entered or changed in the yellow cells as this would affect the formulas.

### **2. Identifying Information**

Enter the student's:

- Name
- School
- Enter an 'x' for the type of term (semester, quarter, or other). If you select Semester, the minimum potential VR participation will be \$600/term. If you select Quarter or Other, the minimum potential VR participation will be \$400/term.
- Term start date
- Year
- Number of credits for the term

**For a Summer School program that does not run year-round, do not use the higher ed worksheet. See the note on Summer School on page 7.**

### 3. Budget Duration

Enter the number of months to calculate the budget duration. Normally, the budget duration would be 9 (one year of school is 9 months). However, all authorizations for postsecondary education are currently for ONE semester only. Therefore, the budget duration for one semester is 4.5.

It is critical the budget duration number is correct, since it significantly affects the calculations that follow. **The majority of the time, the budget duration for a full time student (12 or more credits) for one semester will be 4.5.**

Enter **4.5** for one semester

Enter **3** for one quarter, for example, a term at Rasmussen or Minnesota School of Business.

If the student is taking less than 12 credits, that ratio must be applied to the budget duration. In certain circumstances, a counselor may decide to pay for less than 12 credits. For example, a counselor may choose not to pay for retaking a class that was failed, or not paying for a class not required in the degree plan.

This table shows the budget duration for 1 to 11 credits for **one semester**:

No. of Credits	Semester Months	Formula	Budget Duration
1	4.5	$+4.5*(1/12)$	.375
2	4.5	$+4.5*(2/12)$	.750
3	4.5	$+4.5*(3/12)$	1.125
4	4.5	$+4.5*(4/12)$	1.500
5	4.5	$+4.5*(5/12)$	1.875
6	4.5	$+4.5*(6/12)$	2.250
7	4.5	$+4.5*(7/12)$	2.625
8	4.5	$+4.5*(8/12)$	3.000
9	4.5	$+4.5*(9/12)$	3.375
10	4.5	$+4.5*(10/12)$	3.750
11	4.5	$+4.5*(11/12)$	4.125

This table shows the budget duration for 1 to 11 credits for **one quarter**:

No. of Credits	Quarter Months	Formula	Budget Duration
1	3	$+3*(1/12)$	.250
2	3	$+3*(2/12)$	.500
3	3	$+3*(3/12)$	.750
4	3	$+3*(4/12)$	1.000
5	3	$+3*(5/12)$	1.250
6	3	$+3*(6/12)$	1.500
7	3	$+3*(7/12)$	1.750
8	3	$+3*(8/12)$	2.000
9	3	$+3*(9/12)$	2.250
10	3	$+3*(10/12)$	2.500
11	3	$+3*(11/12)$	2.750

#### **4. ASTEP Program through MSU or DCB**

For most instances, leave this cell as n (for no). If the student is participating in the ASTEP program through Minot State University or Dakota College at Bottineau, enter a y (for yes). See more about the ASTEP program on the last page of this document.

#### **5. Out-of-State or Private Universities**

For most instances, leave this cell as n (for no). If, because of the student's disability or vocational goal, the only available postsecondary training is at an in-state private, or out-of-state institution, enter a y (for yes) in this cell, and document this in the "Rationale & Notes" box. If they are attending an out-of-state, or in-state private institution not due to the student's disability or vocational goal, leave the n (for no).

#### **6. Expenses**

Enter the Actual Expenses in the blue cells.

Tuition/Fees expenses are for one term, minus any waivers or discounts (such as minority waivers or employee discounts).

Enter the Books/Supplies expenses for one term. Do not leave this field blank. If there are no expenses for books and supplies, enter a zero.

Enter the Program Required Tools/Equipment for one term. Do not combine this amount into the Books/Supplies expense. The Books/Supplies amount has a maximum of \$600.

#### **Purchasing a laptop, tablet, notebook or equivalent device (hereafter referred to as computer)**

If a student requires a computer for AT due to their disability, it is purchased on a separate authorization and the Client Financial Participation Worksheet would apply to the purchase.

If purchasing a computer for general use for a student, include the dollar amount, up to \$600, for the computer and software in the 'Tools/Equipment' line. This amount needs to be documented in the 'rationale and notes' box and approved by the Regional Administrator.

If the awards letter lists the computer as a requirement, enter that cost in the 'Tools/Equipment' line.

If the cost to rent a computer is listed as Tuition and Fees on the awards letter, include it in the Tuition/Fees amount. Do not list it separately under Tools/Equipment.

If the computer breaks, that is handled on a case by case basis using counselor judgement.

## 7. EFC for 1 term

Enter the Expected/Estimated Family Contribution (EFC) for 1 term. Many times an awards letter gives the EFC for two semesters. You must calculate the EFC for one term. For example, if this is for one semester, divide the EFC in half, and enter the amount in this cell. The worksheet will calculate 75% of this amount and enter it in the Assistance section.

## 8. Total Cost for One Term

The total cost for one term is the sum of the "Amt. Used" column. The "Amt. Used" selects the postsecondary Rate Amount or the Actual Amount, whichever is less, for Tuition/Fees and Books/Supplies (unless 'out of state or private' is designated y for yes). In either case, the maximum amount for books is \$600.

The postsecondary rate is the highest in-state tuition rate for one semester, determined each year by the state office. If the budget duration is 4.5 (one semester), the rate is the highest in-state tuition and \$600 for books. If the budget duration is less than 4.5 (see section 3), the rate will be reduced by the same ratio.

## 9. Assistance

The 'Minus 75% EFC for 1 term' is a protected cell. The amount is calculated by taking 75% of the EFC entered in step 7.

Enter the Grants for 1 term.

Enter the Non-merit Scholarships for 1 term. (Merit Scholarships are based on the student's academic and/or extra-curricular abilities, such as sports, music, and the arts, and **cannot** be used as a comparable benefit.)

Enter Other Comparable Benefits (WIOA, Military, etc.) for 1 term. Be sure to refer to WIOA, when appropriate.

The majority of the time, Work Study is not considered and not entered on the worksheet.

The assistance amounts are deducted from the total cost, and the difference is the 'VR Unmet Need for 1 term'.

There are rare circumstances when transportation and lodging can be considered as 'Other Expenses'. (See next section.)

### **Potential VR Participation to Apply Toward Tuition**

If the VR Unmet Need for 1 semester is \$600 or less, the total potential VR participation will be \$600. If the VR Unmet Need for 1 quarter is \$400 or less, the total potential VR participation will be \$400.

This is the maximum amount that VR can authorize. There are instances when the authorization is less than the potential participation. You do not want to overfund the student.

## Other Expenses for 1 Term

If the Unmet Need is less than \$600 due to a high EFC and not receiving grants, do not enter anything for Other Expenses.

If the Unmet Need is less than \$1,200 and the student is receiving needs-based Grants, VR may consider additional participation in special situations.

There are two situations where VR may consider additional participation. For those situations, there is an ability to enter up to \$1,200 for Other Expenses when the budget duration is 4.5 (one semester). If the budget duration is less than 4.5, the amount you can enter is a ratio. For example, if a student is half time, you can enter up to \$600. Entering a number greater than the allowable amount will yield an error message.

Any amounts entered in the 'Other Expenses' cell must be documented in the "Rationale & Notes" box **and** be approved by your Regional Administrator with their signature at the bottom of the form. This amount would be applied toward tuition which saves you the work of creating additional authorizations.

The two situations are transportation if the student commutes to school from out of town, or, the student must pay for a second residence while attending school.

### Example 1:

A student lives out of town, and Gasbuddy.com determined you can assist with transportation costs in the amount of \$200 per semester. Instead of writing separate monthly authorizations for gas, you would enter 200 in the 'Other Expenses for 1 term' cell. This will increase the Total VR Participation by \$200, and be applied towards tuition. Document this in the Rationale & Notes box and have it approved by your Regional Administrator.

### Example 2:

A student is required to pay for a second residence, and needs assistance with room and board costs in the amount of \$800 per semester. Enter 800 in the 'Other Expenses for 1 term' cell. This will increase the Total VR Participation by \$800, and be applied towards tuition. Document this in the Rationale & Notes box and have it approved by your Regional Administrator.

## **10. Loans**

Enter amounts for Loans. These amounts are not used in the calculations, but are displayed as a counseling and guidance and informed choice tool for the counselor and student. If a student has been awarded unsubsidized and/or subsidized loans, and VR is participating in the cost of tuition/fees/books, the school will reduce the loan amount the student receives. Counselors will want to ensure the student is aware of that.

Unsubsidized loans – interest accrues while the student is in school.

Subsidized loans – interest does not accrue while the student is in school.

## **11. Rationale & Notes**

Always document the following:

- If waivers or discounts were deducted from tuition/fees (show the actual calculation).
- If a private or out-of-state school was chosen due to the student's disability or vocational goal.
- If Other Expenses for one term were entered. If a computer is being purchased (that was not listed on the awards letter). These require Regional Administrator's approval.

## **12. Signatures**

The counselor signs and dates the form.

The Regional Administrator signs and approves all higher ed worksheets that have Other Expenses listed, computers not on the awards letter, or at their discretion.

## **13. Final Steps**

A copy of the completed worksheet must be provided to the student. Send copies to the school's SFA Office and/or Business Office if the school requires it.

- ✓ VR encourages all individuals to contribute toward their rehabilitation to the extent they can.
- ✓ Students cannot be required to take a loan.
- ✓ Satisfactory progress must be maintained, as documented in the IPE, to continue to receive funding from VR.
- ✓ VR financial participation is always contingent on funds being available.

#### **14. Summer School**

One of the two criteria must be met for VR to participate financially for Summer School:

1. The coursework is required for the degree program and is only available in Summer; or
2. Attending Summer School will allow the individual to graduate at least a semester early.

If there are other situations that may warrant consideration for summer school, those situations must be approved by the Regional Administrator and/or the Field Chief.

If one of the above criteria is met, VR financial participation will be calculated at \$60 per credit hour. The \$60/credit hour factors in the cost of books; therefore, no additional VR funds will be available for the purchase of books. You do not need to complete the higher ed worksheet for these situations. You simply have documentation of the number of credits and document you are paying \$60 per credit hour.

VR counselors must document in the case file which criteria were met. The case file must also contain a school document identifying the number of credits.

#### **15. VR financial participation for programs such as Cosmetology, Truck Driving or other special training or for schools that run on quarters**

The higher ed worksheet must be completed. Follow the instructions on the following pages of this document.

## Nontraditional Training Programs

### Cosmetology Schools

- Whether Cosmetology programs do or do not have Federal Financial Aid, clients who wish to attend must complete the FAFSA.
- Mark semester for the Type of Term.
- Mark the Out-of-state or Private cell as y (for yes).
- Each 900 hour session should be calculated as a semester with the **Budget duration of 4.500**.
- Complete the worksheet as you would a state institution.
- The payments should be made in increments negotiated with the client and the school.
- Satisfactory progress must be maintained, as documented in the IPE, to continue to receive funding from VR.

### Lynnes Welding

- Clients who wish to attend Lynnes Welding must complete the FAFSA application. However, Lynnes Welding will calculate the EFC differently based on their program length. Contact Lynnes Welding's Financial Aid Administrator to get the modified EFC.
- Always refer the client to WIOA and other programs that may have comparable benefits such as Skill Build.
- Mark Semester for the Type of Term.
- Leave the Out-of-state or Private cell as n (for no).
- The 5 or 6 week programs will be considered as 2 semesters.
- **The Budget duration will be 9.00** (one worksheet will be completed for the 2 semesters). If the Potential VR Participation is \$600, change it to \$1,200 since this is the equivalent of 2 semesters.
- **You will need to write this on the worksheet (the worksheet will not calculate for you).**
- Regarding room and board – Board will not be covered. Room will be covered when necessary as determined by the counselor and approved by the Regional Administrator.
- The payments should be made in increments negotiated with the client and the school.
- Satisfactory progress must be maintained, as documented in the IPE, to continue to receive funding from VR.

### CDL (Commercial Driver's License)

- CDL training programs do not have Federal Financial Aid. However, clients must complete the FAFSA application to determine EFC.
- Always refer the client to WIOA and other programs that may have comparable benefits such as Skill Build.
- Mark Semester for the Type of Term.
- Mark the Out-of-State or Private cell as y (for yes).
- The CDL programs will be calculated as one semester with the **Budget duration of 4.500**.

- Complete the worksheet as you would an out-of-state/private institution.
- The payments should be made in increments negotiated with the client and the school.
- Satisfactory progress must be maintained, as documented in the IPE, to continue to receive funding from VR.

### **EMT Training**

- For EMT training not provided by a state school, the client must complete the FAFSA to determine EFC.
- Mark Other for the Type of Term.
- Mark the out-of-state or private cell as n (for no).
- The six month EMT program is calculated as one semester with the **Budget duration of 4.500.**
- The payments should be made in increments negotiated with the client and the school.
- Satisfactory progress must be maintained, as documented in the IPE, to continue to receive funding from VR.

### **Other Schools**

Clients must complete the FAFSA application to determine EFC for other schools that do not have Federal Financial Aid. Be sure to review these cases with the Regional Administrator.

### **ASTEP Program**

All Adult Student Transition Education Program (ASTEP) students must complete the FAFSA to determine EFC whether they are taking the class for credit or auditing.

Mark semester for the type of term.

Budget duration if taking six credits is 2.250, however, if taking more or less than 6 credits follow the budget duration table in this document.

Enter y (for yes) for “Is this the ASTEP program at MSU or DCB?”

Enter n (for no) for “out-of-state or private university”.

Complete the worksheet as you would for a state institution.

Room and Board are not covered by VR. Do not enter an amount for ‘Other Expenses’.

If the VR Unmet Need for 1 semester is \$600 or less, the total potential VR participation will be \$600. The worksheet will not exceed the total cost of ASTEP’s Career Development schedule, which is \$1,600/semester as of 07/01/2016.

The AWARE ND service category for the plan and authorization is ‘Training, Other/Miscellaneous’.