



WASHINGTON
OPPORTUNITY PATHWAYS

**GEAR UP SCHOLARSHIP
PROGRAM MANUAL
2013 – 2014**

**Washington Student
Achievement Council**

TABLE OF CONTENTS

Section 1: Program Description	1
GEAR UP Overview	
The Scholars Project	
Contact Information	
Section 2: Eligibility Guidelines and Rules	3
Eligibility Requirements	
List of Eligible Students	
Maximum Years of Eligibility	
Scholarship Expiration	
Monitoring Eligibility	
Academic Progress Requirement	
Need vs. Cost of Attendance	
Packaging the Scholarship	
Section 3: Monitoring Continued Eligibility	5
Revised Eligibility	
Satisfactory Academic Progress (SAP)	
Eligible Institutions	
Section 4: Payment Requests and Disbursement	7
Disbursement Procedures	
Payment Request Procedure	
Accessing the Portal Website Payment Request Form	
Files, Forms, and Memos	
Document Submission	
Responsibility for Warrants	
Retroactive Payments	
Reconciliation of Records	
Award Amount/Payment Schedule	
Transfer Students	
Section 5: Forms and Completion Instructions	11
Graduate Data Sheet	
Warrant Request Form	
Affidavit of Lost or Destroyed Warrant	
Required Information	
Section 6: Frequently Asked Questions	19
Section 7: Definitions	20
Eligible Course of Study	
Revised Payment	
Satisfactory Academic Progress	
Supplemental Award	
Theology Degree	

SECTION 1

PROGRAM DESCRIPTION

GEAR UP Overview

GEAR UP or “Gaining Early Awareness and Readiness for Undergraduate Programs” aims to give students the message that with early planning and hard work, they can go to college. GEAR UP is helping thousands of disadvantaged middle and high school students think about, prepare for, and succeed in college.

Washington State GEAR UP is a partnership of the Office of the Governor, the Washington Student Achievement Council (WSAC), the University of Washington, and the College Success Foundation. It is funded by a \$21 million dollar grant from the U.S. Department of Education. Funding is expected to last through August 2016.

Washington State GEAR UP provides tutoring, mentoring, career, and college information for 1,000 at-risk students every year. As a part of these efforts, we also provide scholarships to students who successfully participate in the direct services component of the grant, the Scholars Project.

The Scholars Project

Scholars Project participants are typically the first in their families to think about or pursue higher education. All come from low-income communities with high numbers of at-risk youth.

The Scholars Project graduates are students from the communities of Aberdeen, Elma, Hoquiam, Inchelium, Quincy, Seattle, Spokane, Tacoma, Taholah, Wapato, White Swan, and Yakima. Starting in 2011, the graduates were from the communities of Bellingham, Everett, Monroe, Federal Way, Vancouver, Okanogan, Inchelium, Spokane, Wenatchee, Quincy, and Wapato.

Contact Information

Questions and concerns about GEAR UP Scholarships should be directed to:

Kelly Keeney

Program Specialist

917 Lakeridge Way

PO Box 43430

Olympia, WA 98504-3430

Phone: (360) 753-7838

Email: kellyk@wsac.wa.gov

SECTION 2

ELIGIBILITY GUIDELINES AND RULES

In 1999, GEAR UP replaced the federal grant program known as National Early Intervention Scholarship and Partnership (NEISP) Program. Students who have successfully participated in either program are now eligible for what we call the GEAR UP scholarship. For awarding purposes, NEISP and GEAR UP are one and the same.

NOTE: Beginning with the 2001-02 year, students may receive both the GEAR UP scholarship and the State Need Grant (SNG). The GEAR UP scholarship is separate from the regular SNG award, funds are held in a separate account, and GEAR UP awards do not impact SNG allocations.

Eligibility Requirements

To be eligible for a GEAR UP scholarship, students must:

1. Successfully participate in NEISP or Washington GEAR UP for one year or more;
2. Earn one or more years of scholarship;
3. Graduate from high school or earn a General Education Development (GED) certificate and complete the requirements for college admission;
4. Enroll at least half-time;
5. Enroll at an eligible institution;
6. Not pursue a theology degree;
7. Not be in an unsatisfactory progress-denied condition;
8. Complete and return a Free Application for Federal Student Aid to the federal processor;
9. Send a completed Graduate Data Form, with attachments, to the GEAR UP office in Olympia.

List of Eligible Students

A list of currently eligible students can be obtained from the Washington Student Achievement Council's password-protected financial aid website, located at:
<https://fortress.wa.gov/hecb/secure/login.asp>. The list is updated weekly.

If you do not see a student's name on the list, it may mean the student has not yet submitted a Graduate Data Form, transcript, or high school diploma to GEAR UP staff in Olympia. Please contact Kelly Keeney at (360) 753-7838 or gearup@wsac.wa.gov with any questions or concerns regarding student eligibility.

Maximum Years of Eligibility

Students may receive up to four years of scholarship (12 quarters or eight semesters).

Scholarship Expiration

Students must begin using their awards by the fall term following their high school graduation. Scholarships expire five years after high school graduation. This policy may change in future years.

Monitoring Eligibility

Institutions are responsible for monitoring and responding to changes in student eligibility that affect the GEAR UP Scholarship award. Additional information on monitoring can be found on page 7.

Academic Progress Requirement

To remain eligible for the GEAR UP scholarship, a student must meet his/her institution's academic progress policy on financial aid awards.

Need vs. Cost of Attendance

By federal regulation, the GEAR UP Scholarship may exceed a student's financial need, but may **not, in combination with other aid, exceed the student's total cost of attendance.**

The Financial Aid Administrator (FAA) may, using professional discretion, allow the scholarship to replace a portion of the student's Expected Family Contribution (EFC). The FAA may decide to reduce the student's EFC, based on a change in financial circumstances.

For students who demonstrate no financial need, the scholarship should be awarded in a manner similar to other merit-based aid programs, but prorated for less than full-time enrollment.

Packaging the Scholarship

When you are packaging the GEAR UP Scholarship, we ask that you follow the regulations under 34CFR694.10, and award the GEAR UP scholarship in the following order:

- Federal Pell Grant
- Other public or private grants, scholarships, or tuition discounts.
- **GEAR UP scholarship**
- Other financial assistance, such as loans or work-study.

Please characterize this award in any communications with students, including award letters, as the "GEAR UP Scholarship." Recipients contributed hundreds of hours to community service and college preparation activities to earn this award.

SECTION 3

MONITORING CONTINUED ELIGIBILITY

Once a student receives the GEAR UP Scholarship award, the institution must monitor for continued eligibility. Students must continue to meet all eligibility requirements as outlined on page 4.

Revised Eligibility

It is a good idea to re-evaluate the student's eligibility for the GEAR UP Scholarship whenever a recalculation is required for federal student aid programs.

Satisfactory Academic Progress (SAP)

As outlined in the eligibility guidelines, students cannot receive the GEAR UP scholarship when they are denied federal or state aid for SAP reasons. At the end of each term, the institution must examine each scholarship recipient's progress and determine whether the student is making satisfactory progress toward his/her program requirements.

Unlike State Need Grant, GEAR UP does not define satisfactory progress. Instead, the academic progress policy of the institution determines the SAP status of each student.

Eligible Institutions

Students who are eligible for a GEAR UP Scholarship may use their scholarship awards at any of the following institutions:

Four-Year Public Colleges and Universities

Central Washington University
Eastern Washington University
The Evergreen State College
University of Washington
Washington State University
Western Washington University

Two-Year Public Colleges and Universities

Bellevue CC
Big Bend CC
Cascadia CC
Centralia College
Clark College
Columbia Basin College
Edmonds CC
Everett CC
Grays Harbor College
Green River CC
Highline CC
Lower Columbia College
North Seattle CC
Northwest Indian College
Olympic College
Peninsula College
Pierce College
Seattle Central CC
Shoreline CC
Skagit Valley College
South Puget Sound CC
South Seattle CC
Spokane CC
Spokane Falls CC
Tacoma CC
Walla Walla CC
Wenatchee Valley College
Whatcom CC
Yakima Valley College

Two-Year Public Technical Colleges

Bates Technical College
Bellingham Technical College
Clover Park Technical College
Lake Washington Tech. College
Renton Technical College
Seattle Vocational Institute

Four-Year Private Colleges and Universities

Antioch University
Bastyr University
City University
Cornish College
Gonzaga University
Henry Cogswell College
Heritage University
Northwest University, Kirkland
NW College of Art, Poulsbo
Pacific Lutheran University
Saint Martin's University
Seattle Pacific University
Seattle University
University of Puget Sound
Walla Walla University
Whitman College
Whitworth University

Private Technical Colleges

Academy of Hair Design
Art Institute of Seattle
Bellingham Beauty School
Brenneke School of Massage
Bryman College
Carrington College
DeVry Institute of Technology
Digipen Institute of Technology
Divers Institute of Technology
Everest College
Gene Juarez Academy
Glen Dow Academy
Greenwood Academy of Hair
Interface Computer School
International Air Academy & Hospitality
ITT Tech. Institute, Seattle
ITT Tech. Institute, Spokane
Kaplan College
Northwest Aviation College
Perry Technical Institute
Pima Medical Institute

SECTION 4

PAYMENT REQUESTS AND DISBUREMENT

Upon notification and verification of student eligibility for the GEAR UP Scholarship, the institution should request payment of the student's GEAR UP Scholarship award. This section outlines scholarship payment request procedures.

Disbursement Procedures

The institution may disburse funds by providing the student with a direct payment or by crediting the student's account. Public institutions are expected to be consistent with institutional policy on the awarding of federal financial aid.

A student must be afforded the opportunity of cashing the GEAR UP Scholarship warrant at his/her own bank or financial institution. A school may not withhold or delay the disbursement of GEAR UP Scholarship funds due to the student owing any debt to the institution.

Disbursements may be made only after the school confirms enrollment. Warrant amounts must be consistent with enrollment status at the time of the disbursement.

A student whose off-campus program precludes his/her return to the institution for disbursement may assign Power of Attorney to a responsible person to receive GEAR UP Scholarship payments on his/her behalf. A copy of the Power of Attorney must be kept in the student's file.

Warrants must be disbursed to the student or returned to the Board within 30 days of receipt by the institutions.

Payment Request Procedure

Institutions must request payment of the GEAR UP Scholarship using the Warrant Request Form (see Section 5: Forms). The Warrant Request Form can be submitted either electronically through the WSAC Portal or a paper copy can be mailed or faxed to the GEAR UP department at the WSAC.

The FAA should list the names of students who are eligible, including recipients who may have transferred into the institution. The FAA must sign and date the first page of the form if it is being sent by mail or fax and keep a copy for institutional records.

Warrant Request Forms should be completed carefully; they will be processed exactly as received.

Incomplete or illegible lists may be returned for correction.

Accessing the Portal Website Payment Request Form

Files, Forms, and Memos *Previously GEAR UP Miscellaneous Document Submission (Formerly Secure File Upload) on the secure website.

To view or download GEAR UP Files, Forms, and Memos:

- Go to: <https://fortress.wa.gov/wsac/portal>.
- Enter your **User Name** (your e-mail address) and **Password**.
- Under **Common**, select *Messages and Files*, then select *Files, Forms and Memos*.
- Click on the 'GEAR UP' tab.
- Select the *GEAR UP Payment Request Form*; fill out, and save the form to your computer.

Document Submission *Previously Signature-less Document Submission on the secure website.

- Go to: <https://fortress.wa.gov/wsac/portal>.
- Enter your **User Name** (your e-mail address) and **Password**.
- Under **Common**, select *Messages and Files*, and then select *Inbox*.
- Click on the *Create a new secure message to WSAC* link on the top right of the page.
- Select GEAR UP from the *Select a Program Mailbox* drop down box.
- Fill in the *Subject* line accordingly.
- Select the file (from your computer) that you want to add to the **Attachments** field, by clicking on the *Browse...* button.
- Add a comment to the blank box, if necessary.
- Click on the *Send Message* link on the top of the page.

Responsibility for Warrants

The institution is responsible for GEAR UP Scholarship warrants in its custody, including those that are lost, stolen, destroyed, or disbursed to ineligible students.

Retroactive Payments

Retroactive payments may be made to an eligible student. The value of the retroactive payment for a previous term should be based on the student's rate of satisfactorily completed credits at the end of that term. Students need not be enrolled at the time of the retroactive payment.

Reconciliation of Records

Following each term, the HECB will send the FAA a cumulative summary of GEAR UP Scholarship disbursements. If the report does not accurately reflect institutional records, the FAA should advise the WSAC accordingly.

Award Amount/Payment Schedule

The amount of the GEAR UP scholarship award for 2013-14 is \$4,000 for full-time enrollment; it should be prorated for half- or three-quarter-time enrollment. The student must be enrolled at least half-time to receive the award.

The GEAR UP Scholarship is payable in three equal quarterly installments or two equal semester installments. If the student has not used a portion of their scholarship during the regular academic year, they have the option of using it during the summer term.

Verification of unused scholarship must be confirmed prior to requesting payment. Clock hour schools are payable at the rate of 450 hours equaling one semester and 300 hours equaling one quarter.

Transfer Students

It is the student's responsibility to notify the institution he/she is transferring to and transferring from of scholarship eligibility and intent to transfer.

SECTION 5

FORMS AND COMPLETION INSTRUCTIONS

The following forms and instructions assist FAA's and students to properly request and process GEAR UP Scholarships.

Graduate Data Sheet

Students must complete the Graduate Data Sheet and send it to the GEAR UP office in Olympia. Students must include an official final high school transcripts and copy of their final high school diplomas as attachments. A copy of the Graduate Data Sheet can be found at the end of this section.

Students who transfer to or from an institution should contact Kelly Keeney, GEAR UP Program Specialist at (360) 753-7838 or gearup@wsac.wa.gov to reconfirm eligibility and, if necessary, arrange for the transfer of their scholarship funds.

Warrant Request Form

The Warrant Request Form is the instrument that must be used to request payment of the GEAR UP Scholarship. A copy of the form is included at the end of this section and is available on the WSAC Portal.

The FAA should list the names of students who are eligible, including recipients who may have transferred into the institution. The FAA must sign and date the first page of the form if it is being submitted by mail or fax. If the institution has an electronic signature agreement with the WSAC, the Warrant Request Form can be submitted without signature via the WSAC Portal. The FAA should keep a copy for institutional records.

Warrant Request Forms should be completed carefully; they will be processed exactly as received. Incomplete or illegible lists may be returned for correction. See the following page for additional instructions on completing the Warrant Request Form.

Affidavit of Lost or Destroyed Warrant

Private institutions do not receive payment of GEAR UP Scholarship funds electronically and may use this form to certify the loss or destruction of a Board warrant. This form must be signed and notarized before being returned to the GEAR UP office in Olympia.

Required Information

The following information must be provided to order warrants:

Social Security Number (SSN) – These are used to generate payments and monitor the number of terms a student has received the scholarship award. All nine digits must appear on the Warrant Request Form. If a student does not have a valid SSN, their Individual Tax Identification Number (ITIN) should be used. If a student does not have either a SSN or ITIN notify Kelly Keeney, GEAR UP Program Coordinator at (360) 753-7838 or gearup@wsac.wa.gov to assign an identification number for the student.

Student Name – Names should not be abbreviated. Nicknames should NOT be used. Middle initial should be provided if available. If the student has no middle initial, please leave that space blank.

Amount to be Paid – The warrant should be requested in whole dollars only.

Term Payment – One of the following term payment codes should be used:

- 1 = Summer, First Term Fiscal Year
- 2 = Fall Term
- 3 = Winter Quarter
- 4 = Spring Term
- 5 = Summer, Last Term Fiscal Year

Is this a Revised Payment? Write “Yes” or leave this blank. See definitions for more information on whether to indicate this is a revised payment.

Is this a Supplemental Award? Write “Yes” or leave this blank. See definitions for more information on whether to indicate this is a supplemental award.

Status – Status refers to the student’s expected enrollment status at the time of disbursement. One of the following codes should be used:

- 1 = Full-time student
- 2 = Half-time student
- 3 = Three-quarter time student

Certification and Signature – The FAA must sign the certification statement on the Warrant Request Form for request not sent electronically. If multiple pages are submitted at one time, only one certification is necessary. Warrant Requests sent electronically through the WSAC Portal do not require a signature.



GEAR UP – GET SCHOLARSHIP PAYMENT REQUEST FORM

Class of 2011 GEAR UP Student: Please submit completed form to:

GEAR UP – GET Scholarship
ATTN: Kelly Keeney
PO Box 43430
Olympia, WA 98504
Fax: 360-704-6238

Account Information:

Account Owner	<u>Washington GEAR UP Scholars Project</u>	Account Number	<u>05011425</u>
Student Name	_____	Phone Number	_____
Email Address	_____		
		Social Security Number	_____

Have you filed your Free Application for Free Student Aid (FAFSA) for the academic year you are requesting for? YES NO

School Information: I am planning to attend the following college:

Washington State Public College	Out-of-state College or In-state Private College
<input type="checkbox"/> Central Washington University	<input type="checkbox"/> Out-of-state College named below:
<input type="checkbox"/> Eastern Washington University	Name: _____
<input type="checkbox"/> The Evergreen State College	Address: _____
<input type="checkbox"/> University of Washington	_____
<input type="checkbox"/> Washington State University	<input type="checkbox"/> Private College named below:
<input type="checkbox"/> Western Washington University	Name: _____
<input type="checkbox"/> Community or Technical College named below:	Address: _____

Requesting Tuition and Fees: For Academic Year: 2011-2012 2012-2013 2013-2014 2014-2015 2015-2016

<input type="checkbox"/> Fall Quarter/Semester: \$ _____ / Date payment must be received by the college _____	<input type="checkbox"/> Spring Quarter/Semester: \$ _____ / Date payment must be received by the college _____
<input type="checkbox"/> Winter Quarter: \$ _____ / Date payment must be received by the college: _____	<input type="checkbox"/> Summer Quarter: \$ _____ / Date payment must be received by the college: _____

This form must be approved and signed by your financial aid counselor, or a financial aid officer, to ensure the amount requested does not exceed unmet need, and/or cost of attendance.

Financial Aid Officer Signature: _____ Date: _____

INFORMATION RELEASE

In compliance with the Family Educational Rights and Privacy Act of 1974 (FERPA), I authorize the **Guaranteed Education Tuition Program, GEAR UP,** and the college listed above to disclose to each other personally identifiable information, including my Social Security number and any other account information necessary to make a distribution from the GEAR UP Scholars Project GET account. I certify that the information provided on this form is true and correct to the best of my knowledge and belief. I understand that non-qualified distributions may be subject to a penalty and/or federal income tax on the earnings.

GEAR UP Student Signature Date

**PAYMENT REQUEST FORM
GEAR UP SCHOLARSHIP PROGRAM
FY 2013-2014**

Name of Institution: _____ **Institution Code:** _____ **Page :** _____ **of** _____

PLEASE TYPE OR PRINT LEGIBLY!

Social Security Number	Student's Last Name	Student's First Name	Student's Middle Initial	Amount to be paid this term?	Term Fall = 2 Winter = 3 Spring = 4	Revised payment? (Yes or Blank)	Supplemental payment? (Yes or Blank)	Enrollment Full Time = 1 Part Time = 2 ¼ Time = 3
1. _____	_____	_____	_____	\$ _____	_____	_____	_____	_____
2. _____	_____	_____	_____	\$ _____	_____	_____	_____	_____
3. _____	_____	_____	_____	\$ _____	_____	_____	_____	_____
4. _____	_____	_____	_____	\$ _____	_____	_____	_____	_____
5. _____	_____	_____	_____	\$ _____	_____	_____	_____	_____
6. _____	_____	_____	_____	\$ _____	_____	_____	_____	_____
7. _____	_____	_____	_____	\$ _____	_____	_____	_____	_____
8. _____	_____	_____	_____	\$ _____	_____	_____	_____	_____
9. _____	_____	_____	_____	\$ _____	_____	_____	_____	_____
10. _____	_____	_____	_____	\$ _____	_____	_____	_____	_____

Total Number of Payments: _____

Total Amount Requested: \$ _____

THE STATE OF WASHINGTON'S GEAR UP SCHOLARSHIP ELIGIBILITY AND CERTIFICATION STATEMENT

I hereby certify that the students listed above are:

- A. Matched and verified as eligible against the list of eligible students provided by the Higher Education Coordinating Board,
- B. Enrolled at this institution at least half time, and
- C. Not pursuing a degree in theology or religious studies.

I further certify that the above statement is a true and accurate report of the status of the GEAR UP Scholarship recipients for the term indicated above.

Financial Aid Administrator or Business Officer Signature

Financial Aid Administrator or Business Officer Name (Print)

Phone Number

Date

Mail requests to:
GEAR UP Program
Higher Education Coordinating Board
PO Box 43430
Olympia, WA 98504-3430
Tel: (360) 753-7838
Fax: (360) 753-7808
Email: gearup@hecb.wa.gov

HECB USE ONLY		
Initials _____	# of Payments _____	Request Total \$ _____

SECTION 6

FREQUENTLY ASKED QUESTIONS

What is a GEAR UP Scholarship?

A GEAR UP Scholarship is a type of financial aid to help students pay for college. It does not have to be repaid. It can be used to help pay for tuition, books, and other college expenses.

How do students earn a year of scholarship?

To earn a GEAR UP Scholarship, students must:

- Participate successfully in the GEAR UP Scholars Program for one or more years.
- Have a parent/sponsor participate successfully for one or more years.
- Have earned at least one year of scholarship.
- Graduate from high school and complete the requirements for admission to college.
- Attend an eligible college or university in Washington State.
- Not pursue a theology degree.
- Be enrolled at least half time in college.
- Students must begin using their awards by the fall term following their high school graduation.

How much can students earn?

Students can earn one year of scholarship for each year they participate, up to four years total. GEAR UP and the Washington Higher Education Coordinating Board decide the amount of the scholarship award each year. The amount may be different each year, but for the 2013-14 school year, the maximum scholarship award is \$4,000. The Higher Education Coordinating Board keeps track of student hours and the amount of scholarship funds they earn.

How do students get their GEAR UP Scholarship?

Students must request and fill out the Graduate Data Form (provided by GEAR UP) and send it with a photocopy of their high school diploma and final official high school transcript to the GEAR UP office in Olympia. Students are also asked to complete and return the Free Application for Federal Student Aid (FAFSA) and give a copy of their award letter to their college's financial aid office. GEAR UP Scholarships cannot be used to pursue a degree in theology.

What do students need to do to keep getting the GEAR UP Scholarship?

Students must stay in good academic standing and attend college at least half time. If the student changes his/her address or college, the GEAR UP Program should be notified.

If students meet these requirements, the GEAR UP Scholarship is guaranteed. If the student is enrolled less than full time, the award will be reduced.

Who should students and FAA's call if they have more questions?

For more information, call Kelly Keeney at (360) 753-7838 or e-mail gearup@wsac.wa.gov.

SECTION 7

DEFINITIONS

ELIGIBLE COURSE OF STUDY

Students may not pursue a theological course of study and receive the GEAR UP Scholarship. Any other course of study is permissible.

REVISED PAYMENT

A revised payment or request is one that replaces an earlier warrant drawn for the same term because the student failed to pick it up, or there was a reduction in the student's enrollment status resulting in a reduced scholarship award. For private institutions, the original warrant must be returned to the board for cancellation before a new warrant may be issued.

SATISFACTORY ACADEMIC PROGRESS

Satisfactory Academic Progress will be as defined by the institution. See Section 3: Monitoring Continued Eligibility for more information.

SUPPLEMENTAL AWARD

Supplemental awards are additional payment requests processed for the same student for the same term. If it is a payment request in addition to one already received by the WSAC for that term, the Supplemental Code on the Warrant Request Form should be marked "Yes." Retroactive payments are not supplemental awards.

THEOLOGY DEGREE

A state statute, applicable to all financial aid programs, addresses the theology issue — RCW 28B.10.814 states: "No aid shall be awarded to any student who is pursuing a degree in theology."

The decision as to what majors are considered "theology" is left to the individual institutions, which are in the best position to determine the course content of their own major courses of study. The individual institutions must make this determination in light of the Washington State Constitution, which provides at Article 1 11 that no "public money or property shall be appropriated for or applied to any religious worship, exercise, or instruction".