



SFA PARTNER

Quarterly Update

July 2016

From the Director

Hello **SFA Partners**,

It's hard to believe, but we are well into summer now. Let's hope for beautiful weather, great summer vacations, and happy students who all write to thank us for the financial aid awards they receive for the upcoming 2016-17 year!

The entire WSAC Student Financial Assistance (SFA) team wants to thank you in advance for the good work that you and others at your institutions do in the completion of the final year-end 2015-16 SNG & CBS interim report, as well as for your upcoming work to complete other state reports for 2015-16, such as SWS, Passport to College, and the Unit Record Report.

As the 2016-17 year advances, we will work to get final SNG allocations to institutions soon, and look forward to assisting you throughout the year to make administration of the state financial aid programs as successful as possible. SFA staff will present several workshops and engage in discussions with you at the fall WFAA conference in Spokane, where I also will provide an overall update to the WFAA membership.

If things were not busy enough already — we now get to work together with the new October 1, 2016 availability date for the 2017-18 FAFSA, and in the implementation of the 2017-18 WASFA availability for DREAMers using the same schedule.

Please share this issue with other colleagues at your institution and encourage them to subscribe to the [listserv](#), if they have not already done so. We look forward to your feedback, and suggestions for future topics.

Becky Thompson

Director of Student Financial Assistance

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Important Dates to Remember

- ✓ Final Interim Report (Reconciliation) for SNG and CBS due – July 8, 2016
- ✓ WFAA Summer 2016 Training – July 26 (PLU) and July 27 (Gonzaga)
- ✓ Unit Record Report Portal open – August 15 – October 14, 2016
- ✓ WASFA 2017-18 Applications submission opening date – October 1, 2016
- ✓ WFAA Fall 2016 Conference – October 12-14 (Spokane)
- ✓ Pave the Way Conference – November 1-2, 2016 - **Save the Date!**

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State Need Grant Institutional Allocations for 2016-17

Initial State Need Grant (SNG) allocations were emailed to institutions, from Carissa Glassburn, on June 17, 2016.

Initial allocations were calculated using 90 percent of the total SNG appropriation for 2016-17. Student data reported for both served and unserved SNG students on the 2015-16 spring interim report (excluding summer terms) together with the 2016-17 award amounts were used to determine each institution's initial allocation.

The remainder of the SNG appropriation will be committed in August at the end of the SNG reconciliation process. Final 2016-17 SNG allocations will be determined using final interim report data for 2015-16, including both Summer 1 and Summer 2 terms.

As you know, the Legislature decreased the total SNG funds available for distribution, related to the reduction in tuition levels at the public four-year colleges and universities for 2016-17. As a result, award amounts for those colleges were also reduced, affecting allocations for the public four-year colleges, as well as for the community and technical colleges who offer applied baccalaureate degrees.

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Include CBS on Award Letters if OK to Award = Yes

CBS Status in Cruncher is: OK to Award = Yes, and OK to Pay = No

When awarding a 2016 high school grad year CBS student who appears with this Cruncher status, remember to include both a CBS and a SNG award amount on the student's award letter **if** the student meets all other CBS eligibility criteria. Be sure to indicate that the CBS award amount is **tentative** until your institution receives verification from WSAC that the student graduated from high school with at least a 2.0 GPA.

WSAC will receive official confirmation from OSPI throughout the summer and early fall that CBS students have met the high school requirements. As this takes place, Cruncher records will update to OK to Pay = Yes. At that point your institution can make payments to eligible CBS students. If you would like to receive an email from WSAC when the update occurs, use the "Watch List" feature and be sure your setting is updated to "every 1 weeks."

Also, your institution can update the "HS Req Met" field in the Cruncher to "Yes" if you have a copy of the student's high school transcript that verifies the student's graduation from a Washington high school with a cumulative GPA of 2.0 or higher. Institutions that wish to finalize "Summer 1" payments when the Cruncher status has not yet been updated by WSAC may use this update functionality.

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State Need Grant (SNG) and College Bound Scholarship (CBS) –100% Coordination

2015-16 Year – Institutions did a great job implementing the 100% coordination requirement this year – providing SNG awards to all eligible CBS students enrolling on their campuses.

2016-17 Year – The 100% coordination requirement continues this year, and for all future years. Institutions with summer 2016 terms that are considered "Summer 1" terms will use 2016-17 SNG funding to coordinate their Summer 1 CBS awards. Institutions that do not make Summer 1 awards will begin awarding 2016-17 SNG funding for Fall term 2016, and will continue their CBS coordination through summer 2017 with "Summer 2" awards.

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State Need Grant Institutional Set-Aside to Accomplish 100% Coordination

Each institution is responsible for assuring that ample SNG funds are "set-aside," or reserved, for all eligible CBS students who enroll during the year. This means that all institutions must do their best to predict the number of eligible CBS students who will enroll for all terms during the 2016-17 year (Summer 1, Fall, Winter, Spring, and Summer 2) and hold ample funds back from their 2016-17 final SNG allocation to fund them.

From a statewide perspective, in its June 2016 report, the Caseload Forecast Council estimated that there will be a 10.9% increase in CBS funded students in 2016-17, over the previous 2015-16 year.

However, changes in enrollment levels may vary considerably by sector and also from one college to another. Therefore, to determine the SNG funds to set-aside for eligible CBS students, each institution will also want to carefully review their own institutional data to consider:

- What is the annual percentage change in eligible CBS students enrolling at your institution since the first year of CBS funding in 2012-13?
- How has the annual percentage changed in the most recent year(s)?
- What do key staff in enrollment services or other areas at your institution believe the growth rate in eligible CBS students might be for the 2016-17 year?
- What is the average SNG award per term and per year that CBS students have received at your institution in 2015-16?
- What do you estimate will be the average SNG award per term and per year for CBS students at your institution in 2016-17?

We also recommend that institutions initially hold back slightly more funds than their initial projections might forecast, just in case there are additional unanticipated enrollments later in the year. As the year progresses, adjustments should be made in the set asides in order to assure that all eligible CBS students receive fully coordinated CBS and SNG awards, and that 100% of SNG funds are fully spent by the end of the year.

Although decisions on the amount of SNG funds to hold back are institutional decisions, [Steve Thorndill](#) of WSAC staff would be glad to talk through this process with individual aid administrators if you would like to contact him.

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2016-17 Passport to College Scholarship Program Manual Now Available

The new 2016-17 manual is now available at <http://www.wsac.wa.gov/FAA-resources>. Once on the web page, go to the “Resources” section and click on “Passport to College Scholarship 2016-17.”

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Summer Awarding of CBS and SNG (repeat of information from April SFA Partner)

- **Award All Eligible CBS Students Enrolling in Summer 2016**
 - All eligible College Bound students enrolling in summer 2016 must receive their full eligibility in both CBS and SNG.
 - SNG and CBS award amounts for public CTCs and private institutions are identical for 2015-16 and 2016-17; therefore, the CBS and SNG award amounts will be the same whether an institution makes Summer 2 (“trailer”) awards or Summer 1 (“leader”) awards.
 - Public four-year colleges (including Bachelor’s degree programs at CTCs) must make both (2015-16) Summer 2 or (2016-17) Summer 1 awards using 2015-16 charts.

- **Additional Information and Options When Awarding SNG to Eligible CBS Students in (2015-16) Summer 2**
 - Award all eligible CBS students who have complete files with your school by June 1, 2016 with CBS and SNG from your 2015-16 SNG allocation.
 - If you have CBS students whose files are completed between June 1, 2016 and August 1, 2016, who enroll in your summer term, contact WSAC for payment instructions if you don't have remaining SNG 2015-16 funds to award.
 - No Summer 2 CBS or SNG awards should be made to students whose files are complete after August 1, 2016.
 - Be sure your 2015-16 allocation is fully spent and reported to WSAC by July 8 on your final Interim Report.
- **Awarding SNG to non-CBS students during (2015-16) Summer 2 or (2016-17) Summer 1**
 - If required by your institution's policy to do so, and funds are available, make the SNG award.
 - Summer 2 awards are part of an institution's 2015-16 SNG allocation.
 - Use the 2015-16 award chart if an award is made.
 - Report eligible SNG students as unserved if funds are not available.
 - Summer 1 awards are part of an institution's 2016-17 SNG allocation.
 - Use either the 2015-16 or 2016-17 award chart.
 - Report eligible SNG students as unserved if funds are not available.

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Retroactive CBS and SNG Awards and Payments for Previous Terms

The information that follows is covered in Chapters 5 and 6 of the 2016-17 SNG-CBS Program Manual. The additional guidance is added to provide clarity for determining in which cases a student's term enrollment status must also be updated in CSAW.

- Retroactive SNG and CBS awards and payments **MUST** be made to **eligible CBS Scholars** for a prior term(s) as long as the term is within the current program year and other program rules are followed.
- Retroactive SNG awards and payments also **MAY** be made to eligible SNG students (who are not also eligible CBS Scholars) for a prior term(s). Students do not have to be enrolled at the time retroactive payments are made.
- Retroactive awards and payments must be based on a student's rate of satisfactorily completed credits (minimum of three credits) determined by the institution at the end of the term(s).

Additional Guidance 7/1/16:

If an institution retroactively awards SNG funds to a student who completed fewer credits for that term than they would have been awarded had the award been made at the beginning of the term, the student's CSAW enrollment status for the term must be updated to reflect the enrollment status for which the payment was actually made.

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Awarding of SNG to Unserved Students and SAP Status

Questions have come up regarding Satisfactory Academic Progress (SAP) and the awarding of SNG for a subsequent term to students who were initially reported as unserved during the previous term. Please review these two examples.

- **Example 1:** If a student was reported to be a full-time unserved student for the fall term, but the student only completed three credits for the fall term, the student could be paid SNG retroactively for the three credits. In this case, the fall term CSAW enrollment status would have to be updated to show less than half-time enrollment. Because the student was paid for only three credits, the student's SAP status after the fall term, however, would be considered "Satisfactory."
- **Example 2:** If a student was reported as unserved on the fall term CSAW record, but did not successfully complete at least 50% of the fall credits, the student would be considered to be in "Denied" status for SNG eligibility. The student could not receive SNG for the next term or be reported as an unserved SNG student for the next term unless the institution made a professional judgment decision and documented the extenuating circumstances.

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Professional Judgment and Satisfactory Academic Progress (SAP) Decisions

The following appears on page 43 of the 2016-17 SNG-CBS Program Manual, and may be of help as you review the academic performance of your terms at the conclusion of each term.

Professional Judgment/Appeals

The Financial Aid Administrator may, on a case-by-case basis, reinstate a student into satisfactory academic progress in response to that student's extenuating circumstances. The FAA may choose to exercise professional judgment without a specific request to do so from the student.

For example, the Financial Aid Administrator may decide to grant a student continued access to state aid if failure in one term is countered by an extensive history of prior success. The student's file must include documentation related to the professional judgment decision.

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Self-Help Requirements for SNG Students May be Prorated

Self-help requirements for SNG students may be prorated for students enrolling in less than three quarters or two semesters. Pages 34 and 35 of the 2016-17 SNG-CBS Program Manual provide the self-help requirements for SNG students. The three examples provided in the manual work well for students enrolling in three or more quarters or two or more semesters during the year.

In the case of students attending fewer terms in the year, however, the self-help of \$3,465 for Cost of Attendance (COA) greater than \$13,860 may be prorated. For example, if a student enrolls for two quarters and the student's COA exceeds \$9,240 (two-thirds of \$13,860), the student's required SNG self-help may be prorated to \$2,310 (two-thirds of \$3,465).

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CSAW 2.0 Enhancements

As mentioned in the January edition of the **SFA Partner**, CSAW 2.0 went live at the beginning of 2016. Six enhancements were implemented into CSAW 2.0. The features are:

1. Ability to designate term type (Quarter/Semester)
2. Revamped account status
3. Pre-submission interim report data analysis
4. Descriptive data on student records re: maximum award amounts
5. Expanded use of Applied Baccalaureate designation
6. Passport payments

User guides are posted in the Messages and Files section of the WSAC Portal. We encourage feedback! Please send us a secure message via the WSAC Portal or, if not including sensitive information, email us directly at sng@wsac.wa.gov.

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“Institution to Bill” Receivables Reminder

A reminder to those institutions processing “Institution to Bill” collections for State Need Grant, College Bound Scholarship, and Passport to College repayments during the academic year: The last day to accept in-house student payments for 2015-16 accounts was **June 30, 2016**. Any outstanding balances must be referred to WSAC for continued billing activity no later than **August 31**, after the close of the academic year. Refer to page 61 of the SNG/CBS program manual for more information. Direct additional questions to Katie Guthrie, WSAC's receivables coordinator, at kateg@wsac.wa.gov or call 360-753-7632.

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WASFA – New Processing Contractor Beginning on October 1, 2016

WSAC is in the final stages of selecting a new WASFA contractor. This ensures that WASFA processing goes smoothly for both the 2016-17 processing year, which continues to June 30, 2017, and for the new 2017-18 processing year, which begins October 1, 2016. Institutions will be emailed additional details about the conversion process later this summer. In the meantime, please contact Carissa Glassburn if you have any questions.

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2015-16 State Work Study (SWS) Update and Reminders

- **SWS Stakeholder Surveys**

Over the next few months, WSAC will be updating its Strategic Action Plan to help further the attainment goals outlined in the Roadmap. The Strategic Action Plan also will help guide the Council's legislative request priorities for the upcoming 2017 session.

In order to better inform Council members on the impact of SWS, WSAC is surveying its institutional, student, and employer stakeholders on their experience in the program. SFA would like to thank institutions for their assistance in distributing the surveys to on-campus supervisors and for their efforts in completing the institutional survey.

The student survey is currently in progress, but SFA would like to share the following results from nearly 500 employer respondents at this time:

- 95% believe SWS makes their organization more productive.
- 88% believe SWS provides a means of influencing college programs related to their industry.
- 89% believe SWS allows their organization to strengthen relationships with the local community.
- 97% believe SWS provides students with flexibility to accommodate academic schedules.
- 96% believe their organizations SWS employment experiences impart useful post-graduation employment skills.

What limits the hiring of additional SWS students at your organization?

- 39% indicated a lack of further available work at the student employee level.
- 37% indicated a lack of available students with SWS awards.
- 26% indicated a lack of available qualified SWS students.
- 16% indicated current reimbursement rates make additional hires unaffordable.

In making post-graduation hiring decisions:

- Paid work experiences like SWS were ranked as more desirable than unpaid/volunteer work experiences.
- 66% have hired their former SWS employees.
- 76% give preference to recent graduates with SWS or other work experience over a similarly qualified applicant.
- 87% have provided references for former SWS employees.

- **2015-16 SWS Year-End Process**

Private Institutions: SWS time sheets *and* time sheet corrections for hours worked during the 2015-16 fiscal year ending June 30, 2016, must be received at WSAC by **Friday, July 15, 2016**. Time sheets received or corrected after July 15, 2016, will be reimbursed on a **funds available basis**. If funding is not available, the time sheets will be returned to the institution. As always, carefully review each time sheet to verify it is complete, accurate, and error-free prior to submitting the time sheet to WSAC, which will expedite reimbursements to employers.

Please note: If you receive time sheets that cross over the state fiscal year (June/July), you must submit separate time sheets for June and July hours. For example, if you receive a time sheet for June 15 through July 14, you will need to submit two time sheets (6/15/16 – 6/30/16 and 7/1/16 – 7/14/16). June hours are reimbursed from 2015-16 funds, while July hours will be reimbursed from 2016-17 funds.

Public Institutions are eligible to receive an administrative allowance for the direct administration of the SWS program on their campus. The administrative allowance is equal to 3% of the institution's SWS expenditures (state share). To request your administrative allowance, complete the 2015-16 Year End Report emailed to you by Marlena Rae Robbins on June 15, 2016, and submit via scan and email (marlenar@wsac.wa.gov), or fax (1-855-480-8718), **no later than Friday, July 15, 2016**. It is crucial to submit the report by the deadline to ensure payment. If you cannot meet this deadline, please contact Marlena as soon as possible.

Please note: The Year End Report **cannot** be used as a cash request. Use the portal's Cash Request feature to submit your final cash request by **Friday, July 15, 2016**.

- **2016-17 SWS Allocations**

SWS initial allocations for 2016-2017 have been entered into the [portal](#) (Home, Programs, SWS, Summary of account status).

Please note: The amount listed as Initial Allocation in the portal **represents only 75%** of the estimated 2016-17 SWS allocation for your institution. In early August, final 2016-17 allocation amounts will be determined once all 2015-16 SWS activity is complete. Institutions will receive a reserve letter via email that includes **approximately 25% more** in SWS funding. At that time, institutions will have the opportunity to accept all, part, or none of the 100% initial allocation and must return a signed and dated copy of the letter via scan and email, or by fax.

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2015-16 Unit Record Report (URR) Training Webinars and Deadlines

WSAC recently distributed an email to URR contacts at all institutions, announcing the availability of the 2015-16 URR Manual. The Manual, and an example of the CSV file record lay-out, may be downloaded and printed from the WSAC website at: <http://www.wsac.wa.gov/unit-record>.

Unit Record Report training webinars are planned for **August 2016**, and additional information will be emailed to URR contacts in late July.

The live URR Portal (<https://fortress.wa.gov/wsac/portal/>) will begin accepting file uploads on **Monday, August 15**. However, institutions may now access the Portal training environment at <https://fortress.wa.gov/wsac/portaltraining/> to upload test files for the purpose of identifying edits that may need correction prior to live submission.

Final institutional URRs are **due by 5 p.m., Friday, October 14**.

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Review Portal Institutional Contacts and Update Permissions

Each institution's director of financial aid or his/her designate should review the names of authorized users on a regular basis to add, delete or modify staff and permissions. When in the WSAC portal, select the "Manage Users" tab and then click the "Search" button near the bottom. If you need assistance, please contact Victor Fernandez.

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WSAC Connections

A quick reminder that the SFA and CAS staff contact lists are now available on WSAC's FAA Resources web page at <http://www.wsac.wa.gov/FAA-resources>. Click the appropriate link in the purple "Resources" box at the right-hand screen edge to download and open the document.

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Providing Feedback to SFA

The **SFA Partner** was designed with you, our SFA friends and colleagues, in mind! We want to respond to your needs and improve future issues of the **SFA Partner**. Tell us what topic areas you would like covered, and where we may provide additional guidance to better assist you in your work. Send your feedback, comments, and suggestions to finaid@wsac.wa.gov and let us know what you think!

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