SFA PARTNER

Quarterly Update

November 2017

From the Director

Hello SFA Partners,

Welcome to the second anniversary edition of the **SFA Partner**! We are now deep into fall, with the leaves blanketing the ground in colors of yellow, red, and brown, and the crisp air signals the coming winter season. Many have already experienced their first snowfall of the year!

Transitions and a quickening pace are a fact of life for the financial aid professional, but one thing that has not changed over time is our commitment to the students we serve. In this issue, you will find a range of articles to assist you in your day-to-day work, as well as in support of diverse populations, foster youth, and undocumented students.

We enjoyed seeing many of you at the annual Washington Financial Aid Association (WFAA) conference in Vancouver last month! It was wonderful to connect with our colleagues on a personal basis, to visit and catch up on news, and to make new friends! Like a breath of fresh air, I am invigorated for the long winter months to come!

Please remember to share the **Partner** with colleagues at your institution, and encourage them to subscribe to the listserv if they have not yet done so. The existing subscription link will change on December 15, as the listserv migrates to a new servicer, and we will be sure to share updated information with you as soon as it is available. As always, your feedback and suggestions are welcome.

Becky Thompson
Director of Student Financial Assistance

Click on these links or scroll down to learn more about the following topics:

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Important Dates to Remember

- ✓ **FAFSA 2018-19 Application Opened: October 1, 2017**
- ✓ **WASFA 2018-19 Application Submission Opened: October 8, 2017**
- ✓ **Unit Record Report: Institutional Profile Reports Available January 2018**

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SNG and CBS Guidance for 2018-19 Awarding

The following guidance was emailed to FAAs by Carla Idohl-Corwin on 11/06/2017:

Median Family Income Chart for 2018-2019

The MFI Chart for 2018-19 State Need Grant (SNG) and College Bound Scholarship (CBS) awarding is available on WSAC's [FAA Resources](#) web page. Please note the 70% MFI column is for SNG awarding only, as the maximum MFI for CBS awarding is 65%.

Please also note that the family income used will normally be the 2016 year income reported by the families on their 2018-19 FAFSA or WASFA.

Release of 2018-19 SNG and CBS Award Chart

We expect that the 2018-19 award chart will be released after the 2018 Legislative Session is complete (late in the spring of 2018). Tuition at public colleges and universities for the 2018-19 year may also be determined then. For preliminary 2018-19 state aid awarding, WSAC recommends:

- Using the current 2017-18 award chart to provide estimated 2018-19 SNG and CBS award amounts until the official 2018-19 award chart is available. The 2017-18 chart is located on page 30 of the 2017-18 SNG & CBS Program Manual.

- Including the *Washington State Aid – Conditions of Award* statement with all award letters. The full conditions statement is available on page 67 of the program manual. The following excerpt appears as condition #9.

The offer of this financial assistance is subject to, and conditioned upon, the availability of funds. The Washington Student Achievement Council, and the institution through which the grant or scholarship is awarded, reserve the right to withdraw, reduce, or modify the awards due to funding limitations or due to changes in circumstances which affect your eligibility for the program(s).

Be Sure to Include Estimated CBS Awards on Award Letters if "OK to Award = Yes"

When a CBS student record first matches with a FAFSA or WASFA application, the student's record will appear in the "Cruncher."

If the student has not yet graduated from high school, the information received from OSPI at that time, the "HS Req. Met" status, will show as either:

- Unknown – no GPA available in OSPI record
- Unlikely – the reported GPA was less than 2.0
- Likely – the reported GPA was 2.0 or higher

Those with "Likely" status will also show as "OK to Award = Yes"

- Be sure to award all eligible CBS students in this category with both estimated SNG and CBS awards.

SNG Allocations for 2018-19

Many factors will impact individual school allocations. These may include enrollment changes, award amounts, state appropriations, and program policies such the requirement to award SNG to 100% of your eligible CBS students. WSAC expects to provide colleges with preliminary 2018-19 SNG allocations, which will include 90% of the total state funds available for SNG after spring interim—assuming legislative session has ended. In August 2018, after all college final interim reports for the 2017-18 year have been reviewed and reconciled, final SNG allocations will be sent to colleges.

At this time, WSAC advises colleges to be conservative in how many SNG dollars they commit to students for 2018-19. Colleges will also have to project their enrollment levels of eligible CBS students for the 2018-19 year, and hold back sufficient SNG funds to fully coordinate their awards.

If you have any questions, please contact Carla at 360-753-7847.

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12th Year Campaign – A Call for Volunteers!

WSAC leads Washington's 12th Year Campaign to support college admissions and FAFSA/WASFA completion in our state. Our students and families need your help! Please join us in volunteering to help students and families at this link. You will be contacted by 12th Year Campaign sites at location(s) for which you indicate availability about assisting at the local event(s). You do not need to be a seasoned financial aid veteran to volunteer. There are several different ways you can help. Please consider passing the word to other campus colleagues as well.

Join us in the "Plus 5 Push!" to increase FAFSA/WASFA completion in our state by 5% this year. If you have any questions about volunteering or the 12th Year Campaign in general, please contact Christina Winstead at christinaw@wsac.wa.gov or visit www.readysetgrad.org/12thyear.

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Unit Record Report – Revisiting 2016-17 Changes

WSAC's Unit Record Report team thanks you for timely submissions of your 2016-17 Unit Record Reports last month! Data collected through the Unit Record Report (URR) Portal each year is foundational to state student financial aid research and policy. WSAC works diligently to integrate improvements to align and ensure integrity between data existing in the Portal (that is, CSAW, as updated through the Final Interim Report) and institutional URR submissions after year-end close.

As part of our effort to align Portal data with the URR data, WSAC incorporated several new edits into the 2016-17 URR, including those for **Family Size/Number in College** and **Family Income**. To reduce discrepancies between URR and existing Portal data, we encourage institutions to update those fields in CSAW through the Interim and Final Interim Report process during the year as new information is available. Override comments entered must articulate reason(s) why any difference(s) legitimately may remain.

> **NOTE**: Originally released as two separate edits, WSAC consolidated the **Family Size and Number in College** edits to reduce duplication of effort. For SNG and CBS recipients in CSAW, the sum of those fields in CSAW is compared to the sum of the same fields in the student's URR record. This process eliminates discrepancies that are due to SNG awarding adjustments shown in CSAW for families with more than one in college.

Other details to remember that will affect URR for 2017-18:

- **Expected Family Contribution (EFC)** –WSAC now requires reporting of EFC in the URR using Federal Methodology (FM) rather than Institutional Methodology (IM). This change affects only those institutions that currently use an IM calculation of EFC.

- **Cost of Attendance (COA)** – To capture actual costs as compared to the aid received by the student, institutions are required to report COA using the full-assessed tuition amount before the application of tuition waivers for SNG and CBS recipients, where possible. Tuition waivers for these recipients are to be reported either as Need-Based or Non-Need Based Institutional Gift Aid, as appropriate. More on this topic in Chapter 2 of the 2017-18 SNG/CBS program manual.

- **Missing SNG Unserved** – It is important that institutions update and report their unserved data accurately in the Final Interim Report because the unserved population affects the calculation of the institution's fair share in the SNG Fair Share Model. The Missing SNG Unserved discrepancy report is not new to the URR, however, instructions for completion and return of the annotated download report to the URR Team changed this year. If your institution has not yet returned an annotated Missing SNG Unserved Report to WSAC, a URR team member will request that document from you soon.

As WSAC continues reviews over the next several weeks, the URR team may be in touch with institutional URR administrators about questions that arise. The 2016-17 Unit Record Report Manual is available for download and review by clicking here.

Please direct any questions to the Unit Record Report Team at unitrecord@wsac.wa.gov, or call Ann Voyles at 360-753-7843 or Carla Idohl-Corwin at 360-753-7847.

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DACA/DREAMers and State Aid Programs

On September 5, the federal government rescinded Deferred Action for Childhood Arrivals (DACA), bringing concern and confusion to this state's population of undocumented students. Reiterated here is the text of WSAC's September 6, 2017 email, from Becky Thompson, to our residency and student financial aid colleagues at SNG-participating institutions in state:

Dear Residency and Financial Aid Colleagues,

We wanted to share some information regarding yesterday's federal action to rescind DACA (Deferred Action for Early Childhood Arrival). Leaders across our higher education system issued a joint statement expressing concern over this action, and a commitment to continue to support DREAMers in our colleges and universities.

DACA individuals who have established state residency **will continue to be eligible** for state higher education benefits. Those who do not have (and are no longer able to apply for) DACA will be restricted to the "1079" eligibility outlined below.

Benefit Eligibility

As you know, undocumented students establish residency in one of two ways – referred to as "1079" and "DACA." Students in either classification may be eligible for in-state tuition rates and State Need Grant. Students with DACA residency may be eligible for other forms of financial aid including the College Bound Scholarship.

- In general, the "1079" standard applies to undocumented students who have graduated from high school after having lived in Washington for three years.
- DACA permits individuals to establish a domicile in Washington. In general, students need to live in Washington for a year for other than educational purposes.

Continued Eligibility for DACA Students

In general, DACA individuals who have established state residency will continue to be eligible. In other words, all guidance you have received is still applicable to individuals with DACA.

As a reminder, previous and current guidance includes:

- Residency classification remains unchanged unless contrary evidence is presented/discovered.
- The receiving institution may accept the residency determination from a previous institution.

Please do not hesitate to contact the State Need Grant team at sng@wsac.wa.gov or me if you have any financial aid questions. Refer residency questions to residency@wsac.wa.gov.

The 2018-19 WASFA application site went live on October 8. Direct students to WSAC's ReadySetGrad website for WASFA information, and to apply for state student financial aid (click here).

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Supporting Our Undocumented Students

Written in collaboration with Alejandra Pérez, College and Career Success Coordinator, Community Center for Education Results, aperez@ccedresults.org, and Sarah Weiss, Associate Director, College Access and Support, WSAC, sarahwe@wsac.wa.gov.

As educators, it is important that we understand this is a time of fear and uncertainty for many of our students. To that end, it is more critical than ever before that we collectively share accurate information about resident tuition policies, state financial aid policies, and WASFA, and connect students to the latest information on immigration policies as applicable. Below is a beginning of a list of suggestions on how to ensure your campus communities are inclusive and supportive of your undocumented students:

- Normalize the resources undocumented students can access. For example, update all pages on your websites that reference financial aid to include FAFSA and WASFA. WASFA often is left out of financial aid information that schools and departments provide; mentioning it any time FAFSA is mentioned can be a helpful to ensure students have all the information they need.

- Create—and regularly update—an undocumented student resource page on your website, with links to the latest information on immigration and the resources available on your campus such as mental health services, healthcare, emergency funding, and legal assistance.

- Reaffirm your support of your students' human and educational rights by building a network of educators and undocumented students that actively co-create best practices, programs, and trainings to advocate with and for undocumented students.

- Learn more by reading Washington Dream Coalition's Resource Guide for Educators on how to work with undocumented students in appropriate and supportive ways.

- Remember, the issues that affect undocumented students go beyond just financial aid. You are in a position to provide direct support at an important time to undocumented students on your campus.

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Resolving Duplicate WASFA IDs

As many of you are aware, on October 1, 2016, the WASFA application servicer changed from *Need Access* to *Regent*. Any student who previously filled out a Need Access WASFA application will have to create a new account in Regent.

This change has created an issue with students who filled out a WASFA in previous years and used their WASFA ID number as their SSN/DACA/ITIN number, which is the default action when a student does not have a SSN/DACA/ITIN number.

If the student did not have a SSN/DACA/ITIN number and used the auto-assigned WASFA ID number as their default SSN/DACA/ITIN number in previous years, they needed to supply that same WASFA ID number in the new WASFA application. If they did not do this, the WASFA application assigned a new WASFA ID number to them and that number defaulted to their SSN/DACA/ITIN number.

This creates a problem in the portal because now the student has multiple SSN/DACA/ITIN numbers to which their awards and QERs are connected. When this happens, update the student's record to match the correct SSN/DACA/ITIN number.

Another issue that can complicate the situation is if a student receives a new SSN/DACA/ITIN number after already having an award under their auto-assigned WASFA ID number. These student records also need updating.

Whenever the student has a government issued SSN/DACA/ITIN number, always use that number and not the WASFA number. Use the default auto-assigned WASFA number **_only_** when students do not have a government issued SSN/DACA/ITIN number.

To correct duplicate WASFA ID issues, please visit this **Duplicate WASFA ID Cheat Sheet** at the WSAC FAA Resources webpage for more information. In some instances, WSAC will need to make the necessary corrections. In other situations, the student will need to make the correction themselves by editing and resubmitting their WASFA application.

If you have any questions about this, please email wasfa@wsac.wa.gov.

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Verifying Independent Status for Washington's Foster Youth

Documentation of foster care status can be a difficult hurdle to overcome when applying for financial aid.

Since 2008, WSAC has provided institutions with verified data from the Washington Department of Social and Health Services (DSHS) through the Passport Eligibility Checker on the Portal. The electronic Portal verification will suffice for documentation of foster care status for the purpose of financial aid packaging and support services.

This information also can be used to determine priority funding for the State Need Grant and State Work Study programs.

The information on the Portal provides verification in two areas:

- Passport eligibility – the student was a dependent of Washington State and spent at least one year in foster care after age 16.
- Foster youth status – the student was a dependent of Washington State on or after their 13th birthday, and should be considered an independent student for financial aid purposes.

NOTE: Aid administrators will still need to collect documentation from the student if they were in foster care outside of Washington, were in federal foster care, or were dependents of a tribal court.

For questions or additional information, contact Dawn Cypriano-McAferty at (360) 753-7846 or dawnc@wsac.wa.gov.

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Passport Viable Plan for 2017-18

Institutions should have received emailed details regarding the Passport Viable Plan for 2017-18 on August 24, 2017, from Becky Thompson and Dawn Cypriano-McAferty. The details are noted here:

The Passport to College Promise program was created by the state of Washington in 2007, to help students from foster care attend and succeed in college. The Passport to College Promise program, or Passport, is a comprehensive program providing scholarships and support services to eligible students attending postsecondary institutions in Washington State.

Institutions receive financial incentives for supporting Passport students, and are able to participate in the Passport viable plan through signing an addendum to the Washington State Institutional Participation Agreement for State Financial Aid.

There are currently 47 institutions in Washington State that have a Passport viable plan and are committed to serving foster youth on their campuses.

Elements of the Passport Viable Plan

The primary components of the Passport viable plan are established in WAC 250-83-60 and listed below:

- *Leadership commitment* – Strive to create a lasting institutional commitment to serve current and former foster youth.

- *Designated support staff* – Designating a knowledgeable "home base" person to direct youth to support services on campus.

- ***Full financial aid package*** – Review the student's individual budget to recognize their actual living expenses, utilizing all available aid, and reducing a reliance on loans.

- ***Connection to social services*** – Work with nonprofit agencies to ensure students from foster care receive support services and college preparation information.

- ***Identification and consent*** – Include on college application and registration materials a question asking a student to self-disclose if they were in foster care.

Upcoming Work

The existing Passport campus viable plan addendums expire on **June 30, 2018**, and, although the primary components to the viable plan will remain the same, WSAC staff members are working with an advisory team to develop a new campus agreement, reporting tool, and program implementation resources.

In order to develop a quality viable plan for Passport students and campuses, and to ensure collaborative communication, WSAC will be providing quarterly updates and will be soliciting feedback from all Passport designated support staff.

If you have any questions about the work and development of the viable plan, please contact Dawn Cypriano McAferty at dawnc@wsac.wa.gov.

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Teacher Shortage Conditional Grant Program

The Teacher Shortage Conditional Grant is a new program established by the Washington State Legislature in 2016. With the purpose of encouraging individuals to become teachers, the program provides financial support to preparation program candidates who commit to teaching in specified shortage areas.

WSAC ran the first application cycle in May of 2017, and received 885 completed applications for the program. WSAC offered grants to 53 recipients, fully expending the initial appropriation of $468,000. Customized award amounts fit within the applicant's financial aid package, with a maximum of $10,000 for the 2017-18 academic year.

In exchange for receiving the grant, recipients must teach at a Washington preK-12 public school for two school years, or fulfill the obligation in half the time by serving in a shortage area.

Aid administrators will report funds received for recipients of the Teacher Shortage Conditional Grant Program in next year's Unit Record Report (2017-18) under the "ConditionalLoans" category.

Direct any questions to J. Lee Schultz at (360) 753-7791 or jlees@wsac.wa.gov.

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State Work Study Information

- **SWS and DACA**

  Please see WSAC's guidance on regarding the recent federal action to rescind the DACA program as it relates to residency and state financial aid eligibility.

  In conjunction with that guidance, SWS is reaffirming its current guidance in this area as it appears on page V in the Update section of the 2017-18 SWS Program Manual (http://www.wsac.wa.gov/sites/default/files/2017-18%20State%20Work%20Study%20Program%20Manual.pdf) and as follows:

  Students completing the WASFA may be eligible for SWS. If the student is authorized to work in the United States as a participant in the Deferred Action for Childhood Arrivals program (DACA), can demonstrate residency and need via the WASFA, and meets all other SWS eligibility criteria, the student would be eligible for SWS.

  Students who continue to meet employment authorization, residency, and financial need requirements would typically continue to be eligible for SWS. Employers are required to verify the identity and legal authorization to work for all paid employees, including SWS student employees, via the completion of Form I-9 (Employment Eligibility Verification).

  DACA students can continue to use valid Employment Authorization Cards (EAC) in the I-9 verification process to establish both identity and employment eligibility during the period of EAC validity.

  Please do not hesitate to contact the SWS team at sws@wsac.wa.gov or me if you have questions. Direct any Residency questions to residency@wsac.wa.gov.

- **SWS and I-1433-Mandated Sick Leave**

  In addition to its state minimum wage provisions, Initiative 1433's passage also requires that Washington employers provide all employees with **paid sick leave**.

  Beginning **January 1, 2018**, all Washington employers must provide paid sick leave to all their employees, including SWS student employees.

  Employees must accrue at least one-hour of paid sick leave for every 40 hours worked.

  An employee may use paid sick leave for the following reasons:

  - An absence resulting from an employee's mental or physical illness, injury, or health condition; to accommodate the employee's need for medical diagnosis, care, or treatment of a mental or physical illness, injury, or health condition; or an employee's need for preventive medical care;

  - To allow the employee to provide care for a family member with a mental or physical illness, injury, or health condition; care of a family member who needs medical diagnosis, care, or treatment of a mental or physical illness, injury, or health condition; or care for a family member who needs preventive medical care;

- When the employee's place of business has been closed by order of a public official for any health-related reason, or when an employee's child's school or place of care has been closed for such a reason; and

- For absences that qualify for leave under the state's existing Domestic Violence Leave Act.

Employees are entitled to use accrued paid sick leave beginning on the 90th day after starting their employment. Unused paid sick leave carries over to the following year; however, an employer is not required to allow an employee to carry over more than 40 hours of sick leave.

Because the minimum paid sick leave hours as defined by I-1433 are a required component of state-mandated employee compensation, and not a fringe benefit such as employer-provided health insurance, or a required tax owed to the state or federal government such as Workers Compensation or FICA, the paid sick leave hours required by I-1433 are eligible for SWS reimbursement as hours worked.

SWS employers should document student employee sick leave hours on SWS timesheets as they would any other hours of SWS employment.

Please note that average weekly SWS hour limitations still apply, including any sick leave hours associated with the calculation period.

State-mandated sick leave hours under I-1433 do not impact federal FICA tax exemptions. Student employees who would otherwise be exempt from FICA deductions would retain that exemption regardless of state-mandated sick leave requirements. Please see https://www.irs.gov/pub/irs-drop/rp-05-11.pdf, page 12, item 6.04 for more information.

The Department of Labor & Industries is currently writing the rules on I-1433-mandated sick leave benefit implementation. These rules should help clarify many institutional/employer questions but will not be final until fall 2017. WSAC will work to ensure SWS stakeholders are informed on the latest I-1433 developments and we appreciate your patience prior to final rules. In the meantime, the latest information on I-1433 implementation can be found at http://www.lni.wa.gov/WorkplaceRights/Wages/Minimum/1443.asp.

- **Upcoming SWS November Survey Round**

  SWS's first Survey Round of the 2017-18 fiscal year will be conducted in November, providing institutions the opportunity to request additional SWS funding or return funds, that otherwise would go unspent, so they can be redistributed to institutions with additional SWS capacity.

- **WSASEA Fall Town Meeting**

  The Washington State Association of Student Employment Administrators (WSASEA) held its Fall Town Meeting on Tuesday October 24, 2017, at Pacific Lutheran University. The Fall Town Meeting was free to WSASEA members and $15 for non-members.

  Student employment professionals attending the Fall Town Meeting participated in unique training opportunities, shared effective practices and procedures, and heard important student employment regulatory updates.

This year's Fall Town Meeting agenda included a WSAC update, a speaker addressing Veteran's Student Affairs and Student Employment, and a roundtable discussion.

For more information about WSASEA and the Fall Town Meeting, please visit their website: http://www.wsasea.org/.

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Comings, Goings, and Transitions – WSAC Staffing Updates

- **Carissa Glassburn**, our long-time Assistant Director for the State Need Grant program, recently left WSAC to accept a promotional opportunity at another state agency. We miss Carissa's smiling presence, and we offer her congratulations as she pursues new career avenues.

- **Neesha Griffiths** joined WSAC as the SFA division's Receivables Coordinator on November 13. She comes to WSAC with multiple years of experience in financial aid, and as a veterans certifying official. Welcome Neesha!

- **Katie Guthrie**, our former Receivables Coordinator, recently accepted an in-house promotional opportunity. She has moved from SFA to the Administrative Services division, where she now serves as the agency's Assistant Budget Manager. We are pleased for Katie and happy to report that we still visit with her at her new digs next door!

- We congratulate **Carla Idohl-Corwin**, who has taken on new operational responsibilities for the State Need Grant, College Bound, and Passport programs. Carla's new title is Senior Associate Director. Way to go Carla!

- We welcomed **Annie Pocklington** to WSAC SFA on October 16. Annie fills the Program Coordinator vacancy for Workforce Programs. We look forward to integrating her strong customer service skills into the SFA team.

- We applaud **J. Lee Schultz**, who assumed new responsibilities beginning August 21. She has transitioned from Assistant Director for Teacher Shortage to the position of Associate Director of Workforce Programs. Yay J. Lee!

- We are happy to announce that **Marla Skelley** joined WSAC on October 20, as the Associate Director of Compliance. Many of you remember Marla from her days as Director of Financial Aid at The Evergreen State College, and as a leader at NELA several years ago. She comes to us from her most recent experience as a consultant working with colleges nationwide to improve financial aid processes. Welcome Marla!

- We expect to fill our final vacancy for the **Program Associate/Assistant Director of Need Based Programs** very soon. Look for the announcement in the near future. As we move forward, we are excited for what the future holds!

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Providing Feedback to SFA

We designed the **SFA Partner** with you, our SFA friends and colleagues, in mind. We want to respond to your needs, and are committed to continuous improvement that is achievable through your input, for future issues of the **SFA Partner**.

Let us know 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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To Subscribe or Unsubscribe

The SFA Partner listserv is moving to a new servicer effective December 15, 2017. Until then, please follow this link to Subscribe or Unsubscribe to the WSAC SFA Partner. We anticipate that migration to the new listserv will be relatively seamless, and will provide updated subscriber information as soon as it is available.

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