



**WASHINGTON COLLEGE GRANT  
AND  
COLLEGE BOUND SCHOLARSHIP  
PROGRAM MANUAL  
FOR FINANCIAL AID ADMINISTRATORS  
2020-21**

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# WASHINGTON COLLEGE GRANT AND COLLEGE BOUND SCHOLARSHIP 2020-21 PROGRAM MANUAL

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# 2020-21 Academic Year Updates & Reminders

## WELCOME to the Washington College Grant and College Bound Scholarship Program Manual for Financial Aid Administrators.

The guidance in this manual reflects the program rules for the Washington Administrative Code 250-21 – Washington College Grant, which were made available in [Washington State Register 20-06-052](#). These rules are effective June 29, 2020, and apply to the 2020-21 award year.

To search for a specific topic or key word, press “Ctrl-F” on your keyboard, then type in the word or topic you are looking for. This will direct you to all occurrences located within the manual.

## MANUAL UPDATES

*Program Manual Revisions (Information will be added each time there is an update)*

Date	Chapter/Section	Topic/Reason
June 15, 2020	Chapter 2	Chapter 2 was modified to include permissible exclusions that aid administrators MAY exclude from income.
June 26, 2020	Chapters 1, 3, 5, 7, 8	WAC Updates; and SAP and Repayment clarification added
June 26, 2020	Updates & Reminders	Changed final interim report due date to July 10
June 30, 2020	Chapter 4	CSAW file correction to <b>Summer1WcgAwardIsServed</b>
July 10, 2020	Chapter 1	WASFA filing clarification
July 21, 2020	Chapters 2, 4 and 5	File Layout, Tuition waivers, and Repayment & Award Adjustments
Aug/Sept. 2020	Updates & Reminders, Chapters 1, 6, 7, 8	Requesting payments, Archive restored, Cruncher clarification, SNAP, Financial Literacy, links to WAC

## NEW FOR 2020-21:

### ◆ Washington College Grant Established

The Washington College Grant (WCG) was created in 2019-20, to provide a statewide free college program for eligible participants, and greater access to postsecondary education for Washington residents—expanding and replacing the State Need Grant. Like the College Bound Scholarship (CBS), WCG awards now come directly from WSAC, and there are no allocations made to institutions.

The Workforce Education Investment Act ([HB 2158](#)) renamed the State Need Grant to the Washington College Grant, with guaranteed funding for all eligible students starting in the 2020-21 academic year.

In addition, the program expanded by increasing the eligibility threshold from 70 percent Median Family Income (MFI) to 100 percent MFI, providing new prorated awards including maximum awards going up to 55 percent MFI. Apprenticeship awards also are expanded.

### ◆ **WCG Apprenticeship**

The Washington College Grant (WCG) is expanded to include approved apprenticeship programs under [chapter 49.04 RCW](#) starting in the 2020-21 academic year. This expands apprenticeships outside of traditional academic programs.

Additional information will be provided as student eligibility and program requirements are established. A WCG Apprenticeship manual will be issued separately.

### ◆ **College Bound Scholarship Eligibility Extended**

College Bound Scholarship (CBS) eligible students, whose family income exceeds 65 percent of the state Median Family Income (MFI) up to 100 percent MFI, are eligible for the Washington College Grant, and shall be awarded the maximum WCG for which the student is eligible ([E2SHB 1311, Section 4\(1\)\(a\)](#)).

In 2019-20, sign-up for CBS extended from 7th and 8th grade to include 9th grade, for students who qualify for free or reduced-price lunch in 9th grade, who were previously ineligible during the 7th or 8th grade.

### ◆ **CSAW File Upload Layout Changes (Chapter 4)**

The CSAW file layout has been updated to accommodate the new changes in the Washington College Grant Program. Please be sure your institution is using this new file layout.

The Portal will no longer support Internet Explorer (IE) after June 30th. Please use a different browser such as Chrome, Firefox, Edge, etc.

AA degree data elements have been removed from the CBS Cruncher file layout for the 2020-21 academic year.

### ◆ **Repayment Checker**

The “Repayment Checker” is a new tool for Institutions to quickly identify students who are in repayment. Edits for students who are in repayment will need to be addressed at the time files are initially loaded into CSAW. Continue to use the Archive for determining student Quarters of Eligibility Remaining (QER).

### ◆ **No Longer Reporting Students As Unserved**

With guaranteed funding for all students up to 100 percent MFI, there will be no unserved students.



### ◆ **Revised State Aid Repayment Guidelines**

Please carefully review the complete Chapter 5 in this manual due to significant changes made to the repayment requirements.



Colleges must report repayments to WSAC, per the prescribed timelines in Chapter 5, to better assist students, and to avoid the awarding of state aid to ineligible students.

Failure to report repayments by the established deadlines, whether being collected by the institution or WSAC, may result in the repayment of funds to WSAC by the institution. Guidelines for reporting repayments to WSAC can be found in Chapter 5.

***Please Note:*** *In order to report a receivable or Institution to Bill, you must have first reported awards and requested funds through CSAW for that student.*

#### ◆ **Unclaimed Property** **NEW**

If a student fails to cash their WCG check or pickup any remaining funds by the close of the academic year, the funds shall be returned to the program at WSAC and treated as funds declined by the student. These funds shall no longer be referred to the state as unclaimed property.

#### ◆ **Revised Washington State Conditions of Award (Chapter 6)**

The revised Conditions of Award statement is included in Chapter 6. Institutions must provide this language (or a WSAC approved alternate) to students.

If you have already sent out your Conditions of Award for the 2020-21 academic year, you will not be expected to send out a new Conditions of Award statement for this year. Please be sure that you inform students in a separate correspondence regarding the new condition added (#10) related to uncashed/unclaimed funds being treated as declined funds.

Conditions of Award statements must be provided to students on paper or electronically. Emailed Conditions of Award statements must display the Conditions language, in its entirety, in the body of the email unless the institution requires students to certify their acceptance by filing a signed form or otherwise verifying receipt of the Conditions language.

Institutions must maintain documentation that the state Conditions of Award was provided to awarded students.

## **REMINDERS**

#### ◆ **Funding Sources**

Every eligible CBS Scholar must first receive a maximum WCG award before being considered for CBS funding. The CBS amount is determined after WCG and any other state grant or scholarship aid has been awarded.

- WCG and CBS awards come directly from WSAC and there are no allocations made to institutions.

### ◆ **Requesting Funds**

Per WAC 250-21-051-3, institutions should submit anticipated awards and payment requests for eligible students once identified. Institutional payment requests may be made any time of the academic year and are encouraged to be at least monthly.

### ◆ **Accurate Reporting**

Ensure that all data on your Interim Reports are accurate. Correct or update changes to student enrollment as they occur. This data is critical to forecast program funding costs. Do not report students who were not eligible for aid (didn't meet SAP, didn't complete financial aid paperwork, pending residency, etc.)

### ◆ **College Bound Scholarships and/or Washington College Grant for All Terms of Enrollment, Including Summer(s)**

Ensure that 100 percent of eligible CBS Scholars and/or WCG eligible students are awarded full Washington College Grants and/or College Bound Scholarships for all periods of enrollment, including summer(s).

See *Calculating Awards* (Chapter 2) to review the information on how to award and report Summer 1 ("header" institutions) awards versus Summer 2 ("trailer" institutions) awards.

No Summer 2 CBS and/or WCG awards should be made to students whose files are complete after August 1. Contact WSAC if you later need to adjust your final Interim Report.

### ◆ **Expanded Use of Applied Baccalaureate Designation in CSAW**

In recent years, the Applied Baccalaureate designation could be used by any two-year college that primarily offered associate degrees, but also was approved to and offered any type of bachelor's degrees, including applied bachelor's degrees.

The increased award amounts at the Applied Baccalaureate level only apply to students at the public community and technical colleges. Students enrolled in a mixture of upper- and lower-division courses at two-year colleges may not receive an award in excess of assessed tuition, service and activity fees.

Colleges are encouraged to use the calculator provided by the State Board for Community and Technical Colleges (SBCTC) to calculate correct tuition and award amounts. You may experience an edit when requesting payments or completing interim reports that you will need to override, explaining that it is a BAS student enrolled in upper and lower division coursework.

The Baccalaureate Tuition Calculator provided by the SBCTC is located at:

<https://www.sbctc.edu/colleges-staff/collegeaccess/baccalaureate-tuition-calculator.aspx>

◆ **Students Needing Repayment Status Information (Chapter 5)**

WSAC is using a billing service for repayments. Students with repayments wanting information about the status of their repayments should be instructed to call our contracted billing service, [University Accounting Services](#) (UAS), at 1-844-870-8701.

◆ **Washington Opportunity Scholarship & College Bound Scholarship (Chapter 2)**

Washington State Opportunity Scholarship (WSOS) **is not** to be considered state aid when determining the College Bound Scholarship (CBS) state aid award commitment.

For a full list of state programs that must be subtracted from the total maximum CBS amount ([HB 2158, Section 68](#)), see Chapter 2.

◆ **Second Associate Degrees**

The second associate degree restriction was eliminated in 2019-20. Please note that satisfactory academic progress and the maximum usage limit of five full time years of eligibility remains unchanged for Washington College Grant. College Bound Scholarship recipients have a maximum usage limit of four full time years of eligibility.

Institutions must update their Conditions of Award to reflect this change and others as provided in the sample 'Conditions of Award' in Chapter 6.

◆ **WCG Dependent Care Allowance**

The Dependent Care Allowance was eliminated effective 2019-20.

◆ **WCG Self-Help Requirement**

The self-help requirement for WCG recipients was eliminated effective 2019-20.

◆ **Cost of Attendance (COA) and Tuition Waivers (Chapter 2)**

A student receiving WCG or CBS must have the full assessed tuition amount included in the COA and the value of the waiver reported for each student in the Unit Record Report. More information is available in Chapter 2.

◆ **Information for Students on the ReadySetGrad Website:**

Refer students to [www.readysetgrad.org](http://www.readysetgrad.org) for financial aid information and resources.

- This is the page students will land on if they click on the link in the *Washington State Aid Conditions of Award* (Chapter 6):  
<http://www.readysetgrad.org/college/financial-aid-101>
- For specific information on the **Washington College Grant**, visit: [wsac.wa.gov/wcg](http://wsac.wa.gov/wcg)
- For specific information on the **College Bound Scholarship**, visit:  
<http://www.readysetgrad.org/college/college-bound-scholarship-program> or  
[www.collegebound.wa.gov](http://www.collegebound.wa.gov)

## Washington College Grant and College Bound Scholarship History and Operation

- 1969:** State Need Grant (SNG) program was established.
- 1976:** Legislative intent noted to offset tuition/fees for low-income students.
- For every dollar increase in tuition, 24 cents in aid provided, above previous levels.
  - Reflected the portion of undergraduates on aid at that time.
  - Policy inferred that the state needs to “give back” to needy students when increasing tuition.
  - Students were nominated, then ranked together according to need.
  - Grants were one-third of the difference between budget costs and family contribution.
- 1980:** For-profit institution participation was authorized.
- 1988:** Grant amounts changed from flat grant to variable in order to reflect Cost of Attendance differences supporting student choice.
- 1989:** Part-time students authorized.
- 1991:** A “fair share” fund distribution model was adopted creating campus “reserve funds” based on percentage of campus-eligible students divided by all eligible students.
- 1993:** Revised the eligibility and cost model to use MFI as a result of change in federal needs analysis – 50 percent MFI used initially.
- 1995:** MFI increased to 65 percent via budget process.
- 1996:** MFI decreased to 40 percent via budget process.
- 1998:** Award amounts based on public tuition rates.
- 2001:** MFI increased to 55 percent via budget process.
- 2005:** MFI increased to 65 percent via budget process.
- 2005:** Less-than-half-time eligibility pilot with 10 campuses.
- 2006:** Less-than-half-time eligibility pilot expanded to all.
- 2007:** Legislature established the College Bound Scholarship Program, allowing eligible 7<sup>th</sup> and 8<sup>th</sup> graders to sign up to receive scholarship support in college.
- Maximum MFI for SNG increased to 70 percent.
  - Maximum MFI level for CBS established at 65 percent.
- 2009:** SNG MFI ranges expanded from three to five categories for pro-rated awards via budget process.
- 2011:** SNG Awards for new students attending for-profit institutions reduced by half.
- 2011:** SNG Less-than-half-time eligibility pilot extended two years through the budget with the addition of a required outcomes study.
- 2012:** The first College Bound Scholarship students receive funding.  
Financial aid counseling curriculum for institutions with SNG recipients per SSB6121
- 2014:** The Legislature enacted the REAL Hope Act, granting SNG eligibility determination for students who meet RCW 28B.15.012(2)(e) residency requirements, often referred to as “1079” requirements. This includes non-U.S. citizens, including undocumented students.
- 2014:** SNG Awards for students attending for-profit institutions restored to 100% level.

- 2015:** The Legislature required that all eligible CBS Scholars be awarded maximum SNG awards.
- The State Attorney General’s Office indicated that students with Deferred Action for Childhood Arrival (DACA) status may qualify for in-state tuition under RCW 28B.15.012(2)(a)-(r), may meet the residency requirements for State Need Grant under RCW 28B.15.012(2)(a)-(e), and may meet the residency requirements for College Bound Scholarship under RCW 28B.15.012(2)(a)-(d).
  - SNG eligibility for less-than-half-time enrollment became permanent.
  - The Legislature reduced tuition for the 2015-16 year at public colleges through the biennium, while holding students attending private institutions harmless from reduced awards, keeping state aid award amounts the same at private institutions.
- 2017:** Legislature enacted separate award categories for 4-year for-profit and 4-year non-profit institutions.
- 2018:** Residency requirements were aligned for SNG and CBS. Students may meet residency requirements under RCW 28B.15.012(2)(a)-(e) for both programs. This permits CBS scholars to meet residency requirements using the “1079” standard that has been in place for WCG since 2014. Also permits residency to be determined using the DACA standard (see 2015) even if DACA is expired.
- 2019:** Washington College Grant (WCG) program established, replacing the State Need Grant (SNG)
- Award amounts defined in statute for all sectors
  - CBS students that meet WCG eligibility given WCG priority in statute.
  - CBS sign-up is extended to 9th grade students who qualify for free or reduced-price lunch who were previously ineligible during the 7th & 8th Grade.
  - Self-help requirement removed.
  - Second associate degree restriction removed. Dependent care allowance eliminated.
- 2020:** WCG guaranteed funding for all eligible students in statute.
- Award amounts defined in statute
  - Increased eligibility threshold from 70 percent MFI to 100 percent MFI.
  - Increased maximum awards up to 55 percent MFI
  - Expands to include apprenticeship programs
  - WCG WAC 250-21 created/repeal of SNG WAC 250-20

## **WCG & CBS Report and Funding Request Timeline**

<b>June 1, 2020</b>	Renewal materials due for institutions to apply for recertification of their “Institutional Agreement to Participate.”
<b>July 10, 2020</b>	Final Year End Interim Reports (Reconciliation) due for the 2019-20 academic year.
<b>August 2020</b>	2019-20 Unit Record Report training webinars.
<b>October 1, 2020</b>	Washington Application for State Financial Aid (WASFA) available for the 2021-22 academic year.
<b>October 5, 2020</b>	2019-20 Unit Record Report due.
<b>November 6, 2020</b>	Fall Interim Reports are due.
<b>February 5, 2021</b>	Winter Interim Reports are due.
<b>May 7, 2021</b>	Spring Interim Reports are due.
<b>May/June 2021</b>	Annual Workshops – state financial aid training and updates.
<b>June 30, 2021</b>	Final date that 2020-21 WASFA form may be processed.
<b>July 5, 2021</b>	Final Year End Interim Reports (Reconciliation) due; final date to request WCG Funds.

# CHAPTER 1

## Washington College Grant and College Bound Scholarship Eligibility Determination and Monitoring

### ELIGIBILITY DETERMINATION

- ◆ **First: Determine if the student is an eligible College Bound Scholar.**

College Bound students are identified through the CBS “Cruncher” located in the WSAC portal. CBS students, who meet all high school eligibility requirements, are considered College Bound Scholars.

College Bound Scholars, who meet all income and program requirements for that year, must be considered for CBS funding, and are identified throughout this manual as **eligible College Bound Scholars** or **eligible CBS Scholars**.

- ◆ **Second: If the student is an eligible College Bound Scholar, determine the amounts of funding the student is eligible to receive from both the WCG and CBS programs.**

*Note: In some cases, eligible College Bound Scholars may not receive CBS assistance. An example is an eligible CBS Scholar who receives sufficient WCG and other state aid funding to meet the amount required for eligible CBS Scholars to receive. Gift equity policies do not apply to CBS/WCG awards.*

- ◆ **Third: If the student is not an eligible College Bound Scholar, determine the student’s eligibility only for the WCG program.**

CBS students, who exceed the 65 percent MFI and up to 100 percent MFI, are to be awarded WCG.

## Initial Criteria for WCG and CBS for Eligibility Determination

STUDENTS MUST:	WCG	CBS
<b>Meet High School (HS) Graduation Requirements</b>	<input type="checkbox"/> High School graduation or GED/equivalent	<input type="checkbox"/> Graduate from a Washington High School with a 2.0 GPA or higher (GED OK for certain former foster youth) or approved homeschool program. <input type="checkbox"/> No felony convictions before HS graduation
<b>Meet College Enrollment Deadline</b>	<input type="checkbox"/> N/A	<input type="checkbox"/> Within one year of HS grad. (Typically, the fall term a year after June HS graduation)
<b>Submit an Approved Application</b>	<input type="checkbox"/> FAFSA or WASFA each year	<input type="checkbox"/> FAFSA or WASFA each year
<b>Be a Washington Resident*</b>	<input type="checkbox"/> Meet residency requirements according to RCW 28B.15.012(2)(a)-(e). <ul style="list-style-type: none"> <li>▪ Includes students with Deferred Action for Childhood Arrival (DACA) status who meet 28B.15.012(2)(a)-(e). requirements. DACA can be expired at the time of residency determination.</li> <li>▪ Includes non-U.S. Citizens who meet 28B.15.012(2)(e), also known as “1079,” requirements.</li> <li>▪ Both U.S. citizens and non-citizens may be eligible to meet residency requirements.</li> <li>▪ At public institutions, residency officers determine if and how a student meets residency requirements. Financial aid officers at public institutions should ask their residency officer if student meets this requirement.</li> <li>▪ Financial aid officers at private institutions should use this handbook to make residency decisions.</li> </ul> For additional residency information see: <a href="https://readyssetgrad.wa.gov/search/node/residency">https://readyssetgrad.wa.gov/search/node/residency</a>	<input type="checkbox"/> Meet residency requirements according to RCW 28B.15.012(2)(a)-(e). <ul style="list-style-type: none"> <li>▪ Includes students with Deferred Action for Childhood Arrival (DACA) status that meet 28B.15.012(2)(a)-(d). requirements. DACA can be expired at the time of residency determination.</li> <li>▪ Includes non-U.S. Citizens who meet 28B.15.012(2)(e), also known as “1079,” requirements.</li> <li>▪ Both U.S. citizens and non-citizens may be eligible to meet residency requirements.</li> <li>▪ At public institutions, residency officers determine if and how a student meets residency requirements. Financial aid officers at public institutions should ask their residency officer if student meets this requirement.</li> <li>▪ Financial aid officers at private institutions should use this handbook to make residency decisions.</li> </ul> For additional residency information see: <a href="https://readyssetgrad.wa.gov/search/node/residency">https://readyssetgrad.wa.gov/search/node/residency</a>
<b>Meet family income eligibility based on MFI level</b>	<input type="checkbox"/> <b>100% Median Family Income (MFI) or less</b>	<input type="checkbox"/> <b>65% MFI or less</b>
<b>Maximum Full-Time Term Usage</b>	<input type="checkbox"/> <b>15 quarters/10 semesters</b>	<input type="checkbox"/> <b>12 quarters/8 semesters</b>
<b>Eligibility Window to Receive Payments</b>	<input type="checkbox"/> N/A	<input type="checkbox"/> 5-year usage window from year of HS graduation (window ends with summer)

\*See expanded information in this chapter for more details regarding residency.



## Shared WCG / CBS Eligibility Areas

### ALL WCG and ALL CBS SCHOLARS MUST:

- Meet Washington resident tuition requirements according to RCW 28B.15.012(2)(a)-(e).
- Demonstrate financial need as defined under RCW 28B.92.030.
- Be undergraduate students.
- Enroll in at least 3 credits per quarter or the equivalent.
- Enroll in eligible programs at eligible institutions; or
- Be enrolled in an approved apprenticeship program.

### ALL WCG and ALL CBS SCHOLARS CANNOT:

- Exceed maximum term usage.
- Be in unsatisfactory progress or denied status.
- Owe a repayment to any state program.
- Be in default on a state student loan.
- Be pursuing a second bachelor's degree.
- Be pursuing a degree in Theology.

## Financial Need and Income Cutoff

The student must demonstrate *financial need*, as calculated by the institution, using the Federal Methodology (FM) formula based on the FAFSA or WASFA for the appropriate aid year. The student's state aid award, in combination with other forms of aid, may not exceed the calculated need.

The student must have a family income below a specified *income cutoff*. The cutoff equals a percentage of the state's median family income (MFI) and adjusts with the student's family size.

The income cutoff is 100 percent of the state's MFI for Washington College Grant and 65 percent for College Bound Scholarship recipients. CBS eligible recipients with family incomes between 66-100 percent should receive WCG. State aid must fit within the student's calculated need after counting all other need-based resources. Chapter 2, *Calculating WCG and CBS Awards*, describes the income cutoff thresholds.

## Undergraduate Student

An **undergraduate student** is a student who has not received a baccalaureate or professional degree. Students that have earned enough credits towards a degree, but have not yet been conferred the degree, may continue to be awarded State financial aid as long as they continue to meet eligibility requirements and have unused QER.

## Enrolled for at Least Three Credits per Quarter or the equivalent.

A student must be enrolled in a course load of at least three credits per quarter or the equivalent at a participating postsecondary institution to receive state aid. Apprenticeship requirements will be defined in the Washington College Grant for Apprenticeship Program Manual.

## **Eligible Program**

An eligible program is a program at a location approved by the U.S. Department of Education for participation in the Title IV financial aid programs.

The student must be enrolled in an educational program that does one of the following:

1. Leads to a baccalaureate, associate, or undergraduate professional degree.
2. Leads to a postsecondary vocational certificate or degree in a program of at least 600 clock hours, 16 semester, or 24 quarter credit hours. Program completion must prepare the student for gainful employment in a recognized occupation.

**Note:** *It is permissible to count needed remedial coursework toward the state aid enrollment requirement (but they do not count in the program length requirement mentioned above).*

### ***Eligible Apprenticeship Program***

Apprenticeships qualifying as eligible programs must be a registered apprenticeship program approved under Chapter 49.04 RCW. See separate WCG for Apprenticeship Program Manual.

### ***Remedial Coursework***

Up to one academic year's worth of remedial coursework may count in the student's enrollment status. For the purpose of this limit, that is 30 semester or trimester hours, 45 quarter hours, or 900 clock hours. Please note students are still subject to the maximum full-time term usage limits.

***Correspondence and Distance Education*** – A student may not take more than half of their course load through correspondence courses. There are no restrictions on the number of electronically delivered (online) credits that a state aid recipient may enroll in from an eligible institution.

***Study Abroad Programs*** – Study abroad students are eligible to be considered for state aid if one of the following is true:

- They are enrolled at an eligible institution for a Study Abroad program.
- The institution has agreed to administer the financial aid in conjunction with another institution running the Study Abroad program.

## **Maximum Terms of Eligibility**

WCG and CBS recipients have a lifetime maximum number of terms they can receive for each program. Remaining eligibility is described as Quarters of Eligibility Remaining (QER).

- A WCG recipient may receive the grant for a maximum of 15 quarters, 10 semesters, or the equivalent combination of the 2 at a full-time rate of enrollment. This includes combined usage under the apprenticeship program option and academic programs.
- CBS recipients may receive CBS funds for a maximum of 12 quarters, 8 semesters, or the equivalent combination of the two at a full-time rate of enrollment.

CBS scholarships may be received during any terms within a five-year period following their high school graduation year, even if enrollment is not continuous, provided the student met their initial enrollment deadline. The five-year period concludes with the summer term.

In order to meet the enrollment deadline, students must be enrolled and attending. Registering for a future term does not meet the enrollment deadline. Transcribed courses verify the enrollment deadline was met. After five years, the scholarship is no longer available.

**For example**, students with a high school graduation year of 2020, must begin their college enrollment by fall 2021, and have through the first summer term of 2025 to receive scholarship funding. When five years have expired, usually in September, the CBS Cruncher field in the portal will no longer show that the students are 'Ok to Award' or 'Ok to Pay.'

If CBS Scholars exhaust their CBS funding, they may continue to receive WCG funding as long as they meet all other WCG requirements.

The CBS Cruncher, and the College Bound/Washington College Grant Award Warehouse (CSAW) system will track individual students' eligibility.

### **Satisfactory Academic Progress (SAP)**

Institutions are responsible for monitoring and responding to changes in student eligibility. Chapter 3 discusses SAP changes in student status that occur after receipt of an award.

### **Unsatisfactory Progress or Denied Status**

**Unsatisfactory progress** means that in a previous term, the student failed to complete at least one-half (50 percent) of the minimum number of credits for which state aid was received and has not yet earned reinstatement.

Students enrolled in clock hour programs are required to complete 300 hours per term before the next disbursement can be made. Please see the section on clock hours.

**Denied status** may also refer to a student's status when the student has not met the institution's qualitative standard or maximum timeframe policy. See Chapter 3 for more information.

### **Refund/Repayment**

All students must certify that they do not owe a refund or repayment for any state student financial aid programs. The student may not be in default on a loan made through a state loan program.

### **Previous Bachelor's Degree**

WCG recipients and CBS Scholars who have already earned a bachelor's degree, including foreign bachelor's degrees, are not eligible to receive WCG or CBS awards. If a student provides documentation that the foreign degree is not equivalent to a bachelor's degree in the U.S., the institution may determine that the student does not have a bachelor's degree.

**Note:** *This is the same exception allowed for Federal Pell Grant administration.*

## Theology Degree

State law prevents students pursuing a degree in theology from receiving state financial aid.

Students pursuing a degree in theology are ineligible to receive state financial aid. Each institution must determine whether the student is pursuing this type of degree.

## Resident for Washington College Grant and College Bound Scholarship Purposes

Residency requirements are the same for both programs. Students must meet one of five resident tuition requirements as outlined in [RCW 28B.15.012\(2\)\(a\)-\(e\)](#)

- **For public institutions:** Residency officers determine if a student meets residency requirements for tuition. Residency officers should indicate which part of the residency RCW a student meets so that financial aid officers know which financial aid programs may be available to the student.

Financial aid officers at public institutions should coordinate with their residency officers to ensure consistent residency determinations for tuition and financial aid.

- **For private institutions:** Private institutions do not have residency officers so financial aid officers may use this handbook to determine if a student has met financial aid residency requirements. If there are any questions, please email [wcg@wsac.wa.gov](mailto:wcg@wsac.wa.gov).

Additional residency information is available at <https://www.wsac.wa.gov/student-residency> or <https://readyssetgrad.wa.gov/residency-citizenship>.

**There are two student groups that have different residency requirements. A student's group depends on their citizenship or immigration status.**

### Student Group #1

- US citizens
- Permanent residents, U.S. nationals
- Citizens of the Federated States of Micronesia, Marshall Islands, and Palau
- FAFSA-eligible non-citizens
- Students with current or expired Deferred Action for Childhood Arrivals (DACA) status
- Students with one of the following immigration statuses:
  - Refugee
  - Asylee
  - Temporary Protected Status
  - Withholding of Removal status
  - Conditional permanent resident
  - E3, H-1B, H4, L1, L2, or U visa
  - Students with a current Employment Authorization Document (EAD).
  - Other non-citizens may also be in this group.
    - See [www.wsac.wa.gov/student-residency](http://www.wsac.wa.gov/student-residency) for more information.
- To find out what documentation is needed to prove a certain immigration status, please see [www.wsac.wa.gov/student-residency](http://www.wsac.wa.gov/student-residency).

## Student Group #2

- Undocumented students without expired or current DACA status.
- Students who are not listed in Student Group #1 (for example, students with an F visa who do not have a current EAD).

## Residency requirements for Student Group #1

Students in Student Group #1 meet residency requirements for WCG and CBS if they meet **ONE** of the following five sections of RCW 28B.15.012(2). The first two sections of the RCW, **(a) and (b), are the most common.** Each RCW section is outlined below.

### **(a) Financially independent students** (definition differs from federal aid definition)

To be considered financially independent for residency purposes, a student must meet all of the following for the current and previous calendar years (calendar year means January – December):

- Cannot be claimed as a dependent exemption on a tax return, regardless of age.
- Cannot receive significant financial assistance from parents, relatives, legal guardians, or others (except for a spouse), regardless of age and marital status.
- Must have used their own income—or financial aid awarded in their name—to pay their living and tuition expenses.

To qualify for Washington resident tuition through (a), financially independent students must have a domicile in the state for at least one year immediately before their first term.

- The domicile must be primarily for purposes other than educational (meaning the student cannot take more than six quarter or semester credits in any one term).
- People with a B, C, D, F, J, M, or TN/TD visa status cannot establish domicile in Washington.

### **(b) Financially dependent students** (definition differs from federal aid definition)

Financially dependent students are students who are not considered financially independent for tuition purposes. To qualify for Washington resident tuition through (b), financially dependent students' parent(s) or legal guardian(s) must have a domicile in the state for at least one year immediately before the student's first term.

- Parents or legal guardians who are undocumented can establish domicile in Washington.
- Parents or legal guardians with a B, C, D, F, J, M, or TN/TD visa status cannot establish a domicile in Washington.

See [wsac.wa.gov/student-residency#financial-independence](https://wsac.wa.gov/student-residency#financial-independence) for more information about financial independence for residency purposes.

### **(c) Section (c) is very unlikely. Please see**

<https://apps.leg.wa.gov/rcw/default.aspx?cite=28B.15.012> for more information.

**(d) Recent high school graduates whose parent(s) or legal guardian(s) move out-of-state.** (*Not as common*) . . .

Students who qualify under section (d) of the RCW must meet the following:

- Student must have spent at least 75 percent of their last two years of high school in Washington high schools.
- Student’s parent(s) or legal guardian(s) must have had a domicile for at least one year within the five-year period before student graduated high school.
- Student must start college within six months of graduating high school.
- Student may continue to meet residency requirements for as long as the student remains continuously enrolled for at least three quarters or two semesters per calendar year.

**(e) Students who live in Washington for three years prior to graduating high school (otherwise known as “1079” requirements).** To meet the requirements for (e) or “1079” students must:

- Graduate from a Washington high school with a diploma, earn a GED, or earn a diploma equivalent.
  - High school graduates must finish their full senior year at a Washington high school.
- Live in Washington for at least three consecutive years (36 consecutive months) immediately before the date they earn a high school diploma, GED, or equivalent.
- Continuously live in Washington after the date they earn a high school diploma, GED, or equivalent until they are admitted to college.
- Sign an [affidavit](#) saying they meet the above requirements. The affidavit is included in the WASFA. There is a paper affidavit for students who are eligible for and fill out the FAFSA. Students should only fill out the paper affidavit or the WASFA affidavit, not both.
  - Non-U.S. Citizens must also promise that they will apply to become a U.S. permanent resident as soon as they are eligible.

### **Residency requirements for Student Group #2**

Undocumented students without expired or current DACA status and students who are not in Group #1 may meet residency requirements for WCG and CBS if they meet the requirements for (e) or “1079” as follows:

- Graduate from a Washington high school with a diploma, earn a GED, or earn a diploma equivalent.
  - High school graduates must finish their full senior year at a Washington high school.
- Live in Washington for at least three consecutive years (36 consecutive months) immediately before the date they earn a high school diploma, GED, or equivalent.
- Continuously live in Washington after the date they earn a high school diploma, GED, or equivalent until they are admitted to college.
- Sign an [affidavit](#) saying they meet the above requirements. There is a paper affidavit (<https://wsac.wa.gov/sites/default/files/Residency.Affidavit.pdf>) for students who are eligible for and fill out the FAFSA. Students should only fill out the paper affidavit or the WASFA affidavit, not both.
  - Non-U.S. Citizens must also promise that they will apply to become a U.S. permanent resident as soon as they are eligible.

Send questions regarding assistance related to an individual student’s residency to: [wcg@wsac.wa.gov](mailto:wcg@wsac.wa.gov).

## **Washington Resident for Tuition, but not for State Aid**

The Legislature has classified the individuals from the groups below as Washington residents for tuition and fee purposes at public institutions. This legislation **DID NOT** make these individuals eligible for WCG and CBS, unless they meet the residency requirements outlined above; however, they may be eligible for other state aid programs.

These groups are:

- 1. Members of certain federally recognized tribes** who were domiciled for one year in one or a combination of the following states: Idaho, Montana, Oregon, or Washington. More information, including the list of tribes, is found at <https://www.wsac.wa.gov/student-residency#federally-recognized-tribes>.
- 2. Certain military personnel or Washington National Guard members, as well as their spouse(s) and dependent(s).** More information is found at <https://wsac.wa.gov/student-residency#military-veterans-dependents>.
- 3. E-3, H-1B, or L visa holders and their spouse(s) and dependent(s)** who ONLY meet resident tuition requirements through living in Washington for one year for purposes other than educational. Also includes those who ONLY meet resident tuition requirements because they hold or previously held one of these visa statuses and filed a green card application.
- 4. Students on exchange programs.**
- 5. Oregon residents who reside (or recently resided) in counties that border Washington and attend an institution in a Washington county that borders Oregon.**

See <https://wsac.wa.gov/student-residency#oregon-border-counties> for more information.

## **Conflicting Information**

All applicants for state aid, regardless of the application filed, must resolve conflicting information. Institutions should follow their standard review policy regarding the resolution of conflicting information for any applicant. However, institutions may not require an applicant to file a federal tax return if they are electing to apply only for state aid—regardless of whether they file the FAFSA or WASFA.

Financial Aid Administrators are strongly encouraged to advise students accordingly, who may be otherwise eligible for federal aid to proceed with and complete their taxes to be considered for federal aid but may not require this for state aid only applicants. In lieu of a federal tax return, applicants may submit other forms of documentation to resolve conflicting information.

WSAC requires institutions to resolve any conflicting residency information between their financial aid, admissions, and registration offices. WSAC will periodically compare residency-related data reported on the FAFSA or WASFA (such as mailing address, state of legal residence, driver's license state) and request that institutions either confirm eligibility or resolve conflicting information.

## **Approved Applications – FAFSA and WASFA**

**No Application Fee** – No student shall be required to pay a fee to apply for state aid.

Students applying for state aid must file either the **Free Application for Federal Student Aid (FAFSA)** form, as approved by the U.S. Department of Education, or for those not eligible for Federal student aid, the **Washington Application for State Financial Aid (WASFA)**. **Students who are eligible to complete the FAFSA, but chose not to apply for Federal student aid, can complete the WASFA instead. If a student chooses to do the WASFA, it is important they understand that they will be considered only for State financial aid.**

Institutions may also require that students complete an institutional aid application to collect additional information that is not available on the FAFSA or WASFA. If so, institutions must provide such applications to students on a timely basis if they receive FAFSA or WASFA information from students but have not received the required institutional application. Instructions for students to complete the WASFA can be found at: [www.readyssetgrad.org/WASFA](http://www.readyssetgrad.org/WASFA).

Access to information for WASFA students that have applied to your institution can be found in the WSAC Portal under Programs>WASFA and should be checked for new applications on a consistent basis parallel with processing FAFSA applications. Aid administrators must be granted WASFA permissions in the WSAC Portal to access WASFA applicant data.

Features on the site include:

- Applicant search with optional .csv download option
- WASFA applicant data views
- File extracts of applicant data in ISIR format
- Federal EFC calculations
- WASFA Residency report

Contact your institution's Portal administrator, or WSAC staff at [wcg@wsac.wa.gov](mailto:wcg@wsac.wa.gov), to request WASFA access in the WSAC Portal.

## **Former Foster Youth and CBS High School Requirement**

Beginning in the fall of 2017 (Senate Bill 5890), students who experienced foster care at any point between 7<sup>th</sup> grade and the age of 21, may be able to receive College Bound Scholarship after earning a high school equivalency certificate.

Students should contact program staff at [collegebound@wsac.wa.gov](mailto:collegebound@wsac.wa.gov) or 888-535-0747, Option 1, to discuss their specific situation and next steps, but generally:

- Students need to have been auto-enrolled into the College Bound Scholarship
- They will need to provide a copy of their high school equivalency certificate (currently in WA, this is the GED exam) to program staff
- Students will need to have earned the GED prior to their 21st birthday
- Students will need to enroll in college within one year of receiving their GED
- Students must not have been convicted of a felony
- Students also must be income-eligible, as determined by completing the FAFSA or WASFA



## **Ability to Benefit – Applies only to WCG Students Revised**

Ability to Benefit and GEDs do not qualify as meeting the high school requirements for CBS students. CBS students must graduate from a Washington high school with a cumulative 2.0 or higher GPA (except for some former foster youth who earn a GED – see Former Foster Youth and CBS High School Requirement section above).

WCG recipients must have a high school diploma or its equivalent or for those without a high school credential, meet the ability to benefit option. Equivalent standards include a general education development certificate or a certificate of completion of a home-based instruction under chapter 28A.200 RCW.

For a student without a high school diploma or its equivalent, a school may accept:

- (a) A recognized ability to benefit test as defined by federal financial aid regulations;
- (b) Completion of at least six college level credits towards an eligible program of study;
- (c) Alternate state equivalent approved by the U.S. Department of Education; or
- (d) Co-enrollment in Washington state's Integrated Basic Education and Skills Training Program (I-BEST) and High school+ (HS+) programs that include an eligible program of study as defined in WAC 250-21-010(18).

## **Fraudulent Information**

Any student who obtains state aid by means of a willfully false statement or failure to reveal any material fact, condition, or circumstance affecting eligibility will be subject to applicable civil and criminal penalties and repayment of all state aid funds received.

## **Consistent Policies**

Institutional policies shall apply consistently to state aid recipients and federal aid recipients, except when in conflict with state aid regulations academic progress requirements or if there are specific references to state aid processing (such as the frequency of term payments for clock hour schools).

## **ELIGIBILITY MONITORING FOR WCG AND CBS**

Once a student receives a state aid award, the institution must monitor continued eligibility. The institution must issue the student a revised award offer when the student's state aid award changes.

The institution is required to verify student eligibility for all students by:

- Checking the WSAC WCG Archive report for Quarters of Eligibility Remaining (QER)
- Checking the WSAC Repayment Checker to ensure student does not owe a repayment on a previously disbursed state aid award
- Monitoring SAP status (Refer to Chapter 3)
- Confirming OK to Pay status in the CBS **Cruncher** (for CBS students only)

## Washington Student Achievement Council Archive Report

Use the archive to determine whether or not a WCG student:

- Has exhausted or is approaching the 15 quarter/10 semester limitation for WCG eligibility. The archive lists students who are within five quarters of meeting the 15 quarter/10 semester maximum and displays the number of quarters of eligibility remaining (QER).
  - If a CBS student has exhausted WCG eligibility, but still has CBS eligibility remaining, the institution shall award the student an award using CBS funds only.

**It is the institution's responsibility to ensure that all students who receive WCG have been checked against the archive at both the time of awarding and time of disbursement.**

SSN	Name (last, first, MI)	In Repayment	Quarters Used	Quarters Remaining	Initial Archive Date
		No	15.000	0.000	8/8/2006
		No	6.000	9.000	 7/31/2015
		 Yes	1.000	14.000	 5/4/2019
		 Yes	1.000	14.000	 5/4/2019
		No	5.250	9.750	 11/7/2015

**Please note:** Archive report currently contains Repayment data in the CSV that may not be correct, please use the new Repayment Checker for the most accurate information. QERs in the archive may be used as a guide for award planning but they are only updated intermittently. CSAW provides real time information.

The report sample images will be updated in the manual as technology is modified.

- **Archive results example** – The final archive is available each year in mid-August. It contains updated information on the prior year's WCG recipient exceptions. Institutions can upload data on their ready-to-award students to WSAC's Portal: <https://portal.wsac.wa.gov/>, Results are downloadable into Excel.
- **Downloadable file format example** – In the period of time before WSAC finalizes the archive data, institutions shall use the most recent data available in the archive as a basis for offering awards to students to minimize the need for late repackaging.

The archive is updated at the end of the fiscal year to reflect updated repayment information. CSAW is real time and contains the most up to date information for repayments and QERs.

**Note:** Check the archive before submitting any payment requests. Access can be requested by contacting your institutional administrator (usually the Financial Aid Administrator at each institution) or WSAC staff at [wgc@wsac.wa.gov](mailto:wcg@wsac.wa.gov).

## Repayment Checker **NEW**

Use the new Repayment Checker to determine if a student owes a repayment on a previously disbursed state aid award. Continue to use the Archive for Quarters of Eligibility Remaining (QER). Real time information is also available in CSAW.

SSN	First Name	Last Name	Program	Status	Setup Date	Initial Debt	Current Balance	Year	Institution	Term
			WCG	Sent to Collection Agency	6/20/2019	\$609.00	\$609.00	2018-2019	Spokane	Spring
			WCG	Uncollectable	8/10/2010	\$335.00	\$335.00	2009-2010	Spokane	Spring

## The CBS Eligibility “Cruncher” for College Bound Scholars and Recipients

Campuses will need to check eligibility using the CBS Cruncher at the time of awarding and again prior to each disbursement.

The CBS Cruncher is located in the Portal. From the main menu, select Programs, then College Bound, then Cruncher. Step-by-step instructions for using the CBS Cruncher are found in this chapter.

Name (last, first, SSN)	SID (UW)	OK to Award	OK to Pay	HS Grad Yr	HS Req Met	Enrollment Deadline Met	5-yr Elig. Open	CBS Qtrs Used	CBS Qtrs Remaining	In Repayment	WASFA Student	Last Updated
		Verify updated 12/19/2018	No updated 12/19/2018	2020 estimated from OSPI	Unlikely	n/a	Yes	0.00	12.00	No	No	11/1/2019
		Yes updated 10/4/2019	Yes updated 7/14/2020	2020 actual from OSPI	Yes	Yes	Yes	0.00	12.00	No	No	8/27/2020

**Please note:** Institutions must check for prior repayments and QERs. QERs in the Cruncher should be used only as a guide as they are only annually updated at the close of each fiscal year. CSAW provides the most timely and accurate QER data.

## Matching CBS Valid Applicants to FAFSA and WASFA Filers

Washington Student Achievement Council’s CBS valid applicant database is matched to incoming FAFSA and WASFA applications. FAFSA and WASFA data is matched daily.

Using the **CBS Eligibility Cruncher**, institutions shall compare their student data against the Cruncher database. After entering information for potentially eligible students, campuses are presented with a list of CBS students whose CBS application matched to an incoming FAFSA or WASFA.

**Note:** *The CBS Eligibility Cruncher does not determine all CBS eligibility criteria.*

**The CBS Cruncher checks for:**

- Complete and valid CBS application on file with WSAC
- High school graduation with a 2.0 or higher GPA
- That a student has enrolled and attended college within one year of high school graduation
- Within 5-year eligibility window – please be aware that the cruncher does not update the end of the 5-year eligibility until after the Fall term. The 5-year eligibility ends with the summer term and may require you to manually review students prior to awarding.
- Within 12 quarter or 8 semester usage limit
- Outstanding repayments
- No felony conviction before high school graduation
- WASFA filer

**The campus determines all other eligibility criteria, such as residency, income, need, enrollment, etc.**

**College Bound Scholarship Processing Timeline**

Month	Institution Action	Explanation
October and beyond	N/A	Students notified by the Washington Student Achievement Council that their CBS application is matched to FAFSA or WASFA.
November and beyond	Use “CBS Cruncher” to identify eligible students for awarding	Campuses upload ready-to-award student SSN/WASFA IDs into the CBS Cruncher to identify valid CBS applicants. Students eligible for awarding will show a <u>YES</u> in the “OKtoAward” column.
	<b>Continue identifying and awarding students</b>	Campuses continue to upload lists of students to the Cruncher frequently in order to: <ul style="list-style-type: none"> <li>• Identify new students added to the Cruncher.</li> <li>• Determine students whose status may have changed. Can also use Watchlist located in the Cruncher to monitor changes.</li> </ul>
July and beyond	Confirm eligibility for awarded students prior to disbursement by viewing “OKtoPay”	WSAC updates the CBS Cruncher to reflect HS graduation data received from OSPI. Students who attended private schools or were home schooled must be validated individually by either WSAC or the institution.
August/September	Include CBS awards in CSAW	CSAW includes a field for the CBS award amount.
Fall and as needed	Request payment from WSAC	Campuses will request payment for CBS via CSAW. Campuses will not receive an initial CBS allocation – funds will be added to reserves on a funds-requested basis.
November, February, May, July	Submit Interim Reports	Campuses will upload WCG and CBS data simultaneously via the file format and address edits for both programs.

## CBS Cruncher Layout and Code Descriptions

The Cruncher layout has been modified for the 2020-21 academic year. The AA Degree Year and Term have been removed.

Data that is entered only in the first year an eligible CBS student files a FAFSA or WASFA	
SSN	9-digit number
LastName	Up to 75 characters
FirstName	Up to 50 characters
HSGradYear*	4-digit number – estimated by CBS application or OSPI data OR Unknown
HSRequirementsMet**	<b>Yes – Confirmed HS graduation requirements met</b> <b>Likely – Preliminary OSPI data indicates likelihood of meeting requirements</b> <b>Unknown – WSAC doesn't know if HS requirements have been met</b> <b>Unlikely – Preliminary OSPI data indicates meeting HS req. unlikely</b> <b>No – Confirmed HS graduation requirements not met</b>
Data that will continue to be updated for all CBS students	
OKtoAward	<b>Yes – Student is likely to meet or has met CBS eligibility requirements</b> <b>No – Student's HS GPA is below 2.0 or has not met other CBS requirements</b> <b>Verify – WSAC doesn't have information to say Yes or No</b>
OKtoPay	<b>Yes – Student confirmed to have met all HS graduation requirements</b> <b>No – Student did not meet program requirements</b>
EnrollmentDeadlineMet**	<b>Yes – Student enrolled in college within one year of HS graduation</b> <b>No – Student does not appear to have enrolled in college within one year of HS.</b> <b>n/a – One year has not passed since graduation</b>
FiveYearEligibilityWindowOpen	<b>Yes – Student is within the 5-year eligibility window</b> <b>No – The student's 5-year eligibility window has passed</b>
CBTermsUsed	Two Decimal places (e.g. 4.25, 6.00)
CBTermsRemaining	Two Decimal places (e.g. 4.25, 6.00)
InRepayment	<b>No – Student is not in repayment</b> <b>Yes – Student is in repayment</b>
LastUpdated	The most recent date that <i>any</i> of the columns have been changed Date format: d/m/yyyy h:m:s [AM PM]
<p>*In some instances, college financial aid staff may override, please see following section for High School Requirements Met.</p> <p>**Information in these fields may be overridden by college financial aid staff or by WSAC staff. Documentation must be kept on file by the institution that overrides to substantiate the override, and a history of the timing and source of updates is available in the Cruncher field.</p>	

## High School Graduation Year

The anticipated year of high school graduation is noted for reference. Campuses do not need to review the “HS Requirements Met” field for continuing CBS Scholars previously determined eligible. However, the Cruncher will still need to be reviewed for the purpose of the scholarship timeframe criteria, quarters of eligibility remaining, and outstanding repayments.

CBS Scholars who are verified to have graduated early may be awarded the College Bound Scholarship, and the four-year award must be used within five years of their actual graduation year.

## High School Requirements Met

CBS Students must graduate from a Washington high school (public or approved private institutions) with at least a 2.0 cumulative GPA or receive home-based instruction under [RCW 28A.200](#), and not convicted of a felony before high school graduation\* to be considered as **College Bound Scholars**. The GED is not an allowable substitute for high school graduation, except for some former foster youth.

*\*WSAC is responsible for insuring that CBS students do not have felony convictions before they enroll in college.*

CBS Students below a 2.0 as of their junior year in high school are flagged as “unlikely” in the “HS Requirements Met” field. Students who were not enrolled in a public high school are flagged as “unknown” in the “HS Requirements Met” field. Students may submit a copy of their final high school transcript to WSAC or campus financial aid staff.

Campuses should update the response to the “HS Requirements” field and enter the student’s GPA and graduation date in the reason field if they have updated information regarding a student’s HS Requirements status. The system will note which individual and which institution changed the response and all campuses will be able to view and accept the data as valid. Campuses must retain this documentation for the standard record retention period.

Campuses may verify high school requirements under these circumstances:

- The CBS Student inquires and is able to provide a final transcript verifying they met the requirements, including for students who attended a private high school.
- To expedite the process: Four-year campuses are encouraged to review their admissions information to determine if students met the high school requirements. This may be a more expedient way to verify graduation and GPA information than the WSAC data match with OSPI. This also may expedite the process in the case of students who attended private schools.
- The CBS Student was home schooled: Campuses and/or students are asked to verify that the high school graduation requirement has been met for the home schooled student by contacting College Bound program staff at [collegebound@wsac.wa.gov](mailto:collegebound@wsac.wa.gov) or 888-535-0747, opt. 1.

Campuses who verify high school graduation must change the “HS Requirements Met” field or an edit will be triggered when requesting reimbursement or processing interim reports.

**Note:** Both GPA **and** graduation date must be confirmed. Please document both the GPA and graduation date in the ‘reason’ field when updating the Cruncher.

## Enrollment Deadline

College Bound Scholars must enroll and attend college no later than the fall term (as defined by the institution), one academic year following the high school graduation year to be eligible for CBS consideration. For example, a College Bound Scholar, who graduated high school in the spring of 2020, would need to enroll and attend college by the fall term of 2021.

***Note:** Financial Aid Administrators may review students who don't meet the enrollment deadline on a case-by-case basis and may grant a professional judgment exception for students who have unexpected circumstances that prevented their enrollment such as extenuating medical conditions, etc. All use of professional judgment shall be applied judiciously and shall be documented in the student's file.*

**Adult Basic Education** and **Running Start** courses count towards meeting the college enrollment deadline—even if taken while in high school. College in the High School and CTE dual credits also may count towards meeting the college enrollment deadline if a college transcript is generated.

College Bound Scholars who do not enroll and attend college, or have funds disbursed, within a year of high school graduation are not eligible to receive CBS.

If the college has knowledge, however, that the student attended college within the one year window, but the Cruncher does not show “Yes” in the “Enrollment Deadline Met” column, the college should update this column to “Yes” as long as documentation (i.e. college transcript) is kept on file at the college.

An example of this is if a student attended an out-of-state college within the one-year window of time. In that case, the institution could later verify this attendance based on a review of the student's academic transcript from the previous college. In this case, and in the case of Running Start courses, there would need to be proof that the student had successfully completed at least one course that is transcribed in order for it to be counted as having met the one-year enrollment deadline.

## Students Who Do Not Appear in the Cruncher

Students who inform the institution that they submitted the College Bound Scholarship application and received a College Bound certificate in middle school who cannot be located in the Cruncher should be referred to WSAC at [collegebound@wsac.wa.gov](mailto:collegebound@wsac.wa.gov). College Bound outreach staff will determine whether the student has a valid application on file.

WASFA applicants can be more difficult to identify through the crunching process due to potential SSN/WASFA ID mismatches and different naming conventions on the CBS application and the WASFA. Some tips for searching manually for potential CBS students:

- On the “Search by Name” tab, enter the student's date of birth only and look for their name
- Search on one part of a hyphenated last name, or search partial first or last names

If a valid application is found, WSAC staff will work to find and match the two applications so the student will appear in the Cruncher.



## Campus Systems Preparation Instructions

Campuses can take the following steps to identify and award eligible College Bound Scholars:

1. Prepare a file to upload SSNs into the CBS Cruncher in the WSAC Portal. This is necessary to identify the potential CBS applicants prior to awarding.

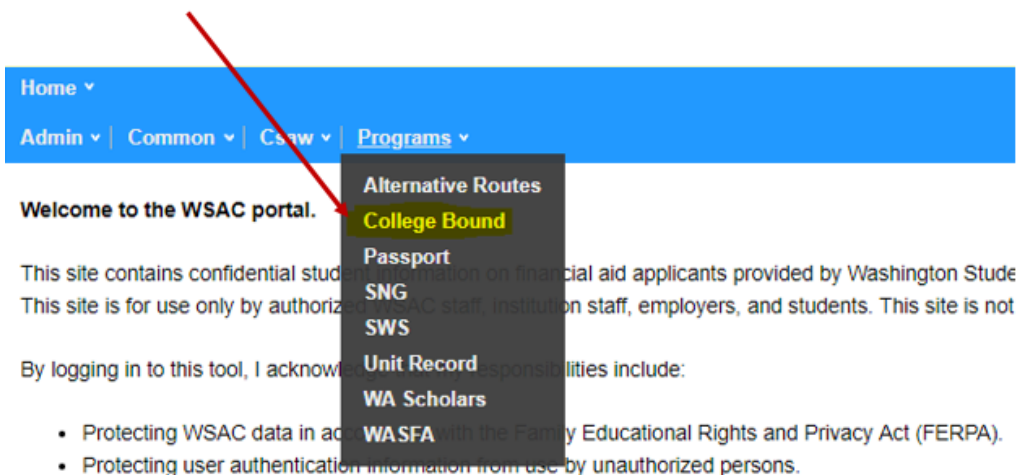
Campuses can select one of three ways to communicate with WSAC Portal. *For questions regarding the REST web service or SFTP approach, please contact WSAC.*

- **Manually upload a file** via WSAC's Portal website: Any user with access may log into the CBS Cruncher and upload a text file containing SSNs (1 per row) to get the output on the page or via a CSV download file.
  - **HTTP REST Interface:** Systems capable of consuming web services may issue a HTTP POST request with a list of SSNs as the post data. This is expected to be authenticated using Basic Authentication through an SSL tunnel. WSAC staff would create an API user account with permissions and a hard password without an expiration date for this purpose.
  - **SFTP:** WSAC also can set-up an automated file transfer system. The campus would upload a file of SSNs and WSAC would return a CSV data file.
2. Determine how to identify/flag potential CBS Awards in your system prior to awarding. The output can be viewed in the portal or downloaded as an Excel file.
  3. Review previously awarded students for a change in eligibility status (either by a separate SSN file upload or evaluating the output accordingly).
  4. Review the eligibility criteria in Chapter 2 to automate eligibility criteria where possible (such as 65 percent MFI and "gap fill" after other state aid).

## CBS Cruncher Instructions

Log on to the Portal at <https://fortress.wa.gov/wsac/portal/default.aspx>

Select 'College Bound' from the Programs drop down





Click on the 'Cruncher' menu item.



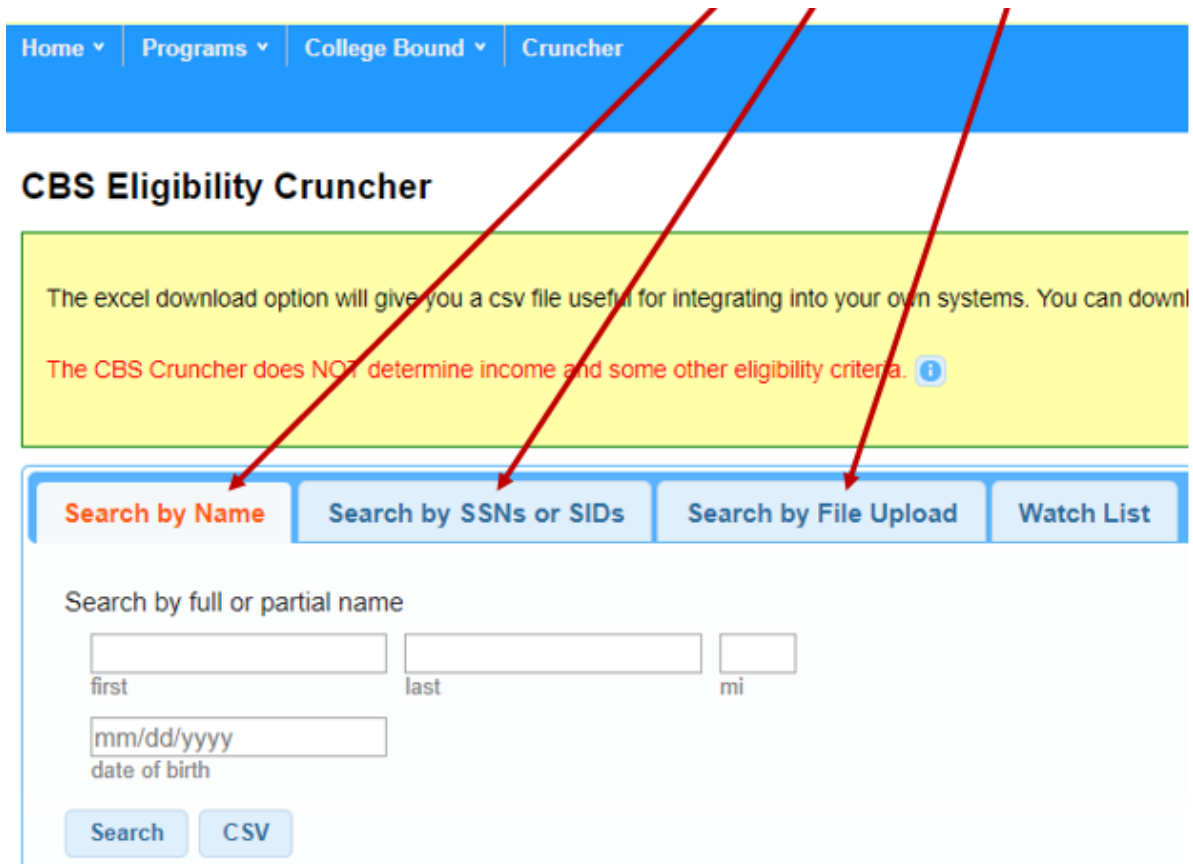
Welcome to the WSAC portal.

This site contains confidential student information on financial aid applicants provided by Washington Student Achievement Council. This site is for use only by authorized WSAC staff, institution staff, employers, and students. This site is not for use by the general public.

By logging in to this tool, I acknowledge that my responsibilities include:

- Protecting WSAC data in accordance with the Family Educational Rights and Privacy Act (FERPA).
- Protecting user authentication information from use by unauthorized persons.
- Using WSAC data only for purposes of administering and assisting students with state financial aid programs.

Click on the tab to choose a search method. Search by Name, SSNs, or Upload a File.



## Searching the Cruncher

### ▪ Searching by Name

Enter the full or partial first, last, and middle initial. Click 'Search'. Note that the search boxes are ordered first name, THEN last name.

To download search results in Excel, click the CSV button.

Search by Name | Search by SSNs or SIDs | Search by File Upload | Watch List

Search by full or partial name

first last mi

mm/dd/yyyy  
date of birth

Search CSV

Showing 16-30 of 205 results

Name (last, first, SSN)	SID (Olympic)	OK to Award	OK to Pay	HS Grad Yr	HS Req Met	Enrollment Deadline Met
[REDACTED]		No updated 1/1/2014	No updated 1/1/2014	2012 actual from OSPI	Yes	No
[REDACTED]		No updated 1/24/2014	No updated 1/24/2014	2012 actual from OSPI	Yes	No
[REDACTED]		No updated 9/14/2017	No updated 9/14/2017	2012 actual from OSPI	Yes	Yes

Otherwise, your results will display in list format below the search area.

### ▪ Searching by SSNs

You can perform a search with multiple SSNs by entering a list of SSNs, separated by commas, tabs, spaces, or new lines. If you have an Excel spreadsheet of SSNs, you can copy and paste the column of SSNs into the search box. Once you've entered your SSNs, click Search.

Search by Name | Search by SSNs or SIDs | Search by File Upload | Watch List

Enter a list of SSNs or SIDs, separated by commas or white space (tabs, spaces, or new lines)

123456789  
987654321  
000000000

Include SSNs/SIDs in my watch list

Search CSV

Checking the 'include SSNs/SIDs in my watch list' box will store students to your Watch list. You will receive emails when there are changes to the student.

You are alerted to SSNs that do not return any results. Click the details link to see which SSNs did not match to a CBS application. Clicking on 'details' will open an Excel file.

Search by Name Search by SSNs or SIDs Search by File Upload Watch List

Enter a list of SSNs or SIDs, separated by commas or white space (tabs, spaces, or new lines)

123456789  
987654321  
000000000

include SSNs/SIDs in my watch list

Search CSV

2 entry(ies) were not found ([details](#))

Showing 1-1 of 1 results

Name (last, first, SSN)	SID (Olympic)	OK to Award	OK to Pay	HS Grad Yr	HS Req Met	Enrollment Deadline Met
[REDACTED]		No	No	Unknown	No	n/a

updated 3/18/2016 updated 3/18/2016

The results for the SSNs that have a CBS application on file with WSAC will display below.

#### ▪ Searching by File Upload

You can upload a .csv or .txt file, with one SSN on each line. Click the browse button, select your file, then click Search. Your results will display below.

Search by Name Search by SSNs or SIDs Search by File Upload Watch List

The file must have either .csv or .txt extension, and contain only SSNs, separated by commas or v

Select a file to upload

No file selected... browse

include SSNs/SIDs in my watch list

Search CSV

Again, you are alerted to SSNs that do not display results. Click the details link to see which SSNs did not match to a CBS application. Results will open in an Excel file.

3 entry(ies) were not found ([details](#))

No results to display

Proceed to the next section to learn how to interpret CBS Cruncher search results.

**Note:** Refer to the CBS Cruncher Layout and Code Descriptions provided earlier in this chapter.

## Interpreting the Search Results

WSAC depends on graduation and GPA data from the Office of the Superintendent of Public Instruction (OSPI), high school registrars, or transcripts provided by students, to determine if College Bound students met the program's high school graduation requirements. OSPI data includes students who attend public high schools.

All OSPI data on graduating seniors is preliminary until late summer/early fall since graduation and GPA data cannot be compiled from the high schools and confirmed until that time. Therefore, WSAC provides information to colleges on those students 'likely' to meet the requirements during the packaging period and designate them 'OK to Award.' This preliminary data from OSPI includes the student's GPA as of the end of their junior year.

Students who are later confirmed to have met the requirements will then be listed by WSAC as 'OK to Pay.' Students who have valid applications but are not included in the OSPI match must submit their final transcript to WSAC or the campus for determination. Either the institution or WSAC can change the HS Req Met field after verifying the student's GPA and graduation. If relying on the student's high school transcript, the campus must retain that documentation.

Here is a preview of what your search results will look like full screen. You can sort results by any category by clicking on the blue column heading.

Name (last, first, SSN)	Date of Birth	SID (UW)	OK to Award	OK to Pay	HS Grad Yr	HS Req Met	Enrollment Deadline Met	5-yr Elig. Open	CBS Qtrs Used	CBS Qtrs Remaining	In Repayment	WASPA Student	Last Updated
[REDACTED]	11/8/1998		No updated 2/5/2020	No updated 2/5/2020	Unknown	No	Yes	No	0.00	12.00	No	Yes	2/5/2020
[REDACTED]	11/8/1998		Yes updated 2/5/2020	Yes updated 2/5/2020	2017 actual from OSPI	Yes	Yes	Yes	3.00	9.00	No	Yes	2/8/2020

In the example above, all the students with a YES in the OK to Award column can be packaged for College Bound Scholarship along with the Washington College Grant, as long as they meet all of the requirements.

Students with a **NO** in the OK to Award column should not be packaged with CBS.

### Students cannot be paid CBS funds until there is a YES in the OK to Pay Column

Name (last, first, SSN)	Date of Birth	SID (UW)	OK to Award	OK to Pay	HS Grad Yr	HS Req Met	Enrollment Deadline Met	5-yr Elig. Open	CBS Qtrs Used	CBS Qtrs Remaining	In Repayment	WASPA Student	Last Updated
[REDACTED]	11/8/1998		No updated 2/5/2020	No updated 2/5/2020	Unknown	No	Yes	No	0.00	12.00	No	Yes	2/5/2020
[REDACTED]	11/8/1998		Yes updated 2/5/2020	Yes updated 2/5/2020	2017 actual from OSPI	Yes	Yes	Yes	3.00	9.00	No	Yes	2/8/2020

Verify students who have YES in the OK to Award and YES in the OK to Pay and their 5-year eligibility is the current academic year. The student eligibility runs through the summer term; however, the Cruncher does not update until after the Fall term begins.

Name (last, first, SSN)	SID (UW)	OK to Award	OK to Pay	HS Grad Yr	HS Req Met	Enrollment Deadline Met	5-yr Elig. Open
[REDACTED]		Verify updated 12/19/2018	No updated 12/19/2018	2020 estimated from OSPI	Unlikely	n/a	Yes
[REDACTED]		Yes updated 10/4/2019	Yes updated 7/14/2020	2020 actual from OSPI	Yes	Yes	Yes

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

This status will occur frequently for students who are either prospective students or new students. When awarding students with this status, be sure to include both CBS and WCG awards on the student's award offer if the student meets all other CBS eligibility criteria.

You also will want 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. Institutions must verify student eligibility before disbursing funds.

## CHAPTER 2

### Calculating WCG and CBS Awards

#### **The Commitment to Eligible College Bound Scholars**

Washington has made a commitment that each eligible CBS Scholar will receive state scholarship and/or grant assistance to cover the average cost of tuition (at public college rates), plus some fees and a small book allowance, during the periods of each student's eligibility. Information about how this works and what types of state aid count towards state scholarship/grant assistance are included in this chapter.

#### **All Eligible College Bound Scholars Must Receive Maximum WCG Funding**

All eligible College Bound Scholars must first receive maximum WCG awards as part of their CBS maximum award and receive funding for all enrolled terms—including either Summer 1 or Summer 2.

Every eligible CBS Scholar must first receive a maximum WCG award before being considered for CBS funding. The CBS amount is determined after WCG and any other state grant or scholarship aid has been awarded.

When a student's CBS amount is met with other state grants and/or scholarships, the student may receive a reduced or no WCG award. In this instance, report the student as having need met.

***Note:** The aid administrator must award WCG funds to all eligible CBS Scholars to ensure 100 percent coordination between CBS and WCG is achieved for all terms, including summer.*

The maximum WCG and CBS award amounts vary based on the institution attended, the student's enrollment status, and the student's Median Family Income (MFI) level. WCG award amounts may not be reduced for eligible CBS Scholars due to institutional awarding policies such as gift equity policies.

#### **MAXIMUM MEDIAN FAMILY INCOME LEVELS**

This chart includes the MFI levels that determine eligibility and award amounts for the WCG and CBS programs.

- The maximum MFI level for CBS student eligibility is 65 percent.
  - CBS students with MFI levels from 66 - 100 percent will not receive CBS but must receive WCG.
- The maximum MFI level for WCG students is 100 percent.

## Adjust the Family Size for More Than One Family Member in College

Increase the family size by one for every family member who will be in college beyond the first, excluding parents (e.g. A family of five with two non-parents in college is treated as a family of six on the income MFI chart; a family of five with three non-parents in college is treated as a family of seven).

*Note: Information on family size typically comes from the FAFSA or WASFA.*

## Determining Income for MFI Levels

In most cases, use the income reported on the FAFSA or WASFA. Adjustments may be made through verification reviews and through professional judgment decisions of a Financial Aid Administrator. These must be submitted on a corrected FAFSA/WASFA.

**Median Family Income (MFI) Levels for 2020-21 Washington College Grant and College Bound Scholarship Program Eligibility**

Family Size	55%	60%	65% (CBS Maximum)	70% (WCG only)	75% (WCG only)	100% (WCG only Maximum)
1	\$27,500	\$30,000	\$32,500	\$35,000	\$38,000	\$50,500
2	\$36,000	\$39,500	\$43,000	\$46,000	\$49,500	\$66,000
3	\$44,500	\$49,000	\$53,000	\$57,000	\$61,000	\$81,500
4	\$53,000	\$58,000	\$63,000	\$68,000	\$72,500	\$97,000
5	\$62,000	\$67,500	\$73,000	\$78,500	\$84,000	\$112,500
6	\$70,500	\$76,500	\$83,000	\$89,500	\$96,000	\$128,000
7	\$72,000	\$78,500	\$85,000	\$91,500	\$98,000	\$130,500
8	\$73,500	\$80,000	\$87,000	\$93,500	\$100,000	\$133,500
9	\$75,000	\$82,000	\$88,500	\$95,500	\$102,500	\$136,500
10	\$76,500	\$83,500	\$90,500	\$97,500	\$104,500	\$139,500
11	\$78,500	\$85,500	\$92,500	\$99,500	\$106,500	\$142,500
12	\$80,000	\$87,000	\$94,500	\$101,500	\$109,000	\$145,000
13	\$81,500	\$89,000	\$96,500	\$103,500	\$111,000	\$148,000
14	\$83,000	\$90,500	\$98,000	\$105,500	\$113,500	\$151,000
15	\$84,500	\$92,500	\$100,000	\$107,500	\$115,500	\$154,000
16	\$86,500	\$94,000	\$102,000	\$110,000	\$117,500	\$157,000
17	\$88,000	\$96,000	\$104,000	\$112,000	\$120,000	\$159,500
18	\$89,500	\$97,500	\$105,500	\$114,000	\$122,000	\$162,500
19	\$91,000	\$99,500	\$107,500	\$116,000	\$124,000	\$165,500
20	\$92,500	\$101,000	\$109,500	\$118,000	\$126,500	\$168,500

The above chart was prepared by the Washington Student Achievement Council (WSAC) from U.S. Department of Commerce (Census Bureau) data published on-line by the U.S. Department of Health & Human Services, Office of Community Services website as transmittal number LIHEAP-IM-2019-02, dated August 7, 2019, from the Low Income Home Energy Assistance Program (LIHEAP). It was derived from five-year estimates from the 2013 through 2017 American Community Surveys (ACSes). All figures have been rounded to the nearest \$500 income range.

*Note: A CBS Scholar could be eligible for College Bound Scholarship funding for some years, and not eligible for others, if the family's MFI level exceeded 65 percent in one or more years.*

When calculating family income for a “**dependent**” student, count the parents’ Adjusted Gross Income (AGI) and non-taxable income. Do not include the student’s income.

When calculating family income for an “**independent**” student, count the student’s AGI and non-taxable income, and that of the spouse (if the student is married).

For both dependent and independent students, if the AGI is not present (i.e., parent/student is not a tax filer), use the sum of all taxable plus non-taxable income.

The Financial Aid Administrator may (but is not required to) subtract the following allowable exclusions:

- Taxable earnings from need-based employment programs such as Federal Work Study and need-based employment portions of fellowships and assistantships.
- Taxable student grant and scholarship aid reported to the IRS in the AGI. This includes AmeriCorps benefits as well as grant and scholarship portions of fellowships and assistantships.
- Untaxed combat pay or special combat pay.
- Earnings from work under a cooperative education program offered by a college.
- Education tax credits under the American Opportunity and Lifetime Learning tax credits.
- Child support payments made for a dependent not counted in the family household size.
- Combat pay – only the portion included in the adjusted gross income.

**Title IV grant aid** should be subtracted from the base income regardless of whether it was taxed or untaxed.

**Child support income** must be excluded from income calculations for less-than-half-time independent students, but not from other enrollment categories.

**Veterans benefits** are treated in the same manner as for the purposes of eligibility for Title IV financial aid.

***Note:** In addition to having income qualify based on the MFI levels, state aid must fit within the student’s calculated need after counting in all other need-based resources.*

## **EXPECTED FAMILY CONTRIBUTION (EFC)**

The “Expected Family Contribution” is the amount that a student or the student’s family is expected to contribute to the cost of attendance based on a federal computation.

The EFC is initially based on information submitted on the FAFSA or WASFA. In some cases, EFC may be adjusted by the Financial Aid Administrator through a professional judgment decision. These must be submitted on a corrected FAFSA/WASFA.



## **COST OF ATTENDANCE (COA)**

The “Cost of Attendance” is the budget used by the Financial Aid Administrator to reflect the student’s cost for the period of time for which the financial aid is being awarded. Information regarding the WCG Apprenticeship COA will be issued in a separate manual.

The COA includes tuition and fees, books and supplies, room and board, transportation, and miscellaneous/personal expenses.

Each year the Washington Financial Aid Association (WFAA) publishes several standard budgets that include all amounts except for tuition and fees, which are determined by each institution.

The [WFAA Student Budgets](#) for the 2020-21 academic year includes four categories:

1. Dependent, living with parent(s)
2. Independent, living with parent(s)
3. Not living with parent(s)
4. High-cost regions

WSAC requires that institutions submit the COA amounts each year during the participation renewal process. If the amounts used by institutions vary by more than 10 percent from the recommended WFAA standard budgets, institutions must submit their rationale to WSAC for review and approval for use when awarding state financial aid.

### **Cost of Attendance and Tuition Waivers**

A student receiving WCG or CBS must have the full-assessed tuition amount included in their COA. This COA amount must be reported when the Unit Record Report (URR) is submitted.

In addition, all tuition waivers received by WCG and CBS recipients must be reported either as need-based institutional gift aid or as non-need-based institutional gift aid on the URR.

***Note:** The full-assessed tuition amount is what the student is or would be assessed before any tuition waiver(s) have been applied. The tuition waiver is then reported as a resource as described above.*

If a student receives other need-based assistance, but does not receive WCG or CBS, WSAC requests that any tuition waiver(s) received by the student be reported as institutional gift aid and that the full assessed tuition amount be included in the COA, whenever possible, when the URR is submitted.

A student who receives non-need-based tuition waiver(s) but does not receive any need-based financial assistance, is not reported on the URR.

## **NEED AMOUNT**

The Expected Family Contribution (EFC) is subtracted from the student's Cost of Attendance (COA) to determine the need amount. Need-based aid, such as WCG and CBS, must be within the need amount, and cannot exceed the need amount.

### **Professional Judgment**

The FAA may, using professional judgment, adjust the resources up or down to more accurately reflect the family's financial situation during the year. In general, adjustments shall be consistent with changes made for federal aid and reflected on the FAFSA/WASFA.

The aid administrator shall document the reason for the variance in the student's file. The FAA may consider assets when assets aren't being considered for EFC computations (e.g. auto zero EFCs and simplified EFCs) for the purposes of WCG eligibility.

### **Family Income Change of 3 Percent or Less**

A student who received WCG in the previous year and whose family income has increased by no more than 3 percent may be eligible to continue to receive WCG in the current year. Discretion is left to the FAA. This applies when the student's current family income increases slightly above the 100 percent maximum MFI level.

The WCG policy that permits awarding to continuing recipients whose MFI changed by 3 percent or less is not applicable to CBS Scholars, however, because the 65 percent MFI standard is statutorily required for CBS recipients.

### **College Bound Scholarship and Washington College Grant Coordination**

Every eligible CBS Scholar must first receive a maximum WCG award before being considered for CBS funding. The CBS amount is determined after WCG and any other state grant or scholarship aid has been awarded.

When a student's CBS amount is met with other state grants and/or scholarships, the student may receive a reduced or no WCG award. In this instance, report the student as having need met.

## **AWARD AMOUNTS**

See the following page for WCG and CBS award amounts. You can also view grant amounts in the WSAC Portal under CSAW/Grant Amounts.

## WCG and CBS Award Amounts for 3 Quarters/2 Semesters for Students Enrolled Full-Time for All Terms

2020-21 Maximum Washington College Grant and College Bound Scholarship Award Amounts for 3 Quarters/2 Semesters										
Institution/Sector	Median Family Income									
	CBS Max	0 - 55%	0 - 55%	56 - 60%	56 - 60%	61 - 65%	61 - 65%	66 - 70%	71 - 75%	76 - 100%
	WCG + CBS = Full CBS Award	Full WCG award	CBS Amount	70% of full WCG award	CBS Amount	60% of full WCG award	CBS Amount	WCG ONLY = 50% of full award	WCG ONLY = 24.5% of full award	WCG ONLY = 10% of full award
University of Washington	\$11,540	\$11,040	\$500	\$7,728	\$3,812	\$6,624	\$4,916	\$5,520	\$2,705	\$1,104
Washington State University	\$11,235	\$10,735	\$500	\$7,515	\$3,721	\$6,441	\$4,794	\$5,368	\$2,630	\$1,074
Central Washington University	\$7,677	\$7,177	\$500	\$5,024	\$2,653	\$4,306	\$3,371	\$3,589	\$1,758	\$718
Eastern Washington University	\$7,194	\$6,694	\$500	\$4,686	\$2,508	\$4,016	\$3,178	\$3,347	\$1,640	\$669
The Evergreen State College	\$7,667	\$7,167	\$500	\$5,017	\$2,650	\$4,300	\$3,367	\$3,584	\$1,756	\$717
Western Washington University	\$7,881	\$7,381	\$500	\$5,167	\$2,714	\$4,429	\$3,452	\$3,691	\$1,808	\$738
Private Four-year Non-Profit	\$11,904	\$9,739	\$2,165	\$6,817	\$5,087	\$5,843	\$6,061	\$4,870	\$2,386	\$974
Private Four-year For-Profit	\$11,904	\$8,517	\$3,387	\$5,962	\$5,942	\$5,110	\$6,794	\$4,259	\$2,087	\$852
WGU Washington	\$6,280	\$5,619	\$661	\$3,933	\$2,347	\$3,371	\$2,909	\$2,810	\$1,377	\$562
Community & Technical Colleges	\$4,719	\$4,219	\$500	\$2,953	\$1,766	\$2,531	\$2,188	\$2,110	\$1,034	\$422
CTC Applied Bachelor's	\$7,264	\$6,764	\$500	\$4,735	\$2,529	\$4,058	\$3,206	\$3,382	\$1,657	\$676
Private Two-Year Non-Profit	\$4,719	\$3,694	\$1,025	\$2,586	\$2,133	\$2,216	\$2,503	\$1,847	\$905	\$369
Private Two-Year For Profit	\$4,719	\$2,823	\$1,896	\$1,976	\$2,743	\$1,694	\$3,025	\$1,412	\$692	\$282

updated 6/23/2020

Please note that annual awards may not be exceeded for 3 quarter/2 semester enrollments. If annual award amounts do not divide evenly, you must round up/down accordingly to ensure you do not exceed the annual limit. However, eligible students will receive more than these amounts if enrolled more than 3 quarters/2 semesters.

Most award amounts are not divisible by both two and three. For institutions whose systems require even disbursements, the per term award may be rounded, up or down, by one dollar. This may not result in more than a two-dollar difference over a three-quarter year or equivalent. This procedure is also discussed in this chapter under "Award Rounding."

## **CBS Maximum Award Amounts to Disburse**

The value of the initial eligible CBS Scholar award shall be the difference between the “Total Maximum WCG and CBS to Eligible College Bound Scholars” amount, minus the WCG Maximum, and minus the value of any other state funded grants or scholarships (gift aid) the student has been awarded at the time of the CBS award decision.

The award shall be further reduced if total need-based aid is in excess of need or the student attends part-time. If additional state gift aid is awarded after the initial CBS award decision was made, the CBS award must be revised to reflect that additional state aid.

## **Subtraction of State Gift Aid for Determining Eligibility for CBS Award Amounts**

The following state programs must be subtracted from the “Total Maximum WCG and CBS to Eligible College Bound Scholars” amount in determining the amount to fund from the CBS program.

- **Washington College Grant** – Due to 100 percent coordination requirements, all eligible CBS Scholars must receive a maximum Washington College Grant award.
- **Passport to College Promise Scholarship** – A state scholarship program for current and former foster youth and, beginning on July 1, 2019, unaccompanied homeless youth.

*Note: Students who receive Passport funds will likely have their maximum CBS commitment met with a combination of Washington College Grant and Passport scholarship funds, and therefore will not receive a CBS award.*

- **SBCTC Opportunity Grant** – The Opportunity Grant helps low-income adults train for high-wage, high-demand careers. It is administered by the State Board for Community and Technical Colleges.
- **SBCTC Worker Retraining Funds** – Workers who are unemployed or have been notified by their employers that they are about to be laid off may be eligible for these funds administered by the State Board for Community and Technical Colleges.
- **American Indian Endowed Scholarship** – A scholarship for students having financial need with close social and cultural ties to an in-state American Indian community, for pursuing undergraduate and graduate studies.

Do not subtract **State Work Study** or other institutional aid, including tuition waivers, because they are not considered as other state gift aid for this purpose.

*Note: There may be cases where eligible CBS Scholars will receive total state aid greater than the “Total Maximum WCG and CBS to Eligible College Bound Scholars” amounts.*

*An example of this is an eligible CBS Scholar, who receives a WCG award and a Passport to College Scholarship award of \$4,500, which together may exceed the CBS maximum. Similar situations may also occur with combinations of WCG and SBCTC Opportunity Grant funding.*

*In these cases, the CBS Scholar would not receive College Bound Scholarship funding for the year, because the other awarded state gift aid exceeds the CBS Commitment amount. Report students as having CBS need met.*

## **Uneven WCG Disbursements Permitted to Students Not Receiving CBS funding**

Typically, WCG awards are disbursed evenly for all terms during the year if the student's enrollment status is the same each term. However, the Financial Aid Administrator may award a greater proportion of the student's WCG award in one term if the disbursement is justified by the student's costs in that same term, (i.e. extensive fees fall term that won't be charged the remainder of the year.)

If this exception is used, a statement shall be placed in the student's file acknowledging that an exception to uneven WCG disbursements has been granted. If the student receives a larger WCG disbursement in one term, but then does not attend the full year, the student will be considered overpaid and will owe a WCG repayment.

*Note: This uneven disbursement policy does not apply to those receiving CBS funding.*

### **Minimum Awards:**

- **The minimum CBS award amount is one dollar (\$1.00) per term.**
- **The minimum WCG award amount is also one dollar (\$1.00) per term.**  
Circumstances relevant to part-time enrollment and other factors may reduce a student's WCG to a very low level. The FAA may issue WCG awards as low as \$1.00 per term.

### **Declining CBS or WCG Awards**

If a CBS or WCG awarded student wishes to decline a CBS or WCG award, the institution must maintain a written record of the award amount that is declined and the reason it was declined. This may occur, for example, when a student is awarded a very small amount and wishes to retain flexibility for future terms of eligibility.

If a WCG or CBS awarded student wishes to decline their CBS/WCG award and/or return funds due to an enrollment level decrease and to have their quarterly award and QER usage reduced to reflect that lower amount, the student must notify the financial aid office in writing. The aid office must then recalculate their eligibility and return those funds received either due to a tuition refund and/or funds returned by the student to WSAC using the CSAW portal. The aid office must ensure they update the reporting in CSAW to reflect the lowered award amount and enrollment level associated with that reduced award.

See the next table for maximum Washington College Grant Awards for students enrolled full-time.

## Maximum Washington College Grant Awards for Students Enrolled Full-Time for All Terms

2020-21 Washington College Grant Award Amounts for 3 Quarters/2 Semesters						
Institution/Sector	Median Family Income					
	50% - 55% (full award)	56% - 60% (70% of full award)	61% - 65% (60% of full award)	66% - 70% (50% of full award)	71% - 75% (24.5% of full award)	76% - 100% (10% of full award)
University of Washington	\$11,040	\$7,728	\$6,624	\$5,520	\$2,705	\$1,104
Washington State University	\$10,735	\$7,515	\$6,441	\$5,368	\$2,630	\$1,074
Central Washington University	\$7,177	\$5,024	\$4,306	\$3,589	\$1,758	\$718
Eastern Washington University	\$6,694	\$4,686	\$4,016	\$3,347	\$1,640	\$669
The Evergreen State College	\$7,167	\$5,017	\$4,300	\$3,584	\$1,756	\$717
Western Washington University	\$7,381	\$5,167	\$4,429	\$3,691	\$1,808	\$738
Private Four-Year Non-Profit	\$9,739	\$6,817	\$5,843	\$4,870	\$2,386	\$974
Private Four-Year For-Profit	\$8,517	\$5,962	\$5,110	\$4,259	\$2,087	\$852
WGU Washington	\$5,619	\$3,933	\$3,371	\$2,810	\$1,377	\$562
Community & Technical Colleges	\$4,219	\$2,953	\$2,531	\$2,110	\$1,034	\$422
CTC Applied Bachelor's	\$6,764	\$4,735	\$4,058	\$3,382	\$1,657	\$676
Private Two-Year Non-Profit	\$3,694	\$2,586	\$2,216	\$1,847	\$905	\$369
Private Two-Year For-Profit	\$2,823	\$1,976	\$1,694	\$1,412	\$692	\$282

\*Eligible students will receive more than these amounts if enrolled for more than 3 quarters or 2 semesters.

*Please note: Annual awards may not be exceeded for 3 quarter/2 semester enrollments. If annual award amounts do not divide evenly, you must round up/down accordingly to ensure you do not exceed the annual limit.*

## **ADJUSTING MAXIMUM AWARD AMOUNTS**

The maximum WCG and CBS awards for full-time students appearing in the charts in the previous pages must be reduced under the following two conditions:

### **Part-Time Students**

Both CBS and WCG awards must be reduced for part-time students based on their enrollment status:

- Students at  $\frac{3}{4}$  time are eligible for 75 percent of the maximum award
- Students at  $\frac{1}{2}$  time are eligible for 50 percent of the maximum award
- Students at  $\frac{1}{4}$  time are eligible for 25 percent of the maximum

### **Attendance Less Than 3 Quarters or the Equivalent**

CBS and WCG students attending for fewer than three quarters or the equivalent will receive a pro-rated share of the total annual award. Example: A full-time student attending one of three quarters will receive one-third of the maximum award amounts shown in the charts.

### **Clock Hour Schools**

Additional information on awarding students enrolled in clock hour programs appears in Chapter 5. Students must receive at least twelve clock hours of instruction per week to be awarded state aid. Except for the final payment term, all students should be paid as full-time students for each term.

The first term payment should be made as soon as possible once the student is enrolled and has met all program requirements. Once the student has successfully completed 300 hours, the student may be eligible for the next term payment. Then for each additional 300 hours successfully completed, the student may be eligible for additional term payments.

### **Institutional Gift Equity Policies**

Institutional gift equity policies do not apply to eligible College Bound Scholars or Washington College Grant eligible students. Eligible College Bound Scholars, including those with family income 66-100 percent, must receive the maximum WCG award for which they are eligible, even if they do not receive any CBS funds.

## **OTHER AWARDING CONSIDERATIONS:**

### **USE OF STATE FUNDS FOR PRIOR YEAR CHARGES**

State financial aid is based on current year cost of attendance and more specifically tuition and fees. As such, State financial aid may not be used to pay a student's prior year charges in any amount.

### **Fourth Quarter/Third Semester Awards**

It is possible for a student to receive terms of WCG and/or CBS, in addition to the typical 3 quarters/2 semesters, within the same year. For students earning academic credits, they may enroll and receive payments for up to four quarters or three semesters during the year. For students earning clock hours, students may be able to enroll and receive up to five quarter payments per year (for more information on clock hours, see Chapter 5).

For students exceeding 3 quarters/2 semesters, the value of the additional award is calculated as it would be for any regular term. Students receiving additional terms of aid will reach their maximum quarter limit more quickly than students engaged in the common three quarter/two semester enrollment pattern. In this scenario, it is permissible to exceed the 3 quarter or equivalent grant amounts listed in the award charts.

### **Summer Awarding of CBS and/or WCG**

Award all eligible CBS and/or WCG students enrolling during Summer 2020.

If Summer 1 (2020-21):

- All eligible College Bound students and/or Washington College Grant students enrolling in summer 2020 (Summer 1) must receive their full eligibility in both CBS and WCG.
- Colleges may use either the 2019-20 or 2020-21 WCG award amount for the summer 1 term.

If Summer 2 (2019-20):

- No Summer 2 (2019-20) CBS and/or WCG awards should be made to students whose files are complete after August 1. Contact WSAC if you later need to adjust your Final Interim Report.

### **Awarding WCG to non-CBS students Summer 2 2019-20**

If Summer 2 (2019-20):

- Summer 2 (2019-20) awards are part of colleges' 2019-20 WCG funding. Use the 2019-20 award chart if an award is made. Subject to funds availability.

### **Financial Aid Over-Award**

State aid, combined with other aid meeting need, may not exceed the student's calculated need. However, a student will not be considered over-awarded if additions to the initial award exceed his or her financial need by \$300 or less by the end of the year.



## **Changes in Need, MFI, or Other Aid Received that May Cause Award Revisions**

If any of these types of changes occur, the FAA must review the eligibility for WCG and/or CBS and, if necessary, readjust the awards.

### **Examples:**

- ◆ A CBS funded student receives additional state aid (e.g. Passport to College Scholarship or Opportunity Grant) after a student has been awarded CBS. In this case, the CBS award must be revised. If a disbursement of the CBS has already been made, that award amount may need to be repaid to WSAC, either fully or partially, depending on the circumstances.

If the FAA can reduce the award disbursements for future terms, however, and not repay funds already disbursed, that is permissible in this limited instance. The WCG award needs also to be reviewed to be sure the award is not over need, for example. If the student fails to attend future terms the student would owe the funds.

- ◆ A WCG funded student (who is not an eligible CBS Scholar) receives additional aid, the MFI level changes, or the need changes. The FAA must review the award to make sure that the student is still eligible for the WCG amount originally awarded. This would include making sure that the proper MFI award amount was in place if there were changes in the family income or family size.

## **Payments Cannot be Made to Students for a Current Term After Withdrawal**

If a student completely withdraws for a term without earning at least 3 credits, no additional WCG or CBS payments may be made to the student for that term, on or after a student's official withdrawal date.

***Note:** State policy differs from the Federal policy on this issue of post withdrawal disbursements.*

## **Retroactive Awards and/or Payments for Previous Terms for Eligible CBS and/or WCG Scholars**

Retroactive WCG and CBS awards and/or payments **MUST** be made to eligible CBS Scholars and/or WCG students for a prior term(s) as long as they are for the current year and other program rules are followed. The value of the retroactive awards and/or payments must be based on a student's rate of satisfactorily completed credits (must be at least 3 credits or the equivalent) determined by the institution at the end of the term(s).

If an institution retroactively awards WCG 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.

## Late Applicants

The Financial Aid Administrator must ensure that 100 percent coordination between CBS and WCG is achieved for all terms, including summer.

## Award Rounding

Major rounding of awards is not permitted. When a calculated award cannot be evenly divided, award one dollar more or less than the desired even disbursement in one of the terms. Rounding by more than two dollars per year is not permitted.

## Concurrent Award at Two Institutions

While it is not encouraged, it is permissible for two institutions to disburse separate state aid awards to the same student during the same term. The state aid at each institution shall be calculated in the normal fashion. It is presumed that the student's maintenance costs are considered in the overall award at one institution and the second institution's award shall not exceed the cost it recognizes for tuition and books.

If an institution exercises this option, **it must coordinate with the second institution.** One institution may fund the full COA and one can only fund tuition and books. It is important that you document this in the student's file. This information will be requested by WSAC via edits generated by payment requests and interim reporting.

## Fractional Last Term

If a fraction of a term of eligibility is remaining for a student towards the end of their eligibility, a fractional award may be granted. Refer to the formulas below for award calculations, based on quarter institution or semester institution.

***Note:** You only need to perform this calculation if the student does not have enough Quarters of Eligibility Remaining (QER) to fully fund the enrollment status. For example, if a student at a quarter institution has .38 QER, but is only enrolled less than half-time, the student will only use .25 QER, and therefore, the fractional calculation is not yet necessary.*

### ***Fractional award conversion examples:***

QER = Quarters of Eligibility Remaining  
SER = Semesters of Eligibility Remaining

QER x Full-time award amount within MFI category

### **Quarter WCG Institution Example:**

Joe student has .38 QER. The full-time WCG quarter award amount within Joe's MFI category is \$1,180.

The calculation is:

.38 x \$1,180 = \$448. Joe would be eligible for a \$448 final quarter award.

***Semester Institutions:***

$$\begin{aligned} \text{QER} / 1.5 &= \text{Semesters of Eligibility Remaining (SER)}^* \\ \text{SER} \times \text{Full-time award amount within MFI category} & \end{aligned}$$

\*A Semester is equal to 1.5 quarters, so for the first step of the formula you must convert the amount of QUARTERS remaining (QER) into SEMESTERS remaining (SER). Do this by dividing the QER by the semester multiplier of 1.5. Then multiply the SER by the full-time award amount within the student’s MFI category.

***Semester WCG Institution Example:***

Maria student has .38 Quarters of Eligibility Remaining (QER). The full-time semester award amount within Maria’s MFI category is \$4,259. The calculation is:

$$\begin{array}{rclcl} .38 & / & 1.5 & = & .26 \\ \text{QER} & & \text{Semester Divider} & & \text{SER} \end{array}$$

Now, multiply the SER with the full-time WCG award amount within her MFI category.

$$.26 \times \$4,259 = \$1,107. \text{ Maria would be eligible for a } \$1,107 \text{ final semester award.}$$

**AWARDING PRACTICES NOT PERMITTED**

**Single Parents and Part-Time Students**

All eligible students in these groups must be treated equally. No group, such as single parents or part-time students, may be disadvantaged relative to any other group of recipients in its access to state aid.

## CHAPTER 3

### SATISFACTORY ACADEMIC PROGRESS

#### SATISFACTORY ACADEMIC PROGRESS (SAP)

Institutions are responsible for monitoring each recipient's *Satisfactory Academic Progress*, as outlined in [WAC 250-21-021\(16\)](#) of the WCG rules, and in the institution's WSAC-approved institutional SAP policy.

The SAP policy is applicable to all state aid grant programs, including Washington College Grant, College Bound Scholarship, and Passport to College Scholarship. There are differences between state and federal SAP requirements including:

- A maximum usage limit of five full-time years of eligibility versus 150 percent of the published program length (federal). (Note: CBS has a maximum usage limit of four full-time years of eligibility to be used in within the five years following high school graduation.)
- A required **per term** SAP review for state aid.
- A quantitative standard requiring that at least one-half of the credits enrolled, for which the aid was calculated and disbursed each term, are earned as compared to the federal "pace" requirement.

At the end of each term, participating institutions shall examine the progress of each state aid recipient and determine which of the following applies to the student:

- Is meeting *Satisfactory Academic Progress*.
- Is to be placed in *Warning Status*<sup>1</sup> and may be continued on state aid.
- Is to be placed in *Unsatisfactory or Denied Status* and therefore ineligible for state aid until the student meets the conditions of the institution's reinstatement policy.

An institution may submit an alternative approach to evaluating academic progress that includes a plan for improved student retention and comparison data to ensure state grant funds are used efficiently. WSAC will initially determine whether to approve the alternative policy, then evaluate it over a specified timeframe, then determine whether the policy may continue to be approved.

#### Maximum Usage Timeframe

As stated in Chapter 1, Washington College Grant recipients may receive the equivalent of 5 full-time years of maximum usage (15 Quarters of Eligibility, or the equivalent). College Bound Scholarship recipients may receive the equivalent of 4 full-time years of maximum usage (12 quarters of eligibility or the equivalent.)

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<sup>1</sup>To avoid confusion with the federal definition of "probation," the term "warning" is used for state aid administration.

## **Quantitative Standard for Students in Quarter and Semester Credit Programs**

To meet “satisfactory academic progress” the student must successfully complete a minimum number of credit or clock hours for each term in which the grant was received.

Each school’s policy for measuring progress of state aid grant recipients must define satisfactory as the student’s completion of the minimum number of credit or clock hours for which the aid was disbursed.

The minimum number of credits standard for enrolled students whose aid was calculated and disbursed as less than full-time students is:

- Full-time enrollment – 12 credits or 300 clock hours
- Three-quarter time enrollment – 9 credits or 225 clock hours
- Half-time enrollment – 6 credits or 150 clock hours
- Less than half-time enrollment – 3 credits or 75 clock hours  
(Only applies to WCG and CBS programs)

***Note:** The minimum number of credits for full-time enrollment is 12 credits per term for institutions that base their enrollment on a credit system. For these institutions, 12 credits are considered the amount for which aid was calculated and disbursed even if the student enrolled for more than 12 credits.*

## **Successful Completion of Credits**

Coursework that counts towards successful completion of program or degree completion typically includes letter grades of A-D and Pass. Grades received of F, E, Fail, Withdraw, Unofficial Withdrawal, and Incomplete do not count as successfully completed credits.

## **Warning Status<sup>2</sup>**

**Warning Status** for state aid recipients is triggered when a student completes at least one-half, but less than all of the minimum number of credits for which the aid was calculated and disbursed, or otherwise fails to fulfill the conditions of the institution’s satisfactory progress policy.

- For a full-time student at 12 credits, this means that if the student successfully completes 6 to less than 12 credits, the student is to be placed in a warning status for the following term.
- For a three-quarter time student at 9 credits, a student must successfully complete 4.5 to less than 9 credits to be placed on warning status
- For a half-time student at 6 credits, a student must successfully complete 3 to less than 6 credits to be placed on warning status.
- For a less than half-time student at 3 credits, a student must successfully complete 1.5 to less than 3 credits to be placed on warning status.

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<sup>2</sup>To avoid confusion with the federal definition of “probation,” the term “warning” is used for state aid administration.

Since all clock hours from the previous payment period must be earned before making additional payments, there is no routinely recognized warning status for clock hour students.

In addition, WSAC expects institutions to have rigorous policies for measuring academic progress that limit the number of terms a student can continue to receive state aid while in warning status. The institution may make disbursements and continue a student on State Work Study to a student who is in warning status.

### **Denied Status**

**Denied status** requires that each school's policy must deny further disbursements of all state aid at the conclusion of any term in which he or she fails to complete at least one-half of the minimum number of credits or clock hours for which the aid was disbursed or otherwise fails to fulfill the conditions of the institution's satisfactory progress policy. This status also may be given to a student who has remained in warning status for more terms than the institution's policies allow.

### **Quantitative Standard for Students in Clock Hour Programs**

Students enrolled in clock hour programs must enroll as full-time students and complete 300 hours for each term to meet the quantitative standard before being eligible for the next term disbursement.

Since all hours from the previous payment period must be earned before making additional payments, there is no routinely recognized warning status for clock hour students. A school however, may petition WSAC to allow a warning status.

### **Qualitative Standard**

The institution's satisfactory academic progress policy must contain a qualitative standard. For purposes of state aid programs, the qualitative standard used to comply with federal satisfactory academic progress standards is acceptable.

### **Other Conditions of SAP Policy**

The value of any retroactive financial aid payments shall be based on the student's rate of satisfactorily completed credits, determined by institution policy, at the end of the term. See Chapter 2 for more information regarding retroactive payments.

A student may be denied further state aid disbursements or awards if the student fails to fulfill any other conditions of the institution's WSAC-approved satisfactory academic progress policy.

### **Professional Judgment/Appeals**

The Financial Aid Administrator may, on a case-by-case basis, reinstate a student back 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 FAA 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.

### **Reinstatement**

Each institution's satisfactory academic progress policy shall state which conditions a denied status student must meet before state aid will be reinstated. For example: the student may have to attend the institution without state financial aid for a specific period of time or may have to show proof that credits have been made up within a designated time period.

### **Notifying Students of SAP Policies**

Institutions must make information available to state aid recipients of the state SAP policies that impact their students' ability to continue receiving state aid for future terms.

This must include information about how state SAP is determined at the institution, how Warning Status and Denial Status are determined, and the institution's Reinstatement Policy of state aid should the student go into Denial Status.

The available information also must include when SAP reviews will take place and how and when students will be notified in writing should their state aid status change to Warning, Denial or Reinstatement.

This information may be included in institutional financial aid handbooks or other information made available to all students or all state aid recipients at each institution. It does not need to be sent individually to all state aid recipients.

## **STUDENT WITHDRAWALS/REPAYMENT CALCULATIONS**

See Chapter 5 for required repayment policy information.

## CHAPTER 4

### PORTAL ACCESS AND REPORTING REQUIREMENTS

#### PORTAL ACCESS

Each Financial Aid Administrator (FAA) is required to obtain their own Portal login to access functions and submit reports via the WSAC Portal. A universal account, or the account of another aid administrator, cannot be used to access the Portal for multiple aid administrators.

*It is the responsibility of each college's appointed authorizing official to promptly remove Portal access for staff who should no longer have access, such as those who are no longer employed by the college or have moved to another department.*

To obtain an account, contact the appointed authorizing official at your college. The appointed authorizing official will grant access to the appropriate programs and functions in the Portal using the 'Manage User' function.

Portal user administration instructions for the authorizing official to create and manage Portal accounts are located in the Portal under the 'Common' menu item. Select [Common/Messages and Files/Files, Forms, and Memos](#).

If the authorizing official is unable to add or remove an account, contact [wcg@wsac.wa.gov](mailto:wcg@wsac.wa.gov).

#### Security of Information

All institutions are expected to treat information on the WSAC Portal in accordance with the Electronic Agreement contained in the Institutional Agreement to Participate.

Institutions and individuals are granted access to data with the expectation that they protect the confidentiality of this information with the same level of care as they do any other student aid document.

#### Secure Data Transmission

No personally identifiable information (PII) shall be transmitted to WSAC via email. All institutions must send information to WSAC via the secure email function in the Portal or using CSAW.

#### Portal Training

Portal users have access to the portal training site: <https://portaltraining.wsac.wa.gov/>. It is a great way to get acquainted with CSAW functions. Information in the Training Portal updates and resets each night allowing for training in a safe environment.



## REQUIRED REPORTS

Participating institutions are required to submit eligible Washington College Grant, College Bound Scholars and Passport to College student details via quarterly Interim Reports, including a year-end submission for reconciliation purposes, and an annual Unit Record Report (URR).

Please refer to the Unit Record Report Manual for details regarding that report and the required deadlines for submission.

### Interim Report Definition

The **Interim Report** is a quarterly data submission that includes student details for every eligible student awarded the Washington College Grant, College Bound Scholarships and Passport to College.

Data reported on the interim reports provides the basis for WCG, CBS, and PTC funding projections.

### Interim Report Due Dates for the 2020-21 Academic Year

Report	Due Dates
Fall Interim Report	November 6, 2020
Winter Interim Report	February 5, 2021
Spring Interim Report	May 7, 2021
Final Interim Report*	July 5, 2021

*\*The final Interim Report for the 2020-21 academic year also serves as the year-end reconciliation and is due July 5, 2021.*

### Record Layouts **NEW**

All institutions will use the College Bound-WCG Award Warehouse (CSAW) to fulfill the Interim Reporting requirement. The layout for the 2020-21 academic year, which includes fields for Passport to College Scholarships and term type, is located at the end of this chapter and has changed from the 2019-20 academic year layout.

A sample .csv file is located at: <http://www.wsac.wa.gov/FAA-resources>. Your file layout can be submitted in a different order but the header names must be identical to the sample file and are not case sensitive. Please do not make any modifications to header names.

## ELIGIBLE AWARDED WCG AND CBS STUDENTS

**Eligible awarded WCG students** refers to Washington College Grant students, who have either received a WCG payment, or who have had WCG funds committed (student has received an award offer) but not yet disbursed at the time of the report.

**Eligible awarded CBS students** refers to eligible College Bound Scholars who have either received a CBS payment, or who have had CBS funds committed, but not yet disbursed at the time of the report.

## INSTRUCTIONS

For detailed interim report submission instructions, including how to upload a file and address edits, visit [Common/Messages and Files/Files, Forms, and Memos](#) area of the Portal.

### Edits

CSAW rejects data in the form of edits. All edits must be addressed individually, except informational edits. A complete list of edits is located in the instructions at the end of this chapter.

### Reporting Enrollment Status

In general, each student's term enrollment status should reflect the funding the student was eligible to receive.

- Report the student's enrollment status for each term as of the date WCG or CBS was disbursed unless the student changed enrollment prior to the start of the term.
- If the student wasn't considered eligible for aid for a term, do not report them.

**Exceptions:** *Applies to both WCG and CBS Recipients.*

- If a student received a full refund of tuition charges and the balance of funds were not disbursed to the student, all funds must be returned via CSAW and the student's CSAW record must be updated to show as not enrolled for that term.
- If a student received a partial refund and the WCG or CBS award was proportionally decreased to a revised enrollment level, the enrollment status must also be updated (e.g., the student's original disbursement was based on 12 credits and the student's enrollment status was reported as full-time.)

Later a refund is applied that adjusts the students awards to half-time, they would be reported as half-time. The WCG for the term and enrollment status must be updated to show half-time enrollment and the appropriate amount of WCG.

**Reminder:** Be sure to update each student's term enrollment status on each of the Interim Reports. We have found some institutions that have updated the term award amounts but failed to update the enrollment statuses. This is very important as the term enrollment statuses impact the students QER.

### Secure Data Transmission

No personally identifiable information (PII) shall be transmitted to WSAC via email. All institutions must send information to WSAC via the secure email function or using CSAW.

## **Security of Information**

All institutions are expected to treat information on the WSAC Portal in accordance with the Electronic Agreement contained in the Institutional Agreement to Participate.

Institutions and individuals are granted access to data with the expectation that they protect the confidentiality of this information with the same level of care as they do any other student aid document. The institution's Financial Aid Administrator (FAA) is required to immediately notify WSAC in the event of any breaches or potential breaches of data.

Information contained in these files is for the sole purpose of administering state aid programs. This information may not be used for research. If you have questions about the proper use of the information, please contact WSAC at [wcg@wsac.wa.gov](mailto:wcg@wsac.wa.gov)

Each institution must have one or more Financial Aid Administrator(s) with a WSAC-assigned portal account. Each account user must have a separate unique password. If you have forgotten your password, please click on the "forgot your password" link on the Portal login page. Accounts and passwords are not to be shared among staff – each person needs their own account and password.

## **RECONCILIATION REPORT**

During the year-end reconciliation reporting period (Final Interim Report submitted in July), institutions have access to a balance sheet on the interim report tab in CSAW. Please ensure that your ending balance is zero. If you think your balance should be zero but it is not, contact program staff at [wcg@wsac.wa.gov](mailto:wcg@wsac.wa.gov).

Any remaining balance of WCG, CBS, or PTC funds at the end of the institution's reconciliation process need to be returned to WSAC in the form of a check or by EFT. Documentation must be provided with the check that specifies which program and dollar amount the funds are for.

**For complete instructions on how to complete the WCG-CBS-PTC interim report, go to Portal/Common/Messages and Files/Files, Forms and Memos.**

## Interim Report Complete List of Edits

Edit Description	Overrideable
CBS student has 3 or less QER	Informational only
PTC student has 3 or less QER	Informational only
WCG student has 3 or less QER	Informational only
Student is OK to award, not OK to pay, and hasn't been awarded CBS	Informational only
Applied baccalaureate is only allowed for Community and Technical colleges	Non-overrideable
Birthdate is required for PTC student	Non-overrideable
Cannot have awards for both summer terms at the same institution (except for clock-hour schools)	Non-overrideable
CBS award cannot be less than zero	Non-overrideable
CBS receivable balance cannot exceed the award amount	Non-overrideable
CBS student is not OK to Pay	Non-overrideable
Enrollment status cannot be "Not Enrolled" unless all awards have been cancelled	Non-overrideable
Enrollment status must be "Not Enrolled" if no awards are reported	Non-overrideable
Family income exceeds 65% CBS MFI Threshold	Non-overrideable
Family income exceeds WCG MFI threshold	Non-overrideable
Family income information is required for WCG and CBS students	Non-overrideable
Family size must be between 1 and 20	Non-overrideable
Family size must be more than or equal to number in college	Non-overrideable
Number in college must be between 1 and 20	Non-overrideable
PTC award cannot be less than zero	Non-overrideable
PTC cannot be awarded to students attending less than half time	Non-overrideable
PTC receivable balance cannot exceed the award amount	Non-overrideable
WCG award cannot be less than zero	Non-overrideable
WCG receivable balance cannot exceed the award amount	Non-overrideable
Student does not have any WCG QER for this award	Non-overrideable
Student does not have any CBS QER for this award	Non-overrideable
Student does not have enough PTC QER for this award	Non-overrideable
Student has unpaid receivables for a prior term	Non-overrideable
Student is not eligible to receive PTC	Non-overrideable
CBS award exceeds maximum eligible amount	Overrideable
CBS students must receive maximum WCG award	Overrideable
Combined enrollment status cannot exceed full-time for a single term	Overrideable
PTC award exceeds maximum eligible amount	Overrideable
PTC Student cannot be awarded or paid after age 27	Overrideable
PTC Student must receive first award prior to age 22	Overrideable
WCG award exceeds maximum eligible amount	Overrideable
WCG eligible student must be awarded	Overrideable
WCG, CBS, and PTC repayments must be referred at the same time	Overrideable
Student is eligible for PTC but hasn't been awarded	Overrideable
Student is OK to pay but hasn't been awarded CBS	Overrideable

Many edits can be resolved by correcting the data in the data fields. Correcting the data in CSAW will make the edit no longer appear. Overrides should be used when data cannot be corrected.

### Common Edits to be Addressed with Data Correction Instead of Overriding

Edit Name	Sample <u>Incorrect</u> Override Reason	<u>Correct</u> Data Change
Award Exceeds Maximum Eligible Amount	Eligible at time of disbursement-or-Enrolled FT	Update enrollment status to the status at time of disbursement
Award Exceeds Maximum Eligible Amount	Pursuing bachelor's degree	Check the App Bacc* box on each term the student is enrolled in upper-division BAS courses (applies to CTC sector only. NWIC and Perry Tech cannot exceed CTC award amounts for students in two-year programs)
Award Amount Exceeds Max, Most Likely Because of MFI Issue	Awarded on original income reported on FAFSA	Change the income reported for the student to reflect what was used to award
Combined Enrollment Status Cannot Exceed Full-time	No aid was disbursed	Remove student award records if you know student is not attending or is ineligible
Combined Enrollment Status Cannot Exceed Full-time	No financial aid my institution	Remove student award records if you know student is not attending or ineligible
Student is OK to Pay But Not Awarded CBS	MFI too high	Update income – the income being reported shows them within 65%
Student is OK to Pay But Not Awarded WCG / CBS / PTC	Need met	Enter \$0 in award amount

\*This applies only to students enrolled at institutions that are considered two-year degree institutions. BAS refers to students at those institutions who are enrolled in applied baccalaureate degree programs at those institutions.

### CSAW FILE UPLOAD LAYOUT FOR ALL INSTITUTIONS

A sample .csv file is located at <http://www.wsac.wa.gov/FAA-resources>. The file layout can be submitted in a different order, but **the header names must be identical to the sample file** and are not case sensitive.

***Please Note:***

- Including the Passport and Term Type fields in the CSAW file upload are strongly encouraged to ensure timely accurate reporting.
- Winter term fields are not required for Semester institutions.
- The SchoolCode field is an optional field. It may be completed or left blank.
- The WCG and CBS AwardAmount fields may be left blank if the student is not enrolled for that term.
- All Enrollment Status and Boolean data type (yes/no) fields are not case-sensitive.
- The WcgApprenticeship fields are not required at this time and should be left blank.

## 2020-21 CSAW File Upload Layout

Field	Valid Inputs	Remarks
<b>Ssn</b>	Numbers and hyphens	9-digit student identifier. SSN, ITIN, or WASFA ID. Dashes will be removed, and any 8-digit entries will be left-padded with a zero (this is applicable in cases where Microsoft Excel interprets SSN as a number and removes the leading zero).
<b>SchoolCode</b>	Any characters	Unique identifier for this student, for this institution.
<b>LastName</b>	Any characters	Required
<b>FirstName</b>	Any characters	Required
<b>MiddleInitial</b>		Optional
<b>FamilySize</b>	Integer	Required
<b>NumberInCollege</b>	Integer	Required
<b>FamilyIncome</b>	Number up to two decimal places	Family income used to determine WCG eligibility and award amount.
<b>BirthDate</b>	mm/dd/yyyy	Required. 10byte max, requires slashes. Leading zeros on month and day not required.
<b>IsirWasfaTransactionNumber</b>	Integer 1-99	ISIR or WASFA Transaction number used to award student. Leading zero on 1-9 is optional
<b>Summer1EnrollmentStatus</b>	('Not enrolled' or '0') ( 'Full Time' or '1') ( 'Half Time' or '2') ( '3/4 Time' or '3') ( '< Half Time' or '5')	The enrollment status the student was eligible for at the time of disbursement or as of the first day of the term. If left blank, this will be set to Not Enrolled.
<b>Summer1TermType</b>	(Quarter or '1') (Semester or '2'), optional	If left blank or excluded from file, will use the default term type.
<b>Summer1AppliedBaccalaureate</b>	('true' or 'y') ( 'false' or 'n')	This only applies to students at CTCs and private colleges that primarily offer associate degrees. All other institutions should leave this blank. Determines whether this student is enrolled in a baccalaureate program for this term.
<b>Summer1CbsAwardAmount</b>	Number up to two decimal places	Maximum CBS award amount, minus specified state aid. '0' indicates "need met". Leave blank if not awarded.
<b>Summer1PtcAwardAmount</b>	Number up to two decimal places	If left blank, will assume all Passport students are being entered by hand. '0' indicates "need met"
<b>Summer1WcgAwardAmount</b>	Number up to two decimal places	Award amount. '0' indicates "need met". Leave blank if not awarded.
<b>Summer1WcgApprenticeship</b>		Not required. Leave blank
<b>Summer1WcgAwardIsServed</b>		Not required. Leave blank

### 2020-21 CSAW File Upload Layout (Cont.)

Field	Valid Inputs	Remarks
<b>FallEnrollmentStatus</b>	('Not enrolled' or '0') ( 'Full Time' or '1') ( 'Half Time' or '2') ( '3/4 Time' or '3') ( '< Half Time' or '5')	The enrollment status the student was eligible for at the time of disbursement or as of the first day of the term. If left blank, this will be set to Not Enrolled.
<b>FallTermType</b>	(Quarter or '1') (Semester or '2'), optional	If left blank or excluded from file, will use the default term type.
<b>FallAppliedBaccalaureate</b>	('true' or 'y') ( 'false' or 'n')	This only applies to students at CTCs and private colleges that primarily offer associate degrees. All other institutions should leave this blank. Determines whether this student is enrolled in a baccalaureate program for this term.
<b>FallCbsAwardAmount</b>	Number up to two decimal places	Maximum CBS award amount, minus specified state aid. '0' indicates "need met". Leave blank if not awarded.
<b>FallPtcAwardAmount</b>	Number up to two decimal places	If left blank, will assume all Passport students are being entered by hand. '0' indicates "need met"
<b>FallWcgAwardAmount</b>	Number up to two decimal places	Award amount. '0' indicates "need met". Leave blank if not awarded.
<b>FallWcgApprenticeship</b>		Not Required. Leave blank
<b>FallWcgAwardIsServed</b>		Not Required. Leave blank
<b>WinterEnrollmentStatus</b>	('Not enrolled' or '0') ( 'Full Time' or '1') ( 'Half Time' or '2') ( '3/4 Time' or '3') ( '< Half Time' or '5')	The enrollment status the student was eligible for at the time of disbursement or as of the first day of the term. If left blank, this will be set to Not Enrolled.
<b>WinterTermType</b>	(Quarter or '1') (Semester or '2'), optional	If left blank or excluded from file, will use the default term type.
<b>WinterAppliedBaccalaureate</b>	('true' or 'y') ( 'false' or 'n')	This only applies to students at CTCs and private colleges that primarily offer associate degrees. All other institutions should leave this blank. Determines whether this student is enrolled in a baccalaureate program for this term.
<b>WinterCbsAwardAmount</b>	Number up to two decimal places	Maximum CBS award amount, minus specified state aid. 0' indicates "need met". Leave blank if not awarded.
<b>WinterPtcAwardAmount</b>	Number up to two decimal places	If left blank, will assume all Passport students are being entered by hand. '0' indicates "need met"
<b>WinterWcgAwardAmount</b>	Number up to two decimal places	Award amount. '0' indicates "need met". Leave blank if not awarded.
<b>WinterWcgApprenticeship</b>		Nor required. Leave blank.
<b>WinterWcgAwardIsServed</b>		Not required. Leave blank.



### 2020-21 CSAW File Upload Layout (Cont.)

Field	Valid Inputs	Remarks
<b>SpringEnrollmentStatus</b>	('Not enrolled' or '0') ( 'Full Time' or '1') ( 'Half Time' or '2') ( '3/4 Time' or '3') ( '< Half Time' or '5')	The enrollment status the student was eligible for at the time of disbursement or as of the first day of the term. If left blank, this will be set to Not Enrolled.
<b>SpringTermType</b>	(Quarter or '1') (Semester or '2'), optional	If left blank or excluded from file, will use the default term type.
<b>SpringAppliedBaccalaureate</b>	('true' or 'y') ( 'false' or 'n')	This only applies to students at CTCs and private colleges that primarily offer associate degrees. All other institutions should leave this blank. Determines whether this student is enrolled in a baccalaureate program for this term.
<b>SpringCbsAwardAmount</b>	Number up to two decimal places	Maximum CBS award amount, minus specified state aid. '0' indicates "need met". Leave blank if not awarded.
<b>SpringPtcAwardAmount</b>	Number up to two decimal places	If left blank, will assume all Passport students are being entered by hand. '0' indicates "need met"
<b>SpringWcgAwardAmount</b>	Number up to two decimal places	Award amount. '0' indicates "need met". Leave blank if not awarded.
<b>SpringWcgApprenticeship</b>		Not required. Leave blank.
<b>SpringWcgAwardIsServed</b>		Not required. Leave blank.
<b>Summer2EnrollmentStatus</b>	('Not enrolled' or '0') ( 'Full Time' or '1') ( 'Half Time' or '2') ( '3/4 Time' or '3') ( '< Half Time' or '5')	The enrollment status the student was eligible for at the time of disbursement or as of the first day of the term. If left blank, this will be set to Not Enrolled.
<b>Summer2TermType</b>	(Quarter or '1') (Semester or '2'), optional	If left blank or excluded from file, will use the default term type.
<b>Summer2AppliedBaccalaureate</b>	('true' or 'y') ( 'false' or 'n')	This only applies to students at CTCs and private colleges that primarily offer associate degrees. All other institutions should leave this blank. Determines whether this student is enrolled in a baccalaureate program for this term.
<b>Summer2CbsAwardAmount</b>	Number up to two decimal places	Maximum CBS award amount, minus specified state aid. '0' indicates "need met". Leave blank if not awarded.
<b>Summer2PtcAwardAmount</b>	Number up to two decimal places	If left blank, will assume all Passport students are being entered by hand. '0' indicates "need met"
<b>Summer2WcgAwardAmount</b>	Number up to two decimal places	Award amount. '0' indicates "need met". Leave blank if not awarded.
<b>Summer2WcgApprenticeship</b>		Not required. Leave blank.
<b>Summer2WcgAwardIsServed</b>		Not required. Leave blank.

- Winter term fields are not required for Semester institutions.
- The SchoolCode field is an optional field. It may be completed or left blank.
- The WCG and CBS AwardAmount fields may be left blank if the student is not enrolled for that term.
- All Enrollment Status and Boolean data type (yes/no) fields are not case-sensitive.



## CHAPTER 5

### WCG AND CBS PAYMENTS, REPAYMENTS, AND REPORTING

#### PROCEDURES FOR ELECTRONIC FUND TRANSFER PAYMENT REQUESTS, STUDENT REPAYMENTS, AND REPORTING

For the most efficient and timely processing of funds, colleges are strongly encouraged to use the Electronic Fund Transfer (EFT) method.

Private colleges are required to front monies to eligible students and then request reimbursement from WSAC.

Public institutions are not required to have previously disbursed funds to eligible students before requesting program funds

#### Electronic Funds Transfer (EFT) Request Procedure

##### Payment Requests

Once a student is identified as eligible and an award is calculated, the institution may begin the disbursement process.

Payment requests must be submitted through the use of CSAW (College Bound - WCG Award Warehouse) located in the Portal. Institutions upload their eligible student file into CSAW and manage awards from within the warehouse.

Instructions for requesting state aid funds are located in the [Common/Messages and Files/Files, Forms, and Memos](#) area of the Portal.

The file layout specifications and instructions for requesting reimbursements in CSAW are located at the end of this chapter.

**Note:** *The Clock Hour school payment request calendar is located at the end of this chapter.*

When submitting files, please populate the SSN field for undocumented students in the following order:

- SSN
- Tax ID Number (ITIN)
- 9-digit WASFA Applicant ID number

Payment requests may be made any time from late-July through late-June of the academic year. Payments for a new year will not begin until the college's annual participation agreement is approved, and the final interim report is reconciled for the prior year. EFT payment requests will be processed within 24 hours of receipt whenever possible.

Please allow a minimum of five to six business days from the time a request is submitted until funds are received at your institution.

## **Disbursement Procedures**

The institution must confirm that the student is still eligible and confirm enrollment status at the time of disbursement. In addition, the institution shall check the CBS Cruncher in the WSAC Portal to ensure student eligibility.

If a student does not attend, withdraws prior to the start of a term, reduces enrollment levels prior to the start of the term or fails to commence attendance in all classes that their enrollment level/award amount is based on, institutions must bill the student and report the repayment to WSAC.

If a student changes enrollment prior to the start of a term institutions must adjust the student's award in CSAW. Institutions that choose to cover repayment amounts owed will return the funds via CSAW as an award cancellation and not report the student in repayment.

Reducing a processed award will create a negative payment request for that student under the 'Request Funds' tab. It is permissible to only submit negative payment requests; however, WSAC will not send funds until you have submitted positive awards to offset the reduced awards.

***Note:** If the institution does not have reimbursements to offset any reduced awards after the final interim report is reconciled, the institution must return the under-spent amount to the Washington Student Achievement Council.*

## **Payments Cannot be Made to Students for a Current Term After They Withdraw**

If students withdraw for a term without earning at least 3 credits, no additional WCG or CBS payments may be made to the students for that term on or after a student's official withdrawal date.

***Note:** State policy differs from the Federal policy on this issue of post-withdrawal disbursements.*

## **Retroactive Awards and Payments for Previous Terms**

Retroactive WCG and CBS awards and payments **MUST** be made to **eligible CBS Scholars and eligible WCG students** for a prior term(s) as long as they are for the current academic year and other program rules are followed. This applies whether or not the student is currently enrolled.

The value of the retroactive awards and payments must be based on a student's rate of satisfactorily completed credits (at least 3 credits) determined by the institution at the end of the term(s).

## Required Student Directive for Private Institutions

Private institutions must use WSAC's Student Directive Form to record a student's decision on where to apply their financial aid payment. The student's financial aid payment can be deposited directly into a student's account, or disbursed in the form of a check, based on their choice on the directive. For a copy of the student directive, see Chapter 6.

- ❑ Institutions must not coerce or influence the student's choice on where to apply their financial aid payment.
- ❑ The directive remains in effect for the duration of the student's continuous enrollment at the institution, excluding approved leaves of absence and summer terms. A new directive is required if the student is not continuously enrolled.
- ❑ Institutions must allow students to change their minds at any time, prior to disbursement, and follow their current directives at all times.
- ❑ Institutions must remind students once a year that their current directive is still in place and that they may change it.

The institution may not withhold or delay the disbursement of state aid due to any student debt, including tuition, fees, or fines owed the institution.

## Conditions of Award Statements **NEW**

Prior to disbursement, the institution must inform the state aid recipient of their responsibilities to the program through a "Conditions of Award" statement. A copy of this statement is located in Chapter 6. This has been updated for 2020-21.

The statement must be presented annually and can be delivered to the student through paper or electronic means each year. The statement must be provided in its entirety and is not satisfied by providing a link to the document or by attaching a copy of the document. The Conditions of Award does not have to be signed by the student as long as the institution can provide assurances to WSAC that the document was provided to the student each year.

It is the institution's responsibility to maintain documentation that the conditions were presented to the student.

WSAC may request a copy of the Conditions of Award statement that was presented to the student and documentation that it was presented to the student. WSAC's request for this documentation must be fulfilled within 5 business days.

## Power of Attorney Disbursements

A student whose off-campus program precludes their return to the institution for disbursement of state aid funds must assign a Power of Attorney to a responsible person to receive payments on their behalf. A copy of the Power of Attorney documentation must be kept in the student's file.

## Institutional Repayments

If a student is awarded incorrectly due to institutional error, it is the institution's financial obligation to repay the funds and they must be returned to WSAC immediately.

## **Student Repayments**

Repayment is a student responsibility if it is due to incorrect information provided by the student, failure to complete the term or failure to commence attendance in all classes on which their enrollment level/award amount is based. If a grant recipient leaves an institution during an academic term in which he or she receives WCG, the student may be required to repay WCG funds.

***Note:** The Washington College Grant Repayment Policy Requirements are Mandatory for all Participating WCG Institutions.*

## **Persian Gulf Veterans**

Persian Gulf veterans are not required to repay the unused portions of grants received under state student financial aid programs.

## **STATE AID GRANT REPAYMENT POLICY REQUIREMENTS NEW**

### **General**

Students who fail to attend classes, who withdraw or reduce enrollment levels prior to the start of the term, fail to commence attendance in all classes for which their enrollment level/award amount are based on or who receive funding based on fraudulent information will be required to repay 100% of the funds received.

Students who have received state aid (aid disbursed prior to the start of the term) and who change enrollment status prior to the first day of the term, must have their state aid eligibility recalculated to reflect their enrollment status as of the start of the term.

Students who fail to commence attendance in all classes for which their enrollment level/award amount is based must have their state aid eligibility recalculated to reflect only their enrollment level for those classes they attended.

The student who decreases enrollment status prior to the first day of the term will owe a repayment of the overpayment amount. Students who increase enrollment status throughout the term are entitled to additional funds for enrollment status increases.

Students who make enrollment status adjustments (up or down) after disbursement and after the start of the term will be subject to completion of satisfactory academic progress requirements outlined under 250-21-010 (12) (a-e). Enrollment status increases must include WCG awards based on that enrollment and may not exceed need. However, students may not receive more WCG than the cost of their tuition and fees.

If a student's enrollment is adjusted during the tuition refund period and tuition is reduced, and the student failed to commence attendance in all classes for which their disbursement was made, the grant must be reduced to not exceed the cost of tuition and fees.

***Note:** For this section, "state grant" refers to all state grant and scholarship programs.*

## REPAYMENT AND AWARD ADJUSTMENT EXAMPLES

Any practice other than in the examples provided below will require the institution to submit an alternate Repayment Policy to WSAC for consideration. The alternate policy must be clear and ensure that students receive their maximum awards, prevent ineligible students from receiving awards, avoid initial disbursements in excess of tuition and fees, and adjust remaining eligibility appropriately to not exceed QERS.

*Note: It is permissible for students to decline a WCG award in part or in whole. This permissible declination (as in C below) is consistent with existing WSAC WCG guidance, although is most common when a student has minimal need remaining and wishes to retain a full award for a future term. Students should be notified that this option is available to them and how it will affect them.*

### Repayment Examples:

#### EXAMPLE 1

- A. WCG calculated and disbursed at full-time and student attends at least one class for each course for which funds were disbursed but does not complete any classes.**

**ACTION:** No adjustment necessary; award and enrollment will be reported at fulltime.

**RESULT:** Student will not owe a repayment, but the student will have used 1 QER and be impacted by quarterly SAP.

- B. WCG calculated and disbursed at fulltime except student withdraws from two classes after attending at least one class in each course:**

**ACTION:** No adjustment is necessary since the student began attendance in all the enrolled classes for which the WCG was calculated. Award and enrollment will be reported at fulltime.

**RESULT:** Student will not owe a repayment, will be impacted by quarterly SAP since fewer than full time credits were completed and 1 QER will be utilized.

- C. WCG calculated and disbursed at fulltime for 13 credits, then student withdraws from six credits after attending at least one class in each course but within the tuition refund period.** The student notifies the financial aid office that they wish to decline the refund and have the tuition refund returned to their WCG award and their award reduced to match their new enrollment level/QER. This may involve the student returning funds as well to the school to be returned to WSAC via CSAW so that their award/enrollment level reflects the lower amount. (e.g. full-time to half-time and aid returned to reflect half-time)

**ACTION:** Adjust student's WCG award to appropriate enrollment level and return funds to WSAC via CSAW. Award and enrollment level will be reported at half time.

**RESULT:** Student's WCG will reflect appropriate QER at awarded enrollment and student will remain in good standing for SAP (as long as all credits for which the award was adjusted are completed).

## AWARD ADJUSTMENT EXAMPLE

### EXAMPLE 2

- A. WCG is calculated at less than full-time and disbursed at less than full-time. Student adds classes at any point in the term which changes their enrollment level to a higher level and the WCG award amount and tuition are increased.

**ACTION:** WCG Award **MUST** be increased to the enrollment level for which the student is enrolled—regardless of any alternative institutional policy or institutional census date. The award and enrollment level will be reported at the higher level.

**RESULT:** Student receives additional WCG funds and CSAW reporting is adjusted to reflect the higher enrollment level.

### Alternative Repayment Policy Option

Institutions may propose alternative policies to our office for review. WSAC will analyze alternative policies and may require adjustments to achieve consistent treatment of students in similar circumstances across campuses and support student success. Institutions will be notified if they are approved or require modifications.

Key considerations when developing alternative policies should include the following:

- Ensuring students receive their maximum awards
- Prevent ineligible students from receiving awards
- Avoid awards in excess of maximum tuition and fees
- Adjust remaining eligibility appropriately to not exceed QERs

### Repayments for Deceased Students

All repayments for deceased students are forgiven. Please forward proof of death for all In Repayment accounts to the Repayment mailbox using the secure email function in the Portal. WSAC will process the cancellation.

### Timely Management of Repayment Referrals for Institutions

Institutions must enter repayment accounts into the WSAC Portal under Transmittal using the Receivable Transmittal feature within **10** business days of the date a student withdraws or the end of the term, whichever is earlier. There are two types of repayment accounts: ***Institution to Bill and In Repayment.***

***Please note:*** *In order to report a receivable or Institution to Bill, you must have first reported awards and requested funds through CSAW for that student.*

**Institutions** may choose from the following options:

**1. Institution to Bill (has 2 subcategories):**

**Calculation Pending:** Under Institution to Bill, this allows you to flag a student in CSAW who has not met satisfactory academic progress and may owe a repayment but for whom you have not yet completed the calculation. You must enter a date that indicates the last date of the term or the student's withdrawal, whichever is earlier.

This will ensure that the student does not receive additional state aid elsewhere. You must complete the calculation and enter the dollar amount or convert to In Repayment within 30 calendar days from the initial date of withdrawal/the end of the term, whichever is earlier as reported above.

**Calculation Completed/student owes:** This allows you to report the student as Institution to Bill, with an attached dollar amount you are actively collecting on from the student. This prevents the student from receiving aid elsewhere while they are in a repayment status for state aid.

**All Institution to Bill accounts not paid in full must be converted to In Repayment Status prior to submission of the Final Interim Report, or the institution assumes liability and will have to repay the funds to the state aid programs.**

**2. In Repayment:** The institution has determined that a repayment is owed within the initial 10 business day window or is updating the status from Institution to Bill as explained above within the 30 calendar days from the initial date you determined they were no longer attending.

Accounts are transferred to our billing service within a short period of time and actively collected on by our contracted billing service.

The following chart summarizes the different repayment actions and the timeframe for completing those actions. Detailed information is provided in the following pages of this chapter and in the [Common/Messages and Files/Files, Forms, and Memos](#) area of the Portal.

	TIMEFRAME FOR COMPLETION		
REPAYMENT ACTION	INSTITUTION TO BILL Under Review	INSTITUTION TO BILL Repayment Amount Known	IN REPAYMENT
STATE AID REPAYMENT RECORD ENTERED INTO CSAW	10 business days from the end of the term or date of withdrawal; whichever is earlier; enter date	10 business days from the end of the term or date of withdrawal; whichever is earlier; enter amount (Summer 2 CANNOT BE ITB AND MUST BE IN REPAYMENT)	10 business days from the end of the term or date of withdrawal; whichever is earlier; enter amount
REPAYMENT CALCULATED AND REPORTED TO WSAC	N/A – Repayment is under review and student is blocked from receiving additional funding	Immediately upon creating “ITB – Repayment Amount Known” record	Immediately upon creating In Repayment record
LAST DAY TO CONVERT TO “INSTITUTION TO BILL REPAYMENT KNOWN” OR “IN REPAYMENT” ACCOUNT	Must convert to either “ITB Repayment Amount Known” or “In Repayment” within 30 calendar days from end of the term or date of withdrawal; whichever is earlier <b>-OR-</b> The Institution is liable for the funds to WSAC	N/A	N/A
LAST DATE TO CONVERT “INSTITUTION TO BILL REPAYMENT AMOUNT KNOWN” INTO “IN REPAYMENT” ACCOUNT	N/A	Must convert to “In Repayment” prior to submission of your Final Interim Report Submission	N/A
LAST DATE TO REFER TO WSAC	If not converted to “ITB Repayment Amount Known” or “In Repayment” within 30 calendar days of date outlined above, institution becomes financially liable and must return funds to WSAC	Must convert to “In Repayment” prior to submission of your Final Interim Report Submission	Already referred to WSAC
LAST DATE TO ACCEPT PAYMENT FOR CURRENT YEAR “INSTITUTION TO BILL AMOUNT KNOWN” OR “IN REPAYMENT” ACCOUNT	N/A	Up to the date you convert them to “In Repayment” prior to the submission of your Final Interim Report	Never - Institutions are not permitted to accept payments once an account is referred to WSAC for collection.
LAST DATE TO ACCEPT PAYMENT FOR PRIOR YEAR REPAYMENTS	N/A	N/A	Never – Refer student to WSAC

**Note:** Summer 2/Trailer repayments may not be established as institution to bill and must be reported as In Repayment in CSAW. All summer 2/Trailer repayments must be entered by August 31 each year.



## **Institution to Bill Accounts**

The institution must create Institution to Bill records for accounts that the institution chooses to actively collect on during the academic year. Institution to Bill records shall be entered into the Portal within 10 business days of the student's withdrawal, or the end of the term, whichever is earlier. Doing so prevents students in repayment status from receiving aid at another institution by flagging them on the CBS cruncher.

The institution has two options under this category based on the timelines described above.

The institution may retain the repayment account within the academic year if it continues active collection procedures or if a student is making payments to the institution. Any remaining balance must be converted to In Repayment status prior to submission of your Final Interim Report. **The institution shall not accept payments from the student past the date you convert them to In Repayment.**

If the student repays the Institution to Bill obligation in full to the institution within the academic year, it is the institution's responsibility to remove the Institution to Bill account for that student as soon as possible after receipt of payment. **If the institution does not remove the record, then the Institution to Bill account will continue to appear on the students record and the student will be ineligible for further state aid disbursements.**

A reduction in the student award shall correspond with funds collected within the academic year for Institution to Bill accounts.

Institutional refunds can be applied directly to student awards in Institution to Bill status and the award reduced in CSAW. Accounts that are In Repayment status require the institution to return the refunds directly to WSAC outside of the CSAW portal.

***Note:** Summer 2/Trailer repayments may not be established as Institution to Bill and must be reported as In Repayment in CSAW. All summer 2/Trailer repayments must be entered no later than August 31 each year. Students who withdraw must be reported within 10 business days as outlined above to ensure ineligible students do not continue to receive aid.*

## **In Repayment**

If an institution does not want to actively collect from a student, refer accounts to WSAC to commence collection activity.

***Note:** Once an In Repayment account is created, it cannot be canceled. In Repayment may only be canceled when it was determined that the repayment was created in error and the student never owed. Contact WSAC Receivables Coordinator for further assistance at [repayment@wsac.wa.gov](mailto:repayment@wsac.wa.gov).*

To refer a repayment account to WSAC for collection, select the In Repayment status in the Transmittal function on the Portal. If an Institution to Bill record exists for the repayment already, convert the original Institution to Bill account to an In Repayment account using the instructions at the link referenced above.

**If a student is a recipient of WCG, CBS, and/or PTC the repayments must be referred to WSAC simultaneously to ensure seamless and transparent billing to the student.**

**As noted above, institutions have a total of 30 calendar days. The initial reporting must be entered within 10 business days. Repayments not referred within the time frames above will become the financial responsibility of the institution for failure to report. Institutions will be required to return the funds to WSAC.**

Accounts that are In Repayment status require the institution to return the funds directly to WSAC outside of the CSAW portal.

If students contact the institution regarding their repayment after it has been referred to WSAC, the institution **must** direct students to WSAC's contracted billing service, University Accounting Service (UAS), at 844-870-8701.

***Note:** Institutions must enter repayments into the Portal before sending communications to students that refer them to UAS or WSAC.*

### **Authority**

Washington College Grant ([WAC 250.21.051\(7\)](#))

### **No-Show Repayments**

If a state grant recipient never attends courses in the term for which they received a state grant award, the state grant repayment amount is 100 percent of the award. If an institution is unable to distinguish between a no-show and an unofficial withdrawal, the no-show policy shall apply.

### **Institutional Errors**

Institutions are responsible for repaying WSAC for overpayments resulting from calculation errors. Institutions shall reduce the student's award(s) to reflect the amount the student was eligible to receive.

### **Canceling In Repayment Accounts**

Once an In Repayment account is created, it cannot be canceled. In Repayment may only be canceled when it was determined that the repayment was created in error and student never owed. Examples are proof of an updated last date of attendance, grade change, proof of high school diploma, etc.

Institutions may not accept any payment or apply tuition refunds for an In Repayment account and must forward all funds to WSAC. For further assistance, contact WSAC Receivables Coordinator at [repayment@wsac.wa.gov](mailto:repayment@wsac.wa.gov).

If it is determined that a repayment was created in error and needs to be canceled in the Portal, the institution must enter a clear explanation for why the repayment has been canceled. Any funds the student has paid WSAC towards the repayment will be refunded to the student by WSAC.

Cancellation of repayments created more than one academic year before the current year must be done by contacting WSAC at [repayment@wsac.wa.gov](mailto:repayment@wsac.wa.gov).

## **INFORMATION FOR CLOCK HOUR PROGRAMS**

In order to equate the clock hour programs to the credit hour programs, the following policy makes the annual award amount equitable for students attending both clock hour and credit hour programs.

### **Payment Periods:**

1. All clock hour students, except for their final term, must be reported as full-time students in CSAW. First payments are made at the beginning of the program for eligible students. Additional payments may be made for each 300 clock hours successfully completed and are reported within a quarter term payment schedule.
2. Additional payments shall not be disbursed until the previous payment's clock hours have been earned/completed.
3. For a full-time, two-term (600 clock hours) student in good standing, the student should be awarded for two payment periods (equivalent to two quarterly payments).
4. For a full-time, three-term (900 clock hours) student in good standing, the student should be awarded for three payment periods (equivalent to three quarterly payments).
5. For a full-time, four-term (1200 clock hours) student in good standing, the student should be awarded for four payment periods (equivalent to four quarterly payments).
6. For a full-time, five-term (up to 1500 clock hours) student in good standing, the student should be awarded for five payment periods (equivalent to five quarterly payments).

### **Program Lengths**

Clock hour programs must be at least 600 hours in length to qualify for state aid awards. The program must provide a minimum of twelve clock hours of instruction per week.

A final quarter payment request can be submitted for students nearing completion of their program who have between 75 and 299 remaining hours.

### **Remainder Hours – Award Percentages**

75 - 149 hours	=	25% of a full-time award (report as less than half-time)
150 - 224 hours	=	50% of a full-time award (report as half-time)
225 - 299 hours	=	75% of full-time award (report as three-quarter time)
300+ hours	=	100% of full-time award (report as full-time)

## Academic Year Cross-Over Programs

If a payment falls in the cross-over between academic years, the school can select the academic year in which to request the payment.

Additional clock hours earned beyond a full disbursement that are clocked prior to July 1 of the next academic year may be carried over. For example, if a student earns 980 hours in one academic year and is awarded for two 450 hour terms, the 80 remaining hours may be carried into the next academic year.

## Clock Hour Payment Request Calendar

Payment periods are described as periods 1-5. Due to Portal limitations, the payment periods must still be referred to as Summer 1, Fall, Winter, Spring, and Summer 2 (in corresponding terms).

*Assign the term based on the dates when the majority of the student's enrollment for each 300 clock hour time period will occur.*

Payment Period	Date Range	Term
1	July 1 – September 11	Summer 1
2	September 12 – November 22	Fall
3	November 23 – February 5	Winter
4	February 6 – April 18	Spring
5	April 19 – June 30	Summer 2

*Based on ten-week minimum between payment periods, five payment periods maximum.*

## PASSPORT STUDENT SUPPORT FUNDS PAYMENT REFUND POLICY SUMMARY

Passport to Careers Student Support Funds (formerly called Incentive Grants) are provided to the postsecondary institution (by WSAC) or apprenticeship program (by a contracted third party) and are used for the recruitment and retention of Passport eligible students.

Student Support Fund payments are currently valued at \$500 per student per quarter or 300 clock hours, or \$750 per student per semester.

### Student Support Fund payment process (for postsecondary institutions only):

1. Institution awards student scholarship in the portal.
2. Institution requests scholarship funds from WSAC, WSAC processes scholarship payment through CSAW.
3. Student Support Funds are automatically “posted” in the portal.
4. WSAC processes the Student Support Fund payment *after* the close of quarterly WCG/CBS/PTC interim reporting and sends funds to the institution in bulk.

### **Student Support Fund refund policy (WSAC only):**

1. If the student does not enroll in or attend any classes, scholarship and Student Support Funds must be returned to WSAC.
2. If the student enrolls, but does not attend, scholarship and Student Support Funds will need to be returned to WSAC.
3. If the student enrolls and attends classes, but withdraws, does not make SAP, or discontinues attendance and the institution has done their due diligence to recruit and support the student, WSAC will not require Student Support Funds to be returned. In these cases, the institution has upheld their agreement to participate through the Passport Addendum and has earned the Student Support Funds.

***Note:** Scholarship funds should be returned based on the state's repayment calculation policy and scholarship payments to the student are subject to repayment.*

### **Student Support Fund repayment process (Institutions only):**

When a Passport student scholarship is returned in full, the institution should document the Student Support Fund returned to WSAC and provide the following payment information:

1. Student name
2. Year
3. Term for the refund
4. Type of funding (scholarship or incentive)

Student Support Fund payment refunds need to be submitted to WSAC within the fiscal year that they were paid for.

For example, if funds were paid in Fall 2020 and through the reconciliation process, the student scholarship portion was returned for non-enrollment, the Student Support Funds should also be returned at that same time and within the same fiscal year for that student.

## CHAPTER 6

### CONDITIONS OF AWARD AND DIRECTIVES

#### **Forms used to Provide Required Notification to Students**

Prior to the first annual disbursement of state financial aid, institutions must inform students of the conditions associated with their state financial aid award(s) by providing them with the Washington State Aid – Conditions of Award below.

Conditions of Award statements must be provided to students on paper or electronically.

Emailed Conditions of Award statements must display the Conditions language, in its entirety, in the body of the email, unless the institution requires students to certify their acceptance by filing a signed form or otherwise verifying receipt of the Conditions language. Institutions must maintain documentation that the state Conditions of Award were provided to awarded students.

WSAC strongly encourages institutions to inform students of their potential eligibility for Supplemental Nutrition Assistance Program (SNAP) through the Department of Social and Health Services (DSHS).

Adding a statement to award letters is one way institutions can inform students that they may be eligible for Basic Food benefits.

*Sample language you might consider incorporating into student communications:*

College students who receive the Washington College Grant may be eligible for Basic Food benefits in Washington. For more information about Basic Food assistance and how to apply: <https://www.dshs.wa.gov/esa/community-services-offices/basic-food>

WSAC values institutional flexibility in best meeting our shared student disclosure obligations. Institutions may propose alternative Conditions of Award language varying from the statement below during the annual participation renewal process. Alternative Conditions language must still convey the points included in the statement below and will be evaluated for approval accordingly.

Institutions may incorporate state Conditions of Award language into more comprehensive conditions statements that cover other forms of financial aid, subject to WSAC approval during renewal.

## Conditions of Award Statement – Applies to Students at All Institutions Each Year

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### Washington State Aid – Conditions of Award

By accepting state financial aid, you agree to the conditions listed below. If you have questions or find that you cannot comply with these conditions, please contact your institution's financial aid office.

1. You must meet the requirements for Washington State residency.
2. You do not owe a repayment to any state grant or scholarship nor are you in default on a state student loan.
3. You must be enrolled in an eligible program and not be pursuing a degree in theology.
4. If you hold a bachelor's degree or the foreign equivalent, you are not eligible to receive state grant funds.
5. If you do not attend or if you withdraw from your classes, you may owe a repayment of all or part of any state funds you have received.
6. You must maintain the academic progress standards established by your institution in order to receive additional state aid.
7. There could be other circumstances that would require a repayment or reduction in your current award amounts.
8. You must meet all eligibility requirements for the state aid program(s) awarded.
9. The offer of this financial assistance is subject to, and conditioned upon, the availability of funds. Washington Student Achievement Council (WSAC) and the institution through which the grant, scholarship, or work study 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).

#### **NEW**

10. If I fail to cash my check containing state funds or pickup any remaining funds by the close of the academic year, the funds shall be returned to the program at WSAC and treated as funds declined by me.

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The State of Washington is offering you financial assistance to help support your educational expenses. Please visit [www.opportunitypathways.wa.gov](http://www.opportunitypathways.wa.gov) to receive more information about financial aid, scholarships, work study, and student loans.

You may choose to voluntarily make financial contributions to WSAC in recognition of the assistance that you received. All voluntary contributions will be used to provide financial assistance to other students. Please contact [finaid@wsac.wa.gov](mailto:finaid@wsac.wa.gov) for more information.

## **Required Directive Form for Students at Private Institutions**

Private institutions must use the following WSAC Student Directive Form to record a student's decision on where to apply their state financial aid payment(s) each term.

The student's financial aid payment can be deposited directly into a student's account or disbursed in the form of a check based on their choice on the directive. In addition, institutions:

- Must not coerce or influence the student's choice on where to apply their financial aid payment.
- Will keep the directive in effect for the duration of the student's continuous enrollment at the institution, excluding approved leaves of absence and summer terms. A new directive is required if the student is not continuously enrolled.
- Must allow students to change their minds at any time, prior to disbursement, and follow their current directives at all times.
- Must remind students once a year that their current directive is still in place and that they may change it.

The student must sign and date the directive. The signature can be either a wet or an electronic signature. For electronic signatures, the institution must have assurances that only the student can access their signature page, likely through a portal that is name and password protected.



**State of Washington**  
**Student Achievement Council**

**STUDENT DIRECTIVE FOR DISBURSEMENT OF STATE AID**

Return this form to the *NAME of Institution* Financial Aid Office as soon as possible.

Student Name (please print): \_\_\_\_\_ ID#: \_\_\_\_\_

You have been awarded financial aid from the State of Washington. Your designation and signature on this form will document your choice for funds to be applied directly into your student account or to be given to you in the form of a check. A state grant or scholarship recipient has the following two choices:

- Choosing to have the funds deposited to your student account permits the aid to be automatically credited toward expenses you may owe to the institution. This option allows faster processing of any refunds of financial aid proceeds that may be due you.
- Choosing to have state financial aid funds given directly to you means that state student aid will not be automatically available to pay for tuition and fees. You are responsible for using the funds to pay for educational expenses including any expense you owe to the institution.

**Please choose one of these options:**

\_\_\_\_\_ I choose to have state aid funds applied directly to my student account and automatically credited toward expenses I owe *NAME of Institution*.

**OR**

\_\_\_\_\_ I wish to have state aid funds given directly to me (not credited to my student account). I understand that I am responsible for all outstanding balances on my student account at *NAME of Institution*.

**Your choice will stay in effect as long as you are enrolled at this institution. However, you may change your directive for a future term by informing your Financial Aid Office in writing.**

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

Make sure you check one of the options above and return this form to:

*NAME of Institution*

Address

Address

Address

## CHAPTER 7

### INFORMATION FOR INSTITUTIONS

#### INSTITUTIONAL ELIGIBILITY

To be eligible to participate in state aid programs an institution must:

1. Be a public university, college, community or technical college operated by the state of Washington; be a private institution whose home campus is located in the state of Washington and who is accredited by a Washington Student Achievement Council (WSAC) approved accrediting association; or be a nonprofit institution recognized by the state of Washington (as provided in RCW [28B.77.240](#)).

Certain branch campuses, extensions, or facilities operating within the state of Washington, and affiliated with an institution operating in another state, may participate under certain circumstances. Such facilities must be either:

- A separately accredited institution; or
  - Operated as a nonprofit college or university delivering on-site classroom instruction to at least seven hundred full-time equivalent students for a minimum of 20 consecutive years within the state of Washington.
2. Be approved by a national or regional accrediting association that is recognized by the council and the Secretary of the U.S. Department of Education and in alignment with WAC [250-61-050](#).
  3. Participate in a fully certified status in the federal Title IV student financial aid programs including, at a minimum, the Federal Pell Grant program. Institutions not participating in a fully certified status will be evaluated on a case-by-case basis for continued participation and may have additional conditions imposed by the office in order to maintain their participation in state financial aid programs.
  4. Demonstrate a continuing administrative capability to administer financial aid programs.
  5. Sign the “Agreement to Participate” and have it endorsed by WSAC.

#### AGREEMENT TO PARTICIPATE

The **Agreement to Participate** documents an institution’s legal commitment to abide by all program statutes, rules, and guidelines. The agreement is designed for multiple years of use, typically for five years.

Each year participating institutions submit or certify their student maintenance budgets, Conditions of Award statements and delivery methods, state aid repayment, satisfactory academic progress, and packaging policies as directed by WSAC for approval and renewal of participation in the following fiscal year. Additional supporting documentation may also be required.

In addition, for-profit and newly admitted non-profit institutions are required to submit additional performance data including, but not limited to, their most recent federal composite score, graduation and placement rates as validated by the institution's accreditor, federal Cohort Default Rates, current enrollment levels and tuition costs, as directed by WSAC.

## **STUDENT MAINTENANCE BUDGETS**

Student budgets are reviewed to determine if the maintenance portion is within 10 percent of the Washington Financial Aid Association's (WFAA) maintenance budgets. If the institution's student maintenance budgets vary from this standard by more than 10 percent, the institution must provide an explanation justifying the variance.

## **STATE OF WASHINGTON CONDITIONS OF AWARD**

Prior to the first disbursement of state aid each year, institutions must inform state aid recipients of their responsibilities to the program(s) through a "State of Washington Conditions of Award" statement. Please refer to Chapter 6, Conditions of Award.

**Revised  
Please  
Review**

Statements must include the Opportunity Pathways link - <http://www.opportunitypathways.wa.gov> and must be presented or delivered to the student via paper or electronic means.

The statement does not have to be signed by the student.

## **FINANCIAL LITERACY**

Per [RCW 28B.76.502](#) institutions must take reasonable steps to ensure that each incoming student participates in a financial aid workshop including, but not limited to:

- An explanation of the WCG program rules including Satisfactory Academic Progress (SAP), repayment rules, and usage limits.
- Information on campus and private scholarships and work study opportunities including the application processes, and overview or student loan options, consequences of default and sample monthly repayment amounts.
- Overview of personal finance
- Average salaries for a wide range of jobs
- Financial education
- Contact information for local financial aid resources and the federal student aid Ombuds' office.

For full context please see [RCW 28B.76.502](#)

## **REPAYMENT POLICY**

Schools must follow the state grant repayment policy as outlined in Chapter 5, Payments, Repayments, and Reporting.

## **SATISFACTORY ACADEMIC PROGRESS POLICY**

Satisfactory academic progress policies may be specific to state aid recipients and must meet the provisions of [WAC 250-21-010\(16\)](#), and the Satisfactory Academic Progress Chapter (Chapter 3) of this manual.

An institution may submit an alternative approach to evaluating academic progress that includes a plan for improved student retention and comparison data to ensure state funds are used efficiently. WSAC will initially determine whether to approve the alternative policy, then evaluate it over a specified timeframe, then determine whether the policy may continue to be approved.

## **PACKAGING POLICIES**

Policies should reflect priorities for awarding Washington College Grant, College Bound Scholarship, Passport to College Promise Scholarship and State Work Study funds (if applicable).

Policies must ensure that legislatively directed awarding policies are reflected, such as ensuring that each WCG eligible student receives the maximum award for which they are eligible for all eligible terms and ensuring that WASFA applicants are treated equitably. Additionally, policies must reflect that institutional gift equity policies do not apply to WCG or CBS programs.

## **NOTIFICATIONS**

WSAC must be notified within thirty days of material changes affecting the institution — including additional locations of the institution as applicable that may impact students eligible for state aid.

Material changes that must be reported to WSAC within thirty days include, but are not limited to:

- Participation status in Federal Title IV student financial aid programs
- Locations of main and/or branch campuses and other instructional sites
- Accreditation status
- Contact information for key financial aid professionals
- Institutional ownership
- Third-party servicers

Any findings (including preliminary ones) or discoveries resulting from an internal or external program review or audit shall be sent directly to WSAC.

## **PROGRAM AUDITS AND RECORDS RETENTION**

WSAC staff shall review institutional administrative practices to verify compliance with rules, regulations, and program guidelines. As outlined in the rules, the burden of proof for a grant recipient's eligibility lies with the institution.

Each participating institution must maintain intact and accessible records of student's application, receipt, and expenditure of state aid funds. This includes all accounting records, as well as the original and supporting documents verifying how the funds were spent.

The institution must be able to reconstruct the calculations and rationale for the student's eligibility and award, if requested by WSAC. An institution may keep records electronically.

If the institution keeps its records electronically, it must maintain source documents supporting the electronic data in either hard copy, imaging software or on microfilm.

If a program review or audit reveals that funds were improperly awarded and disbursed as a result of institutional error or failure to follow the appropriate rules and guidelines, the institution must repay the amount of the affected state aid funds to WSAC. The burden for repayment is on the institution, not the student.

### **Records Retention**

Records relating to the state aid programs must be maintained in accordance with [RCW 40.14](#). This law requires all documentation substantiating a student's eligibility for, and receipt of, state aid be maintained for six years in accordance with the Washington State Record Retention Schedule.

Financial Aid Administrators at public institutions must coordinate their records retention plan and schedule with their institution's records officer.

**WASHINGTON STATE AID PROGRAMS  
PARTICIPATING INSTITUTION CODES 2020-21**

1010	University of Washington	4430	Olympic College
1020	*Washington State University	4440	Peninsula College
<hr/>		4370	Pierce College
2030	Central Washington University	4450	Seattle Central College
2040	Eastern Washington University	4480	Shoreline Community College
2050	The Evergreen State College	4490	Skagit Valley College
2060	Western Washington University	4420	South Puget Sound Community College
<hr/>		4470	South Seattle College
3080	Antioch University	4500	Spokane Community College
3090	Bastyr University	4510	Spokane Falls Community College
3100	*Cornish Institute	4520	Tacoma Community College
3230	City University of Seattle	4530	Walla Walla Community College
3310	*DigiPen Institute of Technology	4540	Wenatchee Valley College
3120	*Gonzaga University	4550	Whatcom Community College
3110	*Heritage University	4560	Yakima Valley College
3130	*Northwest University	<hr/>	
3240	*Northwest College of Art	5700	Bates Technical College
3140	*Pacific Lutheran University	5710	Bellingham Technical College
3150	*Saint Martin's University	5720	Clover Park Technical College
6889	Seattle Film Institute	5730	Lake Washington Institute of Technology
3160	Seattle Pacific University	5740	Renton Technical College
3170	Seattle University	<hr/>	
3190	*University of Puget Sound	6740	*Divers Institute of Technology
3200	Walla Walla University	6750	International Air & Hospitality Academy
3210	*Whitman College	6780	*Gene Juarez Academy
3220	*Whitworth University	6840	Perry Technical Institute
3500	*Western Governors University - WA	6884	Stylemasters College of Hair Design
<hr/>		6887	Evergreen Beauty College
4300	Bellevue College	6890	*Paul Mitchell School of Richland
4310	Big Bend Community College	6970	Glen Dow Academy
4580	Cascadia College		
4320	Centralia College		
4330	Clark College		
4340	Columbia Basin College		
4350	Edmonds Community College	*Semester payment institutions	
4360	Everett Community College		
4380	Grays Harbor College		
4390	Green River College		
4400	Highline College		
4410	Lower Columbia College		
4460	North Seattle College		
4570	Northwest Indian College		

## CHAPTER 8

### LAWS AND AGENCY RULES

**Revised Code of Washington (RCW)** — A codification of current statutes (laws enacted and amended by the Legislature).

**Washington Administrative Code (WAC)** — The administrative rules and regulations by which state agencies operate to execute the Laws enacted by the Legislature.

**Please Note:** WSAC completed the formal rule making process during 2019-20, to update the following WAC based on the 2019-2020 session law. The effective date of the new WAC is June 29, 2020.

#### CHAPTER 28B.92 RCW

##### STATE STUDENT FINANCIAL AID PROGRAMS

###### Sections

- [28B.92.005](#) Financial aid application due dates and information—Notification.
- [28B.92.030](#) Definitions.
- [28B.92.040](#) Guidelines in performance of duties.
- [28B.92.060](#) State need grant awards.
- [28B.92.065](#) Washington college grant program appropriations reduction.
- [28B.92.070](#) Persian Gulf veterans—Limited application of RCW [28B.92.060](#).
- [28B.92.085](#) Part-time students—Review of financial aid policies and procedures.
- [28B.92.086](#) Dual credit programs—Review of financial aid policies and programs.
- [28B.92.090](#) Aid granted without regard to applicant's race, creed, color, religion, sex, or ancestry.
- [28B.92.100](#) Theology student denied aid.
- [28B.92.105](#) Supplemental nutrition assistance program eligibility notification.
- [28B.92.110](#) Application of award.
- [28B.92.120](#) Office to determine how funds disbursed.
- [28B.92.130](#) Grants, gifts, bequests, and devises of property.
- [28B.92.140](#) State educational trust fund—Deposits—Expenditures.
- [28B.92.150](#) Rules.
- [28B.92.200](#) Washington college grant program.
- [28B.92.205](#) Washington college grant program—Financial need.
- [28B.92.210](#) Washington college grant program—Caseload forecast.
- [28B.92.220](#) Postsecondary institution student-level data—Education data center.

**NOTES:** *Financial aid counseling curriculum for institutions with state need grant recipients—Financial education workshops: RCW 28B.76.502*

## CHAPTER 250-21 WAC

The guidance in this manual reflects the program rules for the Washington Administrative Code 250-21 – Washington College Grant.

### STATE STUDENT FINANCIAL AID PROGRAM—WASHINGTON COLLEGE GRANT

#### WAC Sections

- [250-21-010](#) Program definitions
- [250-21-11](#) Student eligibility
- [250-21-021](#) Institutions seeking participation
- [250-21-026](#) Participating institutions
- [250-21-031](#) Institutional administrative requirements
- [250-21-041](#) Award procedure
- [360-21-051](#) Institutional fund management requirements
- [250-21-061](#) Program administration and audits
- [250-21-071](#) Student complaint process
- [250-21-081](#) Suspension or termination of institutional participation
- [250-21-091](#) Appeal process
- [250-21-100](#) Apprentice eligibility
- [250-21-121](#) Apprenticeship programs seeking participation
- [250-21-126](#) Participating apprenticeship programs
- [250-21-131](#) Apprenticeship program administrative requirements
- [250-21-141](#) Award procedure
- [250-21-151](#) Program fund management requirements
- [250-21-161](#) Program administration and audits
- [250-21-171](#) Apprentice complaint process
- [250-21-181](#) Suspension or termination of program participation
- [250-21-191](#) Appeal process



## **CHAPTER 250-18 WAC**

### **RESIDENCY STATUS FOR HIGHER EDUCATION**

#### **WAC Sections**

- [250-18-010](#) Purpose and applicability.
- [250-18-015](#) Definitions.
- [250-18-020](#) Student classification.
- [250-18-025](#) Classification procedure.
- [250-18-030](#) Establishment of a domicile.
- [250-18-035](#) Evidence of financial dependence or independence.
- [250-18-045](#) Administration of residency status.
- [250-18-050](#) Appeals process.
- [250-18-055](#) Recovery of fees for improper classification of residency.
- [250-18-060](#) Exemptions from nonresident status.

## **CHAPTER 28B.118 RCW**

### **COLLEGE BOUND SCHOLARSHIP PROGRAM**

#### **Sections**

- [28B.118.005](#) Intent—Finding.
- [28B.118.010](#) Program design and student eligibility.
- [28B.118.020](#) Duties of the office of the superintendent of public instruction.
- [28B.118.030](#) Duty of school districts—Notification.
- [28B.118.040](#) Duties of the office of student financial assistance.
- [28B.118.050](#) Grants, gifts, bequests, and devises.
- [28B.118.060](#) Rules.
- [28B.118.075](#) Caseload estimate.
- [28B.118.080](#) Advising resources—Identification of officials, resources, programs, and students.
- [28B.118.090](#) Transmitting data to the education data center.

## **CHAPTER 250-84 WAC**

### **COLLEGE BOUND SCHOLARSHIP RULES**

#### **WAC Sections**

- [250-84-010](#) Purpose.
- [250-84-020](#) Definitions.
- [250-84-030](#) Eligible applicant.
- [250-84-040](#) Program promotion to eligible students.
- [250-84-050](#) Tracking of scholars.
- [250-84-060](#) Eligibility for receipt of college bound scholarships.
- [250-84-070](#) Scholarship award.
- [250-84-080](#) Request for review and student complaints
- [250-84-090](#) Grant disbursement to institutions.
- [250-84-100](#) Program administration and audits.

## APPENDIX

### Median Family Income (MFI) Levels for 2020-21 Washington College Grant and College Bound Scholarship Program Eligibility

Family Size	55%	60%	65% (CBS Maximum)	70% (WCG only)	75% (WCG only)	100% (WCG only Maximum)
1	\$27,500	\$30,000	\$32,500	\$35,000	\$38,000	\$50,500
2	\$36,000	\$39,500	\$43,000	\$46,000	\$49,500	\$66,000
3	\$44,500	\$49,000	\$53,000	\$57,000	\$61,000	\$81,500
4	\$53,000	\$58,000	\$63,000	\$68,000	\$72,500	\$97,000
5	\$62,000	\$67,500	\$73,000	\$78,500	\$84,000	\$112,500
6	\$70,500	\$76,500	\$83,000	\$89,500	\$96,000	\$128,000
7	\$72,000	\$78,500	\$85,000	\$91,500	\$98,000	\$130,500
8	\$73,500	\$80,000	\$87,000	\$93,500	\$100,000	\$133,500
9	\$75,000	\$82,000	\$88,500	\$95,500	\$102,500	\$136,500
10	\$76,500	\$83,500	\$90,500	\$97,500	\$104,500	\$139,500
11	\$78,500	\$85,500	\$92,500	\$99,500	\$106,500	\$142,500
12	\$80,000	\$87,000	\$94,500	\$101,500	\$109,000	\$145,000
13	\$81,500	\$89,000	\$96,500	\$103,500	\$111,000	\$148,000
14	\$83,000	\$90,500	\$98,000	\$105,500	\$113,500	\$151,000
15	\$84,500	\$92,500	\$100,000	\$107,500	\$115,500	\$154,000
16	\$86,500	\$94,000	\$102,000	\$110,000	\$117,500	\$157,000
17	\$88,000	\$96,000	\$104,000	\$112,000	\$120,000	\$159,500
18	\$89,500	\$97,500	\$105,500	\$114,000	\$122,000	\$162,500
19	\$91,000	\$99,500	\$107,500	\$116,000	\$124,000	\$165,500
20	\$92,500	\$101,000	\$109,500	\$118,000	\$126,500	\$168,500

*The above MFI chart was prepared by the Washington Student Achievement Council (WSAC) from U.S. Department of Commerce (Census Bureau) data published on-line by the U.S. Department of Health & Human Services, Office of Community Services website as transmittal number LIHEAP-IM-2019-02, dated August 7, 2019, from the Low Income Home Energy Assistance Program (LIHEAP). It was derived from five-year estimates from the 2013 through 2017 American Community Surveys (ACSes). All figures have been rounded to the nearest \$500 income range.*

**Note:** A CBS Scholar could be eligible for College Bound Scholarship funding for some years, and not eligible for others, if the family's MFI level exceeded 65 percent in one or more years.

## WCG and CBS Award Amounts for 3 Quarters/2 Semesters for Students Enrolled Full-Time for All Terms

2020-21 Maximum Washington College Grant and College Bound Scholarship Award Amounts for 3 Quarters/2 Semesters										
Institution/Sector	Median Family Income									
	CBS Max	0 - 55%	0 - 55%	56 - 60%	56 - 60%	61 - 65%	61 - 65%	66 - 70%	71 - 75%	76 - 100%
	WCG + CBS = Full CBS Award	Full WCG award	CBS Amount	70% of full WCG award	CBS Amount	60% of full WCG award	CBS Amount	WCG ONLY = 50% of full award	WCG ONLY = 24.5% of full award	WCG ONLY = 10% of full award
University of Washington	\$11,540	\$11,040	\$500	\$7,728	\$3,812	\$6,624	\$4,916	\$5,520	\$2,705	\$1,104
Washington State University	\$11,235	\$10,735	\$500	\$7,515	\$3,721	\$6,441	\$4,794	\$5,368	\$2,630	\$1,074
Central Washington University	\$7,677	\$7,177	\$500	\$5,024	\$2,653	\$4,306	\$3,371	\$3,589	\$1,758	\$718
Eastern Washington University	\$7,194	\$6,694	\$500	\$4,686	\$2,508	\$4,016	\$3,178	\$3,347	\$1,640	\$669
The Evergreen State College	\$7,667	\$7,167	\$500	\$5,017	\$2,650	\$4,300	\$3,367	\$3,584	\$1,756	\$717
Western Washington University	\$7,881	\$7,381	\$500	\$5,167	\$2,714	\$4,429	\$3,452	\$3,691	\$1,808	\$738
Private Four-year Non-Profit	\$11,904	\$9,739	\$2,165	\$6,817	\$5,087	\$5,843	\$6,061	\$4,870	\$2,386	\$974
Private Four-year For-Profit	\$11,904	\$8,517	\$3,387	\$5,962	\$5,942	\$5,110	\$6,794	\$4,259	\$2,087	\$852
WGU Washington	\$6,280	\$5,619	\$661	\$3,933	\$2,347	\$3,371	\$2,909	\$2,810	\$1,377	\$562
Community & Technical Colleges	\$4,719	\$4,219	\$500	\$2,953	\$1,766	\$2,531	\$2,188	\$2,110	\$1,034	\$422
CTC Applied Bachelor's	\$7,264	\$6,764	\$500	\$4,735	\$2,529	\$4,058	\$3,206	\$3,382	\$1,657	\$676
Private Two-Year Non-Profit	\$4,719	\$3,694	\$1,025	\$2,586	\$2,133	\$2,216	\$2,503	\$1,847	\$905	\$369
Private Two-Year For Profit	\$4,719	\$2,823	\$1,896	\$1,976	\$2,743	\$1,694	\$3,025	\$1,412	\$692	\$282

updated 6/23/2020

Please note that annual awards may not be exceeded for 3 quarter/2 semester enrollments. If annual award amounts do not divide evenly, you must round up/down accordingly to ensure you do not exceed the annual limit. However, eligible students will receive more than these amounts if enrolled more than 3 quarters/2 semesters.

## Maximum Washington College Grant Awards for Students Enrolled Full-Time for All Terms

2020-21 Washington College Grant Award Amounts for 3 Quarters/2 Semesters						
Institution/Sector	Median Family Income					
	0% - 55% (full award)	56% - 60% (70% of full award)	61% - 65% (60% of full award)	66% - 70% (50% of full award)	71% - 75% (24.5% of full award)	76% - 100% (10% of full award)
University of Washington	\$11,040	\$7,728	\$6,624	\$5,520	\$2,705	\$1,104
Washington State University	\$10,735	\$7,515	\$6,441	\$5,368	\$2,630	\$1,074
Central Washington University	\$7,177	\$5,024	\$4,306	\$3,589	\$1,758	\$718
Eastern Washington University	\$6,694	\$4,686	\$4,016	\$3,347	\$1,640	\$669
The Evergreen State College	\$7,167	\$5,017	\$4,300	\$3,584	\$1,756	\$717
Western Washington University	\$7,381	\$5,167	\$4,429	\$3,691	\$1,808	\$738
Private Four-Year Non-Profit	\$9,739	\$6,817	\$5,843	\$4,870	\$2,386	\$974
Private Four-Year For-Profit	\$8,517	\$5,962	\$5,110	\$4,259	\$2,087	\$852
WGU Washington	\$5,619	\$3,933	\$3,371	\$2,810	\$1,377	\$562
Community & Technical Colleges	\$4,219	\$2,953	\$2,531	\$2,110	\$1,034	\$422
CTC Applied Bachelor's	\$6,764	\$4,735	\$4,058	\$3,382	\$1,657	\$676
Private Two-Year Non-Profit	\$3,694	\$2,586	\$2,216	\$1,847	\$905	\$369
Private Two-Year For-Profit	\$2,823	\$1,976	\$1,694	\$1,412	\$692	\$282

\*Eligible students will receive more than these amounts if enrolled for more than 3 quarters or 2 semesters.

**Please note:** Annual awards may not be exceeded for 3 quarter/2 semester enrollments. If annual award amounts do not divide evenly, you must round up/down accordingly to ensure you do not exceed the annual limit.