

**WASHINGTON COLLEGE GRANT  
FOR APPRENTICESHIP  
PROGRAM MANUAL**  
*FOR SPONSORS AND THIRD-PARTY SERVICERS*

**2024-25**

AUGUST 2024



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# Washington College Grant for Apprenticeship Program Manual 2024-25 Academic Year

## INTRODUCTION

### WELCOME to the Washington College Grant for Apprenticeship Program Manual

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

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
10/10/2024	Chapter 3: Quantitative Standard for Apprentices	Corrected a typographical error and provided examples.
10/10/2024	Appendix E: Quarterly Reporting Instructions	Added 2024-25 Quarterly Reporting Instructions

## BACKGROUND

### ♦ Washington College Grant

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. WCG awards come directly from the Washington Student Achievement Council (WSAC), once they are requested by Sponsors.

The Workforce Education Investment Act ([HB 2158](#)) added guaranteed funding to WCG for all eligible apprentices, starting in the 2020-21 Academic Year. Additional information on the Washington College Grant and College Bound Scholarship eligibility requirements for colleges and universities can be found in the separate Washington College Grant and College Bound Scholarship Program Manual for Financial Aid Administrators at <https://wsac.wa.gov/FAA-resources>.

### ♦ WCG Apprenticeship (WCG-A)

The Washington College Grant was expanded to include approved apprenticeship programs under [Chapter 49.04 RCW](#), which started in the 2020-21 fiscal year.

The WCG for Apprenticeship manual provides guidelines on how Sponsors can connect their apprentices to grant funding. This funding is guaranteed for all apprentices who qualify—up to 100 percent Median Family Income (MFI) as established in chapters 1 and 2.

## **NEW FOR 2024-25:**

### **◆ Changes from FAFSA Simplification**

The Free Application for Federal Student Aid (FAFSA), which is administered by the U.S. Department of Education, has been significantly modified for 2024-25. These changes have led to changes with the Washington College Grant program, which includes the WA Grant for Apprenticeship (WG-A).

#### **Enrollment Intensity**

State aid will align with federal aid related to enrollment intensity for calculating awards and quarters of eligibility used calculations. See Chapter 2.

#### **Number in College (Chapter 2)**

The number in college will not be factored into MFI beginning with the 2024-25 Academic Year. Institutions are allowed to perform professional judgment on a case-by-case basis to take into consideration an apprentice's specific circumstances. See Chapter 2 for more information.

#### **Dependency Guidance**

Chapter 1 has been updated to include revised guidance for determining if an otherwise Dependent applicant meets a condition to be evaluated for WCG-A as an Independent Applicant.

#### **Family Size**

Chapter 2 has been updated to include revised guidance on who can be counted in the family size.

### **◆ SB 5904: Extending the Terms of Eligibility for Financial Aid Programs**

SB 5904 extends and aligns the maximum time frame allowed to receive Washington College Grant (WCG), College Bound Scholarship (CBS), and Passport to Careers (Passport to College Promise Program and Passport to Apprenticeship Opportunity Program – PTC) to 150 percent of a baccalaureate degree, or 18 full-time quarters/12 full-time semester, or the equivalent clock hours of full-time eligibility of the published length of the program in which the student is enrolled, or the credit or clock hour equivalent.

- Extending the maximum period aligns the maximum time frame usage across WCG, CBS, and PTC programs. The five-year eligibility window for CBS is eliminated, but students are still required to enroll within one year after high school graduation.
- The 26-year age restriction for PTC is eliminated but students must still enroll by age 22.

*NOTE: Washington College Grant includes the WA Grant for Apprenticeship (WG-A) program. Additionally, this means that apprentices who have previously exhausted their Quarters of Eligibility Remaining (QERs) could regain eligibility beginning in the 2024-25 Academic Year.*

### **◆ WSAC Approved Washington College Grant-Connect (WCG-C) Eligible Program**

WSAC has approved the Employment Security Department's [Economic Security for All \(EcSA\)](#) program as WCG-C eligible. Apprentices receiving this type of public assistance were considered income-eligible for WG-A through WCG-C beginning with the 2023-24 Academic Year. The WCG-C Eligibility Checker has been updated to include EcSA.

*NOTE: Approval for this program is not part of 2SHB 1835/2SHB 2214. Dependents are not included as they would be for PWA, HEN, and ABD programs, which are outlined in statute.*

See Chapter 2 for details on policies and awarding WCG-C eligible students.

### ◆ **WG-A Apprentice Application Updates**

In alignment with SB5904, the 2024-2025 WG-A Application has been updated to reflect the change to Washington College Grant's lifetime maximum eligibility from 5 full-time years to 6 full-time years.

To support clarity, Questions 1 and 2 were modified to include *Occupation* for Apprenticeship Program and *Sponsor Organization* for Program Sponsor.

To incorporate WSAC's approved WCG-C program, question 22 has been updated to include Economic Security for All (EcSA) as a public assistance program that can qualify applicants for Washington College Grant – Connect eligibility.

Additionally, the following updates have been made to align with changes to the 2024-2025 Free Application for Federal Student Aid (FAFSA):

- Question 29 (Dependency determination question) has been modified to include children and other people (besides a spouse) who live with the applicant and receive more than half of their support from the applicant. The previous application had one question for children and a separate question for other people.
- Question 32 (Dependency determination question) has updated wording to align with the 2024-2025 FAFSA.
- Question 37 was added for Dependent applicants to answer "yes" or "no" if they will primarily be living at home with their parents during the fiscal year. This response is needed to align with changes to Cost of Attendance budgets. Page 4 of the WG-A Application (page of application reserved for SFAAs) has been updated for a space to record the applicant's response.
- Guidance for Dependency determination questions 28, 31, and 33 were updated to align with the 2024-2025 FAFSA.
- Question 40 was changed from *Household Size* to *Family Size*. Guidance for family size has been provided on the bottom of Page 2 of the WG-A Application. Additionally, guidance in Chapter 2 (Calculating WCG-A Apprentice Awards) of this manual has been updated to reflect a changes that unborn children are no longer counted in the family size.
- Guidance for Question 41 (Family Income) has also been provided in an informational box under the question on the WG-A Application.
- Question 42 asks for the number of family members who will be in college or apprenticeship during the fiscal year. Although a change in wording from *household members* to *family members* was made, the more impactful change is that this information is now *only* used for data collection purposes. The number of family members in college or apprenticeship is no longer used in the determination of an applicant's Median Family Income (MFI).

### ◆ **Updated Guidance for Eligibility Determinations**

Guidance provided in this manual has been updated to support SFAAs with eligibility determinations (see Chapter 1 and 2). The guidance has been updated to align with state statutory requirements and changes to Federal Student Aid policies when applicable. And the guidance now corresponds with the WCG-A Apprentice Application updates.

#### ◆ **Update to Satisfactory Program Progress (SPP) Policy**

WG-A Satisfactory Program Progress (SPP) policy has been modified to align with Washington College Grant's (WCG) Satisfactory Academic Progress (SAP) policy, beginning with the 2024-25 Fiscal Year. While this policy can be implemented as early as the 2024-25 Fiscal Year, there is flexibility for SFAAs to adjust their policy to fit the needs of their apprentice population. See Chapter 3 for additional guidance.

#### ◆ **Ability to Upload Awards and Request Funds**

WSAC Portal development was completed. New screenshots are included in this manual. WSAC will continue to provide additional guidance and training if any changes are made to allow the Sponsor Financial Aid Administrator (SFAA) to complete file Uploads for WCG-A. Once loaded into the system, you will be able to request apprentice payments directly through the WSAC Portal. **(See Chapter 4.)**

#### ◆ **Washington Bridge Grant**

Through Budget language, [ESSB 5187](#), Section 613(9), p. 606), the WA Bridge Grant will continue for the 2024-25 academic year. WCG-A recipients who are receiving a maximum WCG-A award (0-65 percent MFI), but are **not** College Bound Scholarship (CBS) eligible, and who have enrolled in at least 3 credits or the clock hour equivalent, are also entitled to receive a \$500 Washington Bridge Grant. Apprentices who meet eligibility under WCG-C also qualify for the WA Bridge Grant.

Most apprentices will not be CBS eligible; however, there may be rare instances that an eligible CBS student applies for WCG-A. SFAAs are encouraged to upload a CSV file for payment requests in Portal Training to check for CBS eligibility before sending out an award notice to an applicant. If an applicant does show CBS eligibility, SFAAs should contact WSAC using a secure message in the WSAC Portal to notify WSAC and await further instructions.

The Washington Bridge Grant is an annual stipend awarded in addition to WCG-A to provide supplementary financial support to low-income individuals to cover higher education/apprenticeship expenses beyond tuition and fees, such as books, lab fees, supplies, technology, transportation, housing, and childcare.

**The award amount can be a flat rate, lump sum payment for the year or awarded proportionally across payment periods whichever is in the best interest of the apprentice. The award is limited to need.**

Apprentice directive requirements for Sponsors apply to Washington Bridge Grant awards. **See Chapter 6.**

Eligible individuals are apprentices who:

- Are enrolled in at least three credits, or the clock hour equivalent, at a WSAC approved Sponsor;
- Receive a maximum Washington College Grant for Apprenticeship (WCG-A) award;
- Meet Satisfactory Program Progress (SPP);
- Are **NOT** College Bound Scholarship eligible. Please note that these situations are not likely but are possible.
- To be CBS eligible does not mean an apprentice is receiving CBS funding. WSAC recommends using Portal Training to upload a CSV file for payment requests to ensure that apprentices do not have eligibility for CBS before sending an award notification. Contact WSAC using a secure message in the WSAC Portal <mailto:>if an applicant is also eligible for CBS and await further instructions.
  - Some examples of CBS students who might be eligible for a WA Bridge Grant include apprentices who signed up for CBS but did not meet the high school graduation requirement, did not meet the enrollment deadline, and those who are past the 5-year eligibility.

#### ◆ **Expansion of Median Family Income (MFI) Ranges**

Through Budget language, [ESSB 5187](#), Section 923 (2(b), p. 670, the maximum award MFI range expanded from 0-60 percent MFI to 0-65 percent MFI for the 2023-24 and 2024-25 academic years. All other MFI categories remain the same.

**See updated MFI Chart in Chapter 2 and/or Appendix.**

#### ◆ **Dual- and Concurrent-Participation in both WCG and WCG-A**

To address apprentices who are also enrolled in an academic degree pathway and eligible for WCG and WCG-A, guidance has been updated in Chapter 2 for applicants who are seeking Dual- or Concurrent-Participation awarding of both WCG and WCG-A during the fiscal year.

#### ◆ **Quarterly Reporting**

WSAC requires quarterly reports in addition to the Year End Reconciliation Report (also referred to as the Unit Record Report) These reports will be due on:

- November 13, 2024
- February 19, 2025
- May 6, 2025

The Year End Report will still be due on July 10, 2025. **Please refer to Chapter 4.** Third-Party Servicers will follow reporting deadlines established in their executed contract.

## REMINDERS

### ◆ **Residency Requirement Change – Residency Affidavit**

In 2022 ESSB 5874 modified/clarified that students must have lived in Washington for a period of one year prior to **enrollment in higher education primarily for reasons other than educational**.

- The Washington residence must be primarily for purposes other than postsecondary education. This means that students who take more than six college credits (not including dual credit) in any one term after moving to Washington cannot count those terms as part of their 12 consecutive months of maintaining a primary residence. That is, unless they prove that postsecondary education was not their main reason for establishing a primary residence in Washington.

To qualify, the individual needs to have a high school diploma or equivalent and have lived in Washington for a period of one year prior to enrollment in higher education primarily for reasons other than educational.

Apprentices will need to complete the residency [affidavit](#).

This Bill also modifies residency for active-duty military members, National Guard, reservists, and their dependents. Please refer to <https://wsac.wa.gov/student-residency> for more detailed information.

### ◆ **WCG-Apprenticeship (WCG-A) Award Amount Increase**

E2SSB 5764 aligns the WCG-A maximum award for those in approved registered apprenticeships with the maximum award for full-time students attending two-year public institutions. (See updated award charts in Chapter 2 and Appendix)

- **Section 2** – Indicates intent for apprentices who receive related supplemental instruction (RSI) through a community and technical college (CTC) to be awarded WCG-A by the CTC. Requires SBCTC to implement fully by 2025-2026 Academic Year (AY). SBCTC to collaborate with WSAC to create a student IT interface.
- **Section 3** – Requires WSAC to contract with the William D. Ruckelshaus Center to conduct research. Some of the research includes (but this is not a complete list), evaluate paths to credential for apprentices, examine national best practices to award education credentials to apprentices, research apprentices' demand for degrees, review the current funding model within the CTC system, identify and remove barriers for apprentices to receive WCG-A.
- **Section 4** – Four-year public colleges must establish a policy for granting as many credits as possible for RSI by the 2028-2029 AY.

## ◆ Repayment Protocol

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

Failure to report repayments by the established deadlines, whether being collected by the Sponsor, or WSAC, may result in the repayment of funds to WSAC by the Sponsor. 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 the portal for that apprentice. Pending development of the IT solution to report these repayments, Sponsors will notify program staff directly. Once the solution is in place, additional guidance will be given.*

## ◆ Unclaimed Property

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

## ◆ Accurate Reporting

Ensure that all data on your awarding and payment reports are accurate. Correct or update changes to apprentice status. This data is critical to forecast program funding costs. Do not report apprentices who were not eligible for aid (for example: did not meet Satisfactory Program Progress; failed to complete all application materials; did not meet residency requirements).

## ◆ Apprentices Needing Repayment Status Information (Chapter 5)

WSAC is using a billing service for repayments. Apprentices 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.

## ◆ Maximum Usage Limit

Please note that Satisfactory Program Progress and the maximum usage limit of five full time years of eligibility (15 quarters, 10 semesters, or the hour equivalency) remains unchanged.

## ◆ Information for Apprentices:

Refer apprentices to <https://wsac.wa.gov/wcg> for financial aid information and resources.

- This is the page apprentices will land on if they click on the link in the *Washington State Aid Conditions of Award* (Chapter 6): [www.opportunitypathways.wa.gov](http://www.opportunitypathways.wa.gov)
- For specific information on the **Washington College Grant for Apprenticeship**, visit: <https://wsac.wa.gov/wcg-apprentices>.

## 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 apprentices.
- 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 apprentices when increasing tuition.
  - Apprentices 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 apprentice choice.
- 1989:** Part-time apprentices authorized.
- 1991:** A “fair share” fund distribution model was adopted creating campus “reserve funds” based on percentage of campus-eligible apprentices divided by all eligible apprentices.
- 1993:** Revised the eligibility and cost model to use Median Family Income (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 (CBS), 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 apprentices 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 apprentices receive funding.
- 2014:** The Legislature enacted the REAL Hope Act, granting SNG eligibility determination for apprentices who meet RCW 28B.15.012(2)(e) residency requirements, often referred to as “1079” requirements. This includes non-U.S. citizens, including undocumented apprentices.
- 2014:** SNG Awards for apprentices attending for-profit institutions restored to 100 percent level.
- 2015:** The Legislature required that all eligible CBS Scholars be awarded maximum SNG awards.
- The State Attorney General’s Office indicated that apprentices 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 apprentices 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. Apprentices 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 apprentices that meet WCG eligibility given WCG priority in statute.
  - CBS sign-up is extended to 9th grade apprentices 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 apprentices 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
- 2021:** Residency requirement changed RCW 28B.15.012 (e) to living in WA for 1 year prior to being admitted in college and graduating from any high school or GED program. Previously referred to as the “1079” Requirement.
- 2022:** **ESSB 5693:** Washington Bridge Grant established for 2022-23 AY - \$500 WA Bridge Grant for students who are receiving maximum WCG and are not CBS eligible students. Students must be enrolled in at least three credits and the grant is not prorated. The grant is paid in either one lump sum in the first term of enrollment or awarded proportionally across terms, limited to need. Increased maximum awards up to 60 percent MFI
- E2SSB 5764:** Aligns the WCG-A maximum award for those in approved registered apprenticeships with the maximum award for full-time students attending two-year public institutions.
- HB 1907:** Requires that postsecondary institutions that participate in state student financial aid programs have a gift equity packaging policy allowing for a student who receives a private scholarship to receive up to 100 percent of the student's unmet need before any of the student's federal, state, or institutional financial aid is reduced. This provision does not apply to public community and technical colleges.
- ESSB 5874:** Modifies/clarifies that students must have lived in Washington for a period of one year prior to enrollment in higher education primarily for reasons other than educational for residency purposes.
- SSHB1835:** Washington College Grant - Connect beginning in 2023-24 AY. Allows students (or a dependent of the student who is in 10th, 11th, or 12th grade) who are in one of the following types of public assistance to receive WCG without filing a WASFA or a FAFSA:
- Aged, blind, or disabled assistance benefits
  - Essential needs and housing support program benefit
  - Pregnant women assistance program financial grants

**2023: ESSB 5187** Extends Washington Bridge Grant through 2024-2025 AY. Expands the Washington College Grant maximum award MFI range to 0-65% through 2024-2025 AY

**HB 1232:** Requires only College Bound Scholarship (CBS) eligible students seeking direct admission to a public or private four-year institution of higher education to graduate from high school with at least a C grade point average.

- Requires the Education research and Data Center to annually send CBS data that is submitted by institutions of higher education to the Washington Student Achievement Council (WSAC).
- Requires WSAC to submit an annual legislative report beginning November 1, 2023, on CBS data.

**SB 5079:** OFM must calculate and transmit tuition operating fees to institutions by October 1st of each year for the following Academic Year.

**2024: ESHB 2019** Establishes the Native American apprentice assistance program for members of federally recognized Indian tribes whose traditional lands and territories included parts of Washington beginning in 2025.

**2SHB 2214:** Expands income eligibility for the Washington College Grant (WCG) to students in the 10th, 11th, or 12th grade whose families are recipients of Washington Basic Food (SNAP) or Washington Food Assistance programs beginning the 2025-26 AY.

**SB 5904:** Extends and aligns the maximum time frame allowed to receive Washington College Grant (WCG), Washington College Bound Scholarship (CBS), and Passport to Careers (Passport to College Promise Program and Passport to Apprenticeship Opportunity Program – PTC) from five years or 125 percent to six years or 150 percent of a baccalaureate degree, or 18 full-time quarters/12 full-time semester, or the equivalent clock hours of full-time eligibility the published length of the program for which the student is enrolled or the credit or clock hour equivalent.

- Removes the 5-year eligibility window for CBS, after enrollment but keeps the one-year enrollment requirement from high school graduation.
- Removes the age restriction for PTC on the back end but still requires enrollment by age 22.

**SSB 6053:** Requires WSAC to enter into data-sharing agreements with OSPI to facilitate the transfer of high school student directory information for informing high school students of postsecondary financial aid and educational opportunities available in the state. Allows a nonpublic university, college, school, or institute in the state of Washington that is a member institution of an accrediting association recognized by rule of WSAC to enter into student data-sharing agreements with OSPI.

## WCG FOR APPRENTICESHIP REPORT AND FUNDING REQUEST TIMELINE

<b>Monthly</b>	Sponsors will submit award information and payment requests monthly due to ongoing enrollment during the fiscal year.
<b>November 13, 2024</b>	Quarter 1 Reconciliation Report Due
<b>February 19, 2025</b>	Quarter 2 Reconciliation Report Due
<b>May 6, 2025</b>	Quarter 3 Reconciliation Report Due
<b>May/June 2025</b>	Annual Workshops – state financial aid training and updates.
<b>June 30, 2025</b>	Final date to request WCG-A Funds.
<b>July 10, 2025</b>	Final Year End Reconciliation report due.  Sponsors will be required to submit one final year end reconciled report for their apprentices.

# WASHINGTON COLLEGE GRANT FOR APPRENTICESHIP 2023-24 PROGRAM MANUAL

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# CHAPTER 1

## Washington College Grant for Apprenticeship

### Eligibility Determination and Monitoring

#### ELIGIBILITY DETERMINATION

This is a general overview of the steps required for eligibility determination. Refer to additional details in this chapter (or other chapters as referenced) for guidance.

- ❑ **First:** An apprentice completes the *WA Grant for Apprenticeship (WG-A) Application* and submits the application to the Sponsor's Financial Aid Administrator (SFAA) with any required documents.
- ❑ **Second:** SFAA determines if the applicant meets WA Residency requirement for WG-A.
- ❑ **Third:** SFAA determines if the applicant meets high school graduation requirement for WG-A and has not already earned a bachelor's degree or higher.
- ❑ **Fourth:** SFAA queries the applicant's information against WSAC's WCG-Connect (WCG-C) Eligibility Checker in the Portal.

Apprentices who appear in the WCG-Connect Eligibility Checker have been confirmed to be enrolled in one of three DSHS programs or other programs approved by WSAC that allow eligible applicants to meet the WCG income eligibility.

- Aged, Blind, or Disabled (ABD) program
- Housing and Essential Needs (HEN) referral program
- Pregnant Women Assistance (PWA)
- Economic Security for All (EcSA)

It is important to load all applicants through the WCG-Connect Eligibility Checker to identify apprentices who could be eligible to receive maximum WG-A, if all other eligibility requirements have been met such as residency, eligible apprenticeship program, high school diploma or equivalent, etc. This also means an apprentice's award needs to be updated if they did not meet the 65 percent MFI based on the information submitted on their WG-A Application.

- ❑ **Fifth:** SFAA will determine the applicant's Median Family Income (MFI) percentile to determine if the applicant meets WG-A MFI eligibility. The SFAA

should also note if the applicant may be eligible for WA Bridge Grant based on the applicant's MFI percentile.

- ❑ **Sixth:** SFAA queries the applicant's information against WSAC's Repayment Checker in the Portal. An apprentice who owes repayment on any Washington State financial aid program or is in default on a loan made through a Washington State loan program is ineligible for WG-A.
- ❑ **Seventh:** SFAA queries the applicant's information against WSAC's Archive in the WSAC Portal to ensure that the applicant has enough Quarters of Eligibility Remaining (QERs) for Washington College Grant, which includes WG-A. If an apprentice has less than 3.00 QERs remaining, their award may need to be prorated (see Chapter 2). If an apprentice has no (0) QERs, they are ineligible for Washington College Grant, including WG-A.
- ❑ **Eighth:** The SFAA should upload the applicant's data using the .CSV Payment Request File into WSAC's Portal Training site (not the Live WSAC Portal site) to determine if the applicant has any edits that populate. If there are any edits, the SFAA should ensure that the edits do not require additional action before awarding.

If the applicant has any edits due to a Washington College Grant (WCG) or College Bound Scholarship (CBS) award in the same fiscal year, the SFAA should use secure messaging feature in WSAC's Portal (not Portal Training) to request a calculation from WSAC.

If the applicant was awarded any WA Bridge Grant or CBS, the SFAA should use secure messaging feature in WSAC's Portal (not Portal Training) to request a WA Bridge Grant eligibility review. See also Chapter 2 for awarding.

- ❑ **Ninth:** The SFAA must determine if the applicant is meeting Satisfactory Program Progress (SPP) requirements. See Chapter 3 for SPP requirements.

Initial Criteria for WCG-A Eligibility Determination	
<b>APPRENTICES MUST:</b>	
<b>Submit an Approved Application</b>	<input type="checkbox"/> See Sponsor for WSAC provided Application and for information on how to submit the Application.
<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 apprentices 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), by completing the Residency Affidavit, previously referred to as the “1079” requirements.</li> <li>▪ Both U.S. citizens and non-citizens may be eligible to meet residency requirements.</li> <li>▪ Proof of residency can be satisfied in several ways including a WA driver’s license, voter registration or rental agreement.</li> </ul> <p>For complete listing of accepted methods of showing residency, see: <a href="https://wsac.wa.gov/student-residency">https://wsac.wa.gov/student-residency</a></p>
<b>Meet High School (HS) Graduation Requirements</b>	<input type="checkbox"/> High School graduation or GED/equivalent
<b>Meet Postsecondary Credential Eligibility</b>	<input type="checkbox"/> Cannot have earned a bachelor’s degree or higher or its foreign equivalent
<b>Meet family income eligibility based on MFI level</b>	<input type="checkbox"/> 100% Median Family Income (MFI), or less, or meet eligibility under WCG-Connect (WCG-C).
<b>Maximum Full-Time Term Usage</b>	<input type="checkbox"/> Cannot have used 18 quarters/12 semesters or the hour equivalent of Washington College Grant (WCG) or Washington College Grant for Apprenticeship (WCG-A)
<b>Dual- or Concurrent- Enrollment</b>	<input type="checkbox"/> Cannot receive more than one financial aid award that essentially duplicates funding for the same Cost of Attendance (COA) budget item(s).
<b>Satisfactory Program Progress</b>	<input type="checkbox"/> Must be in good standing with their apprenticeship program. (See Chapter 3 for additional information).

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

WCG-A Eligibility
<b>ALL WCG-A Recipients MUST:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Meet Washington resident tuition requirements according to RCW 28B.15.012(2)(a)-(e).</li> <li><input type="checkbox"/> Meet high school graduation requirement.</li> <li><input type="checkbox"/> Demonstrate financial need as defined under RCW 28B.92.030.</li> <li><input type="checkbox"/> Enroll in at least 3 credits per quarter or the hour equivalent.</li> <li><input type="checkbox"/> Enroll in an approved registered apprenticeship program at an approved WSAC Sponsor.</li> <li><input type="checkbox"/> Meet Satisfactory Program Progress (SPP) requirements detailed in Chapter 3.</li> </ul>
<b>ALL WCG-A Recipients CANNOT:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Exceed maximum term usage.</li> <li><input type="checkbox"/> Be in unsatisfactory program progress or denied status.</li> <li><input type="checkbox"/> Owe a repayment to any state program.</li> <li><input type="checkbox"/> Be in default on a state student loan.</li> <li><input type="checkbox"/> Have received a bachelor's degree or higher or its foreign equivalent.</li> <li><input type="checkbox"/> Receive more than one financial aid award that essentially duplicates funding for the same Cost of Attendance (COA) budget item(s).</li> </ul>

## WCG-A Application

In accordance with WSAC's statewide marketing campaign to utilize the shorthand term "WA Grant for Apprenticeship," the application has been retitled as the *WA Grant for Apprenticeship (WG-A) 2024-25 Application*, or *WG-A Application*. This manual will continue to reflect the official program name, Washington College Grant for Apprenticeship (WCG-A) and will refer to the application as the WCG-A Application.

A version of the application for Sponsors utilizing WSAC's approved third-party servicer (Servicer) is also available. Approved WCG-A Sponsors using WSAC's Servicer will have their apprentices complete the Servicer version of the WCG-A application.

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

Questions and fields on the application have been numbered to align with updated guidance provided in this manual.

WCG-A Applications should only be made available to apprentices at Sponsors who have been approved by WSAC to participate in WCG-A.

A WCG-A application must be submitted for the fiscal year that an applicant is seeking financial assistance. WSAC's fiscal year runs from July 1 to June 30. For example, an apprentice seeking eligibility for WCG-A for August 1, 2024, must submit the 2024-25 WCG-A application, even if they are applying in May 2024. Eligibility must be determined at least once per fiscal year, so an individual seeking financial assistance from WCG-A over multiple fiscal years, must re-apply once per fiscal year using the corresponding fiscal year's WCG-A application.

Sponsors who have been approved by WSAC to participate and administer WCG-A need to have policies and procedures that directs prospective applicants to submit their completed applications and supplemental documents to the Sponsor Financial Aid Administrator (SFAA).

Policies and procedures should ensure protecting confidentiality of Personally Identifiable Information (PII).

Sponsors who have been setup to participate in WCG-A with a third-party servicer are required to ensure protecting confidentiality of PII for any apprentice seeking to apply for WCG-A. See Chapter 7 (for Sponsors) and Chapter 8 (for Servicers) for additional information.

SFAAs have been provided additional space on Page 4 of the *WA Grant for Apprenticeship (WG-A) Application* to document eligibility determination, award values, and any other issues pertaining to the application.

## Washington Residency

Apprentices must meet one of five resident tuition requirements as outlined in [RCW 28B.15.012](#) (2)(a) through (e). Residency requirements for apprentices and students attending an academic institution are identical.

Questions **(11-14, 18)** on the WCG-A Application can be used to help determine WA residency.

Sponsor FAAs:

- Determine if an apprentice meets residency requirements. In making this determination, the SFAA should indicate which part of the residency RCW an apprentice meets in their documentation.
- Retain records of this documentation as outlined in Chapter 7 (for Sponsors) and Chapter 8 (for Servicers) of this manual.

This manual may be used to determine if an apprentice has met residency requirements.

- Additional residency information is available at <https://www.wsac.wa.gov/student-residency>.
- If there are any questions, please email [residency@wsac.wa.gov](mailto:residency@wsac.wa.gov).

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

### Apprentice Group #1

- US citizens and nationals
- Permanent residents
- Citizens of the Federated States of Micronesia, Marshall Islands, and Palau
- [FAFSA-eligible](#) non-citizens
- Apprentices with current or expired Deferred Action for Childhood Arrivals (DACA) status
- Apprentices with a current Employment Authorization Document (EAD)
- Apprentices with one of the following immigration statuses:
  - Asylee
  - Canadians who qualify for permanent residence under the Jay Treaty
  - Cuban-Haitian Entrants, Conditional Entrants, and Parolees
  - One of the following visa statuses: A-1, A-2, A-3, DV-1, DV-2, DV-3, DV-6, DV-7, DV-8, E-1, E-2, E-3, G-1, G-2, G-3, G-4, G-5, H-1B, H4, I, K-1, K-2, K-3, K-4, L-1, L-2, N-8, N-9, NATO-1, NATO-2, NATO-3, NATO-4, NATO-5, NATO-6, NATO-7, O-1, O-2, O-3, Q-1, Q-2, Q-3, R-1, R-2, S, U-1, U-2, U-3, U-4, U-5, V-1, V-2, or V-3 visa status

- Pending adjustment of status without a concurrent immigration status
- Refugee
- Special Immigrant Juvenile (SIJ) status or Special Immigrant Visa (SIV) status
- Temporary Protected Status (TPS)
- Withholding of Removal status or Withholding of Deportation status

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).

## **Apprentice Group #2**

- Undocumented apprentices without expired or current DACA status.
- Apprentices who are not listed in Apprentice Group #1 (for example, apprentices with an international student F visa who do not have a current EAD).

## **Residency requirements for Apprentice Group #1**

Apprentices in Apprentice Group #1 meet residency requirements for WCG-A if they meet **ONE** of the following five subsections of RCW 28B.15.012(2). The first two subsections of the RCW, **(a) and (b), are the most common**. Each RCW subsection is outlined below.

### **(a) Financially independent Apprentices** (definition differs from [federal aid definition](#))

To be considered financially independent for residency purposes, an apprentice 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 meet residency requirements for tuition and state aid through (a), financially independent Apprentices must have a domicile in the state for at least one year immediately before the term they apply for residency.

- The domicile must be primarily for purposes other than educational (meaning the Apprentice cannot take more than six quarter or semester credits in any one term). If the Apprentice takes more than six credits in a term, they must prove that education is not their primary reason for having a Washington domicile.
- Apprentices with an EAD must have a domicile-eligible EAD category or a combination of domicile-eligible statuses for the entire year.
- Apprentices with B, C, D, F, H-1B1, H-2, H-3, J, M, P, TD, TN, WB, or WT visa status cannot establish a domicile in Washington.
- Apprentices with another immigration status can typically establish a domicile in Washington.

### **(b) Financially dependent Apprentices** (definition differs from [federal aid definition](#))

Financially dependent apprentices are apprentices who are not considered financially independent for residency purposes.

To meet residency requirements for tuition and state aid through (b), financially dependent apprentices must have at least one parent or legal guardian who has had a domicile in the state for at least one year immediately before the term the apprentice applies for residency.

Parents or legal guardians:

- Who are undocumented can establish a domicile in Washington.
- With B, C, D, F, H-1B1, H-2, H-3, J, M, P, TD, TN, WB, or WT visa status cannot establish a domicile in Washington.
- With another immigration status can typically establish a domicile in Washington.

See <https://wsac.wa.gov/student-residency> for more information about financial independence for residency purposes.

**(c) Subsection (c) is very unlikely.** Please see [RCW 28B.15.012](#) for more information.

**(d) Recent high school graduates whose parent(s) or legal guardian(s) move out-of-state.** *(This option is not very common)*

To meet residency requirements for tuition and state aid through (d), Apprentices must meet the following:

- Apprentice must have spent at least 75 percent of their last two years of high school in Washington high schools.
- Apprentice's parent(s) or legal guardian(s) must have had a domicile for at least one year within the five-year period before Apprentice graduated high school.
- Apprentice must start within six months of graduating high school.

Apprentice qualifies for residency for as long as the apprentice remains continuously enrolled for at least three quarters or two semesters per calendar year.



**(e) Apprentices who have lived in Washington for at least one year and have earned a high school diploma or equivalent**

The requirements for (e) changed in 2021. They are now easier for students to meet. To meet residency requirements for tuition and state aid through (e), Apprentices must meet the following:

- Earn a high school diploma, GED, or diploma equivalent prior to the term they are applying for residency. The diploma or equivalent can be earned anywhere.
- Live in Washington for at least a year before being admitted to college (12 consecutive months)
  - REQUIREMENT: The Washington residence must be primarily for purposes other than college. This means that students who immediately start college after moving to Washington as out-of-state students cannot be a resident student at a new college after 12 months of living in Washington.

- Sign an [affidavit](#) saying they meet the above requirements. Non-U.S. Citizens/nationals/permanent residents must also promise that they will apply to become a U.S. permanent resident as soon as they are eligible.

## Residency requirements for Apprentice Group #2

Undocumented apprentices without expired or current DACA status and apprentices who are not in Group #1 may meet residency requirements for WCG-A if they meet the requirements for (e):

- Earn a high school diploma, GED, or diploma equivalent prior to the term they are applying for residency. The diploma or equivalent can be earned anywhere.
- Live in Washington for at least a year before being admitted to a registered apprenticeship (12 consecutive months).
- Sign an [affidavit](#) saying they meet the above requirements.
  - Non-U.S. Citizens/nationals/permanent residents 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 apprentice's residency to: [residency@wsac.wa.gov](mailto:residency@wsac.wa.gov).

## Other Washington Residents

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-A, unless they meet the residency requirements outlined above.

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>.
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>.
3. **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> for more information.

## High School Graduation Requirement

WAC [250-21-100](#) defines an eligible individual for the Washington College Grant for Apprenticeship (WCG-A) program as an individual who has a high school diploma, or its

equivalent, or meeting an Ability to Benefit (ATB) provision for those without a high school diploma or equivalent.

WAC [250-21-011](#) specifies that equivalent standards include a general education development (GED) certificate or a certificate of completion of a home-based instruction under chapter [28A.200 RCW](#).

Prospective applicants are prompted to respond to the following question **(19)** on the WCG-A application: *What is your high school completion status?* Applicants can select:

- High School Diploma
- General Educational Development (GED) certificate
- Homeschooled
- None of the Above

For an applicant who certifies on their application that they have met eligibility based on a high school diploma, general education development (GED) certificate, or homeschooled, their signed application is sufficient documentation *unless* they have provided conflicting information.

If an applicant provides conflicting information such as a conflicting response to a subsequent question **(20, 44)**, or supporting documents that do not corroborate their application, it is the SFAAs responsibility to determine eligibility through request of additional documentation before awarding WCG-A.

SFAAs are responsible to document conflicting information in the applicant file and retain copies of any documents or records used to make the determination. If fraud is suspected, refer to Chapter 7 (for Sponsors) or Chapter 8 (for Servicers) for reporting suspected fraud to WSAC.

If an applicant selects “None of the Above,” SFAAs may consider determining high school completion status at the start of the apprenticeship program that the applicant is seeking financial assistance for. For example, if an applicant is applying in July for a program that starts in September and will complete their GED by August, the applicant may still be eligible for the September program start.

In these situations, SFAAs should obtain documentation (such as a copy of their GED certificate or a transcript) that verifies an applicant meets this eligibility requirement before awarding WCG-A. SFAAs are responsible to document changes to eligibility in the applicant file and retain copies of any documents or records used to make the determination.

Alternatively, an applicant may be eligible for WCG-A by meeting one of the Ability to Benefit (ATB) provisions outlined in WAC 250-21-011. SFAAs should provide additional screening to see if an applicant meets one of the ATB provisions. If an applicant is seeking eligibility for WCG-A under an ATB provision, Sponsor FAAs are responsible for determining eligibility, notating the ATB provision that an applicant is eligible for in their applicant file, and retain copies of any documents or records used to make the determination.

ATB Provision	Acceptable Documents
A recognized ability to benefit test as defined by federal financial aid regulations	A letter from a college that administered the test and determined that applicant met the federal requirements
Completion of at least six college level credits towards an eligible program of study	College Transcript
Alternate state equivalent approved by the U.S. Department of Education	Contact <a href="mailto:apprenticeship@wsac.wa.gov">apprenticeship@wsac.wa.gov</a>
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).	A course transcript from the Community or Technical College indicating that they are enrolled.

SFAAs should minimally provide information to ineligible applicants regarding eligibility for WCG-A under the ATB provisions. SFAAs should notate the reason why the applicant has been denied in their applicant file and retain any documents or records used to make the determination.

### Previous Bachelor's Degree

RCW [28B.92.200](#)(5) establishes that apprentices who have already earned a bachelor's degree or higher are not eligible to receive WCG awards, including WCG for Apprenticeship. WAC [250-21-100](#) also clarifies that an eligible individual cannot have a foreign bachelor's degree. Question (20) on the WCG-A application can be used to determine if an applicant is eligible for WCG-A.

An applicant with a baccalaureate or professional degree is ineligible even if the degree is from an unaccredited school or is not recognized by a postsecondary academic institution. Similarly, an applicant with a baccalaureate or professional degree from a foreign school usually isn't eligible for WCG-A; however, because a foreign degree may not translate to a bachelor's degree, the SFAA must document whether it equates to a U.S. bachelor's degree.

If the applicant provides written documentation that the foreign degree is not equivalent to a bachelor's degree awarded in the United States, the SFAA may determine that the applicant does not have a bachelor's degree. Documents supporting such a conclusion may include information about the type of school the individual attended and total years of education leading to the degree.

In these situations, the SFAA must notate the determination in the applicant file, and retain any documents or records used to make the determination.

An applicant who has successfully journeyed out of an 8,000-hour (4-year) apprenticeship program has not earned the equivalent of a bachelor's degree or higher and may continue to be eligible for WCG-A, provided that all other eligibility criteria are met.

If an applicant provides conflicting information such as a conflicting response to a subsequent question (**26** or **44**), or supporting documents that do not corroborate their application, it is the SFAAs responsibility to determine eligibility through request of additional documentation before awarding WCG-A. SFAAs are responsible to document conflicting information in the applicant file and retain copies of any documents or records used to make the determination.

Sponsors must report any suspected instances of potential fake/fraudulent applications, received by the Sponsor, to WSAC as soon as they are identified. WSAC will need to review for any potential or actual loss of state funds.

## **Financial Need and Income Cutoff**

An eligible apprentice must demonstrate financial need, as determined by the SFAA, using the WSAC provided application forms.

The apprentice 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 apprentice's family size. The income cutoff is 100 percent of the state's MFI for Washington College Grant. Refer to Chapter 2 of this manual for the current MFI eligibility table, as well as guidance for determining the Family Size and for guidance around unique Family Income information.

## **Establishing Financial Need through Public Assistance Programs – Washington College Grant-Connect (WCG-C)**

WCG-G was established during the 2022 legislative session through [2SHB 1835, section 5](#). This bill allowed individuals in three specific public benefit programs to be considered meeting the income requirements and demonstrating financial need for maximum Washington College Grant funding without having to complete a FAFSA or WASFA. This bill also applies to Washington College Grant for Apprenticeship.

Additionally, WSAC has provided pathways for other programs to join WCG-G. There are three ways that a program may be deemed eligible:

1. Direct legislation where data is sent directly from an eligible program to WSAC and entered into the WCG-C Eligibility Checker.
  - Aged, blind, or disabled assistance (**ABD**) benefits under chapter 74.62 RCW
  - Essential needs and housing support program benefits (**HEN**) under RCW 43.185C.220
  - Pregnant women assistance (**PWA**) program financial grants under RCW 74.62.030
2. Through an application process with WSAC where data is sent directly from an eligible program to WSAC and entered into the WCG-C Eligibility Checker.
  - Economic Security for All (EcSA) benefits program
3. Through a pilot program approved through the WSAC application process, but the institution has the individual data and awards accordingly. WCG-C eligibility would be indicated during interim and URR reporting.

The goal of 2SHB 1835 is to help connect individuals to higher education and apprenticeships and to remove barriers to paying for college and training. Individuals who meet eligibility under this category are referred to being eligible under Washington College Grant – Connect.

Individuals interested in accessing WCG-A funding under WCG-C will still need to complete the WCG-A application, also referred to as the *WA Grant for Apprenticeship (WG-A) 2024-2025 Application*. The WCG-A application allows for an apprentice to self-disclose if they are part of an eligible public benefit program.

Receipt of these public benefit programs by an apprentice or parent of an apprentice is a demonstration of need and are considered to meet maximum grant eligibility.

See Chapter 2 for details on policies and awarding WCG-C eligible apprentices.

Question (22) on page 1 of the WCG-A application provides applicants the opportunity to self-identify as an eligible applicant for WCG-C. Applicants who self-identify as a recipient of an eligible public assistance program will still complete pages 2-3 of the WCG-A application. To ensure that applicants who may be eligible have the greatest opportunity to self-identify, question (22) has an “Other” option to provide applicants a space to disclose public assistance programs that are not specified under 2SHB 1835(5).

SFAAs will need to verify WCG-C eligibility through the WCG-C Eligibility Checker tool on the WSAC portal to verify that an applicant’s financial need is established under WCG-C.

### [The Washington College Grant Connect \(WCG-C\) Eligibility Checker](#)

The Eligibility Checker is available in the [WSAC Portal](#) under Programs > WCG-Connect > Eligibility Checker.

Use the WCG-Connect Eligibility Checker to determine which of your apprentices are eligible for WCG-Connect. Apprentices who qualify under WCG-C are eligible to receive the maximum WCG-A award.

The SFAA will need to determine all other eligibility requirements prior to awarding.

If an apprentice shows that they are eligible under WCG-C, ensure that the apprentice is being awarded WCG-A at the maximum award amount, regardless of what their income shows on the WCG-A application. This may require an update to the apprentice’s awards.

**Note:** It is important to note that the WCG-C Eligibility Checker is updated monthly, so there may be students who meet eligibility under WCG-Connect but aren’t currently in the checker. If an apprentice self-identifies, WSAC can verify their enrollment in one of the approved programs through the DSHS Benefit Verification System (BVS).

Please send a secure message to WSAC through the portal with a copy of the client benefit letter or the following information:

- SSN
- DSHS Client ID
- First and Last Name

- Date of Birth
- Address
- Program (HEN, PWA, ABD, or EcSA currently)
- Start Date in Program

Once WSAC can verify the student through BVS, they will be added to the WCG-C Eligibility Checker.

The WCG-Connect Eligibility Checker looks at:

- ☐ WCG-C eligibility
- ☐ Available QERs
- ☐ College Bound Scholarship (CBS) eligibility
- ☐ Outstanding Repayment
- ☐ When applicant was reported to WSAC

**The SFAA determines all other program eligibility criteria, such as residency, need, enrollment, eligible program, satisfactory program progress, etc.**

Search for apprentices by:

- Name – requires first name, last name, **and** date of birth
- Social Security Number List Search
- Social Security Number file upload

### WCG-Connect - Eligibility Checker

Selected year
2022-2023

Name search

Enter a list of SSN's separated by commas on each line:  

comma separated SSNs

SSN LIST SEARCH

SSN file upload search

Search

Reset

< 1 >

Last Name	First Name	MI	SSN	Birth Date	WCG-C Eligible Year	WCG QER	CBS	In Repayment	Last DSHS Report
	JORDAN		•••••		2022-2023	15			Jan 2023
	CAREY		•••••		2022-2023	9			Jan 2023
	DONNA		•••••		2022-2023	10.25		Yes	Jan 2023
	ASHLEY		•••••		2022-2023	15			Jan 2023
	KRISTINE		•••••		2022-2023	6			Dec 2022

## Dependency Status

The laws and rules governing Washington College Grant follow rules set in federal student aid programs. These rules and laws are based on the principle that an applicant's family is the first source of the applicant's support. Likewise, WCG-A follows the same criteria to determine if an apprentice is considered independent of parents for aid eligibility. An apprentice reaching the age of 18 or 21 or living apart from their parents does not affect their dependency status.

For the 2024-25 fiscal year, an apprentice is considered Independent if they:

- were born before January 1, 2001;
- are married (not separated) or remarried as of the date they apply for WCG-A;
- will be a graduate or professional student when the award year starts (note that graduate or professional students are not WCG-A eligible);
- are currently serving on active duty in the U.S. armed forces for purposes other than training;
- are a veteran of the U.S. Armed Forces;
- has children or other individuals (excluding a spouse), who live with the apprentice and receive more than half of their support from the apprentice between July 1, 2024, and June 30, 2025;
- were an orphan, foster child, or ward/dependent of the court at any time since the age of 13;
- were an emancipated minor or in legal guardianship or was when the applicant reached the age of majority in their state; or
- were determined at any time since July 1, 2023, to be an unaccompanied youth and (1) homeless or (2) self-supporting and at risk of being homeless.

WCG-A Application page 2, questions **(24-33)** provide applicants and SFAAs the means to determine if an applicant is considered a Dependent or Independent for purposes of determining eligibility for financial need and income cutoff. If an applicant cannot answer "Yes" to any of the questions **(24-33)**, the applicant is considered a Dependent and must provide parental household information, even if they are not claimed as a Dependent on their parent's income taxes or are considered Independent for Washington residency purposes.

## Marital Status

Question **(25)** asks, "As of today, are you married?" This question is specific to the date the application is signed. An applicant cannot project that they will be married. An applicant who is only engaged answers "No," unless they wait until after their marriage to complete the application. For an applicant who is separated but living together with their spouse, they should select "Married," not "Divorced" or "Separated." An applicant who was Independent only because they are married becomes Dependent for the next award year if they divorce and cannot answer "Yes" to any of the dependency questions **(24-33)**.

SFAAs, at their discretion, may update an application due to a change in the apprentice's marital status if deemed necessary to address an inequity or to reflect more accurately the apprentice's ability to pay. Such a decision must be on a case-by-case basis, and the

SFAA must document their reasons for it and retain copies of third-party documents used to verify the change in marital status. SFAAs will also need to update all other pertinent information such as spousal income and taxes paid, to be consistent with the new marital status.

If a change to an apprentice's status is made from married to unmarried, which makes the apprentice dependent (because apprentice was independent only due to marriage), the WCG-A application form must be updated with the apprentice's parent information.

### Graduate and Professional Students

Question (26) asks, "As of July 1, 2024, will you be working on a masters or doctorate program?" If an applicant selects "YES," they would be considered Independent and not be required to provide parental information; however, they are ineligible for WCG-A. Refer to "Previous Bachelor's Degree" in this chapter for more information.

### Member or Veteran of the U.S. Armed Forces

Question (27) asks, "Are you currently serving on active duty in the U.S. Armed Forces for purposes other than training?" Instructions are provided on the application:

*Answer "Yes" if you are currently serving in the U.S. Armed Forces or are a National Guard or Reserves enlistee who is on active duty for other than state or training purposes.*

*Answer "No" if you are a National Guard or Reserves enlistee who is on active duty for state or training purposes.*

Question (28) asks, "Are you a veteran of the U.S. Armed Forces?" Instructions are provided on the application:

*Answer "Yes" (you are a veteran) if you (1) have engaged in active duty (including basic training) in the U.S. Armed Forces or are a National Guard or Reserves enlistee who was called to active duty for other than state or training purposes or were a cadet or midshipman at one of the service academies; and (2) were released under a condition other than dishonorable.*

*Also answer "Yes" if you are not a veteran now but will be one by June 30, 2025.*

*Answer "No" (you are not a veteran) if you (1) are currently serving in the U.S. armed forces and will continue to serve through June 30, 2025, (2) have never engaged in active duty (including basic training) in the U.S. Armed Forces; (3) are currently a ROTC student or a cadet or midshipman at a service academy; (4) are a National Guard or Reserves enlistee activated only for state or training purposes; or (5) were engaged in active duty in the U.S. Armed Forces but released under dishonorable conditions.*

Veterans and persons on active duty in the U.S. Armed Forces (the Army, Navy, Air Force, Marines, Space Force, or Coast Guard) for purposes other than training are independent.

Generally, a veteran is an individual who:

- Served on active duty in the U.S. armed forces (the Army, Navy, Air Force, Marines, Space Force, or Coast Guard) for other than training and who was discharged or released under a condition other than “dishonorable”; or
- Served on active duty for training or inactive duty for training in the U.S. armed forces and was disabled from injury incurred or aggravated in the line of duty.

Members of the **National Guard** or **Reserves** are only considered veterans if they were called up to active federal duty [as defined in 10 U.S.C. 101(d)(1)] by presidential order for a purpose other than training. It does not matter how long the active duty lasted or if the apprentice returned to reserve status afterward, but, as with the other qualifying veterans, the apprentice must have had a character of service that was not “dishonorable.”

Individuals serving in ROTC or currently attending a U.S. military academy are not veterans. Additionally, individuals who attended a U.S. military academy or military academy preparatory school but were discharged prior to commission (commonly known as “early exit cadets”) are not veterans.

### Children and Legal Dependents

Question (29) asks, “Do you have children or other people (excluding a spouse) who live with you and receive more than half of their support from you now and between July 1, 2024, and June 30, 2025?”

Support includes money, housing, food, clothes, medical and dental care, gifts, loans, payments of college or apprenticeship costs, etc.

Apprentices who have legal dependents are independent. Legal dependents include children or other people (except a spouse) who meet all the following criteria:

- They live with the apprentice (or, in the case of children, live apart from the apprentice due to a qualifying temporary absence under IRS code, such as living part due to college enrollment).
- They currently receive more than half of their support from the apprentice.
- They will continue to receive more than half of their support from the apprentice between July 1, 2024, and June 30, 2025.

When an apprentice applies after the fiscal year has begun, to count a person who is not the apprentice's child as a dependent, the support already given that year plus the future support must total more than 50 percent for the whole award year for the individual to meet the definition of a legal dependent. See Example 4 below.

### **If the applicant is receiving support to raise a child, is the child still considered a legal dependent?**

If one or both applicant's parents are directly or indirectly providing more than 50% support in cash or other assistance to the applicant's child, then the applicant could not claim to have a legal dependent who receives more than half of their support from the applicant. “Indirect support” includes support that a parent gives to the applicant on

behalf of the child. If the applicant is living with a parent who is paying for most of the household expenses, the parent would usually be considered the primary source of support to the applicant's child, and the applicant should not indicate they have legal dependents. However, there may be some cases where the applicant can demonstrate that they provide more than half of their child's support even while living at home with their parents, in which case the applicant could indicate they have legal dependents.

If the applicant receives money or other support for the legal dependent from sources other than their parents, the applicant may count it as part of their support to the child. Sources include government programs, such as Temporary Assistance for Needy Families (TANF) and Supplemental Nutrition Assistance Program (SNAP), that provide benefits for dependent children. So, an applicant may be considered independent when the benefit they receive is the primary support for the child. However, child support received from a noncustodial parent cannot be counted as part of the applicant's support to the child.

### **Legal dependent examples**

**Example 1:** An apprentice and their disabled sibling currently live together. The sibling receives a small disability payment each month, but the apprentice provides more than 50% support for the sibling and expects to continue to do so through the award year. The sibling is considered a dependent of the apprentice and can be included in the apprentice's family size on the WCG-A application form. The apprentice is also an independent applicant due to having a legal dependent.

**Example 2:** The same apprentice and disabled sibling currently live together and expect to do so through the award year. The sibling receives a small disability payment AND a pension payment each month. The combination of the pension and the disability payment will be enough that the apprentice won't be providing more than half of the sibling's support. Therefore, the apprentice won't be able to include the sibling in their family size. Additionally, the apprentice may or may not be an Independent applicant, depending on their responses to other dependency questions.

**Example 3:** An apprentice is appointed legal guardian of their minor cousin, who lives with the apprentice. The cousin receives Social Security benefits, which are paid to the apprentice because the cousin is a minor. These benefits provide more than half of the cousin's support. Because the cousin lives with and is supported by the apprentice (through the Social Security benefits) throughout the award year, the apprentice indicates they have a legal dependent on the WCG-A application form and is an independent applicant. However, if the cousin did not live with the apprentice, the apprentice would not be able to indicate they have a legal dependent and would only be Independent if they meet other independent circumstances.

**Example 4:** An apprentice and their partner live together but are not married. The apprentice pays \$1,500 per month to support their partner. The partner also has earned income of \$2,000 per month and receives \$200 per month from their parents. The partner uses all of this for their support. The apprentice cannot consider their partner a legal dependent because the \$1,500 they provide is not more than half of their partner's total support of \$3,700.

**Example 5:** In April 2024, an apprentice applies for aid for both 2023-24 and 2024-25 award years. One month prior to that, their parent moved in with the apprentice. The parent is undocumented and does not work or qualify to receive other federal benefits. Even though the apprentice provides all their parent's support, the months of support for March through June 2024 (the end of the fiscal year) would not be more than 50% for 2023-24 fiscal year. Therefore, the apprentice cannot claim their parent as a legal dependent on their 2023-24 WCG-A application form. If the parent had moved in before the midpoint of the year, the apprentice would have been able to count the parent as a dependent for 2023-24. However, because the two plan to live together and the apprentice plans to provide more than 50% support at least through June 2025, the apprentice can count the parent as a dependent for 2024-25.

**Example 6:** An apprentice lives alone with their infant child. The infant child's other parent pays \$200 per month in child support to the apprentice. The apprentice also receives the equivalent of \$500 per month from government assistance programs for the child. The apprentice provides the remainder of the child's support through their employment. The apprentice can consider the child a legal dependent as they live together, and the apprentice provides more than 50% of the child's support.

### Orphan, Foster Child, or Ward of the Court

Question (30) asks, "At any time since you turned age 13, were you an orphan (no living biological or adoptive parent), were a ward of the court, or were in foster care?"

Instructions are provided on the application:

*Answer "Yes" if at any time since you turned age 13:*

- ♦ *You had no living parent, even if you are now adopted; or*
- ♦ *You were in foster care or a dependent or ward of the court, even if you are no longer in foster care today or a dependent or ward of the court today. For federal student aid purposes, someone who is incarcerated is not considered a ward of the court.*

*Your financial aid office may require you to provide proof that you were in foster care or a dependent or ward of the court.*

An apprentice who was an **orphan**—both parents are deceased—when 13 or older is independent even if the apprentice was subsequently adopted. Likewise, an apprentice who was at any time since the age of 13 a **foster child** or a **ward of the court** is Independent even if their status changed later.

An apprentice is a ward of the court if it has assumed legal custody of the apprentice. In some states the court may impose its authority over a juvenile who remains in the legal custody of their parents; such an apprentice is not a ward of the court. Also, incarceration of an apprentice does not qualify the apprentice as a ward of the court. In some states the phrase "ward of the state" is used; if it is **not** due to incarceration, this is considered the same as a ward of the court for dependency status.

If an SFAA requires that an apprentice provide documentation that they were in foster care at age 13 or older, any of the following documentation should be considered adequate:

- Submission of a court order or official state documentation that the apprentice received federal or state support in foster care.
- A documented phone call, written statement, or verifiable electronic data match from
  - a state, county, or tribal agency administering a program under part B or E of *Title IV of the Social Security Act* (42 U.S.C. 621 et seq. and 670 et seq.);
  - a state Medicaid agency; or
  - a public or private foster care placing agency or foster care facility or placement.
- A documented phone call or a written statement from an attorney, guardian ad litem, or Court Appointed Special Advocate.
- Verification of the apprentice's eligibility for an education and training voucher under the John H. Chafee Foster Care Program under section 477 of the *Social Security Act* (42 U.S.C. 677).
- A documented phone call or written statement from a financial aid administrator who documented the apprentice's circumstance in the same or a prior award year.

### Emancipation and Legal Guardianship

Question (31) asks, "Are you or were you legally emancipated, or in a legal guardianship with someone other than your parent or stepparent, as determined by a court in your state of residence?" Instructions provided on the application direct an applicant to:

*Answer "No" if the court papers say "custody" rather than "guardianship," Or if you are still a minor and a court decision for emancipation or legal guardianship is no longer in effect, or the court decision was not in effect at the time you became an adult.*

*Your financial aid office may require you to provide proof that you were an emancipated minor or in legal guardianship.*

Apprentices are independent if they are, or were upon reaching the age of majority, emancipated minors (released from control of their parent or guardian) or in legal guardianship, both as adjudicated by a court of competent jurisdiction in their state of legal residence at the time of the adjudication. The emancipation must be determined by a court, not by an attorney, though the basis for it can vary by state.

Emancipation and Legal Guardianship can be easily misinterpreted by applicants. The SFAA must request documentation to verify a "Yes" response if this is the only response qualifying the applicant as an Independent applicant. As a reminder, the SFAA should document how they arrived at classifying an otherwise Dependent applicant as Independent, as well as retain any supporting documentation to support and verify the decision.

Apprentices placed in legal guardianship to their parents—e.g., if they are disabled adults and under their parents' care—are not independent for WCG-A program purposes by this criterion and would answer "No" to Question (31). Similarly, guardianship of a person's estate does not qualify as a legal guardianship for this purpose. If the applicant's documentation says "custody" instead of "guardianship," seek guidance from WSAC by using secure messaging in the Portal.

SFAAs should also note that the question pertains to a court in an applicant's state of legal residence. If documents provided support considering an applicant as an independent due to being emancipated or in a legal guardianship, but indicate that Washington was not the applicant's state of legal residence at the time a court determined this, it is the SFAA's responsibility to ensure that the applicant meets the WA residency requirement before awarding WCG-A.

### Unaccompanied Youth

Question (32) asks, "At any time on or after July 1, 2023, were you unaccompanied and either (1) homeless or (2) self-supporting and at risk of being homeless? Instructions provided on the application direct an applicant to:

*Answer "Yes" if your situation was determined by a) your high school or district homeless liaison, b) the director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development, or c) the director of a runaway or homeless youth basic center or transitional living program.*

An apprentice is independent if, at any time on or after July 1, 2023, the apprentice is determined to be an unaccompanied youth who is homeless or is self-supporting and at risk of being homeless. In determining independence due to homelessness, the SFAA must consider documentation from any of the following entities—provided through a documented phone call or written statement—to be adequate:

- A local educational agency homeless liaison (or designee), as designated by the *McKinney-Vento Homeless Assistance Act* (42 U.S.C. 11432(g)(1)(J)(ii)).
- The director (or designee) of an emergency or transitional shelter, street outreach program, homeless youth drop-in center, or other program serving individuals who are experiencing homelessness.
- The director (or designee) of a Federal TRIO program or a Gaining Early Awareness and Readiness for Undergraduate program (GEAR UP) grant.
- A financial aid administrator at another institution who documented the apprentice's circumstance in the same or a prior award year.

In the absence of a determination by the entities above, the SFAA, **must** make a case-by-case determination of homeless youth status based upon a written statement from, or a documented interview with the apprentice that confirms that they are an unaccompanied homeless youth, or unaccompanied, at risk of homelessness, and self-supporting.

An apprentice is considered homeless if they lack fixed, regular, and adequate housing. This is broader than just living "on the street." It includes but is not limited to:

- youth sharing housing with other people temporarily because they had nowhere else to go;
- youth living in emergency or transitional shelters, for example, trailers provided by the Federal Emergency Management Agency after disasters;
- youth living in motels, campgrounds, cars, parks, abandoned buildings, bus or train stations, substandard housing, or any public or private place not designed for humans to live in;
- youth living in the school dormitory if they would otherwise be homeless; and

- youth who are migrants and who qualify as experiencing homeless because they are living in circumstances described above.

The documentation for an FAA's evaluation of the living arrangements of an applicant must demonstrate that they meet the definition of this category of independent student. The determination may be based upon a written statement from, or a documented interview with, the applicant that confirms that they are an unaccompanied homeless youth, or unaccompanied, at risk of homelessness, and self-supporting. Such determination should be made without regard to the reasons that the applicant is unaccompanied and/or homeless.

**Homeless youth determination example:** An applicant came out to their parents as transgender when they were 14. The applicant's relationship with their parents deteriorated and they told the applicant to move out. The applicant reached out to their high school counselor for help, who asked if the applicant had some place to go. The parents of the applicant's good friend said that the applicant could stay with them. Though the friend's family is providing the applicant with a place to stay, this is not considered fixed, regular, and adequate nighttime residence as the friend's family may revoke their offer for shelter at any time. The applicant would be considered an unaccompanied youth who is self-supporting and at risk of homelessness.

The applicant's relationship with their parents did not improve, and over the next several years the applicant had almost no contact with them. When the applicant completed their WG-A application for the first time, they were unable to provide parental information but indicated on the form that they have an unusual circumstance. The applicant provided information regarding their situation, so the SFAA asked them to provide documentation. The applicant was unable to obtain documentation of their homeless youth determination from their high school counselor. The SFAA conducted and documented an interview with the applicant to confirm that they are still experiencing homelessness and are self-supporting. The SFAA has the application processed as a homeless youth with a determination by the SFAA. A dependency override is unnecessary because the applicant is considered an Independent applicant on their WG-A application due to homelessness.

#### **Additional guidance for making a homeless youth determination:**

- Relevant information can come from recognized third parties such as private or publicly funded homeless shelters and service providers, financial aid administrators from another college, college access programs such as TRIO and GEAR UP, college or high school counselors, other mental health professionals, social workers, mentors, doctors, and clergy.
- Use discretion when gathering information and respect the applicant's privacy. Some information, such as that protected by doctor-patient privilege, is confidential. Also, documents such as police or Child Protective Services reports are not necessary. *Don't focus on why the applicant is homeless or unaccompanied but on whether the evidence shows they are an unaccompanied homeless youth.*
- Determine eligibility based on the legal definitions provided (see "Homeless youth definitions" below).
- If an unaccompanied homeless youth does not have a mailing address, they may use the address of their SFAA business address as their own on the WG-A application.

- An additional resource SFAAs can use is the National Center for Homeless Education (<https://nche.ed.gov/higher-education/>), or the National Association for the Education of Homeless Children and Youth (<https://naehcy.org/higher-education/>). Search for “Making Student Status Determinations for Unaccompanied Homeless Youth” to find worksheets and tools to help make your determination.
- Reach out for assistance to WSAC using secure messaging.

Finally, SFAAs should also presume that an applicant for whom the SFAA’s institution (or servicing agency or apprenticeship program) has made a determination of homelessness continues to be independent in each subsequent year at your institution unless the applicant discloses that their circumstances have changed or the SFAA has conflicting information. The SFAA should also consider documentation from an FAA at another institution that made a documented determination that an applicant was an unaccompanied homeless youth in the same or prior award year to be adequate documentation to make such a determination with the SFAA’s institution (or servicing agency or apprenticeship program).

### Homeless Youth Definitions

- **At risk of being homeless**—when a student’s housing may cease to be fixed, regular, and adequate, for example, a student who is being evicted and has been unable to find fixed, regular, and adequate housing.
- **Homeless**—lacking fixed, regular, and adequate housing.
- **Self-supporting**—when a student pays for his or her own living expenses, including fixed, regular, and adequate housing.
- **Unaccompanied**—when a student is not living in the physical custody of a parent or guardian.

### Housing Status Definitions

- **Fixed**—stationary, permanent, and not subject to change.
- **Regular**—used on a predictable, routine, or consistent basis.
- **Adequate**—sufficient for meeting both the physical and psychological needs typically met in the home.

### Unusual Circumstances for a Dependency Override

Question (33) asks, “Do you have an unusual circumstance and cannot provide parental information? Instructions are provided on the application:

*You may be experiencing an unusual circumstance if you left home due to an abusive or threatening environment; were abandoned by or estranged from your parents; have refugee or asylee status and are separated from your parents, or your parent are displaced in a foreign country; are a victim of human trafficking; are incarcerated (or your parents are incarcerated), and contact with your parents would pose a risk to you; or are otherwise unable to contact or locate your parents.*

*Not all situations are considered an unusual circumstance. The following situations do **not** qualify as an unusual circumstance:*

- ♦ *You do not live with your parent(s) or your parent(s) do not want to provide their information on your application*
- ♦ *Your parents don't provide you with financial support or refuse to contribute to your program expenses*
- ♦ *Your parents don't claim you as a dependent on their income tax return*

*If you answered "Yes," please see #44 for additional information you will need to provide.*

Applicants, who would otherwise be considered dependent, may request a dependency override due to an unusual circumstance. To request a dependency override, applicants would also need to complete Question (44) to provide a statement and submit supporting documents to the SFAA for review.

Unusual Circumstances do include (but are not limited to):

- Human trafficking, as described in the Trafficking Victims Protection Act of 2000 (22 U.S.C. 7101 et seq.);
- Legal granted refugee or asylum status;
- Parental abandonment or estrangement; or
- Apprentice or parental incarceration

In such cases an override might be warranted based upon the apprentice's individual circumstances. These conditions would also not disqualify an apprentice from being a homeless unaccompanied youth or self-supporting and at risk of homelessness.

Unusual circumstances, singly or in combination, do **not** include:

- Parents refuse to contribute to the apprentice's education.
- Parents will not provide information for the WCG-A Application or verification.
- Parents do not claim the apprentice as a dependent for income tax purposes.
- Apprentice demonstrates total self-sufficiency.

An SFAA may override only from dependent to independent.

Due to the sensitive nature of unusual circumstances SFAAs must have policies and procedures that address the following:

- Notifying apprentices of the SFAA's process, requirements, and reasonable timeline to review adjustment requests after their application form is submitted;
- Providing apprentices with a final determination of their dependency status and financial aid award as soon as practicable after reviewing all requested documentation;
- Retaining all documentation, including documented interviews, related to the adjustment in accordance with WSAC's Record Retention policies after the apprentice's last term of enrollment; and
- Presuming that any apprentice who has obtained an adjustment for unusual circumstances and a final determination of independence to be independent for each subsequent award year at the same Sponsor unless--
  - The apprentice informs the SFAA that their circumstances have changed; or

- The Sponsor or third-party servicer has conflicting information about the apprentice's independence.

Documentation is critical – it must adequately substantiate the apprentice's circumstances.

Documentation may include (but is not limited to) the following:

- a documented interview between the apprentice and the SFAA;
- submission of a court order or official Federal or State documentation that the apprentice or apprentice's parents or legal guardians are incarcerated;
- a documented phone call or written statement, which confirms the unusual circumstances with:
  - a state, county or Tribal welfare agency;
  - an independent living case worker who supports current and former foster youth with the transition to adulthood;
  - a public or private agency, facility, or program servicing the victims of abuse, neglect, assault, or violence; or
- a documented phone call or written statement from an attorney, guardian ad litem, a court-appointed special advocate (or similar), or a representative of a TRIO or GEAR UP program which confirms the circumstances and the person's relationship to the apprentice;
- a documented determination of independence made by a financial aid administrator at a postsecondary education institution in the same or a prior award year; or
- utility bills, health insurance, or other documents that demonstrate a separation from parents or legal guardians.

SFAAs may use a dependency override made in a prior award year for the same apprenticeship program. SFAAs are encouraged to presume an apprentice with a dependency override is Independent in subsequent years unless the apprentice informs that their situation has changed, or there is conflicting information. Although the WCG-A application will need to be completed each year, if an apprentice's unusual circumstances or homeless situation has not changed from year to year, SFAAs should not maintain a practice that delays or hinders financial aid for such an apprentice, nor may they require the apprentice to answer additional questions prior to packaging or disbursing aid or require the apprentice to submit additional documentation unless there is conflicting information that the SFAA needs to resolve.

In the process of determining if an otherwise Dependent applicant qualifies for Independent status, SFAAs may consider the impact to the apprentice to gather verification documentation. For example, if the applicant marks "Yes" for Legal Guardianship and Emancipation, and also indicates an unusual circumstance requesting a dependency override (or is seeking an unaccompanied homeless youth determination), it may be easier for the applicant to verify Legal Guardianship or Emancipation. If this is the case, the SFAA may be able to make the determination on the basis of Legal Guardianship or Emancipation; however, if the apprentice is unable to provide verification of Legal Guardianship or Emancipation, the SFAA should continue efforts to verify the unusual circumstance (or unaccompanied homeless youth determination).

## **Dependency override example**

An applicant is a refugee from a foreign country who meets other WCG-A eligibility requirements but cannot provide information for their parents. The applicant reports in Question (44) that their parents have not entered the U.S. and have been displaced due to the upheaval in their home country and doesn't know how to contact them. When asked to provide additional documentation that can help verify this information, the applicant reports that a relative living in the U.S. can attest to the situation. The SFAA, per their policy, requests for the relative to either appear in person and sign a statement confirming the account or to send a signed, dated statement with contact information. The relative appears in person and signs a statement, so the SFAA grants a dependency override.

## **Eligible Apprenticeship Programs**

Apprenticeships qualifying as eligible programs must be a registered apprenticeship program approved under [Chapter 49.04 RCW](#). Apprenticeship programs must have been granted permanent registration status and cannot be in provisional registration status with the Washington State Apprenticeship & Training Council (WSATC).

Eligible Sponsor Organizations and their respective programs (occupations) that can apply to WSAC to participate in the WCG-A program are found at <https://secure.lni.wa.gov/arts-public/#/program-search>.

Program Sponsor Organizations and their respective programs (occupations) must be setup with WSAC to participate in WCG-A (see Chapter 7 for more information).

SFAAs are responsible to ensure that an applicant is eligible under a registered apprenticeship program (occupation) that has been setup with WSAC. SFAAs should take note that not all a Sponsor Organization's apprenticeship programs (occupations) are setup for participation in the WG-A program.

## **Maximum Terms of Eligibility**

WCG recipients, including apprentices, have a lifetime maximum number of terms they can receive the grant, which is termed as Quarters of Eligibility Remaining (QER).

A WCG-A recipient may receive the grant for a maximum of 6 full-time years (18 quarters, 12 semesters, the hour equivalent, or any combination thereof, at a full-time rate of enrollment). This includes combined usage under the apprenticeship program option and academic based program options.

A full WCG-A Award is based on 2,000 OJT and 144 RSI hours, which will charge 3.00 Quarters of Eligibility to an apprentice's remaining QERs.

*Note: Awards must be prorated if the apprentice does not have enough QER, expects not to be able to complete the standard hours (such as for FMLA leave), or has less than 2,000 OJT and 144 RSI hours. In situations where an apprentice is at the end of their program, the full WCG-A*

*Award can be awarded if the apprentice has at least 2,000 OJT or 144 RSI hours remaining in their program. Refer to Chapter 2 for more information on prorating awards.*

## **Satisfactory Program Progress (SPP)**

SFAAs are responsible for monitoring and responding to changes in Apprentice eligibility. SPP eligibility differs for first-time awarding and subsequent awards or disbursements (if there are two or more disbursements made in a fiscal year).

Refer to Chapter 3 for guidance on SPP.

## **Refund/Repayment**

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

## **Conflicting Information**

All applicants for state aid, regardless of the application filed, must resolve conflicting information. SFAAs should follow their standard review policy regarding the resolution of conflicting information for any applicant. This may mean that you need to collect different documentation to reconcile conflicting information; however, SFAAs may not require an applicant to file a federal tax return if they are electing to apply only for state aid.

SFAAs are strongly encouraged to advise applicants 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 SFAAs to resolve any conflicting residency information between an apprentice's financial aid records and employment or apprenticeship registration records. For academic institutions administering WG-A, WSAC requires SFAAs to resolve any conflicting residency information between an apprentice's financial aid records, admissions, registration, and employment or apprenticeship registration records.**

WSAC will periodically compare related and available data to data reported by SFAAs and request that SFAAs either confirm eligibility or resolve conflicting information.

## **Fraudulent Information**

Any participant 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.

Sponsors and Third-Party Servicers should have Policies and Procedures in place for responding to suspected fraud, including notifying WSAC.

## **ELIGIBILITY MONITORING FOR WCG-A**

Once an apprentice receives a WCG-A award, the SFAA must monitor continued eligibility. The SFAA is responsible for maintaining appropriate policies and procedures that allow for the secure reporting of an apprentice's progress in their program. These records are considered educational records and should be handled in accordance with FERPA guidelines and be retained in accordance with WSAC Record Retention Policies.

The SFAA must issue the apprentice a revised award offer for situations when an apprentice's WCG-A grant award changes.

The SFAA is required to verify apprentice eligibility by:

- ☐ Monitoring Satisfactory Program Progress status (Refer to Chapter 3)
- ☐ Ensuring the apprentice does not owe a repayment on a previously disbursed state aid award or state loan. Each time a file is uploaded it will be checked to see if an apprentice owes funds. An edit will generate for any apprentice owing repayment.
- ☐ Checking apprentice records to verify Quarters of Eligibility Remaining (QER). Each time a file is uploaded it will be checked to see if an apprentice has QER. An edit will generate for any apprentice is out of QER.

## **Washington Student Achievement Council Archive Report**

Use the Archive to determine whether a WCG-A applicant:

- Has exhausted or is approaching the 18 quarter/12 semester limitation for Washington College Grant eligibility. The archive lists individuals who are within five quarters of meeting the 18 quarter/12 semester maximum and displays the number of quarters of eligibility remaining (QER).

**It is the SFAA's responsibility to ensure that all apprentices who receive WCG-A 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 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. Please contact WSAC using the secure messages in the WSAC Portal for updated information.

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

## Repayment Checker

Use the Repayment Checker to determine if an apprentice owes a repayment on a previously disbursed state aid award. Continue to use the Archive for Quarters of Eligibility Remaining (QER).

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

## **CHAPTER 2**

### **Calculating WCG-A Apprentice Awards**

Please note that this chapter may refer to College Bound Scholarship (CBS) and Passport. These are state aid programs in which an apprentice may have eligibility for and may potentially be eligible to receive awards for during the same fiscal year that they are applying for WCG-A but not concurrently while receiving WCG-A. These situations are not anticipated to be common but are possible.

Refer to chapter 1 for eligibility determination before proceeding to awarding guidance provided in this chapter.

The maximum WCG-A award amount for the 2024-2025 fiscal year is \$4,763 for apprentices in the 0-65% Median Family Income (MFI) category. The award is prorated for other MFI categories. Additionally, apprentices who meet all eligibility requirements for the maximum WCG-A award may also be eligible to receive a \$500 Washington Bridge Grant for a total award value of \$5263.

WCG-A awards are dependent on established program costs identified by a program Sponsor in the setup process with WSAC, which is renewed annually.

Sponsors administering WCG-A on their own can elect to disburse awards according to program costs (may be disproportionate disbursements) with an initial disbursement and then subsequent disbursements upon completion of Related Supplemental Instruction (RSI) and On the Job Training (OJT) hours.

If a disproportionate disbursement is used, a statement shall be placed in the apprentice's file acknowledging that an uneven WCG-A disbursement has been given and explaining why (this usually means documented uneven costs warranting the uneven disbursement).

#### **MEDIAN FAMILY INCOME (MFI) LEVELS**

Financial need must be determined by an SFAA as part of an applicant's eligibility for WCG-A. The maximum MFI level for WCG-A eligibility is 100%. For 2024-2025, applicants with MFI levels above 65% and up to 100% will receive prorated awards, and applicants who have an MFI level of 0% up to 65% are eligible for the maximum award (see WCG-A Award Chart below).

The MFI levels are based on family size, which is collected on the WCG-A Application, Question (40). In general, this number should now align with the number of exemptions (which equal the tax filer(s) plus dependents) claimed on an individual's tax return.

Although the WG-A Application still collects the number in college or apprenticeship program in Question (41), it is no longer factored into MFI beginning with the 2024-25 Academic Year. Institutions are allowed to perform professional judgment on a case-by-case basis to take into consideration a student's specific circumstances.

SFAAs are responsible for ensuring that information provided from applicants are consistent between their SFAA verified dependency status (see Chapter 1 for more information), family size, and total family income. For example, a Dependent applicant cannot have a family size of one (1).

## Determining Family Size for Independent Applicants

The following persons are included in the family size of an Independent applicant:

- The applicant and their spouse, unless the spouse has died or is not living in the household due to separation or divorce.
- The applicant's dependent children, if they live with the applicant (or live apart from the applicant due to a qualifying temporary absence under IRS code, such as living apart due to college enrollment) and will receive more than half of their support from the applicant (and spouse) from July 1, 2024, through June 30, 2025. Unborn children should not be included in the family size, though the family size can be updated if the child is born during and will receive more than half of their support from the student (and spouse) during the award year.
- Other persons who live with and receive more than half their support from the applicant and will receive more than half their support from the applicant for the entire award year. See Chapter 1 under "Children and Legal Dependents" section.

Support includes money, housing, food, clothes, medical and dental care, gifts, loans, payments of college or apprenticeship costs, etc.

**Example:** An applicant is considered Independent. The applicant was married, but now the applicant and their spouse have separated. The applicant is paying child support, but it isn't enough to provide more than half of their children's support, so the applicant cannot include their children or spouse in their household size, even if they are not yet legally divorced. Additionally, the applicant's nephew lives with the applicant and gets more than half of their support from the applicant (and will do so for the fiscal year), so the nephew can be counted in the applicant's household size, which is two. The applicant's nephew, having just turned 24, would also be considered independent on his own WCG-A Application with a household size of one.

## Determining Family Size for Dependent Applicants

A Dependent applicant will need to provide parental information. In most cases it's clear who the parents are but not always. SFAAs will need to evaluate if any parental information requires additional verification of an applicant's eligibility for WA Residency – keeping in mind that an applicant may meet Independent criteria for WA Residency, but not meet criteria to complete the WCG-A Application as an Independent.

### Who counts as a Parent on the WG-A Application?

A parent is a biological or adoptive parent or a person that the state has determined to be a parent (for example, when a state allows another person's name to be listed as a parent on a birth certificate). A stepparent is considered a parent if married to a biological or adoptive parent and if the applicant counts in their household size. Biological and adoptive parents who are unmarried and living together give that as their status in Question (38), and both report their information on the WCG-A Application.

However, a stepparent who did not adopt the applicant cannot be the sole parent for determining dependency status. If one parent dies, the student is still a dependent of the remaining biological or adoptive parent, not the stepparent.

**Surviving parent and stepparent example:** A dependent applicant's parents divorced when the applicant was five years old. The applicant's mother remarried, and the applicant lived with her and the applicant's stepfather, who did not adopt the student. The applicant's mother died last year, but the applicant's biological father is still living. The Applicant does not meet any of the criteria to be independent. Because the applicant's biological father is the only surviving parent, the applicant needs to report the father's information on the WG-A application, even if the applicant is still living with and being supported by the stepfather.

If parents are divorced or never married and not living together, the parent on the WG-A application should be the parent who provided more than 50% of the financial support for the applicant during the last 12 months. This may be different from the parent the applicant lived with during that same period. If one parent pays child support to the other parent, the child support paid counts for the payer when determining which parent is a required to provide information on the WG-A application. Once the parent who provides more than 50% of the financial support for the applicant has been determined, that parent (and their current spouse, if applicable) should report their income and asset information on the WG-A application form as the applicant's parent(s). If neither parent provided more than 50% of the financial support for the applicant, the parent (and current spouse, if applicable) with the greater income and assets is a required to provide information on the WG-A application form.

A foster parent or a legal guardian is not treated as a parent for WG-A purposes. If at any time since the age of 13 both applicant's parents were dead (and they did not have an adoptive parent at that time) or the applicant was in foster care, they are independent. If the applicant is now or was when they became an adult an emancipated minor or in legal guardianship, the applicant is independent.

If an applicant is living with their grandparents or other relatives, their data should not be reported on the WG-A application as parental data unless they have adopted the applicant.

**Applicant living with relatives example:** An applicant's father is dead, and the applicant's mother can't support the applicant, so the applicant is living with their grandparents. The applicant's mother doesn't pay any money for the applicant's support. The applicant doesn't meet any of the independence criteria, so the applicant must provide parental information. Because the applicant's grandparents haven't adopted the applicant, they are not the applicant's parents. The applicant will have to provide information about their mother on the WG-A application unless there are unusual circumstances that would warrant a dependency override. See Chapter 1 for additional guidance on unusual circumstances.

The following persons count in the family size of a dependent applicant's parents:

- **The applicant**
- **The parent (and their spouse or partner).**
- **The parent's dependent children,** (even if they live apart from the parents due to a qualifying temporary absence under IRS code, such as living apart due to college enrollment)

who will receive more than half of their support from the parent (and spouse or partner) from July 1, 2024, through June 30, 2025. Unborn children should not be included in the family size, though the family size can be updated if the child is born during and will receive more than half of their support from the parent (and spouse or partner) during the fiscal year.

- **Other persons** who live with and receive more than half their support from the parent (and spouse or partner) and will receive more than half support for the entire fiscal year.

## **Number of Family Member(s) in College/ Apprenticeship**

Question (41) asks, “Including yourself, how many members of your household will be in college or in an apprenticeship between June 30, 2024, and July 1, 2025.” Instructions state, “Do not count parents of Dependent applicants.”

The applicant **always** counts in the number in college, but parents do not. Others included in the household size are also included in the number in college if they are or will be enrolled at least half time during the award year in any eligible degree or certificate program at a school eligible for any of the Federal Student Aid programs (such as Pell Grant) or in an approved apprenticeship program. The definition of half-time enrollment for this question must meet the federal requirements even if the school defines half time differently. Please also see note in previous section for “Service Academics, Household Size, and Number in College.”

Under the FAFSA Simplification Act, effective with the 2024-25 award year, adjustments to calculating MFI for households with more than one (1) in a college or WCG-A approved apprenticeship beyond the applicant are no longer allowed.

## **Determining Income for MFI Levels**

The WCG-A Application, Question (42), asks for total family income for 2022 IRS tax year. The 2022 IRS tax year is the “base year” for 2024-2025. In general, the Adjusted Gross Income (AGI) can be identified on IRS Form 1040, Line 11. The income information from the completed tax year is used as a predictor of the family’s financial situation for the current year.

In most cases, use the income reported on the WCG-A Application. Adjustments may be made through verification reviews and through professional judgment by the Sponsor. These adjustments must be submitted and documented on a corrected WCG-A Application.

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

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

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

The SFAA 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 or apprentice 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.
- Combat pay – only the portion included in the adjusted gross income
- 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.

### **Married Filing Separately**

If one spouse files separately and the other does not file a return but has some income, add the income earned from work (e.g., earnings from the W-2 form or any other earning statements) of the spouse who does not file a return to the AGI (as given on line 11 of Form 1040) of the spouse who does.

If an Independent applicant or a Dependent applicant's parent(s) was not married in 2022 but is married when the application is signed, the applicant also needs to provide income information for the new spouse. Add the AGI of both individuals to determine the family income.

### **Income for Separated, Divorced, or Widowed Status**

If an Independent applicant or a Dependent applicant's parent was married in 2022 but is separated, divorced, or widowed when the application is signed, the applicant or parent excludes the income for that spouse even though the information may be on the 2022 tax forms.

As a reminder, an applicant's Independent status based on marriage alone is determined by their marital status on the date their WCG-A application was signed; therefore, if an applicant was married in 2022 and filed their taxes with their spouse for 2022, but are no longer married and no longer meet any Independent criteria, they are considered Dependent. SFAAs should follow the family income for a Dependent apprentice.

### **Calculating the Individual AGI from a Joint Return**

An applicant and their spouse filed a joint return for 2022 and have since divorced. The AGI on the applicant's WCG-A Application matches the AGI of \$56,500 on the 2022 tax return, which means it's wrong because it includes the former spouse's income.

**Example:** The applicant's W-2 shows that their income for 2022 was \$25,900, and the tax return shows \$400 in interest. Because it was interest on a joint savings account, the SFAA can take half of the interest (\$200) and add it to the wages from the W-2 for a corrected family income of \$26,100.

## Non-US Tax Documents

Information from the income tax returns required by the tax codes of the Commonwealth of Puerto Rico, Guam, American Samoa, and the U.S. Virgin Islands can be reported on the WCG-A Application in the same manner as U.S. tax information, and copies of these forms can be used for verification in the same way as U.S. tax forms are. Amounts are already reported in U.S. dollars, and the SFAA should look at tax return line items that are comparable to the IRS line items for verification.

When an applicant or parent has returns from both a foreign nation and the United States for the same tax year, they should use the data from the U.S. return when filling out the WCG-A application.

## Fiscal Year Tax Returns

For a fiscal year (rather than calendar year) tax return, information should be used from the return that includes the greater number of months in the base year.

**Example:** A Dependent applicant's parents file a fiscal year tax return. Their fiscal year begins in September. The return they filed for the fiscal year starting in September 2021 includes eight months in 2022. The return they filed for the fiscal year starting in September 2022 only includes four months of 2022. Therefore, they should use the information from the return for the fiscal year that began in September 2021.

If the applicant or parents filed a tax return using something other than an IRS form, such as a foreign or Puerto Rican tax form, the applicant should report on the WCG-A Application the amounts (converted to U.S. dollars) from the lines of the form that correspond most closely to those on the common IRS forms for Adjusted Gross Income (AGI).

## Taxable Income for Individuals without an AGI

For both dependent and independent apprentices, if the AGI is not present (i.e., parent/apprentice is not a tax filer), use the sum of all taxable plus non-taxable income. Taxable income for non-tax filers can include wages, salaries, bonuses, tips, investment or unearned income.

- **Virtual currency:** Virtual currencies such as Bitcoin are considered an asset; however, if an Independent applicant or a parent of a Dependent applicant sells a virtual currency and has a capital gain from the sale, the taxable portion is considered taxable income.
- **Trusts funds:** If an applicant, spouse, or parent receives payment of **interest only** from the trust, any interest received in the base year must be reported as income.
- **Retirement and life insurance plans:** The value of retirement plans—401(k) plans, pension funds, annuities, noneducation IRAs, Keogh plans, etc.—distributions do count as income and would generally be accounted for in a tax-filer's AGI. Similarly, the cash value or equity of a whole life insurance policy isn't reported, but an insurance settlement does count as income.

- The full amount of the distribution is reported whether it was a lump sum or annual distribution, and it will count as taxable or untaxed income, as appropriate. An exception to reporting pension distributions is when they are rolled over into another retirement plan in the same tax year (rollover).

## **Non-Taxable Income for Individuals without an AGI**

For both dependent and independent apprentices, if the AGI is not present (i.e., parent/apprentice is not a tax filer), use the sum of all taxable plus non-taxable income. An applicant, or a dependent's parent(s), who hasn't filed a return will have to estimate these amounts, and applicants or parents may need to separate information from a joint return.

- **Payments to tax-deferred or sheltered pension and savings plans (paid directly or withheld from earnings).** This includes untaxed portions of 401(k) and 403(b) plans. These types of payments are listed in boxes 12a through 12d of the W-2 and will have one of the following codes: D, E, F, G, H, or S. Employer contributions to these plans shouldn't be reported as an untaxed benefit.
- **Deductible IRA or Keogh payments.** Payments to an IRA or Keogh plan that are excluded from taxation are reported as untaxed income.
- **Child support received for all children.** Exclude foster care or adoption payments.
- **Tax-exempt interest income.** Certain types of interest, such as interest on municipal bonds, are tax-exempt.
- **Untaxed IRA distributions and pension or annuity payments.** A tax filer determines how much of his or her IRA distribution or pension or annuity payment is taxable when he or she completes his or her tax return. The applicant reports the untaxed portion, which is determined from the tax return, but should not include rollovers (transfers of funds from one IRA to another). These amounts can be found on the 1040 form—(line 4a minus 4b; if negative, use zero) plus (line 5a minus 5b; if negative, use zero)
- **Housing, food, and other living allowances.** Some people, such as clergy, receive these allowances as compensation for their jobs. Money received to pay for rent should also be reported, as should the free use of a house or apartment (the rent or market value of a comparable house or apartment can be used). Similarly, if the apprentice received free room or board in 2021 for a job that was not awarded as part of financial aid awards (such as a resident advisor position at a college that provided free room and board as part of their employment compensation), he or she must report the value of the room and board as untaxed income. Members of the U.S. military should report their basic allowance for subsistence (BAS) but not their basic allowance for housing (BAH).
- **Veterans' noneducation benefits.** This includes disability, the death pension, Dependency and Indemnity Compensation (DIC), and Veterans Affairs (VA) educational work-study allowances.
- **Excluded assets for Native American students.** The law (see HEA Sec. 479C) excludes reporting any income and asset of \$2,000 or less per individual payment (any amount over \$2,000 is reported as untaxed income) received under the Per Capita Act or the Indian Tribal Judgment Funds Use or Distribution Act. It also excludes any income received under the Alaska Native Claims Settlement Act or the Maine Indian Claims Settlement Act. Per capita distributions or the proceeds received from the Land Buy-Back Program for Tribal Nations—a tribal purchase of fractionated lands because

of the Cobell settlement under the Claims Resolution Act of 2010 (42 U.S.C. 1305)—should also be excluded.

- **Any other untaxed income not reported elsewhere.** This includes disability benefits (but not Social Security disability), worker's compensation, tax-free contributions to HSAs (see below), interest income on education IRAs, untaxed portions of Railroad Retirement benefits, black lung benefits, refugee assistance, the untaxed portion of capital gains, and foreign income that wasn't taxed by any government, wasn't earned, and wasn't part of the Foreign Earned Income Exclusion.
- **Health savings accounts (HSAs)** resemble tax-deferred pension and savings plans more than flexible spending arrangements. For example, the balance in an HSA persists from year to year, while that in a flexible spending arrangement must be spent on qualified expenses by the end of the year. Therefore, treat tax-free contributions to an HSA as untaxed income; these will appear on line 13 of Schedule 1 of Form 1040. The balance in the account does not count as an asset, nor would distributions from it count as untaxed income when they are used for qualified medical expenses. Distributions not used for qualified expenses are subject to income tax (and a possible penalty) and will be counted in the adjusted gross income.
- **Extended foster care payments:** Foster children who meet certain criteria can receive benefits until age 21. If these extended payments are under the authority of Title IV, Part E, of the Social Security Act, they are not to be reported. If they are paid under some other authority, e.g., a state foster youth support program, they are reported as untaxed income to the apprentice.
- **Money received:** The apprentice should report any cash support they received, but if dependent they do not count support received from their parents, with one exception: money from a noncustodial parent that is not part of a legal child support agreement is untaxed income to the apprentice. Cash support includes money, gifts, housing, food, clothing, car payments or expenses, medical and dental care, college costs, and money paid to someone else or paid for on their behalf. For example, if a friend or relative pays an apprentice's electric bill or part of their rent, the apprentice must report the amount as untaxed income. If they are living with a friend who pays the rent and the apprentice's name is on the lease, the rent paid on their behalf counts as cash support because the apprentice is responsible for payments that their friend is making. *Note that this is only pertinent to an apprentice, not for a dependent's parent(s).*
- **Tips on reporting benefits:** The apprentice reports the actual dollar amount of benefits received during the year, even if it is an underpayment or an overpayment that will be corrected in the next year. However, if the underpayment or overpayment was adjusted in the same year, only the net amount received during that year would be reported.
  - Benefits the apprentice or parent(s) receive on behalf of anyone included in their WCG-A application household size count as income to them unless the person is an adult (not a child), e.g., a grandmother, who receives the benefits in her name. Such a person is not included in the household size if benefits in their name total more than half of their support.
- **Box 14 items on the W-2:** SFAAs are not required to review income listed in box 14 of the IRS's W-2 form. There are a few reasons for this. Employers could include in box 14 certain nonelective pension plan contributions, which should not be counted in the need analysis. Also because no employer is required to provide information in box 14, it is unlikely that employers will be consistent in what they report there. But if you are aware that a box 14 item should be reported—i.e., if it represents discretionary

income—you should count it as non-taxable income. For example, clergy parsonage allowances often appear in box 14, and you would count that as non-taxed income.

- **Income and benefits NOT to be included:**

- **Student aid** does not count as income in the calculation of the MFI. Student aid includes tuition benefits a parent receives for a dependent, such as those from the parent's employer. Student aid that was included in the AGI can be subtracted from income.
- **Veterans' education benefits:** The following Federal Veterans Education Benefits should be excluded from a calculation for MFI:
  - Chapter 103 of Title 10, United States Code (Senior Reserve Officers' Training Corps)
  - Chapter 106A of Title 10, United States Code (Educational Assistance for Persons Enlisting for Active Duty)
  - Chapter 1606 of Title 10, United States Code (Selected Reserve Educational Assistance Program)
  - Chapter 1607 of Title 10, United States Code (Educational Assistance Program for Reserve Component Members Supporting Contingency Operations and Certain Other Operations)
  - Chapter 30 of Title 38, United States Code (All-Volunteer Force Educational Assistance Program, also known as the "Montgomery GI Bill—active duty")
  - Chapter 31 of Title 38, United States Code (Training and Rehabilitation for Veterans with Service-Connected Disabilities)
  - Chapter 32 of Title 38, United States Code (Post-Vietnam Era Veterans Educational Assistance Program)
  - Chapter 33 of Title 38, United States Code (Post-9/11 Educational Assistance)
  - Chapter 35 of Title 38, United States Code (Survivors' and Dependents' Educational Assistance Program)
  - Section 903 of the Department of Defense Authorization Act, 1981 (10 U.S.C. 2141 note) (Educational Assistance Pilot Program)
  - Section 156(b) of the "Joint Resolution making further continuing appropriations and providing for productive employment for the fiscal year 1983, and for other purposes" (42 U.S.C. 402 note) (Restored Entitlement Program for Survivors, also known as "Quayle benefits")
  - The provisions of Chapter 3 of title 37, United States Code, related to subsistence allowances for members of the Reserve Officers Training Corps
  - Benefits received under the Veterans Retraining Assistance Program (VRAP)
  - Benefits received under the Veterans Rapid Retraining Assistance Program (VRRAP)
- **The value of on-base housing** or the BAH for students or parents in the U.S. military. However, the BAS **does** count as untaxed income.
- **Rent subsidies for low-income housing.**
- **Payments and services received from states for foster care or adoption assistance**, under Part A or Part E of Title IV of the Social Security Act (e.g., Wisconsin's Adoption Assistance Program, which facilitates the adoption of children with special needs).
- **Per capita payments to Native Americans.** See "Excluded assets for Native American students" section earlier in this chapter.
- **Heating/fuel assistance.** This includes payments or allowances received under the Low-Income Home Energy Assistance Act (LIHEA). Payments under the LIHEA are made through state programs that may have different names.

- **Flexible spending arrangements.** These are employee benefit programs, sometimes called “cafeteria plans.” Neither contributions to nor payments from these programs should count as untaxed income.
- **Welfare benefits, untaxed Social Security benefits, and the earned income and additional child tax credits.** Welfare benefits are means-tested state or federal supplementary assistance. Examples are benefits from Medicaid (including the Children’s Health Insurance Program), the Supplemental Nutrition Assistance Program (SNAP), and Temporary Assistance for Needy Families (TANF).
- **Combat pay, Foreign Earned Income Exclusion, and credit for federal tax on special fuels.**
- **In-kind support** is support other than money, for example, friends or relatives giving the apprentice food or allowing him or her to live with them rent-free. This support isn’t included as untaxed income, though you may use professional judgment (e.g., by reducing the cost of attendance or increasing income) with apprentices who receive such in-kind support. This is not the same as housing and other allowances received as compensation for a job, which, as stated earlier, must be reported. If the apprentice is living with someone who is paying living expenses, it can be difficult to determine whether the support is cash support or in-kind support. The basic rule is: if someone pays a cost the apprentice is obligated to pay, the amount counts as cash support.

## **Non-Tax Filers, Foreign Countries, and International Organizations**

In some countries the tax system does not operate as it does in the U.S., and people in those countries can earn a substantial amount of income and pay taxes without having to file a return. In such a case the person should report any *net income that is earned from work*, as appropriate.

What happens when one spouse files a return, but the other spouse does not file a return but has foreign earned income as described above? The foreign net income earned from work is added to the AGI of the tax filing spouse, as our guidance instructs under the “Married Filing Separately” section described earlier in this chapter.

In some instances, employees of certain international organizations, such as the United Nations, the International Monetary Fund, the World Bank, and others, **might not** be required to file a return, which results in situations like those described above. Follow the same guidance—a non-tax filer will report income from that employment as income earned from work only, while a person who is married to a tax filer will report it as income earned from work and add it to the AGI of the tax-filing spouse.

Note that the guidance in this section does not pertain to the Foreign Earned Income Exclusion, which is reported on the U.S. tax return and should be excluded from the MFI calculation.

## Professional Judgment for Special Circumstances

The SFAA may, using Professional Judgment (PJ), adjust the resources up or down to reflect the family's financial situation more accurately during the year. The aid administrator shall document the reason for the variance in the apprentice's file.

Please note that Professional Judgement for Unusual Circumstances are detailed in Chapter 1: Eligibility. Unusual circumstances refer to conditions that justify an aid administrator making an adjustment to an apprentice's dependency status based on a unique situation, more commonly referred to as a dependency override.

Special Circumstances refer to the financial situations (such as the loss of a job) that justify an SFAA adjusting the income used to determine an apprentice's MFI.

An apprentice may have both a special circumstance and an unusual circumstance. SFAAs may make adjustments that are appropriate to each apprentice's situation with appropriate documentation. Depending on the situation, an SFAA may:

- Choose to exercise professional judgment (PJ) to adjust an apprentice's income used to determine the apprentice's MFI to account for an apprentice's **special circumstance**.
- Decide that **unusual circumstances** warrant making a dependent apprentice an independent apprentice.
- Determine that an apprentice should be classified as an **unaccompanied homeless youth**.
- Need to resolve a discrepancy after receiving conflicting information for an apprentice (see Chapter 1: Eligibility) before awarding WCG-A.
- Discover that an apprentice or employee has been guilty of **fraud** and should be reported to WSAC.

The SFAA may use PJ on a case-by-case basis to adjust the data used to determine an apprentice's MFI. This adjustment is valid only at the Sponsor for which the SFAA is making the change.

Some examples of special circumstances that *may* be considered:

- Change in employment status, income, or assets
- Change in housing status (e.g., homelessness)

This is not an exhaustive list. You may use your discretion to make appropriate, reasonable adjustments to reflect an apprentice's situation more accurately. As explained in this chapter, this may include accounting for resources, such as in-kind support, that do not appear on WCG-A application. You may also use your discretion to deny an apprentice's request for adjustment; however, an SFAA may not maintain a policy to deny all requests for special circumstance adjustments.

The SFAA must develop policies and a process for reviewing requests for professional judgment. Additionally, the SFAA must publicly disclose that apprentices may request an adjustment based on special circumstances. This could include (but is not limited to) posting what may be considered a special or unusual circumstance on your website, include such information in mailings to apprentices, or add language on award notifications.

The reason for your decision to approve or deny a request for professional judgment and any subsequent adjustments **must be documented**. The documentation must relate to the special circumstances that differentiate the apprentice—not to conditions that exist for a whole class of apprentices. The SFAA must resolve any inconsistent or conflicting information before making any adjustments. An SFAA’s decision regarding adjustments is final and cannot be appealed to WSAC.

The SFAA is only permitted to adjust the values of specific data elements used in the income calculation for MFI determination. In addition, the SFAA cannot adjust data elements solely because one believes the tables and formula are not adequate or appropriate. The data elements that are adjusted must relate to the apprentice’s special circumstances. For example, if a family member is ill, an SFAA might modify the AGI to allow for lower earnings in the coming year.

*An SFAA cannot use PJ to waive general apprentice eligibility requirements or to circumvent the intent of the law or regulations around WCG-A.* For instance, an SFAA cannot use PJ to change eligibility to participate in an apprenticeship program not approved by L&I.

Examples of “unreasonable” professional judgments include, lowering MFI to cover recurring costs such as vacation expenses, tithing expenses, and standard living expenses (e.g., utilities, credit card expenses, children’s allowances, etc.). SFAAs must make “reasonable” decisions that support the intent of the provision. The SFAA is held accountable for all professional judgment decisions and for fully documenting each decision.

If the SFAA uses professional judgment to adjust income used to determine MFI, the SFAA must use the resulting MFI consistently for all WCG-A and WA Bridge Grant awarded to that apprentice.

Finally, an SFAA is not permitted to make a professional judgement for an apprentice after that apprentice has ceased to be eligible, including when an apprentice is no longer enrolled.

PJ examples:

**Example 1:** A Dependent apprentice’s mother had income earned from work of \$25,000 in 2022 but is no longer employed. After receiving documentation confirming this, the SFAA decides to adjust the AGI reported for the apprentice’s parents to account for their reduced income.

**Example 2:** In 2022 an apprentice claims they had travelled to a foreign country on vacation, which cost them \$12,500. Because the expenses are outside of a reasonable cause that supports the intent of the provision, the SFAA declines to adjust the AGI reported for the apprentice.

## **Documentation**

Question (44) on the WCG-A Application provides an opportunity for an applicant to disclose that they have a special circumstance. They can submit additional pages as necessary. Instructions also disclose that third-party documentation will need to be submitted to the SFAA to validate their statement.

For changes to income, 2022 income documents (such as 2022 Federal Income Tax Return, W-2 Forms, or last pay stub from 2022) should be compared against current income documents (such as pay stubs).

If someone has been laid off or unable to work due to a medical condition, acceptable documents could include a layoff notice.

If someone's income from 2022 has been reduced and the income from current employment is expected to continue through the remainder of the 2024 calendar year, an SFAA could evaluate a pay stub dated after June 30, 2024, (for all jobs held) to estimated total 2024 income by multiplying the YTD Gross Wages by two (2).

If paystubs are not available, an SFAA can have an applicant (or parents of a dependent applicant) submit a signed affidavit disclosing their anticipated income for each month from July 2024 through June 2025.

As stated, discrepancies that result in conflicting information must be resolved before awarding WCG-A. If the income adjustments result in a higher MFI, the SFAA will need to use the information provided to determine the WCG-A award eligibility. Suspected fraud by an applicant or employee must be reported to WSAC immediately.

SFAAs should have policies and procedures that detail how Professional Judgement should be utilized.

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

An apprentice 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 SFAA. This applies when the apprentice's current family income increases slightly above the 100 percent maximum MFI level.

### **Washington College Grant – Connect (WCG-C)**

All apprentices enrolled in a Sponsor's apprenticeship programs (or all applicants submitting their WCG-A application to a Servicer) should be uploaded into the WCG-C Eligibility Checker to see if they are categorically eligible to meet the WCG income eligibility. Apprentices who meet all residency and other program requirements that appear in the WCG-C Eligibility Checker should be awarded the maximum WCG-A award.

Refer to Chapter 1 for instructions on how to use the WCG-Connect Eligibility Checker and guidance on when an apprentice self-identifies on the WCG-A Application but does not show in the WCG-C Eligibility Checker.

## Awarding considerations:

- Apprentices appearing in the WCG-Connect Eligibility Checker are to be considered as meeting the income eligibility for WCG and should be awarded based on meeting the maximum WCG award.
  - Apprentices that fall into this category are not eligible to receive CBS or PTC as these programs require FAFSA/WASFA
  - Apprentices that fall into this category are eligible to receive WA Bridge Grant if they are enrolled in at least 3 credits or the hour equivalency (for example 500 hours of a 2000 hour per year apprenticeship)
- Apprentices appearing in the WCG-C Eligibility Checker should be awarded based on meeting the maximum WCG award regardless of their calculated MFI. This means that you may need to adjust their award to maximum WCG if you already awarded on MFI.

## Washington Bridge Grant

For the 2024-2025 fiscal year, WCG-A recipients who are receiving a maximum WCG-A award (0-65% MFI), but are not CBS eligible, and who have enrolled in at least 3 credits or the hour equivalency (for example 500 hours of a 2000 hour per year apprenticeship), are also entitled to receive a \$500 WA Bridge Grant.

*Note: CBS eligible students are **ineligible** for the Bridge Grant. Most apprentices will not be CBS eligible; however, there may be rare instances that an eligible CBS student applies for WCG-A. SFAAs are encouraged to upload a CSV file into payment requests through Portal Training to check for CBS eligibility before sending out an award notice to an applicant. If an applicant does show CBS eligibility, SFAAs should contact WSAC using a secure message in the WSAC Portal to notify WSAC and await further instructions.*

The Washington Bridge Grant is an annual stipend awarded in addition to WCG-A to provide supplementary financial support to low-income students and apprentices to cover higher education expenses beyond tuition and fees, such as books, lab fees, supplies, technology, transportation, housing, and childcare.

**The award amount can be a flat rate, lump sum payment for the year or awarded proportionally across terms, whichever is in the best interest of the apprentice. The award is limited to need and is not prorated by enrollment level.**

For SFAAs, the *Apprentice Directive for Disbursement of State Aid* requirements apply to Washington Bridge Grant awards.

Eligible apprentices are individuals who:

- Are enrolled in at least 3 credits or the hour equivalency at an eligible apprenticeship program.
  - If an apprentice enrolls in and attends at least 3 quarter credits (or the hour equivalency) the apprentice will not owe back WA Bridge Grant if the apprentice withdraws.
- Receive a maximum Washington College Grant award and still have need remaining.
- Meet Satisfactory Program Progress.

- Are **NOT** College Bound Scholarship eligible. Please note that these situations are not likely but are possible.
  - To be CBS eligible does not mean an apprentice is receiving CBS funding. WSAC recommends using Portal Training to upload a CSV file for payment requests to ensure that apprentices do not have eligibility for CBS before sending an award notification. Contact WSAC using a secure message in the WSAC Portal if an applicant is also eligible for CBS and await further instructions.
    - Some examples of CBS students who might be eligible for a WA Bridge Grant include apprentices who signed up for CBS but did not meet the high school graduation requirement, did not meet the enrollment deadline, and those who are past the 5-year eligibility.

Most award amounts are not divisible by both two and three. For SFAAs 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.

## Median Family Income (MFI) Levels for 2024-25 Washington College Grant for Apprenticeship Eligibility

Family Size	65%	70%	75%	100%
1	\$40,500	\$44,000	\$47,000	\$62,500
2	\$53,000	\$57,500	\$61,500	\$82,000
3	\$65,500	\$71,000	\$76,000	\$101,000
4	\$78,500	\$84,500	\$90,500	\$120,500
5	\$91,000	\$98,000	\$105,000	\$139,500
6	\$103,500	\$111,500	\$119,000	\$159,000
7	\$105,500	\$111,500	\$119,000	\$159,000
8	\$108,000	\$116,500	\$124,500	\$166,000
9	\$110,500	\$119,000	\$127,500	\$170,000
10	\$112,500	\$121,500	\$130,000	\$173,500
11	\$115,000	\$124,000	\$133,000	\$177,000
12	\$117,500	\$126,500	\$135,500	\$180,500
13	\$120,000	\$129,000	\$138,000	\$184,000
14	\$122,000	\$131,500	\$141,000	\$188,000
15	\$124,500	\$134,000	\$143,500	\$191,500
16	\$127,000	\$136,500	\$146,500	\$195,000
17	\$129,000	\$139,000	\$149,000	\$198,500
18	\$131,500	\$141,500	\$151,500	\$202,500
19	\$134,000	\$144,000	\$154,500	\$206,000
20	\$136,000	\$146,500	\$157,000	\$209,500

Washington Student Achievement Council analysis of 2021 American Community Survey data as published by the federal Low-Income Home Energy Assistance Program. All figures have been rounded to the nearest \$500 income range.

\*WA Bridge Grants are available to WG-A recipients (not CBS eligible) who enroll in at least 3 credits or the hour equivalency (for example, 500 hours of a 2,000 hour per year apprenticeship), meet the 65% MFI, and do not qualify for the College Bound Scholarship. Amount can be a flat rate, lump sum payment for the year, or awarded proportionally across terms, whichever is in the best interest of the apprentice. WA Bridge Grants are limited to need and are not prorated by enrollment level.

WSAC Rev 11/02/2023

For questions, contact [wcg@wsac.wa.gov](mailto:wcg@wsac.wa.gov)

## WA Grant for Apprenticeship Award Chart for 2024-25

2024-25 WCG-A and WA Bridge Grant Amounts					
	Median Family Income (MFI)				
	0% - 65%	0% - 65%	66% - 70%	71% - 75%	76% - 100%
	WA Bridge Grant*	Full Award Value = Maximum WCG-A Award	Full Award Value = 50% of Maximum WCG-A Award	Full Award Value = 24.5% of Maximum WCG-A Award	Full Award Value = 10% of Maximum WCG-A Award
Award Value	\$500	\$4,763 3.00 QEU's	\$2,382 3.00 QEU's	\$1,167 3.00 QEU's	\$476 3.00 QEU's

QEU's = Quarters of Eligibility Utilized

Full WCG-A Award Values are tied to program costs paid for by apprentices and based on a 2,000 On-the-Job (OJT) hour standard and completion of the required annual number of Related Supplemental Instruction (RSI) hours as outlined in an apprenticeship program's standards, which amounts to a charge of 3.00 Quarters of Eligibility Utilized (QEU's) to a recipient's lifetime eligibility limits for Washington College Grant programs.

\*Bridge Grants are available to WCG recipients (not CBS eligible) who enroll in at least 3 credits or the hour equivalency (for example 500 hours of a 2000 hour per year apprenticeship), meet the 65% MFI, and do not qualify for the College Bound Scholarship. Amount can be a flat rate, lump sum payment for the year, or awarded proportionally across terms, whichever is in the best interest of the apprentice. Bridge Grants are limited to need and are not prorated by enrollment level.

WCG-A Awards can be awarded and disbursed up-front at the beginning of a program or in alignment with RSI schedules – commonly split into 2, 3, or 4 payments per year as follows:

100% Standard WCG-A Award Splits (Each WCG-A Payment Value & QEU Charge)				
# of Payments Per Year	0% - 65% MFI	66% - 70% MFI	71% - 75% MFI	76% - 100% MFI
1	\$4,763 3.00 QEU's	\$2,382 3.00 QEU's	\$1,167 3.00 QEU's	\$476 3.00 QEU's
2	\$2,381 1.50 QEU's	\$1,191 1.50 QEU's	\$583 1.50 QEU's	\$238 1.50 QEU's
3	\$1,587 1.00 QEU's	\$794 1.00 QEU's	\$389 1.00 QEU's	\$158 1.00 QEU's
4	\$1,190 0.75 QEU's	\$595 0.75 QEU's	\$291 0.75 QEU's	\$119 0.75 QEU's

WCG-A Awards should also be prorated and/or split in the event an apprentice has a limited number of OJT or RSI hours to complete to avoid overpayment.

If the apprentice has disproportionate costs, the Sponsor may document the disproportionate costs (to be retained in the apprentice's file) and award/disburse disproportionately.

For example, if the costs are \$3,149 to begin, and then additional costs are incurred 6 months later, an apprentice with the Maximum WCG-A award would be disbursed \$3,149 at the beginning of the program. An additional \$1,614 would be disbursed 6 months later, provided the apprentice has continued to make progress.

## Minimum Awards

- **The minimum WCG-A award amount is one dollar (\$1.00) per term.**

Circumstances relevant to part-time apprenticeship and other factors may reduce an apprentices' WCG-A to a very low level. The Sponsor may issue WCG-A awards as low as \$1.00 per term. Sponsor should inform the apprentice of their option to decline low awards to preserve QER.

## Declining WCG-A Awards

If a WCG-A awarded apprentice wishes to decline an award, the Sponsor must maintain a written record of the award amount that is declined and the reason it was declined. This may occur, for example, when an apprentice is awarded a very small award and wishes to retain flexibility for Quarters of Eligibility Remaining (QER's).

## ADJUSTING MAXIMUM AWARD AMOUNTS (PRORATED AWARDS)

A full WCG-A Award is based on an annual minimum of 2,000 OJT hours and/or 144 RSI hours, for a charge of 3.00 QEUs to an apprentice's lifetime maximum eligibility. The award should be made with consideration of the Satisfactory Program Progress (SPP) requirements that are specified in Chapter 3. There are situations in which an award must be prorated from the maximum.

## Part-Time Apprentices

In general, most apprentices are awarded based on full-time employment. There may be unique situations where an apprentice is not employed full-time or there may be situations in which an apprentice may know they will not be able to meet SPP requirements due to known extended leaves of absence (such as FMLA leave). In these cases, SFAAs have the option of prorating WCG-A awards to minimize Quarters of Eligibility Utilized (QEUs) and preserve the number of Quarters of Eligibility Remaining (QERs) that an apprentice has. This can prolong an apprentice's ability to receive aid throughout the duration of their program in alignment with their rate of their progression. Proration can also allow an apprentice to pursue a postsecondary education credential using the Washington College Grant.

WCG-A awards must be reduced for part-time apprentices based on their enrollment status:

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

*Note: WA Bridge Grants are not prorated based on enrollment.*

## Less than 2,000 OJT or 144 RSI Hours Remaining (Enrollment Intensity)

If an apprentice has less than 2,000 OJT hours and less than 144 RSI hours remaining in their program, SFAAs will need to prorate the award based on the remaining hours. Washington College Grant refers to this as "Enrollment Intensity" based on the specific number of credits a

student is enrolled in rather than ranges (for example: awarded based on 10 credits rather than a range of 9-11 credits at  $\frac{3}{4}$  time enrollment).

To determine how to prorate based on remaining hours of OJT and RSI, the SFAA must determine with the apprentice and their Sponsor the number of hours that an apprentice is expected to have before they journey out of their program. These situations include, but are not limited to:

- Sponsors may have program standards that continue an apprentice beyond completion of their hours until an anniversary date. SFAA should determine how many additional hours the apprentice will be completing beyond their program hours.
- Sponsors may require apprentices to complete additional OJT hours for absences or as part of other disciplinary or assigned requirements. SFAA should determine how many additional hours the apprentice will need to complete in order to fulfill their obligations and journey out of their program.

Once the remaining hours have been determined:

1. Divide the remaining number of OJT hours by the 2,000 OJT hour standard.
2. Divide the remaining number of RSI hours by the 144 RSI hour standard.
3. Determine the greater value of OJT or RSI hours compared to the standard.
4. Take the value from Step 3 apply to the full WCG-A award value (based on MFI)
5. Take the value from Step 3 and apply to the 3.00 Quarters of Eligibility Utilized (QEUs) standard.
6. Satisfactory Program Progress (SPP) as addressed in Chapter 3 will be based on the OJT hours or the RSI hours for which the award and QEU calculation used.

For example, if there are 750 OJT and 90 RSI hours remaining in an apprentice with a WCG-A Award determined at 65% MFI:

1. OJT Calculation:  $750/2000 = 0.375$
2. RSI Calculation:  $90/144 = 0.625$
3. Greater value: RSI: 0.625
4. 65% MFI Award Proration:  $\$4,763 \times 0.625 = \$2,977$
5. 3.00 QEU Proration:  $3.00 \text{ QEU} \times 0.625 = 1.875 \text{ QEUs}$
6. SPP based on RSI hours (see Chapter 3)

As a reminder, if an apprentice has a minimum of 2,000 OJT hours or 144 RSI hours remaining, they can be awarded the full-year, full-value WCG-A Award.

WSAC has developed a worksheet tool to help guide the collection of the OJT and RSI hour data and to help with the calculation. Dual- and Concurrent-Participation situations (discussed below in Other Awarding Considerations) will require WSAC to determine award value based on their enrollment (or employment) in the other program.

WSAC recommends that SFAAs consider written confirmation or acknowledgement from Sponsor and Apprentice regarding the number of hours that the award is based on. Any calculations and documents used to help determine the award should be retained in the apprentice's record in alignment with record-keeping practices.

## **Less than 3.00 Quarters of Eligibility Remaining (QERs)**

Recipients of Washington College Grant, including WA Grant for Apprenticeship (WG-A), have a combined maximum usage of 6 full-time years (18 quarters, 12 semesters, or the equivalent hours). Full WCG-A Awards are based on 3.00 Quarters of Eligibility Utilized (QEUUs).

WCG-A Awards must be prorated to match an apprentice's remaining Quarters of Eligibility Remaining (QERs) when they have less than 3.00 QERs left.

To determine the WCG-A Award value based on limited QERs:

1. Take the remaining QERs and divide by the 3.00 standard.
2. Then multiply the resulting value by the full value WCG-A award (based on MFI).
3. SFAAs must determine that an apprentice's revised award value does not exceed the number of OJT or RSI hours remaining in the program. This is determined by taking the value from step 1 and multiplying by 2,000 OJT hours and 144 RSI hours. If the apprentice has less than the resulting OJT or RSI hours remaining in their program, then follow the less than 2,000 OJT or 144 Hours Remaining (Enrollment Intensity) proration.
4. SPP is not likely to apply for awards that are terminal due to no remaining Quarters of Eligibility; however, an apprentice should be advised of the minimum number of hours to meet SPP with their award (as discussed in Chapter 3).

For example, if an apprentice has 2.25 QERs for an apprentice with a WCG-A Award determined at 65% MFI:

1. QER Percentage Calculation:  $2.25/3.00 = 0.75$
2. WCG-A Award Value:  $\$4,763 \times 0.75 = \$3,572$
3. OJT Hours =  $2,000 \times 0.75 = 1,500$  OJT Hours  
RSI Hours:  $144 \times 0.75 = 108$  RSI Hours
4. See Chapter 3 for SPP determination.

Dual- and Concurrent-Participation situations (discussed below in Other Awarding Considerations) will require WSAC to determine award value based on their enrollment (or employment) in the other program.

WSAC recommends that SFAAs consider written confirmation or acknowledgement from Sponsor and Apprentice regarding the number of hours that the award is based on. Any calculations and documents used to help determine the award should be retained in the apprentice's record in alignment with record-keeping practices.

## **Attendance Less Than 3 Quarter Credits or the Equivalent**

WCG-A apprentices enrolled for fewer than three quarters or the equivalent will receive a prorated share of the total annual award. Example: A full-time apprentice attending one of three quarters (or the equivalent) will receive one-third of the maximum award amounts shown in the charts. An apprentice enrolled in less than 3 quarter credits (or its equivalent) is not eligible to receive the WA Bridge Grant.

## **Clock Hour Programs**

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

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

## **OTHER AWARDING CONSIDERATIONS**

### **Use of State Funds for Prior Year Charges**

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

### **Additional Term Awards**

It is possible for an apprentice to receive additional term funding of WCG-A, in addition to the typical 3 quarters, or 2 semesters, or hour equivalent, within the same year.

For students earning academic credits, they may enroll and receive payments for up to 4 quarters or 3 semesters during the year.

For apprentices earning clock hours, apprentices may be able to enroll and receive up to 5 quarter payments per year (for more information on clock hours, see Chapter 5).

For students and apprentices exceeding 3 quarters, or 2 semesters, or the hour equivalent, the value of the additional award is calculated as it would be for any regular term. Students and apprentices receiving additional terms of aid will reach their maximum quarter limit more quickly than students and apprentices 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 to add the additional term of funding.

### **Washington College Grant for Apprenticeship Over-Award**

State aid, combined with other aid meeting need, may not exceed the apprentice's calculated need. However, an apprentice will not be considered over-awarded if additions to the initial award due to late reporting of scholarships/resources 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 SFAA must review the eligibility for WCG-A, and if necessary, readjust the awards.

### Example:

- A WCG-A funded apprentice receives additional aid, the MFI level changes, or the need changes. The SFAA must review the award to make sure that the apprentice is still eligible for the WCG-A 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 Apprentices for a Current Term After Withdrawal

If an apprentice completely withdraws for a term without earning at least 3 credits or completing the hour equivalent, no additional WCG-A payments may be made to the apprentice for that term, on or after an apprentice's official withdrawal date, unless it is determined to be a late award.



## Retroactive Awards and/or Payments for Previous Terms for Eligible WCG-A Apprentices

Retroactive awards are for when an apprentice completes their application for WCG-A late but has previously been enrolled in their apprenticeship program, is currently enrolled in their apprenticeship program, -AND- an SFAA reviews a WCG-A application after a term has passed.

Retroactive awards and/or payments **MUST** be made for all programs which an apprentice is eligible 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 an apprentice's rate of satisfactorily completed hours (must be at least the hour equivalent of 3 credits) determined by the Sponsor at the end of the term(s). If an apprentice is on state unsatisfactory or denied status, they would not be eligible for a retroactive award unless they appealed, and the appeal was approved by the SFAA.

If an SFAA retroactively awards WCG-A funds to an apprentice who completed fewer credits for a previous term than they would have been awarded had the award been made at the beginning of the term, the apprentice's enrollment status reported for the term on the CSV file upload must be updated to reflect the enrollment status for which the payment was actually made.

## Examples:

- Example 1: Apprentice completes WCG-A application in January but has been enrolled in their apprenticeship program since August. Apprentice can receive a retroactive award for previous term based on the number of hours they completed. If they completed their hours for their initial and second payment, they would be awarded their initial and second payment. Reminder that an apprentice can receive Bridge Grant if they completed at least 3 credits or the clock hour equivalent.
- Example 2: Apprentice started in August but has since withdrawn from the program they were attending. They did not have a valid WCG-A application on file until January. This would not be a retroactive award since the apprentice was ineligible for the August term (due to not having a valid WCG-A application on file (and did not complete 3 or more credits or the hour equivalent) and is not currently attending the same program.
- Example 3: Apprentice attended their apprenticeship program from August, completed what would have been their hours for a second payment in January, but did not file a WCG-A application until March and completed their program in March. Since the apprentice is no longer enrolled, they are not eligible for a retroactive award.



## Late Awards

Late awards are when an SFAA awards WCG-A and does not award WA Bridge Grant at the same time. It is imperative that all awards are entered into the WSAC Portal at the same time. SFAAs that are not awarding all programs at the same time will be considered to be an SFAA error. WSAC will be monitoring SFAAs for late awarding practices.

To ensure apprentices are held harmless, apprentices should be awarded at the same level that the initial WCG-A award was made, regardless of number of hours completed or if the apprentice is still enrolled.

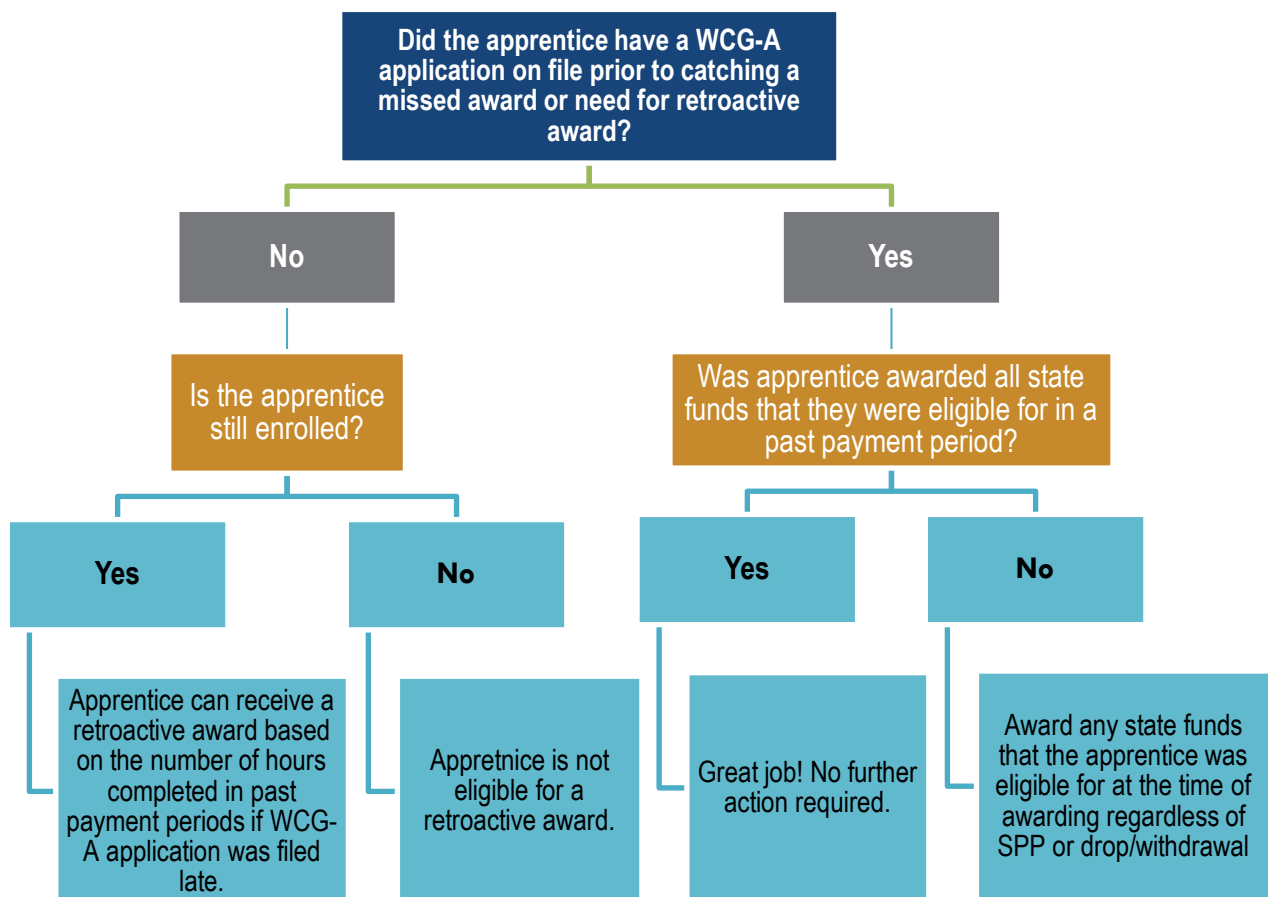
If the apprentice had received all the aid they were entitled to at the beginning of the term, it might have played an important role in their retention and success.

## Examples:

- **Example 1:** SFAA initially awards WCG-A, but apprentice is also eligible for WA Bridge Grant at the time of awarding and is not awarded. SFAA is completing end of year reconciliation report and finds that WA Bridge Grant should have been awarded, but apprentice did not maintain SPP after initial term. The apprentice should still be awarded WA Bridge Grant as a late award since the apprentice was ***eligible at the time of awarding*** and the award was missed due to SFAA error. WA Bridge Grant is awarded at the same enrollment level as the original WCG award, as long as the apprentice completed the hour equivalent of 3 quarter credits.
- **Example 2:** Apprentice enrolled in their program in August and was awarded WCG-A only. They were also eligible for WA Bridge Grant at the time of awarding. They attended at least one day of their program but received 100% reversal of

tuition and fees due to the Sponsor's refund policy. Since the apprentice was eligible at the time, they received WCG-A, WA Bridge Grant must be awarded as a late award due to institutional error based on the enrollment at the time WCG-A was awarded.

- **Example 3:** Apprentice attended apprenticeship program from August through March and graduated after March. During the March payment period, it was found that the apprentice received WCG-A for August and January but was also eligible for WA Bridge Grant and was not awarded. Even though the apprentice is no longer enrolled at the time the misaward was found, they are eligible for a late award within the same fiscal year.



## 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 payment terms. Rounding by more than two dollars per fiscal year is not permitted.

## Cost of Attendance (COA) Budget for WCG-A

WCG-A Cost of Attendance (COA) Budgets include direct program costs that are specific to an individual Sponsor Organization and the apprenticeship program (occupation), and WFAA (Washington Financial Aid Association) budget for living expenses, transportation, and miscellaneous/personal costs. Direct program costs are setup with WSAC annually. These costs include, but are not limited to:

- Tuition and fees (only for courses that were not funded by WCG)
- Books/Supplies/Equipment
- Clothing/Boots
- Other apprenticeship program costs may also be included, if the apprenticeship sponsor has provided data to support a direct cost to the apprentice that is unique from the overlapping budget items, or
- If costs exceed the WFAA budget values. PJ can be used to adjust the direct program COA budget. For example: transportation when travel and/from OJT/RSI exceeds 50 miles one-way and requires lodging in- or out-of-state, or when dependent care is needed during evening or weekend hours to complete OJT/RSI.

The 9-month WFAA Cost of Attendance budgets for the 2024-2025 Fiscal Year have been recalculated for WCG-A to 12-month budgets. Additionally, the living situation is considered, particularly for those categorized as Dependent who are living with their parent(s). To properly identify these applicants, Question (37) was added to the WCG-A Application for Dependent applicants to answer if they will be living primarily at home with their parents between July 1, 2024, and June 30, 2025.

	<b>Dependent Living with Parent</b>	<b>All Others</b>
Transportation	\$3,568	\$3,864
Miscellaneous/Personal Expenses	\$2,464	\$2,474
Living Expenses	\$4,800	\$15,976

## Dual- and Concurrent Award in Apprenticeship and College Programs

While it is not encouraged, it is permissible for an apprenticeship program and college program to disburse separate state aid awards to the same applicant during the same term. If an apprentice is concurrently enrolled in both programs, please reach out to WSAC using the secure messaging in the Portal.

### Dual-Participation in WCG and WCG-A

An individual enrolled in a WCG eligible program and employed by an apprenticeship during the same fiscal year of July 1 to June 30, but where the time-period of participation in both activities do not overlap with each other. *For example: A student enrolled at a CTC for the Fall term only (September thru December) and started an apprenticeship program on February 1.*

In cases where there is no overlap in an individual's participation in WCG and WG-A eligible programs, a dual-enrollment award allowing for the full value of WCG for the term

and the full value of the WG-A award is allowed. The apprentice student will utilize more quarters of eligibility if they accept this aid offer.

*For example: A student enrolled at a CTC for the Fall term only and started an apprenticeship program on February 1.*

Fall 2024	Winter 2025	Spring 2025	Summer 2025 (Trailing)
WCG Award \$1,587 (65% MFI) 1.00 QEU	WG-A Award \$1,190 (65% MFI) 0.75 QEU	WG-A Award \$1,191 (65% MFI) 0.75 QEU	WG-A Award \$1,191 (65% MFI) 0.75 QEU
	WG-A Award (Feb 1) \$4,763 (3.00 QEUs) [Renewal Based on Feb 1]		

### Concurrent-Participation in WCG and WCG-A

An individual enrolled in a WCG eligible program and employed by an apprenticeship for any overlapping time-period within a fiscal year of July 1 to June 30. *For example: A student enrolled at a CTC for the Winter term only, but also participating in an apprenticeship program beginning February 1.*

In cases where there is overlap in an individual's participation in WCG and WG-A eligible programs, the award value of one program must be reduced to direct program costs for the months that have overlap with an academic term.

- In the case of WCG, the FAA (Financial Aid Administrator at the school) would be restricted to awarding tuition and fees if full COA has been awarded under WCG-A.
- In the case of WCG-A, the SFAA would be restricted to awarding non-duplicated direct program costs for:
  - Tuition and fees (only for courses that were not funded by WCG)
  - Books/Supplies/Equipment
  - Clothing/Boots
  - Other apprenticeship program costs may also be included, if the apprenticeship sponsor has provided data to support a direct cost to the apprentice that is unique from the overlapping budget items, or
  - If costs exceed the WFAA budget values. Professional Judgement (PJ) can be used to adjust the direct program COA budget. For example: transportation when travel and/from OJT/RSI exceeds 50 miles one-way and requires lodging in- or out-of-state, or when dependent care is needed during evening or weekend hours to complete OJT/RSI.

PJ cannot be used for the same COA increases in both WCG and WCG-A programs for the same period of time.

*For example: A student enrolled at a CTC for the Winter term only, but also participating in an apprenticeship program beginning February 1.*

Fall 2024	Winter 2025	Spring 2025	Summer 2025 (Trailing)
	WCG Award \$1,587 1.00 QEU		
	Option 1: WG-A Direct Program Costs \$224 (1.00 QEU) -or- Decline Award	WG-A Award \$1,190 (65% MFI) 0.75 QEU	WG-A Award \$1,191 (65% MFI) 0.75 QEU
	Monthly Calculated Award Option 1: Monthly Direct Program Costs X 2 Months: \$224 + Monthly Full COA X 10 Months: \$3,969 Total WG-A Award: \$4,193 3.00 QEU -or- Monthly Calculated Award Option 2: Monthly Full COA X 10 Months: \$3,969 2.641 QEU [Renewal Based on Feb 1]		

## Fractional Last Term

If a fraction of a term of eligibility is remaining for an apprentice towards the end of their eligibility, a fractional award may be granted. Please contact [apprenticeship@wsac.wa.gov](mailto:apprenticeship@wsac.wa.gov) for assistance on an award calculation.

## AWARDING PRACTICES NOT PERMITTED

### Single Parents and Part-Time Apprentices

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

## CHAPTER 3

### Satisfactory Program Progress

#### SATISFACTORY PROGRAM PROGRESS (SPP)

Sponsors are responsible for monitoring each recipient's **Satisfactory Program Progress (SPP)**, as outlined in [WAC 250-21-010\(17\)](#) of the WCG-A rules, and in the Sponsor's WSAC-approved SPP policy.

SFAAs working with a Sponsor must establish policies and procedures that minimally:

- Ensures an apprentice meets SPP before funds are requested from WSAC.
- Ensures that an apprentice's SPP eligibility is communicated by the Sponsor in a timely manner to meet apprentice's needs.
- Ensures security protections of any PII of an apprentice that is communicated with the Sponsor.
- Ensures that protections for the privacy of an apprentices' record under FERPA are adhered to with regards to the communication of an apprentices' record with Sponsor.

The SPP policy requirements include:

- A maximum usage limit of six full-time years of eligibility (18 quarters, 12 semesters, or the hour equivalent).
- A required **annual** SPP review for state aid with the flexibility to implement incremental SPP reviews with the implementation of a "Warning" status.
- A quantitative standard requiring that 67% of the hours for which the aid was calculated and disbursed for a fiscal year were completed.

At the end of each annual period, SFAAs must examine the progress of each state aid recipient and determine which of the following applies to the apprentice:

- Is meeting Satisfactory Program Progress (SPP)
- Is to be placed in Unsatisfactory or Denied Status and therefore ineligible for state aid until the apprentice meets the conditions of the reinstatement policy.

A Sponsor or SFAA may submit an alternative approach to evaluating program progress to WSAC for consideration. It would need to include a plan for improved apprentice retention and completion with 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.

#### Maximum Usage Timeframe

As stated in Chapter 1, aid recipients may receive the equivalent of 6 full-time years of maximum usage (18 quarters, 12 semesters, or the hour equivalent).

## **Quantitative Standard for Apprentices**

As a reminder, full WCG-A Awards are based on an annual standard of 2,000 OJT hours and/or 144 RSI hours, which equate to a 3.00 Quarters of Eligibility Utilized (QEU) charge to the apprentice. Refer to Chapter 2 for situations that may require an award to be adjusted.

For the 2024-2025 Fiscal Year, an apprentice must complete 67% of the OJT and/or RSI hours that they were awarded for within a one-year period to be eligible for a subsequent award. For a full award based on 2,000 OJT and 144 RSI, an apprentice must have completed a minimum of 1,340 OJT and 96 RSI hours in a one-year period to meet Satisfactory Program Progress for a subsequent award.

For example:

- Using annual standards: if the apprentice has been awarded for 2000 OJT AND 144 RSI hours, they must meet SPP for both components (1,340 OJT AND 96 RSI hours) for a subsequent award. This is the "AND" in the SPP policy.
- Using annual standards: if the apprentice is close to finishing their program but still has 2000 OJT OR 144 RSI hours and were awarded a full WG-A award based on one of those components, they must meet SPP for the one component (1,340 OJT OR 96 RSI hours) for a subsequent award if they did not complete their program. This is the "OR" in the SPP policy.
- Using annual standards: if the apprentice was close to finishing their program and has an award based on enrollment intensity for 1500 OJT (75%) and 36 RSI (25%) hours, the apprentice would be awarded based on the OJT hour component. The apprentice would be held to the SPP standard for the OJT hours (67% of 1500 OJT = 1005 OJT hours) for a subsequent award in a situation where they did not complete their program. This is also the "OR" in the SPP policy.

## **Annual Review of SPP**

Effective for the 2024-2025 Fiscal Year, SFAAs are no longer required to adhere to a per-payment-period incremental SPP review. Minimally, the SFAA must complete an annual review of an awarded apprentice's SPP.

## **Incremental Review for Warning Status**

Effective for the 2024-2025 Fiscal Year, SFAAs have the option of completing an incremental review for SPP and to utilize a warning status for any payment period that is within the annual time period for the minimally required annual SPP review. Apprentices who are not meeting SPP based on the number of hours that they were awarded for during the time period can be placed on a warning status. The SFAA would communicate this to the apprentice so that any adjustments to awarding for the remainder of the year can be made.

For example, a program wants to disburse awards to apprentices over two 6-month periods. An apprentice who is awarded based on the 2,000 OJT hour and 144 RSI hour standard would receive 50% of their WCG-A award for the first 1,000 OJT and 72 RSI hours. To meet SPP requirements at the time of the second 6-month disbursement, an apprentice would need to have completed 670 OJT and 49 RSI hours. If the apprentice has not met the minimum number of hours for SPP for the second disbursement, they can be placed on a "Warning" Status.

If the above example continues and the apprentice is reviewed at the required annual SPP evaluation at the conclusion of their one-year time period for a subsequent award, the apprentice would have to meet their annual SPP requirement to be eligible for a subsequent award or be placed in “Denied” status.

An apprentice on “Warning” status can continue to receive payments as part of their annual award unless they have been identified by their program as “Cancelled” or if they have “Transferred.”

The implementation of a “Warning” status is intended to allow SFAAs the opportunity to address the SPP standard with the apprentice and look for alternatives to avoid being in a “Denied” status for a subsequent award.

### **Successful Completion of Hours**

Meeting the hour requirements for progression within the apprentice program are considered successfully completed. Withdrawing from the apprentice program or failing to complete the required hours within the prescribed time will not count as successfully completed hours.

### **Denied Status**

***Denied status*** requires that each SFAA's policy must deny further disbursements of all state aid at the conclusion of any payment period in which the apprentice fails to complete the clock/credit hours required for that payment period

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

Apprentices must complete the minimum number of hours for each payment period to meet the quantitative standard before being eligible for the next payment period's disbursement. For example, a 2000-hour program would require 4 payment periods of 500 hours completed per payment period before additional funds could be requested. If a sponsor's program has disproportionate costs and is approved for full annual disbursement at the beginning of the year to cover the entire year, the apprentice would need to complete all 2000 hours in the example above before being eligible for an additional disbursement.

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

### **Qualitative Standard**

The Sponsor's satisfactory program progress policy must contain a qualitative standard. For purposes of state aid programs, the qualitative standard used to comply with Labor & Industries Apprenticeship progress standards is acceptable.

### **Other Conditions of SPP Policy**

An apprentice may be denied further state aid disbursements or awards if the apprentice fails to fulfill any other conditions of the Sponsor's WSAC-approved satisfactory program progress policy.

## **Professional Judgment/Appeals**

The Sponsor's Financial Aid Administrator (SFAA) may, on a case-by-case basis, reinstate an apprentice back into satisfactory program progress in response to that apprentice's extenuating circumstances. The SFAA may choose to exercise professional judgment without a specific request to do so from the apprentice.

For example, the SFAA may decide to grant an apprentice continued access to state aid if failure in one payment period is countered by an extensive history of prior success. The apprentice's records must include documentation related to the professional judgment decision.

For Sponsors utilizing a Servicer to administer WCG-A, policies and procedures should clearly establish how Sponsor would like the Servicer to handle professional judgement appeals.

## **Reinstatement**

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

## **Notifying Apprentices of SPP Policies**

SFAAs must make information available to state aid recipients of the state SPP policies that impact their apprentices' ability to continue receiving state aid for future payment periods.

This must include information about how state SPP is determined by the Sponsor, how Denied Status is determined, and the Sponsor's Reinstatement Policy of state aid should the apprentice go into Denied Status.

The available information also must include when SPP reviews will take place and how and when apprentices will be notified in writing should their state aid status change to Denied Status or Reinstatement.

This information may be included in Sponsor handbooks for apprentices or other information made available to all apprentices or all state aid recipients at each program. It does not need to be sent individually to all state aid recipients.

## **APPRENTICE WITHDRAWALS/REPAYMENT CALCULATIONS**

See Chapter 5 for required repayment policy information.

## CHAPTER 4

### Secure Portal Access and Reporting Requirements

#### SECURE PORTAL ACCESS

Each individual that needs to work within the WSAC Portal requires their own Portal login to access functions and submit reports via the WSAC Portal. The following actions are prohibited by WSAC:

- Use of a universal account to access the WSAC Secure Portal for multiple individuals
- Using the account of another individual to access the WSAC Secure Portal
- Passing on login credentials from one individual in a position to another individual to access the WSAC Secure Portal

A Sponsor or Servicer must identify an individual to WSAC as their appointed Sponsor Financial Aid Administrator (SFAA) to be granted administrator-level privileges within the WSAC Portal. A Sponsor's designated officer or individual with signing authority responsible for signing the *Agreement to Participate* (or a Servicer's designated officer or individual with signing authority responsible for signing the *Contract for Professional Services*) must notify WSAC via e-mail to [apprenticeship@wsac.wa.gov](mailto:apprenticeship@wsac.wa.gov) if there are any changes to the SFAA. A general SFAA account is not allowed for a Sponsor's or Servicer's SFAA.

SFAA access to the WSAC Portal grants privileges to setup additional accounts to other staff members who have a business *need* to access to the Portal for purposes of administering WCG-A. The SFAA should develop and utilize controls that restrict access to the WSAC Secure Portal to individuals who understand policies and procedures regarding protecting Personally Identifiable Information (PII) and FERPA, and who have a legitimate business need to access the information for purposes of administering the WCG-A program.

***It is the responsibility of the appointed SFAA to promptly remove Portal access for staff who should no longer have access, such as those who are no longer employed by the sponsor or servicer or have moved to another department.***

Sponsor or Servicer staff who need to obtain an account, contact your appointed Sponsor FAA. The appointed Sponsor FAA has the authority to grant access to the appropriate programs and functions in the Portal using the 'Manage User' function.

Portal user administration instructions for the authorizing SFAA to create and manage Portal accounts are located <https://wsac.wa.gov/FAA-resources>, under Financial Aid Training.

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

## Two-Factor Authentication

WSAC requires two-factor authentication (2FA) for all WSAC Portal user accounts. Two-factor authentication provides an added layer of security by requiring users to login with a Password and a second time-based authentication code.

To log into the WSAC Secure Portal:

1. Go to <https://portal.wsac.wa.gov>.
2. Click "Login."
3. Enter your username (email address) and password.
4. Select a method to receive a time-based authentication code:
  - a. Email – the code will be sent to your user email address
  - b. Text – the code will be sent via SMS to your phone as a text message\*
  - c. Voice – the code will be spoken in a call to your phone\*
  - d. Authenticator App – the code can be retrieved from an app on your phone or tablet (if set up)

\*Message and data rates may apply.
5. Enter the Authentication Code.

Currently, the default settings will send the access code to your email address that is attached to your portal account. If you want to have the option to receive security codes via text as well, please follow the instructions at the end of this chapter.

Despite the use of two-factor authentication, WSAC also recommends users update their passwords once every 4-6 months.

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

## Security of Information

All Sponsors are expected to treat information on the WSAC Portal in accordance with the Electronic Agreement contained in the *Agreement to Participate*. All Servicers are expected to treat information on the WSAC Portal in accordance with the Electronic Agreement contained in *Contract for Professional Services*.

Sponsors 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 highly confidential document.

## Secure Data Transmission

No personally identifiable information (PII) shall be transmitted to WSAC via email. All Sponsors must send information to WSAC via the secure message function in the Portal.

## **Secure 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 portal functions. Information in the Training Portal updates and resets each night allowing for training in a safe environment.

## **REQUIRED REPORTS**

Participating Sponsors are required to submit eligible WCG-A Apprentice details via reports as determined by WSAC. Reporting of awards and payment requests will be made based on program setup. If programs and apprentices are starting on a monthly basis, payment requests should be made monthly. At a minimum, payment requests should be made quarterly (or once every 3 months). SFAAs will also need to complete quarterly reconciliation reports in addition to a cumulative year-end report.

Please refer to the timeline provided at the beginning of the manual for required deadlines submission.

### **Quarterly Reconciliation Report / Year-End Report**

The Washington Student Achievement Council collects and analyzes information to better understand who is benefiting from financial aid programs and how well federal, state, institutional, and other aid sources are meeting the needs of Washington residents.

Every participating Sponsor/Third Party Servicer is required to complete a quarterly reconciliation report in addition to a cumulative year-end report. WSAC will send out a report template and instructions. SFAAs must complete the annual year-end report at the end of each state fiscal year (June 30). The annual year-end report may also be referred to as the Unit Record Report (URR).

### **Submission of Apprentice Award and Payment Data**

Data submitted on these reports provides the basis for WCG-A funding projections. SFAAs will be provided with a CSV file layout that they will use to upload their expected awards for the program year.

### **Record Layouts**

All SFAAs will be provided instructions on how to fulfill reporting requirements. The layout for the 2024-25 quarterly and year-end reconciliation report will be provided by our office when it has received final approval.

A sample CSV file will be 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-A APPRENTICES

**Eligible awarded WCG-A Apprentices** refers to WCG-A Apprentices, who have either received a WCG-A payment, or who have had WCG-A funds committed (apprentice has received an award offer) but not yet disbursed at the time of the report.

## INSTRUCTIONS

Detailed report submission instructions, including how to upload a file and address edits, will be posted at <https://wsac.wa.gov/FAA-resources> once they are available. SFAAs should email [apprenticeship@wsac.wa.gov](mailto:apprenticeship@wsac.wa.gov) for issues relating to submission. As a reminder, email is not secure and SFAAs should not include any PII, including CSV files, in emails.

### Edits

Data may be rejected in the form of edits. All edits must be addressed individually, except informational edits. A complete list of edits is located later in this chapter.

### Reporting Enrollment Status

In general, each apprentice's payment period enrollment status should reflect the funding the apprentice was eligible to receive and if they are in a full-time apprenticeship or a part-time apprenticeship.

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

### Exceptions:

- If an apprentice received a full refund of tuition charges and the balance of funds were not disbursed to the apprentice, all funds must be returned to WSAC, and the apprentice's record must be updated to show as "not enrolled" for that payment period. All Quarters of Eligibility Used (QEU) will be restored.
- If an apprentice received a partial refund, and the WCG-A award was proportionally decreased to a revised enrollment level, the enrollment status must also be updated (e.g., the apprentice's original disbursement was based on a 2000 hour per year program and the enrollment status was reported as full-time, but they later changed to a 1000 hour program which is considered a half-time program).
  - Later, if a refund is applied that adjusts the apprentice's awards to half-time, they would be reported as half-time. The WCG-A for the term and enrollment status must be updated to show half-time enrollment and the appropriate amount of WCG-A award.

**Reminder:** Be sure to update each apprentice's payment period enrollment status on each of the award and payment requests. This is very important as the payment period enrollment statuses impact the apprentices Quarters of Eligibility Remaining (QER).

## Secure Data Transmission

No personally identifiable information (PII) shall be transmitted to WSAC via email. All SFAAs must send information to WSAC via the secure WSAC Portal.

Each Sponsor or Servicer must have one or more SFAA(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 is required to have their own account and password.

## Security of Information

All Sponsors are expected to treat information on the WSAC Portal in accordance with the Electronic Agreement contained in the *Agreement to Participate*. All Servicers are expected to treat information on the WSAC Portal in accordance with the Electronic Agreement contained in *Contract for Professional Services*.

Sponsors, Servicers, 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 highly confidential document. **Sponsors, Servicers, and SFAAs are required to immediately notify WSAC in the event of any breaches or potential breaches of data.**

Information contained in these files are 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 [apprenticeship@wsac.wa.gov](mailto:apprenticeship@wsac.wa.gov).

Each Sponsor or Servicer must have one or more SFAA(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 must have their own account and password.

## RECONCILIATION REPORT

During the year-end reconciliation reporting period, Sponsors will need to ensure that their balance between what has been released and what they have disbursed is zero. A WSAC Portal feature has been developed to provide access to a balance sheet detailing the payments released from WSAC.. If you think your internal balance should be zero but it is not, contact program staff at [Apprenticeship@wsac.wa.gov](mailto:Apprenticeship@wsac.wa.gov).

Any remaining balance of WCG-A funds at the end of the sponsor’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, apprentice name, last four digits of apprentice’s social security number, the payment period and dollar amount the funds are for.

## Award & Payment Report List of Edits

Edit Description	Edit Level	Overridable
WCG apprentice has 3 or less QER	Apprentice level	Informational only
Family income exceeds WCG-A MFI threshold	Apprentice Level	Non-overridable
Family income information is required for WCG-A	File level	Non-overridable
Family size must be between 1 and 20	Apprentice Level	Non-overridable
Family size must be more than or equal to number in college/apprenticeships	Apprentice Level	Non-overridable
Number in college/apprenticeships must be between 1 and 20	Apprentice Level	Non-overridable
WCG-A award cannot be less than zero	Apprentice Level	Non-overridable
WCG-A receivable balance cannot exceed the award amount	Apprentice Level	Non-overridable
Apprentice does not have any WCG-A QER for this award	Apprentice Level	Non-overridable
Apprentice has unpaid receivables for a prior term	Apprentice Level	Non-overridable
Cannot have a WCG and WCG-A award in the same terms	Apprentice Level	Overridable
Enrollment status exceeds full time	Apprentice Level	Overridable
WA Bridge Grant ineligible, MFI over 60%	Apprentice Level	Non-overridable
WA Bridge Grant sum of award is greater than \$500	File Level	Non-overridable
WCG-A award exceeds maximum eligible amount	Apprentice Level	Overridable
WA Bridge Grant eligible but not awarded	Apprentice Level	Overridable
WA Bridge Grant requires max WCG-A award	Apprentice Level	Non-overridable
WCG-A eligible apprentice must be awarded	Apprentice Level	Informational only
Multiple WCGA Awards in Fiscal Year	Apprentice Level	Informational Only
Cannot be Dependent with a Family Size of One	File Level	Non-overridable

Many edits can be resolved by correcting the data in the data fields. Correcting the data in your file will make the edit no longer appear. Overrides should be used when data cannot be corrected. File level edits must be addressed within your CSV upload file prior to the file's acceptance into the portal. Apprentice level edits can be addressed within the portal in the apprentice's detail page after successful upload of your CSV file.

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

Edit Name	Sample Incorrect Override Reason	Correct Data Change
<b>Award Exceeds Maximum Eligible Amount</b>	Eligible at time of disbursement-or-Enrolled FT	Update enrollment status to the status at time of disbursement
<b>Award Amount Exceeds Max, Most Likely Because of MFI Issue</b>	Awarded on original income reported on apprentice application	Change the income reported for the apprentice to reflect what was used to award if it was updated based on Sponsor FAA judgement
<b>Combined Enrollment Status Exceeds Full-time</b>	Apprentice not enrolled in college	If the apprentice is dually enrolled in college and apprenticeship, please report the Cost of Attendance (COA) for your program
<b>Combined Enrollment Status Cannot Exceed Full-time</b>	No financial aid with this sponsor	Remove apprentice award records if you know apprentice is not attending or ineligible
<b>Apprentice is OK to Pay But Not Awarded WCG-A</b>	Need met	Enter \$0 in award amount
<b>Cannot be Dependent with a family size of 1</b>	Apprentices may not be considered dependent and only have a	Update dependency status or update family size
<b>Enrollment Status and Expected Payment amounts must be paired</b>	Enrollment status was not reported in conjunction with a month a payment was reported	For any months that included an expected payment the enrollment status for that month must also be filled out
<b>Multiple WCG Awards in Fiscal Year</b>	Apprentice has multiple WCG-A Awards	Contact WSAC

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

Edit Name	Reason	<u>Correct</u> Data Change
Bridge award not allowed in non-WCG-A eligible term	Apprentice is showing as Not-enrolled but has an award in Bridge field	Delete the Bridge grant award/"Need met" (\$0 award) or update enrollment status and add WCG-A award.
Bridge award should be blank if already paid in full	Apprentice is showing as "Need met"	Delete \$0 award and leave field blank
MFI exceeds Bridge Grant cutoff for the year	MFI exceeds 60%	Delete Bridge award or update apprentice income
Student must be awarded Bridge Grant in the first term they are Eligible	Apprentice wasn't awarded Bridge in Summer of in the first term they were eligible	Award apprentice starting in first term they were enrolled in your program and were eligible.
WA Bridge Grant requires Max WCG-A Award	Apprentice is required to be awarded the full WCG-A award amount to qualify to receive WA Bridge Grant	Update apprentice award to reflect full WCG-A award or remove WA Bridge Grant

## PORTAL FILE UPLOAD LAYOUT

WCG-A uses a .csv (CSV) file to upload information into the Portal. SFAAs will be provided with the most current CSV and receive instruction on completing the form accurately. Data entered into the form are not case sensitive.

### Please Note:

- The WCG-A Award Amount field is reported in the fiscal year/month it was requested/paid to the apprentice. It may be left blank if the apprentice is not enrolled for that payment month.
- All Enrollment Status and Boolean data type (yes/no) fields are not case-sensitive.

## 2024-25 File Upload Layout

Field	Valid Inputs	Remarks
IsDelete	'y' or 'true' 'n' or 'false'	Optional - Leave blank if not deleting a student from csaw
Ssn	Numbers and hyphens Numbers, with or without hyphens, no spaces	9-digit identifier: SSN or ITIN 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).

Field	Valid Inputs	Remarks
<b>LastName</b>	Any characters (up to 100)	Required
<b>FirstName</b>	Any characters (up to 50)	Required
<b>MiddleInitial</b>		Optional
<b>StreetAddress</b>	Any characters	Required
<b>City</b>	Any characters	Required
<b>State</b>	Any characters	Required
<b>Zip</b>	Numbers	5 digits Required
<b>Phone</b>	Numbers	10 digits required
<b>Email</b>	Any characters	Required
<b>FamilySize</b>	Integer	Required
<b>NumberInCollegeOrApprenticeship</b>	Integer	Required- includes number in college & apprenticeships.
<b>FamilyIncome</b>	Number up to two decimal places	Family income used to determine WCG-A eligibility and award amount.
<b>BirthDate</b>	mm/dd/yyyy	Required. 10byte max, requires slashes. Leading zeros on month and day not required.
<b>DependencyStatus</b>	I or D	Required I=Independent D=Dependent
<b>Residency</b>	Y or N	Required. Yes, if WA resident; N if not a WA resident.
<b>ApprenticeshipProgram</b>	Any characters	Required. Name of Apprenticeship Program as it appears in the Portal. Must be exact match.
<b>ApprenticesYearInProgram</b>	Integer	Apprentice's year in program based on hours completed to date.
<b>BridgeAwardAmount</b>	Number up to two decimal places	Award amount. '0' indicates "need met". Leave blank if not awarded.
<b>AnnualAwardAmount</b>	Integer	Annual maximum award apprentice is eligible to receive based on year in program, MFI, cost of attendance.
<b>JulyEnrollmentStatus</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 apprentice 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>JulyExpectedPayment</b>	Integer	Enter amount being requested to be paid to the apprentice for July.
<b>AugustEnrollmentStatus</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 apprentice 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.

Field	Valid Inputs	Remarks
<b>AugustExpectedPayment</b>	Integer	Enter amount being requested to be paid to the apprentice for August.
<b>SeptemberEnrollmentStatus</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 apprentice 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>SeptemberExpectedPayment</b>	Integer	Enter amount being requested to be paid to the apprentice for September.
<b>OctoberEnrollmentStatus</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 apprentice 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>OctoberExpectedPayment</b>	Integer	Enter amount being requested to be paid to the apprentice for October.
<b>NovemberEnrollmentStatus</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 apprentice 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>NovemberExpectedPayment</b>	Integer	Enter amount being requested to be paid to the apprentice for November.
<b>DecemberEnrollmentStatus</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 apprentice 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>DecemberExpectedPayment</b>	Integer	Enter amount being requested to be paid to the apprentice for December.
<b>JanuaryEnrollmentStatus</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 apprentice 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>JanuaryExpectedPayment</b>	Integer	Enter amount being requested to be paid to the apprentice for January
<b>FebruaryEnrollmentStatus</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 apprentice 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>FebruaryExpectedPayment</b>	Integer	Enter amount being requested to be paid to the apprentice for February
<b>MarchEnrollmentStatus</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 apprentice 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>MarchExpectedPayment</b>	Integer	Enter amount being requested to be paid to the apprentice for March

Field	Valid Inputs	Remarks
<b>AprilEnrollmentStatus</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 apprentice 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>AprilExpectedPayment</b>	Integer	Enter amount being requested to be paid to the apprentice for April
<b>MayEnrollmentStatus</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 apprentice 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>MayExpectedPayment</b>	Integer	Enter amount being requested to be paid to the apprentice for May
<b>JuneEnrollmentStatus</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 apprentice 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>JuneExpectedPayment</b>	Integer	Enter amount being requested to be paid to the apprentice for June

- The WCG-A AwardAmount fields may be left blank if the apprentice is not enrolled for that term.
- The WA Bridge Grant AwardAmount field may be left blank if the student is not eligible to receive the WA Bridge Grant, receives a lump sum payment, or if they aren't receiving a payment in that term.
- All Enrollment Status and Boolean data type (yes/no) fields are not case-sensitive.

## Errors that prevent File Upload and Import

- File is not in .csv format (or is otherwise unreadable).
- File Header row is missing.
- File Header row is missing some of the column headings:
  - Headings must be spelled correctly without extra punctuation or spaces.
  - Headings can be in any order.
  - Any character casing in the headings will be accepted.
- File Header has 'extra' columns (i.e., columns not in the file specifications).
- SSN duplicated on multiple rows.
- Data rows do not have the same number of columns as the header row.
- Required fields are missing values:
  - SSN
  - LastName
  - FirstName
  - Residency
  - EnrollmentStatus (at least one term)
- Numeric columns do not contain valid numbers (numbers are always integers).
- Selection columns (e.g., enrollment status) do not contain valid selections.

- Boolean (yes/no) columns do not contain valid codes.
- Date fields do not contain valid dates (must use slashes 00/00/0000).

The following chart provides the most common errors and their corresponding rules.

ERROR TEXT	RULE
A value is required for AnnualAwardAmount	AnnualAwardAmount is empty
A value is required for ApprenticeshipProgram	ApprenticeshipProgram is empty
A value is required for ApprenticeYearInProgram	ApprenticeYearInProgram is empty
A value is required for BirthDate	BirthDate is empty
A value is required for City	City is empty
A value is required for DependencyStatus	DependencyStatus is empty
A value is required for Email	Email is empty
A value is required for FamilyIncome	FamilyIncome is empty
A value is required for FamilySize	FamilySize is empty
A value is required for FirstName	FirstName is empty
A value is required for LastName	LastName is empty
A value is required for NumberInCollegeOrApprenticeship	NumberInCollegeOrApprenticeship is empty
A value is required for Phone	Phone is empty
A value is required for Residency	Residency is empty
A value is required for State	State is empty
A value is required for StreetAddress	StreetAddress is empty
A value is required for Zip	Zip is empty
AprilEnrollmentStatus must be 'Not enrolled', 'Full time', 'Half time', '3/4 time', '< half time', or empty	AprilEnrollmentStatus format is invalid
At least one EnrollmentStatus must be specified	No enrollment statuses specified (must include at least one)
At least one ExpectedPayment must be specified	No expected payments specified (must include at least one)
AugustEnrollmentStatus must be 'Not enrolled', 'Full time', 'Half time', '3/4 time', '< half time', or empty	AugustEnrollmentStatus format is invalid
City must be 50 characters or less	City is too long
Could not upload file.	Other error with sending the file (e.g., network outages)
DecemberEnrollmentStatus must be 'Not enrolled', 'Full time', 'Half time', '3/4 time', '< half time', or empty	DecemberEnrollmentStatus format is invalid
DependencyStatus must be either 'D' or 'I'	DependencyStatus is not 'D' or 'I' (case-insensitive)
FebruaryEnrollmentStatus must be 'Not enrolled', 'Full time', 'Half time', '3/4 time', '< half time', or empty	FebruaryEnrollmentStatus format is invalid
Files must be < 45MB. Please split your data into multiple files.	File is too large
FirstName must be 50 characters or less	FirstName is too long
Invalid data format for 'fieldName'	Other data conversion issues not explicitly stated above (e.g., decimal in

ERROR TEXT	RULE
	an integer field, non-dates in the birthdate field, etc.)
Invalid state '{badStateName}'	State isn't in WSAC's list of states (2-letter or full name)
IsDelete must be 'Y', 'N', 'Yes', 'No', 'True', 'False', or empty	IsDelete format is invalid
JanuaryEnrollmentStatus must be 'Not enrolled', 'Full time', 'Half time', '3/4 time', '< half time', or empty	JanuaryEnrollmentStatus format is invalid
JulyEnrollmentStatus must be 'Not enrolled', 'Full time', 'Half time', '3/4 time', '< half time', or empty	JulyEnrollmentStatus format is invalid
JuneEnrollmentStatus must be 'Not enrolled', 'Full time', 'Half time', '3/4 time', '< half time', or empty	JuneEnrollmentStatus format is invalid
LastName must be 200 characters or less	LastName is too long
MarchEnrollmentStatus must be 'Not enrolled', 'Full time', 'Half time', '3/4 time', '< half time', or empty	MarchEnrollmentStatus format is invalid
MayEnrollmentStatus must be 'Not enrolled', 'Full time', 'Half time', '3/4 time', '< half time', or empty	MayEnrollmentStatus format is invalid
MiddleInitial must be 1 character or less	MiddleInitial is too long
No eligible program '{badProgramName}' for this sponsor	Program doesn't exist for selected sponsor, or is not eligible for payment
NovemberEnrollmentStatus must be 'Not enrolled', 'Full time', 'Half time', '3/4 time', '< half time', or empty	NovemberEnrollmentStatus format is invalid
OctoberEnrollmentStatus must be 'Not enrolled', 'Full time', 'Half time', '3/4 time', '< half time', or empty	OctoberEnrollmentStatus format is invalid
Only CSV files are supported.	Non-CSV file type
Residency must be 'Y', 'N', 'Yes', or 'No', 'True', or 'False'	Residency format is invalid
SeptemberEnrollmentStatus must be 'Not enrolled', 'Full time', 'Half time', '3/4 time', '< half time', or empty	SeptemberEnrollmentStatus format is invalid
SSN must be 9 digits, with or without dashes	SSN format is invalid (can include or exclude dashes)
Sum of ExpectedPayments must equal AnnualAwardAmount	Expected and annual payments are unequal
The email field is not a valid email address.	Email format is invalid
The phone field is not a valid phone number.	Phone format is invalid (can include or exclude parentheses and dashes)
Unexpected column name: {badColumnName}	Column names we don't expect (case-insensitive)
Zip must be 5 digits	Zip is empty
Parse Error: Invalid data format for 'Unknown'	Remove any dollar sign formatting (\$) from file

## REQUESTING FUNDS

Once an apprentice is identified as eligible and an award is calculated, the SFAA may begin the payment process with the Sponsor Disbursement Administrator. The Sponsor Disbursement

Administrator must confirm that the apprentice is still eligible to receive funds and is currently in good standing with enrollment/participation status at the time of disbursement.

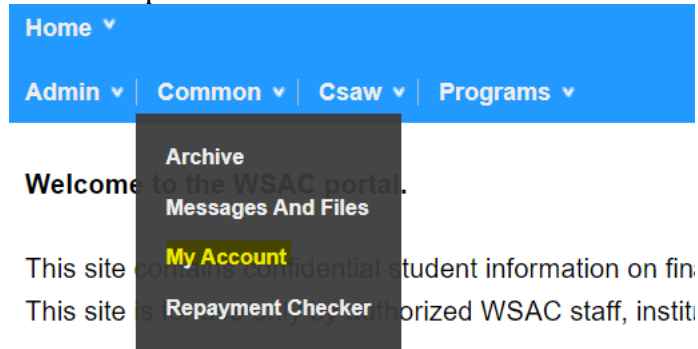
See **Chapter 5** additional information on requesting payments.

## TWO-FACTOR LOGIN INFORMATION

Currently, the default settings will send the access code to your email address that is attached to your portal account. If you want to have the option to receive security codes via text as well, please follow the instructions below.

Log in to the Portal <https://portal.wsac.wa.gov>.

1. Go to the "My Account" option on the "Common" menu.



2. Click on the "update" link to add a phone number.

A screenshot of the 'Your WSAC portal account' page. The page has a white background with a black border. At the top, the title 'Your WSAC portal account' is in large, bold, black font. Below the title, there are sections for 'Login', 'Email', 'Phone', and 'Personal Information'. The 'Login' section has a 'Saved' status. The 'Email' section shows the email 'davidm@wsac.wa.gov' with an 'update' link. The 'Phone' section shows 'Not configured' with an 'update' link. The 'Personal Information' section includes a note about data sources and fields for 'Name' (David Mitchell) and 'Pronouns' (he/him), both with 'update' links. There are also links for 'Change password' and 'Connect authenticator app'.

## **CHAPTER 5**

### **WCG-A PAYMENTS, REPAYMENTS, AND REPORTING**

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

For the most efficient and timely processing of funds, Sponsors (or Servicers) are required to use their Statewide Vendor Number for Electronic Fund Transfer (EFT) as was verified during the Sponsor application process (or Servicer contracting process).

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

##### **Payment Requests**

Once an apprentice is identified as eligible and an award is calculated, the SFAA may begin the payment request.

Payment requests may be made any time from July through late-June of the fiscal year. Please allow a minimum of five (5) to six (6) business days from the time a request is submitted for funds to process from WSAC via Electronic Fund Transfer (EFT).

Sponsors should adopt policies and procedures that support payment requests being made in a timely manner to support timely disbursement of awards to apprentices. For Sponsors with apprentices starting programs every month, WSAC recommends that Sponsors submit payment requests monthly. At a minimum, WSAC recommends that Sponsors submit payment requests on a quarterly basis, meaning once every three (3) months.

Payment requests must be submitted using electronic means as provided by Washington Student Achievement Council (WSAC).

The file layout specifications and instructions for requesting award payments in CSAW are in **Chapter 4: Secure Portal Access and Reporting Requirements**.

When submitting payment requests, please populate the SSN field for undocumented apprentices in the following order:

SSN  
Tax ID Number (ITIN)

Participating Sponsors must complete the following before requests for funds can be made for the new fiscal year:

- Complete all End of Year Reporting and reconcile the closing fiscal year's records.
- Submit or certify apprentice program costs, which include: tuition and fees, books, supplies, and equipment.
- Certify their policies and procedures for Conditions of Award statements and delivery methods, state aid repayment, satisfactory program progress, and awarding.

- Submit updated policies and procedures as directed by WSAC for approval and renewal of participation in the following fiscal year.
- Obtain and submit a copy of a Program Apprentice Status Summary and Occupational Analysis from the Washington State Department of Labor & Industries (L&I) for the most recent calendar year available.
- Complete an updated *Agreement to Participate* with WSAC.
- Submit additional supporting documentation if directed by WSAC.

## **Disbursement Procedures**

The Sponsor Disbursement Administrator must confirm that the apprentice is still eligible to receive funds and is currently in good standing with enrollment/participation status at the time of disbursement.

If an apprentice fails to commence attendance/participation in their apprenticeship program or withdraws prior to the start of a payment period, Sponsor Disbursement Administrator must bill the apprentice and report the repayment to WSAC for any funds received for that payment period. The Sponsor Disbursement Administrator should communicate any adjustments to the SFAA responsible for Award Calculations and Notifications.

SFAAs responsible for Award Calculations and Notifications must adjust the apprentice's award if an apprentice changes their status (enrolls in a part time apprenticeship program versus a full-time apprenticeship program) prior to the start of a payment period.

Sponsors that choose to cover repayment amounts owed will need their Sponsor Disbursement Administrator process a return of funds to WSAC via check or EFT as an award cancellation and communicate to their SFAA not to report the apprentice in repayment.

***Note:*** *If the Sponsor Disbursement Administrator does not have reimbursements to offset any reduced awards after the final year end is reconciled, the Sponsor Disbursement Administrator must return the under-spent amount to WSAC.*

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

If apprentices withdraw or stop participating for a term without earning their required hours, no additional WCG-A payments may be made to the apprentices for that payment period on or after an apprentice's official withdrawal date. The apprentice would also be placed in denied status.

### **Retroactive and Late Awards and Payments for Previous Payment Periods**

Retroactive WCG-A payments **MUST** be made to eligible WCG-A apprentices for a prior payment period(s) as long as they are for the current fiscal year and other program rules are followed.

The value of the **retroactive awards** and payments must be based on an apprentice's rate of satisfactorily completed hours determined by the Sponsor at the end of the payment period(s). If an apprentice is on unsatisfactory program progress or denied status, they would not be eligible for a retroactive award unless they appealed, and the appeal was approved by the SFAA.

The value of the **late awards** and payments must be based on the amount of aid they were originally eligible to receive. Because late awards are considered SFAA error, the apprentice should receive the full amount they were eligible for, provided they commenced attendance in their program, regardless of if they are in good standing or now in a denied status due to not meeting Satisfactory Program Progress (SPP). This applies whether or not the apprentice is currently enrolled or has already completed their apprenticeship program ("graduated"). This is restricted to the current fiscal year and cannot be processed for prior fiscal years.

### **Required Apprentice Directive for Sponsors**

Sponsor Disbursement Administrators must use WSAC's *Apprentice Directive for Disbursement of State Aid* form to record an apprentice's decision on where to apply their financial aid payment (see **Chapter 6: Conditions of Award and Directives** for a copy of the form).

The apprentice's grant award payment can be deposited directly into an apprentice's account or disbursed in the form of a check based on their choice on the directive.

Sponsors and Servicers (including respective SFAAs or Sponsor Disbursement Administrators) must not coerce or influence the apprentice's choice on where to apply their grant award payment.

In addition, Sponsor Disbursement Administrators:

- ☐ Will keep the directive in effect for the duration of the apprentice's continuous enrollment in the apprenticeship program with that specific Sponsor, excluding approved leaves of absence and summer terms. A new directive is required if the apprentice is not continuously enrolled.
- ☐ Must allow apprentices to change their minds at any time, prior to disbursement, and always follow their current directives.
- ☐ Must remind apprentices once a year that their current directive is still in place and that they may change it.

The Sponsor Disbursement Administrator may not withhold or delay the disbursement of state aid due to any apprentice debt, including tuition, fees, or fines owed the Sponsor.

### **Conditions of Award Statements**

Prior to disbursement, the Sponsor Disbursement Administrator must inform the state aid recipient of their responsibilities to the program through a "Conditions of Award" statement. A copy of this statement is in **Chapter 6: Conditions of Award and Directives**.

The statement must be presented annually and can be delivered to the apprentice 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 apprentice as long as the Sponsor can provide assurances to WSAC that the document was provided to the apprentice each year. It is the Sponsor's responsibility to maintain documentation that the conditions were presented to the apprentice.

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

**Retroactive Awarding File Layout Requirements:** When requesting retroactive or late awards and payments please list the payments in the month corresponding to when awards would have requested payment if the award was not retroactive or late. For example, if awards are typically requested in August and December and a retroactive payment is made in January, list the expected payments in August and December. The award amount will be able to be paid out in full in January. This better allows WSAC Staff to understand why a payment is being requested that may vary from the normal awarding schedule.

### **Power of Attorney Disbursements**

An apprentice whose program precludes their return to the Sponsor 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 apprentice's file.

### **SFAA Repayments**

If an apprentice is awarded incorrectly due to an SFAA (or Sponsor Disbursement Administrator's) error, it is the Sponsor's financial obligation to repay the funds and they must be returned to WSAC immediately.

### **Apprentice Repayments**

Repayment is an apprentice responsibility if it is due to incorrect information provided by the apprentice or failure to complete the term. If a grant recipient leaves an apprenticeship program during a payment period in which he or she receives WCG-A, the apprentice may be required to repay WCG-A funds.

***Note: The Washington Sponsor Grant Repayment Policy Requirements are Mandatory for all Participating WCG-A Sponsors.***

### **Persian Gulf Veterans**

[Persian Gulf veterans](#) are not required to repay the unused portions of grants received under state apprentice financial aid programs.

## **Unclaimed Property**

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

## **STATE AID REPAYMENT POLICY REQUIREMENTS**

### **General**

Apprentices who fail to complete their related supplemental instruction (RSI) and/or who fail to complete their required hours of on-the-job training (OJT), but who participated/attended will not owe a repayment but will be placed on denied/suspension status. Apprentices who receive funding based on fraudulent information will be required to repay 100% of the funds received.

Apprentices who have received state aid (aid disbursed prior to the start of the payment period) and who change their apprenticeship program status (such as from full-time to part-time) prior to the first day of the payment period, must have their state aid eligibility recalculated to reflect their apprenticeship program status as of the start of the payment period.

For example, a recalculation would be needed if you have an apprentice who was going to be full-time in an apprenticeship program, receives payment, and then prior to the start of the program, changes to a part-time program. SFAAs are advised to contact WSAC in these instances to determine the apprentice's revised eligibility.

The apprentice who decreases enrollment status prior to the first day of the payment period will owe a repayment of the overpayment amount. Apprentices who increase enrollment status prior to the first day of the term are entitled to additional funds for enrollment status increases.

Apprentices who make enrollment status adjustments (up or down) after disbursement and after the start of the payment period will be subject to completion of satisfactory program progress requirements outlined under [WAC 250-21-010 \(16\) \(a-e\)](#).

### **Alternative Repayment Policy Option**

Sponsors may propose alternative policies to our office for review. WSAC will analyze alternative policies and may require adjustments to achieve consistent treatment of apprentices in similar circumstances across programs and support apprentice success. Sponsors will be notified if they are approved or require modifications. Alternative policies must demonstrate how they are in the best interest of the apprentice and may require subsequent data/reporting if approved.

Key considerations when developing alternative policies should include the following:

- Ensure eligible apprentices receive their maximum awards

- ❑ Prevent ineligible apprentices from receiving awards
- ❑ Adjust remaining eligibility appropriately to not exceed QERs

## Repayments for Deceased Apprentices

All repayments for deceased apprentices 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 cancelation.

## Timely Management of Repayment Referrals for SFAAs

SFAAs must enter repayment accounts into the WSAC Portal via uploading the transmittal through secure messages within **10** business days of the date an apprentice withdraws or the end of the payment period, whichever is earlier.

If a Sponsor is using a Servicer as their SFAA, the requirement to ensure timely reporting of any apprentice status updates that may result in a repayment in a timely manner to the Servicer also applies to the Sponsor. If a Servicer cannot notify WSAC of a repayment within the stated timelines due to a Sponsor not communicating apprentice status in a timely manner, the Sponsor can also be held responsible for any financial liabilities that may be directed to the SFAA. Sponsors working with a Servicer should ensure that their policies and procedures clearly articulate timelines to meet WSAC's timelines.

There are two types of repayment accounts: ***Sponsor to Bill and In Repayment.***

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

SFAAs may choose from the following options:

### 1. Sponsor to Bill (has 2 subcategories):

**Calculation Pending:** Under Sponsor to Bill, this allows you to flag an apprentice who has not met satisfactory program 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 payment period or the apprentice's withdrawal, whichever is earlier.

This will ensure that the apprentice 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 payment period, whichever is earlier as reported above.

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

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

- 2. In Repayment:** The SFAA has determined that a repayment is owed within the initial 10 business day window or is updating the status from Sponsor 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.

	TIMEFRAME FOR COMPLETION		
REPAYMENT ACTION	SPONSOR TO BILL Under Review	SPONSOR TO BILL Repayment Amount Known	IN REPAYMENT
STATE AID REPAYMENT RECORD ENTERED INTO CSAW	10 business days from the end of the payment period or date of withdrawal; whichever is earlier; enter date	10 business days from the end of the payment period or date of withdrawal; whichever is earlier; enter amount (June repayments cannot be "Sponsor to Bill" and must be "In Repayment."	10 business days from the end of the payment period or date of withdrawal; whichever is earlier; enter amount
REPAYMENT CALCULATED AND REPORTED TO WSAC	N/A – Repayment is under review and apprentice is blocked from receiving additional funding	Immediately upon creating "Sponsor to Bill– Repayment Amount Known" record	Immediately upon creating In Repayment record
LAST DAY TO CONVERT TO "SPONSOR TO BILL REPAYMENT KNOWN" OR "IN REPAYMENT" ACCOUNT	Must convert to either "Sponsor to Bill Repayment Amount Known" or "In Repayment" within 30 calendar days from end of the payment period or date of withdrawal; whichever is earlier <b>-OR-</b> The Sponsor is liable for the funds to WSAC	N/A	N/A
LAST DATE TO CONVERT "SPONSOR TO BILL REPAYMENT AMOUNT KNOWN" INTO "IN REPAYMENT" ACCOUNT	N/A	Must convert to "In Repayment" prior to submission of your Final Reconciliation Report Submission	N/A
LAST DATE TO REFER TO WSAC	If not converted to "Sponsor to Bill Repayment Amount Known" or "In Repayment" within 30 calendar days of date outlined above, sponsor becomes financially liable and must return funds to WSAC	Must convert to "In Repayment" prior to submission of your Final Reconciliation Report Submission	Already referred to WSAC
LAST DATE TO ACCEPT PAYMENT FOR CURRENT YEAR "SPONSOR 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 Reconciliation Report	Never - Sponsors 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 apprentice to WSAC

*Note: June repayments may not be established as "Sponsor to Bill" and must be reported as "In Repayment." All June repayments must be entered by July 10 each year.*

## Sponsor to Bill Accounts

The SFAA must create Sponsor to Bill records for accounts that the SFAA chooses to actively collect on during the fiscal/academic year. Sponsor to Bill records shall be entered into the Portal within 10 business days of the apprentice's withdrawal, or the end of the payment period, whichever is earlier. Doing so prevents apprentices in repayment status from receiving aid at another Sponsor or an institution by flagging them within the WSAC Portal.

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

The SFAA may retain the repayment account within the fiscal year if it continues active collection procedures or if an apprentice is making payments to the SFAA. Any remaining balance must be converted to In Repayment status prior to submission of the Final Reconciliation Report. **The Sponsor or Servicer shall not accept payments from the apprentice past the time they have been converted to In Repayment.**

If the apprentice repays the Sponsor to Bill obligation in full to the Sponsor Disbursement Administrator within the same fiscal/academic year, it is the Sponsor Disbursement Administrator's responsibility to notify the SFAA, and the SFAA's responsibility to remove the Sponsor to Bill account for that apprentice as soon as possible after receipt of payment. The Sponsor must return the funds to WSAC via the process below. **If the SFAA does not remove the record, then the Sponsor to Bill account will continue to appear on the apprentice's record and the apprentice will be ineligible for further state aid disbursements.**

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

Sponsor or Servicer refunds can be applied directly to apprentice awards in Sponsor to Bill status and the award reduced in the Portal. Accounts that are In Repayment status require the Sponsor Disbursement Administrator to return the refunds directly to WSAC outside of the portal.

**Note:** *June repayments may not be established as Sponsor to Bill and must be reported as In Repayment. All June repayments must be entered no later than July 10 each year. Apprentices who withdraw must be reported within 10 business days as outlined above to ensure ineligible apprentices do not continue to receive aid.*

## In Repayment

If a Sponsor Disbursement Administrator does not want to actively collect from an apprentice, 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 apprentice 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, upload the transmittal form via the secure messages in the Portal. If a Sponsor to Bill record exists for the repayment already, notify WSAC via secure messages in the Portal to convert the original Sponsor to Bill account to an In Repayment account.

***Note:** Repayments of less than \$50 should not be referred to WSAC.*

**If an apprentice is a recipient of WCG-A and Bridge grant, the repayments must be referred to WSAC simultaneously to ensure seamless and transparent billing to the apprentice.**

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

Accounts that are In Repayment status require the Sponsor Disbursement Administrator to return the funds directly to WSAC by check or EFT.

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

***Note:** SFAAs must report repayments into the Portal before sending communications to apprentices that refer them to UAS or WSAC.*

## **Authority**

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

## **No-Show Repayments**

If a Washington College Grant for Apprenticeship recipient never attends courses for related supplemental instruction (RSI) or completes any hours in their apprenticeship in the payment period for which they received the grant award, the state grant repayment amount is 100 percent of the award. If the SFAA is unable to distinguish between a no-show and an unofficial withdrawal, the no-show policy shall apply.

## **SFAA Errors**

Sponsors are responsible for repaying WSAC for overpayments resulting from calculation errors. SFAAs shall reduce the apprentice's award(s) to reflect the amount the apprentice was eligible to receive. Once the Sponsor Disbursement Administrator returns the funds in full, the apprentice's quarter of eligibility remaining (QER) will be restored.

## **Canceling In Repayment Accounts**

In Repayment accounts may only be canceled when it was determined that the repayment was created in error. Showing that a repayment requirement was posted in error may be

satisfied by providing of an updated last date of attendance, grade change, proof of high school diploma, etc.

Sponsors or Servicers 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 SFAA must enter a clear explanation for why the repayment has been canceled. Any funds the apprentice has paid WSAC towards the repayment will be refunded to the apprentice by WSAC.

Cancellation of repayments created more than one fiscal 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 apprentices attending both clock hour and credit hour programs.

### **Payment Periods:**

1. All clock hour apprentices, except for their final payment period, must be reported as full-time apprentices unless they are specifically enrolled in a part-time apprenticeship program. Initial payments are made at the beginning of the program for eligible apprentices. Additional payments may be made for each block of required hours successfully completed; however, apprentices may only receive subsequent payments if they incur additional tuition and fees, books and supplies or equipment costs not covered in their initial payment.
2. Additional payments shall not be disbursed until the previous payment's hours have been earned/completed.
3. For a full-time, two-payment period apprentice in good standing, the apprentice should be awarded for two payment periods (equivalent to two payments).
4. For a full-time, three-payment period apprentice in good standing, the apprentice should be awarded for three payment periods (equivalent to three payments).
5. For a full-time, four-payment period apprentice in good standing, the apprentice should be awarded for four payment periods (equivalent to four payments).
6. For a full-time, five-payment period apprentice in good standing, the apprentice should be awarded for five payment periods (equivalent to five payments).
7. Program lengths will vary, and Sponsors will work with WSAC staff to determine the clock hours required and the number of payment periods per fiscal year for apprentices in each program.
8. Note: If the apprenticeship program costs are incurred all upfront at the beginning of the enrollment versus every three months, the award would be disbursed up front to

cover those costs. For programs that incur costs on a different schedule, such as quarterly or every six months, disbursements would be proportionally awarded.

### **Apprenticeship Payment Period/Hour Payment Request Calendar**

There are up to twelve payment periods per fiscal year during which SFAAs can submit awards and request payments. The payment periods will be labeled as months of the fiscal year beginning with July and ending with June. The Sponsor will request payment in the month they are disbursing the funds to the apprentice.

Assign the term based on the dates when the majority of the apprentice's completion hours/time for each period will occur.

#### **Payment Request Calendar**

<b>Payment Period</b>	<b>Date Range</b>
<b>July</b>	July 1 – July 31
<b>August</b>	August 1 – August 31
<b>September</b>	September 1 – September 30
<b>October</b>	October 1 – October 31
<b>November</b>	November 1 – November 30
<b>December</b>	December 1 – December 31
<b>January</b>	January 1 – January 31
<b>February</b>	February 1 – February 28
<b>March</b>	March 1 – March 31
<b>April</b>	April 1 – April 30
<b>May</b>	May 1 – May 31
<b>June</b>	June 1 – June 30

*Based on hours earned requirements it is anticipated that any given apprentice will have no more than five payment periods in one fiscal year but three or four will be most typical.*

## **CHAPTER 6**

### **Conditions of Award and Directives**

#### **FORMS USED TO PROVIDE REQUIRED NOTIFICATION TO APPRENTICES**

Prior to the first annual disbursement of Washington College Grant for Apprenticeship, the Sponsor Disbursement Administrator must ensure that the SFAA has informed an apprentice 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 apprentices on paper or electronically. 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.

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

WSAC strongly encourages SFAAs handling award offers to inform apprentices of their potential eligibility for Supplemental Nutrition Assistance Program (SNAP) through the Department of Social and Health Services (DSHS).

Adding a statement to award offers is one way that SFAAs can inform apprentices that they may be eligible for Basic Food benefits.

Sample language you might consider incorporating into apprentice communications:

*Apprentices who receive the WA Grant for Apprenticeship (WG-A) may be eligible for Basic Food benefits in Washington. For more information about Basic Food assistance and how to apply visit: <https://www.dshs.wa.gov/esa/community-services-offices/basic-food>*

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

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

## **CONDITIONS OF AWARD STATEMENT – APPLIES TO APPRENTICES IN ALL APPRENTICESHIP PROGRAMS EACH YEAR**

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### **Washington College Grant for Apprenticeship – 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 Sponsors financial aid administrator.

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 apprenticeship program, you may owe a repayment of all or part of any state funds you have received.
6. You must maintain the program progress standards established by your Sponsor 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 Sponsor 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).
10. If you fail to cash your check containing state funds or pick up any remaining funds by the close of the fiscal year, the funds shall be returned to the program at WSAC and treated as funds declined by you.

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The State of Washington is offering you financial assistance to help support your apprenticeship expenses. Please visit <https://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 apprentices and students. Please contact [finaid@wsac.wa.gov](mailto:finaid@wsac.wa.gov) for more information.

## REQUIRED DIRECTIVE FORM FOR APPRENTICES

The Sponsor Disbursement Administrator must use the following WSAC *Apprentice Directive for Disbursement of State Aid* form to record an apprentice's decision on where to apply their state grant award payment(s) each term.

The apprentice's grant award payment can be deposited directly into an apprentice's account or disbursed in the form of a check based on their choice on the directive.

Sponsors and Servicers (including respective SFAAs or Sponsor Disbursement Administrators) must not coerce or influence the apprentice's choice on where to apply their grant award payment.

In addition, Sponsor Disbursement Administrators:

- ☐ Will keep the directive in effect for the duration of the apprentice's continuous enrollment in the apprenticeship program with that specific Sponsor, excluding approved leaves of absence and summer terms. A new directive is required if the apprentice is not continuously enrolled.
- ☐ Must allow apprentices to change their minds at any time, prior to disbursement, and always follow their current directives.
- ☐ Must remind apprentices once a year that their current directive is still in place and that they may change it.

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

The Sponsor Disbursement Administrator may not withhold or delay the disbursement of state aid due to any apprentice debt, including tuition, fees, or fines owed the Sponsor.

# State of Washington

## Student Achievement Council

### APPRENTICE DIRECTIVE FOR DISBURSEMENT OF STATE AID

Return this form to the NAME of Sponsor Office as soon as possible.

Apprentice 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 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 account permits the aid to be automatically credited toward expenses you may owe to the Sponsor. 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 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 Sponsor.

**Please choose one of these options:**

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

**OR**

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

**Your choice will stay in effect as long as you are enrolled in our program. However, you may change your directive for a future term by informing your Sponsor Financial Aid Administrator in writing.**

\_\_\_\_\_  
Apprentice Signature

\_\_\_\_\_  
Date

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

**NAME of Sponsor**

**Address**

**Address**

**Address**

## **CHAPTER 7**

### **Information For Sponsors**

#### **APPRENTICESHIP PROGRAM ELIGIBILITY**

WCG-A is only available to apprentices of Sponsors who have been approved by WSAC to participate in WCG-A. To apply to participate in WCG-A, Sponsors must first be registered with and approved by the Department of Labor & Industries' (L&I) [Washington State Apprenticeship & Training Council](#) (WSATC) and cannot be in probationary status. WSAC also reviews Sponsors for their financial capacity and administrative capability to administer state financial assistance programs.

WCG-A program administration functions include, but are not limited to:

- WCG-A program promotion
- Determining an apprentice's eligibility for WCG-A
- Completing WCG-A award calculation for eligible apprentices and notifying apprentices of their award
- Requesting WCG-A awards from WSAC
- Disbursing and tracking WCG-A awards and handling repayments to WSAC
  - Implementing a process to receive and disburse state funds directly to recipients.
- Satisfactory Program Progress (SPP) monitoring
- Completing reporting and reconciling
  - Providing detailed reports on expenditures and recipients with accuracy on a monthly, quarterly, and yearly basis.
  - Authoring a final report including challenges, successes, and cumulative recipient information.
  - Reconciling expenditures and ensuring accuracy through WSAC provided data systems.
- Following all OCIO (Office of Chief Information Office) rules to ensure participant privacy.

To meet general administrative capability requirements for WCG-A, Sponsors must demonstrate a separation of functions to ensure sound fiscal practices in the handling of WCG-A awards. The designated entity that offers/authorizes aid must be separate from the designated entity that is disbursing/delivering funds. No one office or individual may control both functions. Individuals must be organizationally independent, cannot be family members, and cannot exercise substantial control over the institution. Additional administrative capability requirements for WCG-A includes, but are not limited to:

- Ensuring implementation of practices relating to identity theft protection.
- Reporting suspected fraud.
- Resolving conflicting information in apprentice applications and records.
- Ensuring appropriate record keeping and retention practices meet standards.
- Completing contingency planning.
- Ensuring secure data access protocols are utilized and reporting security breaches.

## Third-Party Servicer Option

Sponsors can apply to participate in WCG-A utilizing an approved WSAC Third-Party Servicer. The Third-Party Servicer will be able to complete any of the program administration requirements listed above. Sponsors can indicate on their application to participate in WCG-A their intention to contract a Third-Party Servicer. All required application documents are still required to be submitted and approved by WSAC accordingly. The processes of working with a Third-Party Servicer are different and are outlined in Chapter 8.

## Terminology

**Sponsor:** This manual will refer to apprenticeship program sponsors as the “Sponsor.”

**Servicer:** This manual will refer to the third-party servicer as the “Servicer.”

**Sponsor Financial Aid Administrator** (abbreviated **Sponsor FAA** or “**SFAA**”): The Sponsor’s designated individual, office, or servicer that is responsible for the following WCG-A Program Administration requirements, will be referred to in this manual as the Sponsor Financial Aid Administrator:

- Determining an apprentice’s eligibility for WCG-A
- Completing WCG-A award calculation for eligible apprentices and notifying apprentices of their award
- Requesting WCG-A awards from WSAC
- Satisfactory Program Progress (SPP) monitoring
- Completing reporting and reconciling
  - Providing detailed reports on expenditures and recipients with accuracy on a monthly, quarterly, and yearly basis.
  - Authoring a final report including challenges, successes, and cumulative recipient information.
  - Reconciling expenditures and ensuring accuracy through WSAC provided data systems.

**Sponsor Disbursement Administrator:** The Sponsor’s designated individual, office, or servicer that is responsible for the following WCG-A Program Administration requirements, will be referred to in this manual as the Sponsor Disbursement Agent:

- Disbursing and tracking WCG-A awards and handling repayments to WSAC.
  - Implementing a process to receive and disburse state funds directly to recipients.

## Application Process

There are three (3) steps that must be completed for a Sponsor to be approved to participate in WCG-A.

### 1. WSAC will determine if Sponsor meets initial requirements to participate in WCG-A. Sponsor should anticipate WSAC will be:

- Seeking responses to follow-up questions regarding application and supporting documents
- Requesting additional or clarifying information from Sponsor

- Consulting the Department of Labor & Industries (L&I)
  - Reviewing the most current financial statements to determine financial health
- 2. Sponsor will complete a Policies & Procedures Manual for WCG-A**
- Once WSAC has determined that a Sponsor meets initial requirements to participate in WCG-A, WSAC will request the Sponsor submit the policies and procedures that will be in place for WCG-A for review and approval. A template will be provided for Sponsors to help establish and implement policies and procedures that are in line with this WCG-A Program Manual while allowing for variations from Sponsor to Sponsor.
- 3. Sponsor will complete an *Agreement to Participate with WSAC (also known as the PPA)*.** The agreement documents a Sponsor's legal commitment to abide by all program statutes, rules, and guidelines. The agreement is designed for yearly renewal. Once the agreement is completed, Sponsors can anticipate receiving further evaluation and training, which may include:
- Site visits
  - Discussion of state program mechanics
  - Training for awards processing
  - Verification of additional administrative capabilities, such as:
    - Separation of duties in terms of apprentice eligibility determinations
    - Awarding procedures
    - Reporting requirements
    - Repayment obligations

## **WCG-A PROGRAM INFORMATION, ACCESS, AND APPLICATION**

As part of WCG-A program administration, all Sponsors are responsible for WCG-A program promotion and ensuring that apprentices have access to information on WCG-A.

All Sponsors should have policies and procedures that detail:

- How prospective WCG-A applicants would be informed of the WCG-A program.
- How prospective WCG-A applicants would be able to access information regarding the program.
- How prospective WCG-A applicants can access the program application.
- What supports would be available to assist with completing the WCG-A application, including translation services.
- What additional resources are available to WCG-A applicants.
- How information about additional resources will be provided to prospective WCG-A applicants.
- How an applicant is to submit a completed WCG-A application and application materials.

Because applicants provide Personally Identifiable Information (PII) in the application process, it is critical that all Sponsors (including those working with a Servicer) establish policies and procedures that ensure the privacy and protection of PII for an application and supporting documents being submitted to the SFAA for review.

Please note that the SFAA is responsible for policies and procedures that detail the following:

- Provide an overview of what happens to an application once it is submitted.

- How will an application be reviewed for completeness.
- How will incomplete applications be handled and/or remedied.

## STATE OF WASHINGTON CONDITIONS OF AWARD

For a Sponsor completing the awarding process, prior to the first disbursement of state aid each year, the SFAA 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**.

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

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

## REPAYMENT POLICY

Sponsors completing disbursement must also follow the state grant repayment policy as outlined in **Chapter 5: Payments, Repayments, and Reporting**.

## SATISFACTORY PROGRAM PROGRESS (SPP) POLICY

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

A Sponsor may submit an alternative approach to evaluating academic progress that includes a plan for improved apprentice 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.

Sponsors working with a Servicer must establish policies and procedures that minimally:

- Ensures an apprentice meets SPP before funds are requested from WSAC.
- Ensures that an apprentice's SPP eligibility is communicated with Servicer in a timely manner to meet apprentice's needs.
- Ensures security protections of any PII of an apprentice that is communicated with Servicer.
- Ensures that protections for the privacy of an apprentices' record under FERPA are adhered to with regards to the communication of an apprentices' record with Servicer.

## AGREEMENT TO PARTICIPATE

The *Agreement to Participate* documents a Sponsor's legal commitment to abide by all program statutes, rules, and guidelines. This is the final step that must be completed before a Sponsor can participate in WCG-A. The agreement is designed for yearly renewal.

For renewal, participating Sponsors must complete the following before requests for funds can be made for the new fiscal year:

- Complete all End of Year Reporting and reconcile the closing fiscal year's records.
- Submit or certify apprentice program costs, which include: tuition and fees, books, supplies, and equipment.
- Certify their policies and procedures for Conditions of Award statements and delivery methods, state aid repayment, satisfactory program progress, and awarding.
- Submit updated policies and procedures as directed by WSAC for approval and renewal of participation in the following fiscal year.
- Obtain and submit a copy of a Program Apprentice Status Summary and Occupational Analysis from the Washington State Department of Labor & Industries (L&I) for the most recent calendar year available.
- Complete an updated *Agreement to Participate* with WSAC.
- Submit additional supporting documentation if directed by WSAC.

## NOTIFICATIONS

The Sponsor's designated officer or individual with signing authority responsible for signing the *Agreement to Participate* must notify WSAC within 30 days of material changes affecting the Sponsor—including additional locations of the Program as applicable that may impact an apprentice's eligibility for state aid.

**WSAC must be notified immediately when a breach of information occurs (electronic, written, etc.) and what steps are being taken to mitigate any impacts to the Sponsor, its apprentices, a Servicer (if applicable), and WSAC systems.**

Material changes that must be reported to WSAC within 30 days include, but are not limited to:

- Changes to status with Washington State Labor and Industries
- Locations of main and/or branch locations and other instructional sites
- Contact information and/or changes to key employees responsible for administering WCG-A, including the SFAA and the Sponsor Disbursement Administrator.
- Sponsor ownership
- Third-party servicer(s)

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 the Sponsor's administrative practices to verify compliance with rules, regulations, and program guidelines.

Whenever a Sponsor is responsible for one or more SFAA functions and/or the Sponsor Disbursement Administrator function, they are also responsible for record retention for their respective functions.

For example, if a Sponsor is responsible for eligibility determination, as outlined in the rules, the burden of proof for a grant recipient's eligibility lies with the Sponsor. The Sponsor must maintain intact and accessible records of the apprentice's application.

For awarding WCG-A, the Sponsor must be able to reconstruct the calculations and rationale for the Apprentice's eligibility and award, if requested by WSAC. Records may be kept electronically.

For requesting funds and disbursement of state aid, the Sponsor must maintain intact and accessible records of apprentice's 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.

If the Sponsor keeps records electronically, source documents supporting the electronic data must be maintained by the Sponsor 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 Sponsor error or failure to follow the appropriate rules and guidelines, the Sponsor must repay the amount of the affected state aid funds to WSAC. The burden for repayment is on the Sponsor, not the apprentice.

## **Records Retention**

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

## **Reporting Fraudulent Information**

Sponsors must report any suspected instances of potential fake/fraudulent applications, received by the Sponsor, to WSAC as soon as they are identified. WSAC will need to review for any potential or actual loss of state funds.

## **Protecting Apprentice Personally Identifiable Information (PII)**

PII is information that can be used to identify an individual. FERPA's definition of PII includes any information that, alone or in combination, is linked or linkable to a specific apprentice. Appropriate administrative, technical, and physical security practices must be in place to protect the confidentiality, integrity, availability, and control of personal information.

Sponsors are required to adhere to or exceed Washington State Policy for PII and abide by federal rules contained in the [Family Educational Rights to Privacy Act](#) (FERPA). This includes, but is not limited to:

- Protecting apprentices' Personally Identifiable Information (PII)
- Secure online servers
- Locking fireproof filing cabinets
- Notification of security breaches to WSAC

- Written privacy protection procedures to be approved by WSAC
- Thorough understanding of what constitutes PII

### **Drafting Privacy Protection Procedures**

Sponsors submit privacy protection procedures as part of the application to participate in WCG-A. Once approved to participate, Sponsors must submit and receive approval from WSAC regarding PII protection. State requirements for privacy protection pertaining to the administration of the grant can be found here: [Chapter 250-21 WAC](#).

## **CHAPTER 8**

### **Information For Servicers**

#### **THIRD-PARTY SERVICER**

The role of the Third-Party Servicer (Servicer) includes being able to help expand access to WCG-A through outreach to apprenticeship programs and being able to function as a service provider for participating apprenticeship Sponsors, including managing all administrative functions for an approved Sponsor or Sponsors.

WSAC contracts WCG-A Servicer(s) through a competitive bidding process through a Request for Proposals (RFP). Information relating to submitting a proposal is communicated through the RFP announcement.

A Servicer can assist prospective Sponsors to understand the application process to participate in WCG-A, but prospective Sponsors do not need to apply to participate in WCG-A utilizing a WSAC approved Servicer and may elect to administer the program within their own organization.

#### **Sponsor Application Process**

There are five (5) steps that must be completed for a Sponsor to be approved to participate in WCG-A with a third-party servicer (see **Chapter 7** for information regarding Sponsors who do not use a third-party servicer):

1. Servicer will support Sponsor with completing application for WSAC and collecting the data elements required.
2. Servicer will submit application and documents to WSAC.
3. WSAC will complete a public comment period and review the application and materials to setup the Sponsor.
4. WSAC will have the Sponsor complete an *Agreement to Participate* in the program (also known as a PPA).
5. Servicer will complete a MOU with Sponsor and submit a copy to WSAC.

A Servicer can assist a prospective apprenticeship program to understand the application process, but a Servicer does not determine if a Sponsor meets initial requirements to participate in WCG-A. Sponsors must apply to WSAC to participate in WCG-A.

#### **WCG-A Program Administration Functions**

A Servicer would need to be able to function as a service provider to complete all the WCG-A program administration functions. WCG-A program administration functions include, but are not limited to:

- WCG-A program promotion
- Determining an apprentice's eligibility for WCG-A
- Completing WCG-A award calculation for eligible apprentices and notifying apprentices of their award

- Requesting WCG-A awards from WSAC
- Disbursing and tracking WCG-A awards and handling repayments to WSAC
  - Implementing a process to receive and disburse state funds directly to recipients.
- Satisfactory Program Progress (SPP) monitoring
- Completing reporting and reconciling
  - Providing detailed reports on expenditures and recipients with accuracy on a monthly, quarterly, and yearly basis.
  - Authoring a final report including challenges, successes, and cumulative recipient information.
  - Reconciling expenditures and ensuring accuracy through WSAC provided data systems.
- Following all OCIO (Office of Chief Information Office) rules to ensure participant privacy.

To meet general administrative capability requirements for WCG-A, a Servicer must demonstrate a separation of functions to ensure sound fiscal practices in the handling of WCG-A awards. The designated entity that offers/authorizes aid must be separate from the designated entity that is disbursing/delivering funds. No one office or individual may control both functions. Individuals must be organizationally independent, cannot be family members, and cannot exercise substantial control over the institution. Additional administrative capability requirements for WCG-A includes, but is not limited to:

- Ensuring implementation of practices relating to identity theft protection.
- Reporting suspected fraud.
- Resolving conflicting information in apprentice applications and records.
- Ensuring appropriate record keeping and retention practices meet standards.
- Completing contingency planning.
- Ensuring secure data access protocols are utilized and reporting security breaches.

## Terminology

**Sponsor:** This manual will refer to WSAC approved apprenticeship sponsors as the “Sponsor.”

**Servicer:** This manual will refer to the third-party servicer as the “Servicer.”

**Sponsor Financial Aid Administrator** (abbreviated **Sponsor FAA** or “**SFAA**”): The Sponsor’s designated individual, office, or servicer that is responsible for the following WCG-A Program Administration requirements, will be referred to in this manual as the Sponsor Financial Aid Administrator:

- Determining an apprentice’s eligibility for WCG-A
- Completing WCG-A award calculation for eligible apprentices and notifying apprentices of their award
- Requesting WCG-A awards from WSAC
- Satisfactory Program Progress (SPP) monitoring
- Completing reporting and reconciling
  - Providing detailed reports on expenditures and recipients with accuracy on a monthly, quarterly, and yearly basis.

- Authoring a final report including challenges, successes, and cumulative recipient information.
- Reconciling expenditures and ensuring accuracy through WSAC provided data systems.

**Sponsor Disbursement Administrator:** The Sponsor's designated individual, office, or servicer that is responsible for the following WCG-A Program Administration requirements, will be referred to in this manual as the Sponsor Disbursement Agent:

- Disbursing and tracking WCG-A awards and handling repayments to WSAC.
  - Implementing a process to receive and disburse state funds directly to recipients.

## **WCG-A PROGRAM INFORMATION, ACCESS, AND APPLICATION**

As part of WCG-A program administration, a Servicer is responsible for WCG-A program promotion and ensuring that apprentices have access to information on WCG-A.

A Servicer should work with approved Sponsors to ensure policies and procedures detail:

- How prospective WCG-A applicants would be informed of the WCG-A program.
- How prospective WCG-A applicants would be able to access information regarding the program.
- How prospective WCG-A applicants can access the program application.
- What supports would be available to assist with completing the WCG-A application, including translation services.
- What additional resources are available to WCG-A applicants.
- How information about additional resources will be provided to prospective WCG-A applicants.
- How an applicant is to submit a completed WCG-A application and application materials.

Because applicants provide Personally Identifiable Information (PII) in the application process, it is critical that a Servicer establish policies and procedures that ensure the privacy and protection of PII for an application and supporting documents being submitted to the SFAA for review.

Please note that the SFAA is responsible for policies and procedures that detail the following:

- Provide an overview of what happens to an application once it is submitted.
- How will an application be reviewed for completeness.
- How will incomplete applications be handled and/or remedied.

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

For a Servicer completing the awarding process, prior to the first disbursement of state aid each year, the SFAA 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**.

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

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

## **REPAYMENT POLICY**

A Servicer completing disbursement must also follow the state grant repayment policy as outlined in **Chapter 5: Payments, Repayments, and Reporting**.

## **SATISFACTORY PROGRAM PROGRESS (SPP) POLICY**

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

A Servicer may submit an alternative approach on behalf of a Sponsor to evaluating program progress that includes a plan for improved apprentice 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.

## **YEAR-END CLOSEOUT & SPONSOR RENEWALS**

A Servicer working with a Sponsor as their SFAA or Sponsor Disbursement Administrator must work to complete all year-end closeout requirements with Sponsor by stated deadlines.

For renewal, participating Sponsors must complete the following before requests for funds can be made for the new fiscal year:

- Complete all End of Year Reporting and reconcile the closing fiscal year's records.
- Submit or certify apprentice program costs, which include: tuition and fees, books, supplies, and equipment.
- Certify their policies and procedures for Conditions of Award statements and delivery methods, state aid repayment, satisfactory program progress, and awarding.
- Submit updated policies and procedures as directed by WSAC for approval and renewal of participation in the following fiscal year.
- Obtain and submit a copy of a Program Apprentice Status Summary and Occupational Analysis from the Washington State Department of Labor & Industries (L&I) for the most recent calendar year available.
- Complete an updated *Agreement to Participate* with WSAC.
- Submit additional supporting documentation if directed by WSAC.

## **CONTRACT FOR PROFESSIONAL SERVICERS**

The *Contract for Professional Services* documents a Servicer's legal commitment to abide by all program statutes, rules, and guidelines. A Servicer should refer to their contract executed with WSAC.

## **NOTIFICATIONS**

The Servicer's designated officer or individual with signing authority responsible for signing the *Contract for Professional Services* must notify WSAC within 30 days of material changes affecting the Servicer—including additional locations of the Servicer as applicable that may impact an apprentice's eligibility for state aid.

**WSAC must be notified immediately when a breach of information occurs (electronic, written, etc.) and what steps are being taken to mitigate any impacts to the Servicer, Sponsor, apprentices, and WSAC systems.**

Material changes that must be reported to WSAC within 30 days include, but are not limited to:

- Changes to status with Washington State Labor and Industries
- Locations of main and/or branch locations and other instructional sites
- Contact information and/or changes to key employees responsible for administering WCG-A, including the SFAA and the Sponsor Disbursement Administrator.
- Servicer ownership
- Third-party servicer(s)

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

If a Servicer becomes aware of any material changes or breaches of information impacting a Sponsor that they are acting as a service provider for, Servicer must notify WSAC immediately.

## **PROGRAM AUDITS AND RECORDS RETENTION**

WSAC staff shall review the Servicer's administrative practices to verify compliance with rules, regulations, and program guidelines.

Whenever a Servicer is responsible for one or more SFAA functions and/or the Sponsor Disbursement Administrator function, they are also responsible for record retention for their respective functions.

For example, if a Servicer is responsible for eligibility determination, as outlined in the rules, the burden of proof for a grant recipient's eligibility lies with the Servicer. The Servicer must maintain intact and accessible records of the apprentice's application.

For awarding WCG-A, the Servicer must be able to reconstruct the calculations and rationale for the Apprentice's eligibility and award, if requested by WSAC. Records may be kept electronically.

For requesting funds and disbursement of state aid, the Servicer must maintain intact and accessible records of apprentice's 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.

If the Servicer keeps records electronically, source documents supporting the electronic data must be maintained by the Servicer 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 Servicer error or failure to follow the appropriate rules and guidelines, the Servicer must repay the amount of the affected state aid funds to WSAC. The burden for repayment is on the Servicer, not the apprentice.

## **Records Retention**

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

## **Reporting Fraudulent Information**

Servicer must report any suspected instances of potential fake/fraudulent applications, received by the Servicer, to WSAC as soon as they are identified. WSAC will need to review for any potential or actual loss of state funds.

## **Protecting Apprentice Personally Identifiable Information (PII)**

PII is information that can be used to identify an individual. FERPA's definition of PII includes any information that, alone or in combination, is linked or linkable to a specific apprentice. Appropriate administrative, technical, and physical security practices must be in place to protect the confidentiality, integrity, availability, and control of personal information.

Servicer is required to adhere to or exceed Washington State Policy for PII and abide by federal rules contained in the [Family Educational Rights to Privacy Act](#) (FERPA). This includes, but is not limited to:

- Protecting apprentices' Personally Identifiable Information (PII)
- Secure online servers
- Locking fireproof filing cabinets
- Notification of security breaches to WSAC
- Written privacy protection procedures to be approved by WSAC
- Thorough understanding of what constitutes PII

## **Drafting Privacy Protection Procedures**

A Servicer submit privacy protection procedures as part of their contract as a third-party servicer. Servicer must submit and receive approval from WSAC regarding PII protection. State requirements for privacy protection pertaining to the administration of the grant can be found here: [Chapter 250-21 WAC](#).

## CHAPTER 9

### 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.

#### 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 Washington College Grant (formerly 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
- [250-21-051](#) 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.

## APPENDIX A

### Median Family Income (MFI) Levels for 2024-25 Washington College Grant for Apprenticeship Eligibility

Family Size	65%	70%	75%	100%
1	\$40,500	\$44,000	\$47,000	\$62,500
2	\$53,000	\$57,500	\$61,500	\$82,000
3	\$65,500	\$71,000	\$76,000	\$101,000
4	\$78,500	\$84,500	\$90,500	\$120,500
5	\$91,000	\$98,000	\$105,000	\$139,500
6	\$103,500	\$111,500	\$119,000	\$159,000
7	\$105,500	\$111,500	\$119,000	\$159,000
8	\$108,000	\$116,500	\$124,500	\$166,000
9	\$110,500	\$119,000	\$127,500	\$170,000
10	\$112,500	\$121,500	\$130,000	\$173,500
11	\$115,000	\$124,000	\$133,000	\$177,000
12	\$117,500	\$126,500	\$135,500	\$180,500
13	\$120,000	\$129,000	\$138,000	\$184,000
14	\$122,000	\$131,500	\$141,000	\$188,000
15	\$124,500	\$134,000	\$143,500	\$191,500
16	\$127,000	\$136,500	\$146,500	\$195,000
17	\$129,000	\$139,000	\$149,000	\$198,500
18	\$131,500	\$141,500	\$151,500	\$202,500
19	\$134,000	\$144,000	\$154,500	\$206,000
20	\$136,000	\$146,500	\$157,000	\$209,500

Washington Student Achievement Council analysis of 2021 American Community Survey data as published by the federal Low-Income Home Energy Assistance Program. All figures have been rounded to the nearest \$500 income range.

\*WA Bridge Grants are available to WG-A recipients (not CBS eligible) who enroll in at least 3 credits or the hour equivalency (for example, 500 hours of a 2,000 hour per year apprenticeship), meet the 65% MFI, and do not qualify for the College Bound Scholarship. Amount can be a flat rate, lump sum payment for the year, or awarded proportionally across terms, whichever is in the best interest of the apprentice. WA Bridge Grants are limited to need and are not prorated by enrollment level.

WSAC Rev 11/02/2023

For questions, contact [wgc@wsac.wa.gov](mailto:wgc@wsac.wa.gov)

## Apprenticeship Award Chart for 2024-25

2024-25 WCG-A and WA Bridge Grant Amounts					
	Median Family Income (MFI)				
	0% - 65%	0% - 65%	66% - 70%	71% - 75%	76% - 100%
	WA Bridge Grant*	Full Award Value = Maximum WCG-A Award	Full Award Value = 50% of Maximum WCG-A Award	Full Award Value = 24.5% of Maximum WCG-A Award	Full Award Value = 10% of Maximum WCG-A Award
Award Value	\$500	\$4,763 3.00 QEU's	\$2,382 3.00 QEU's	\$1,167 3.00 QEU's	\$476 3.00 QEU's
QEU's = Quarters of Eligibility Utilized					
Full WCG-A Award Values are tied to program costs paid for by apprentices and based on a 2,000 On-the-Job (OJT) hour standard and completion of the required annual number of Related Supplemental Instruction (RSI) hours as outlined in an apprenticeship program's standards, which amounts to a charge of 3.00 Quarters of Eligibility Utilized (QEU's) to a recipient's lifetime eligibility limits for Washington College Grant programs.					
*Bridge Grants are available to WCG recipients (not CBS eligible) who enroll in at least 3 credits or the hour equivalency (for example 500 hours of a 2000 hour per year apprenticeship), meet the 65% MFI, and do not qualify for the College Bound Scholarship. Amount can be a flat rate, lump sum payment for the year, or awarded proportionally across terms, whichever is in the best interest of the apprentice. Bridge Grants are limited to need and are not prorated by enrollment level.					
WCG-A Awards can be awarded and disbursed up-front at the beginning of a program or in alignment with RSI schedules – commonly split into 2, 3, or 4 payments per year as follows:					
100% Standard WCG-A Award Splits (Each WCG-A Payment Value & QEU Charge)					
# of Payments Per Year	0% - 65% MFI	66% - 70% MFI	71% - 75% MFI	76% - 100% MFI	
1	\$4,763 3.00 QEU's	\$2,382 3.00 QEU's	\$1,167 3.00 QEU's	\$476 3.00 QEU's	
2	\$2,381 1.50 QEU's	\$1,191 1.50 QEU's	\$583 1.50 QEU's	\$238 1.50 QEU's	
3	\$1,587 1.00 QEU's	\$794 1.00 QEU's	\$389 1.00 QEU's	\$158 1.00 QEU's	
4	\$1,190 0.75 QEU's	\$595 0.75 QEU's	\$291 0.75 QEU's	\$119 0.75 QEU's	
WCG-A Awards should also be prorated and/or split in the event an apprentice has a limited number of OJT or RSI hours to complete to avoid overpayment.					
If the apprentice has disproportionate costs, the Sponsor may document the disproportionate costs (to be retained in the apprentice's file) and award/disburse disproportionately.					
For example, if the costs are \$3,149 to begin, and then additional costs are incurred 6 months later, an apprentice with the Maximum WCG-A award would be disbursed \$3,149 at the beginning of the program. An additional \$1,614 would be disbursed 6 months later, provided the apprentice has continued to make progress.					

## APPENDIX C

### Acronyms used in this manual and related to program administration

<b>AGI</b>	Adjusted Gross Income	<b>CBS</b>	College Bound Scholarship
<b>CTC</b>	Community Technical College	<b>DACA</b>	Deferred Action for Childhood Arrivals
<b>DSHS</b>	Department of Health Services	<b>E2SHB</b>	Engrossed Second Substitute House Bill
<b>E2SSB</b>	Engrossed Second Substitute Senate Bill	<b>EAD</b>	Employment Authorization Document
<b>EFT</b>	Electronic Funds Transfer	<b>ESSB</b>	Engrossed Substitute Senate Bill
<b>FAFSA</b>	Free Application for Federal Student Aid	<b>FERPA</b>	Family Educational Right to Privacy Act
<b>HB</b>	House Bill	<b>ITIN</b>	Individual Taxpayer Identification Number
<b>MFI</b>	Median Family Income	<b>OJT</b>	On the Job Training
<b>PII</b>	Personally Identifiable Information	<b>PJ</b>	Professional Judgement
<b>QER</b>	Quarters of Eligibility Remaining	<b>QEU</b>	Quarters of Eligibility Used
<b>RCW</b>	Revised Code of Washington	<b>RSI</b>	Related Supplemental Instruction
<b>SBCTC</b>	State Board for Community & Technical Colleges	<b>SFAA</b>	Sponsor Financial Aid Administrator
<b>SJJ</b>	Special Immigrant Status	<b>SNAP</b>	Supplemental Nutrition Assistance Program
<b>SNG</b>	State Need Grant	<b>SPP</b>	Satisfactory Program Progress
<b>SSN</b>	Social Security Number	<b>TIN</b>	Tax Identification Number
<b>TPS</b>	Temporary Protected Status	<b>UAS</b>	University Accounting Services
<b>URR</b>	Unit Record Report	<b>WAC</b>	Washington Administrative Code
<b>WASFA</b>	Washington Application for State Financial Aid	<b>WCG</b>	Washington College Grant
<b>WCG-A</b>	Washington College Grant for Apprenticeship (also WG-A)	<b>WG-A</b>	Washing Grant for Apprenticeship (also WCG-A)
<b>WSAC</b>	Washington Student Achievement Council	<b>WSATC</b>	Washington State Apprenticeship & Training Committee

### Glossary of Terms

**Ability to Benefit (ATB):** A provision for Washington College Grant (WCG) that allows otherwise-eligible apprentices who do not have a high school diploma or its recognized equivalent to qualify for the program. This is a federally recognized test and can be documented by a prior college if applicable.

**Denied Status:** *An ineligible status for WCG-A* referring to an apprentice not meeting the standard required by their program or they have reached their maximum lifetime usage limit.

**Dependent Status:** A WCG-A applicant that cannot answer “Yes” to the Dependency questions on page 2 of the WCG-A application and must provide parental household information to determine their MFI – even if they no longer live with their parents, are not claimed by their parents on their tax returns, or qualify for WA residency under an independent status.

**Independent Status:** A WCG-A applicant that can answer “Yes” to at least one of the Dependency questions on page 2 of the WCG-A application. An Independent applicant’s household information provided to determine to determine their MFI may be impacted by an applicant’s marital status and any children or other dependents in the household.

**Maximum Lifetime Eligibility:** The maximum usage limit of Washington College Grant (WCG), which includes Washington College Grant for Apprenticeship (WCG-A) is five full-time years of eligibility (15 quarters, 10 semesters, or the hour equivalent).

**Median Family Income (MFI):** The financial information used to determine an applicant’s eligibility for WCG-A. In most cases, this is based on the household size and the reported Adjusted Gross Income (AGI) on a prior-prior year’s Federal Tax Return.

**Professional Judgement (PJ):** A provision of SFAAs to review an appeal relating to an unusual circumstance or a special circumstance to adjust data elements used to determine an applicant’s MFI.

**Satisfactory Program Progress (SPP):** An eligibility requirement for WCG-A that is outlined in [WAC 250-21-010\(17\)](#) of the WCG-A rules that requires apprentices (qualifying under RCW [28B.92.200](#) (5)(b)(ii)) to successfully complete a minimum number of hours for each apprenticeship payment period in which the grant was received. Each apprenticeship program's policy for measuring progress of WCG-A recipients must define satisfactory program progress as the apprentice's successful completion of the minimum number of hours for which the aid was disbursed.

**Servicer:** This manual will refer to the third-party servicer as the “Servicer.”

**Special Circumstances:** A situation that may warrant a professional judgement (PJ) review of an applicant's financial situation. In following standards set by state and federal financial aid applications, WCG-A evaluates MFI based on prior-prior year tax information under the rationale that most individual's (or their family's) financial situations are generally consistent from year to year; however, when an individual's (or a family's) financial situation no longer reflects their current financial situation, an applicant can request a PJ based on special circumstances.

**Sponsor:** This manual will refer to apprenticeship program sponsors as the "Sponsor."

**Sponsor Disbursement Administrator:** The Sponsor's designated individual, office, or servicer that is responsible for the following WCG-A Program Administration requirements, will be referred to in this manual as the Sponsor Disbursement Agent:

- Disbursing and tracking WCG-A awards and handling repayments to WSAC.
  - Implementing a process to receive and disburse state funds directly to recipients.

**Sponsor Financial Aid Administrator** (abbreviated **Sponsor FAA** or "**SFAA**"): The Sponsor's designated individual, office, or servicer that is responsible for the following WCG-A Program Administration requirements, will be referred to in this manual as the Sponsor Financial Aid Administrator:

- Determining an apprentice's eligibility for WCG-A
- Completing WCG-A award calculation for eligible apprentices and notifying apprentices of their award
- Requesting WCG-A awards from WSAC
- Satisfactory Program Progress (SPP) monitoring
- Completing reporting and reconciling
  - Providing detailed reports on expenditures and recipients with accuracy on a monthly, quarterly, and yearly basis.
  - Authoring a final report including challenges, successes, and cumulative recipient information.
  - Reconciling expenditures and ensuring accuracy through WSAC provided data systems.

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

**Unsatisfactory Progress:** An ineligible Satisfactory Program Progress (SPP) status, when an apprentice failed to complete at least one-half (50 percent) of the minimum number of hours required in a previous term.

**Unusual Circumstances:** A situation that may warrant a professional judgement (PJ) review of an applicant's dependency status. In following standards set by state and federal financial aid applications, WCG-A evaluates MFI that is based on an applicant's classification as a Dependent or Independent applicant. The definitions that classify an individual as a Dependent or an Independent differ from tax filing status or residency laws. In certain situations, an individual may not qualify for Independent status, but is unable to

provide parental information due to the nature of their circumstances. SFAAs may use PJ to review an applicant's unusual circumstances to determine if an individual can apply with an Independent status.

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

## APPENDIX E

### Washington College Grant for Apprenticeship Quarterly Reporting

The Quarterly Reconciliation Report (also referred to as an Interim report) is a quarterly data submission that includes apprentice details for every eligible apprentice awarded WA Grant for Apprenticeship (WG-A) and WA Bridge Grant for reconciliation and projection purposes. These reports must be completed by the Sponsor Financial Aid Administrator (SFAA) and submitted to WSAC using the secure messaging feature of the WSAC Portal. If a Sponsor is using a third-party servicer (Servicer), then the Servicer will complete and submit these reports to WSAC using the secure messaging feature of the WSAC Portal.

WSAC operates on a fiscal year that starts July 1 and ends on June 30. Each report is intended to be a cumulative of any previous quarter(s) for the fiscal year, with the last report also serving as the Year-End Reconciliation report, which may also be referred to as the Unit Record Report (URR).

Although the quarterly reports align with fiscal year quarters, the Sponsor's Policies and Procedures will determine the payment periods. For Sponsors with Disproportionate Awarding Policies (such as one payment period for the entire fiscal year due to upfront costs) or with payment periods that do not align with the reporting months on the Quarterly Report (such as 3 payment periods per fiscal year), the Quarterly Reporting is not intended to align directly or dictate a Sponsor's standard awarding schedule.

Data reported on the Quarterly Reconciliation Reports provides the basis for WCG-A funding projections.

#### Interim Report Due Dates for the 2024-25 Fiscal Year

Servicers must meet reporting deadlines as laid out in their contract and must submit one report per Sponsor.

Sponsors administering WCG-A without a Servicer have the following due dates:

Report	Due Date
Quarter 1 (July 1 – September 30)	November 21, 2024
Quarter 2 (October 1 – December 31)	February 19, 2025
Quarter 3 (January 1 – March 31)	May 6, 2025
Quarter 4* (April 1 – June 30)	July 10, 2025

\*The quarter 4 report for the 2024-25 fiscal year also serves as the year-end reconciliation report, also referred to as the Unit Record Report (URR).

In the event that a Sponsor does not have any eligible apprentices to report on at the time the report is due, the SFAA should email WSAC at [apprenticeship@wsac.wa.gov](mailto:apprenticeship@wsac.wa.gov) to report that no quarterly report is available at this time. This would likely happen if a Sponsor doesn't have any eligible apprentices or if there are delays in awarding, such as new Sponsors going through the approval process.

In such a case, if an apprentice does become eligible and is retroactively awarded for a quarter that has already been reconciled, the SFAA should ensure that subsequent

Quarterly Reports reflect any retroactive awards and payments for the quarter that the award should have been awarded.

For example: If an apprentice completes the Application for WCG-A in February, but can be determined to have been an active and eligible apprentice since July 1 of the Fiscal Year and should have received a WCG-A award for Quarter 1 and/or 2\*, the apprentice should be reported on the Quarter 3 report to reflect the award eligibility for Quarter 1 and/or 2\*, unless the apprentice declined their award for those payment period(s).

\* Although the quarterly reports align with fiscal year quarters, the Sponsor's Policies and Procedures will determine the payment periods. For Sponsors with Disproportionate Awarding Policies (such as one payment period for the entire fiscal year due to upfront costs) or with payment periods that do not align with the reporting months on the Quarterly Report (such as 3 payment periods per fiscal year), the Quarterly Reporting is not intended to align directly or dictate a Sponsor's standard awarding schedule.

### **Reporting Layouts**

All Sponsors and Servicers will use the WSAC provided *Microsoft Excel* file template to fulfill the quarterly reporting requirement. Do not submit this report to WSAC using email or the file upload for requesting payments. The report must be submitted to WSAC using the secure messaging feature in the WSAC Portal.

The reporting template file is located on the FAA Resources: <https://wsac.wa.gov/FAA-resources> page under the "Program Manuals, MFI & Award Charts" tab for WCG for Apprenticeship.

Please contact [apprenticeship@wsac.wa.gov](mailto:apprenticeship@wsac.wa.gov) for a sample file.

### **Secure Data Transmission**

No Personally Indefinable Information (PII) shall be transmitted to WSAC via email. All Sponsors and Servicers must submit their reports to WSAC via the secure messaging feature of the WSAC Portal.

### **Security of Information**

All Sponsors are expected to handle information in the WSAC Portal in accordance with the Electronic Agreement contained in the Sponsor Agreement to Participate. All Servicers are expected to handle information in the WSAC Portal in accordance with their Contract.

Sponsors and Servicers are granted access to data with the expectation that they protect the confidentiality of this information as an educational record in accordance with Family Educational Rights and Privacy Act (FERPA) guidelines. The data contained in the Quarterly Reconciliation Reports and the source data used to complete the Quarterly Reconciliation Reports are to be secured and handled with access controls. Sponsors, Servicers, and SFAAs are required to immediately notify WSAC in the event of any breaches or potential breaches of the data contained within the Quarterly Reconciliation Reports, including but not limited to transmission of the data using unauthorized means or if access was inadvertently granted to someone that should not have access.

Each authorized WSAC Portal user must utilize their own user account and password. 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. Sponsors utilizing a third-party servicer will not have access to the WSAC Portal.

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

### **Eligible Awarded WCG-A and WA Bridge Grant Apprentices**

Eligible awarded WCG-A apprentices means any apprentice who has either received a WCG-A payment or has WCG-A funds committed (apprentice has received an award offer) but not yet disbursed at the time of the report.

Eligible awarded WA Bridge Grant Apprentices means a WCG-A apprentice meeting the 65% MFI eligibility, who has either received a WA Bridge Grant award, or who has had the WA Bridge Grant funds committed (apprentice has received an award offer) but not yet disbursed at the time of the report. Apprentice should be awarded WA Bridge Grant at the same time as WCG-A.

### **2024-25 Quarterly Report File Layout**

<b>Column</b>	<b>Field</b>	<b>Valid Inputs</b>	<b>Remarks</b>
A	SSN	Number and hyphens Numbers, with or without hyphens, no spaces	Required. 9-digit student identifier: SSN or ITIN 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	LastName	Any characters (up to 100)	Required
C	FirstName	Any characters (up to 50)	Required
D	MiddleInitial	Any character	Optional
E	DateOfBirth	mm/dd/yyyy	Required. 10byte max, requires slashes. Leading zeros on month and day not required.
F	Gender	M or F or X	Optional. M, if Male; F, if Female; or X if

			non-binary. Leave blank if not reported
G	IsStateResident	Y or N	Required. Yes, if WA Resident; N if not WA Resident
H	ApprenticeIDNumber	Numbers with no spaces or hyphens	Apprentice ID number that matches the Apprentice ID number listed in the ARTs system with L&I
I	ProgramName	Any characters	Required. Name of Apprenticeship Program as it appears in the Portal.
J	YearinProgram	Integer	Required. Refer to "Reporting Year in Program"
K	IsOfHispanicOrigin	Y or N	Optional. Y, if Yes; N, if No; Leave blank if not reported.
L	IsRaceAmericanIndianAlaskaNative	Y or N	Optional. Y, if Yes; N, if No; Leave blank if not reported.
M	IsRaceAsian	Y or N	Optional. Y, if Yes; N, if No; Leave blank if not reported.
N	IsRaceBlackAfricanAmerican	Y or N	Optional. Y, if Yes; N, if No; Leave blank if not reported.
O	IsRaceNativeHawaiianPacificIslander	Y or N	Optional. Y, if Yes; N, if No; Leave blank if not reported.
P	IsRaceWhite	Y or N	Optional. Y, if Yes; N, if No; Leave blank if not reported.
Q	IsRaceOther	Y or N	Optional. Y, if Yes; N, if No; Leave blank if not reported.
R	MaritalStatus	M or S	Required. M, if Married; S if Single
S	IsDependent	I or D	Required. I, if independent; D, if dependent.
T	LivingwithParents	Y or N	Required for dependent apprentices. Y, if

			Yes; N or Leave Blank, if No.
U	FamilySize	Integer	Required
V	NumberInCollegeApprentice	Integer	Required- includes number in college & apprenticeships.
W	FamilyIncome	Number up to two decimal places	Family income used to determine WCG-A and award amount.
X	CalculatedMFI	Integer	Required. Enter the MFI category associated with the apprentice's award
Y	OtherResources	Integer	Enter the amount of other resources that apprentice indicated on their application.
Z	ReceivedWCG	Y or N	Required. Y, if Yes; N or Leave Blank, if No.
AA	AnnualAwardAmount	Integer	Annual maximum award apprentice is eligible to receive based on year in program, MFI< cost of attendance.
AB	BridgeAwardAmount	Number up to two decimal places	Award amount. Leave blank if not awarded. Refer to "Reporting WA Bridge Grant Award Amount" for more information.
AC	BridgeGrantCircumstances	Null or "0," "1," "2," "3," "4", or "5"	Refer to "Reporting WA Bridge Grant Circumstances"
AD	JulyEnrollmentStatus	'Not enrolled' or '0' ( 'Full Time' or '1' ( 'Half Time' or '2' ( '3/4 Time' or '3' ( '< Half Time' or '5')	Refer to "Reporting Enrollment Status"
AE	JulyWCGAPayment	Integer	Enter amount being requested to be paid to the apprentice or the amount paid to the apprentice.
AF	JulyCircumstance	Null or "0," "1," "2," "3," "4," "5," "6," "7," "8," or "9"	Refer to "Reporting Apprentice

			Enrollment Circumstances"
AG	AugustEnrollmentStatus	'Not enrolled' or '0') ( 'Full Time' or '1') ( 'Half Time' or '2') ( '3/4 Time' or '3') ( '< Half Time' or '5')	Refer to "Reporting Enrollment Status"
AH	AugustWCGAPayment	Integer	Enter amount being requested to be paid to the apprentice or the amount paid to the apprentice.
AI	AugustCircumstance	Null or "0," "1," "2," "3," "4," "5," "6," "7," "8," or "9"	Refer to "Reporting Apprentice Enrollment Circumstances"
AJ	SeptemberEnrollmentStatus	'Not enrolled' or '0') ( 'Full Time' or '1') ( 'Half Time' or '2') ( '3/4 Time' or '3') ( '< Half Time' or '5')	Refer to "Reporting Enrollment Status"
AK	SeptemberWCGAPayment	Integer	Enter amount being requested to be paid to the apprentice or the amount paid to the apprentice.
AL	SeptemberCircumstance	Null or "0," "1," "2," "3," "4," "5," "6," "7," "8," or "9"	Refer to "Reporting Apprentice Enrollment Circumstances"
AM	OctoberEnrollmentStatus	'Not enrolled' or '0') ( 'Full Time' or '1') ( 'Half Time' or '2') ( '3/4 Time' or '3') ( '< Half Time' or '5')	Refer to "Reporting Enrollment Status"
AN	OctoberWCGAPayment	Integer	Enter amount being requested to be paid to the apprentice or the amount paid to the apprentice.
AO	OctoberCircumstance	Null or "0," "1," "2," "3," "4," "5," "6," "7," "8," or "9"	Refer to "Reporting Apprentice Enrollment Circumstances"
AP	NovemberEnrollmentStatus	'Not enrolled' or '0') ( 'Full Time' or '1') ( 'Half Time' or '2') ( '3/4 Time' or '3') ( '< Half Time' or '5')	Refer to "Reporting Enrollment Status"

AQ	NovemberWCGAPayment	Integer	Enter amount being requested to be paid to the apprentice or the amount paid to the apprentice.
AR	NovemberCircumstance	Null or "0," "1," "2," "3," "4," "5," "6," "7," "8," or "9"	Refer to "Reporting Apprentice Enrollment Circumstances"
AS	DecemberEnrollmentStatus	'Not enrolled' or '0' ( 'Full Time' or '1' ) ( 'Half Time' or '2' ) ( '3/4 Time' or '3' ) ( '< Half Time' or '5' )	Refer to "Reporting Enrollment Status"
AT	DecemberWCGAPayment	Integer	Enter amount being requested to be paid to the apprentice or the amount paid to the apprentice.
AU	DecemberCircumstance	Null or "0," "1," "2," "3," "4," "5," "6," "7," "8," or "9"	Refer to "Reporting Apprentice Enrollment Circumstances"
AV	JanuaryEnrollmentStatus	'Not enrolled' or '0' ( 'Full Time' or '1' ) ( 'Half Time' or '2' ) ( '3/4 Time' or '3' ) ( '< Half Time' or '5' )	Refer to "Reporting Enrollment Status"
AW	JanauryWCGAPayment	Integer	Enter amount being requested to be paid to the apprentice or the amount paid to the apprentice.
AX	JanauryCircumstance	Null or "0," "1," "2," "3," "4," "5," "6," "7," "8," or "9"	Refer to "Reporting Apprentice Enrollment Circumstances"
AZ	FebruaryEnrollmentStatus	'Not enrolled' or '0' ( 'Full Time' or '1' ) ( 'Half Time' or '2' ) ( '3/4 Time' or '3' ) ( '< Half Time' or '5' )	Refer to "Reporting Enrollment Status"
BA	FebruaryWCGAPayment	Integer	Enter amount being requested to be paid to the apprentice or the amount paid to the apprentice.

BB	FebruaryCircumstance	Null or "0," "1," "2," "3," "4," "5," "6," "7," "8," or "9"	Refer to "Reporting Apprentice Enrollment Circumstances"
BC	MarchEnrollmentStatus	'Not enrolled' or '0') ('Full Time' or '1') ('Half Time' or '2') ('3/4 Time' or '3') ('< Half Time' or '5')	Refer to "Reporting Enrollment Status"
BD	MarchWCGAPayment	Integer	Enter amount being requested to be paid to the apprentice or the amount paid to the apprentice.
BE	MarchCircumstance	Null or "0," "1," "2," "3," "4," "5," "6," "7," "8," or "9"	Refer to "Reporting Apprentice Enrollment Circumstances"
BF	AprilEnrollmentStatus	'Not enrolled' or '0') ('Full Time' or '1') ('Half Time' or '2') ('3/4 Time' or '3') ('< Half Time' or '5')	Refer to "Reporting Enrollment Status"
BG	AprilWCGAPayment	Integer	Enter amount being requested to be paid to the apprentice or the amount paid to the apprentice.
BH	AprilCircumstance	Null or "0," "1," "2," "3," "4," "5," "6," "7," "8," or "9"	Refer to "Reporting Apprentice Enrollment Circumstances"
BI	MayEnrollmentStatus	'Not enrolled' or '0') ('Full Time' or '1') ('Half Time' or '2') ('3/4 Time' or '3') ('< Half Time' or '5')	Refer to "Reporting Enrollment Status"
BJ	MayWCGAPayment	Integer	Enter amount being requested to be paid to the apprentice or the amount paid to the apprentice.
BM	MayCircumstance	Null or "0," "1," "2," "3," "4," "5," "6," "7," "8," or "9"	Refer to "Reporting Apprentice Enrollment Circumstances"
BN	JuneEnrollmentStatus	'Not enrolled' or '0') ('Full Time' or '1') ('Half Time' or '2')	Refer to "Reporting Enrollment Status"

		('3/4 Time' or '3') (< Half Time' or '5')	
BO	JuneWCGAPayment	Integer	Enter amount being requested to be paid to the apprentice or the amount paid to the apprentice.
BOP	JuneCircumstance	Null or "0," "1," "2," "3," "4," "5," "6," "7," "8," or "9"	Refer to "Reporting Apprentice Enrollment Circumstances"

### Reporting Year in Program

The value entered for [YearInProgram] should correspond with an apprentice's cumulative OJT hours that the SFAA has on record at the end of the reporting period. An apprentice's reported year in a program can change between reporting periods within the same fiscal year as how step wages are determined by the number of step hours completed. WCG-A classifies apprentices on increments of 2,000 OJT hours unless an exception was granted by the Washington Student Achievement Council within a Sponsor's WSAC approved Policies & Procedures manual:

YearInProgram	OJT Hours Completed
1	0-2000
2	2001-4000
3	4001-6000
4	6001-8000

For Sponsors with an exception granted, refer to Sponsor's Policies & Procedures Manual.

If an apprentice has started in a program and has transferred OJT hours over from their prior program that count towards completion of their apprentice program, please use their cumulative hours that include any hours that have transferred into the program being reported on.

### Reporting WA Bridge Grant Award Amount

Report the amount of WA Bridge Grant that has been awarded, including an award that has not yet been disbursed to the apprentice.

In general, WA Bridge Grant should be awarded at \$500. If there is a circumstance that warrants providing a reason a WA Bridge Award does not fall into standard awarding (such as less than the \$500 award, late awarding), SFAAs should report the circumstance in the WA Bridge Grant Circumstances.

If WA Bridge Grant is not awarded as a one-time lump-sum payment, the amount reported in [BridgeAwardAmount] should be the total amount awarded. SFAAs should indicate that the WA Bridge Grant is not awarded as a one-time lump-sum payment in the [BridgeGrantCircumstances] column.

## Reporting WA Bridge Grant Circumstances

In situations when an apprentice's WA Bridge Grant does not fall into standard awarding (such as less than the \$500 award, late awarding), SFAAs should use the [BridgeGrantCircumstances] column to report the reason. If the apprentice's WA Bridge Grant is awarded as a standard payment or the apprentice is not eligible for WA Bridge Grant, this column should be left blank.

Input	Circumstance
Null (Blank)	Standard WA Bridge Grant Award, or the apprentice is not eligible for WA Bridge Grant.
1	WA Bridge Grant Award is split into more than one lump-sum payment.
2	Apprentice received partial WA Bridge Grant award from another apprenticeship program or academic institution for the current fiscal year.
3	Apprentice was awarded WA Bridge Grant late (after initial award was made).
4	Apprentice was awarded full WA Bridge Grant from an academic institution for the current fiscal year.
5	Other: Use WSAC's secure messages feature in the WSAC Portal to communicate circumstances.

## Reporting Enrollment Status

Each payment month will have a corresponding "[Month]EnrollmentStatus" column to report an apprentice's enrollment status.

For reconciliation purposes, each apprentice's payment-period's enrollment status should reflect the actual enrollment level that the apprentice completed during the payment period. This should be reported with the payment month that the payment was made, or in cases when a late or retroactive payment was made, when the payment should have been made.

For projection purposes, each apprentice's future-payment-period's enrollment status should reflect the expected enrollment level that the apprentice is anticipated to complete during future payment periods. This should be reported with the payment month that the payment should be expected to be made.

Enrollment Status should correspond with the payment month(s) as set by the Sponsor's payment periods outlined in the Sponsor's Policies and Procedures, except for situations such as when an apprentice's start date and initial payment does not lineup with the Sponsor's payment periods.

In general, the payment months should match what is reflected in the apprentice's record contained within the WSAC Portal. During months in which payments were not made, do not report enrollment status for apprentices. The exception to this would be for late or retroactive awarding, where the requested payment is made for a payment period that has already lapsed. The enrollment status and award should be reported for the payment periods that the award was calculated for.

If an apprentice did not complete their required hours and would be ineligible for the next term's payment, the apprentice's projected enrollment status should be reported for upcoming payment periods; however, their projected award value should be adjusted to reflect any changes. For example, if an apprentice will not be eligible to receive a payment in their next payment period, the award for that payment period should reflect \$0 until their eligibility for WCG-A has been reinstated.

If an apprentice was not considered eligible for aid in a payment month due to extenuating circumstances including unsatisfactory SPP, report the apprentice's circumstances in the "[Month]Circumstance" column. Refer to "Reporting Apprentice Circumstances" for reporting circumstances such as having (or not having) an SPP appeal granted.

<b>MonthEnrollmentStatus</b>	<b>Enrollment Level</b>	<b>Example: 3 Payment Periods for a 2000 OJT/144 Hour Program</b>	<b>Example: 4 Payment Periods for a 2000 OJT/144 Hour Program</b>
Not Enrolled or 0	Not Enrolled	0 OJT 0 RSI	0 OJT 0 RSI
Full Time or 1	Full Time	667+ OJT Hours 48+ RSI Hours	500+ OJT Hours 36+ RSI Hours
Half Time or 2	Half Time	334-499 OJT Hours 24-35 RSI Hours	250-374 OJT Hours 18-26 RSI Hours
$\frac{3}{4}$ Time or 3	Three- Quarter Time	500-666 OJT Hours 36-47 RSI Hours	375-499 OJT Hours 27-35 RSI Hours
< Half Time or 5	Less than Half-Time	Less than 334 OJT Less than 24 RSI	Less than 250 OJT Less than 18 RSI

#### *Example 1: Late or Retroactive Awarding*

*If an apprentice completed their application to receive WCG-A in February and is determined to have met eligibility for WCG-A for the Sponsor's August and January payment periods, then the enrollment status should be reported for August and January even if payment was made in February. In this example, the enrollment status for payment periods that have already lapsed should reflect what was completed and any future payment periods should be projected. Also report that apprentice received late or retroactive awarding in the corresponding payment month's circumstances.*

#### *Example 2: Unsatisfactory SPP*

*An apprentice who received a full-time award in September, but only completed 400 out of 500 OJT hours and 36 RSI hours in a 4-payment period model at the three-quarter time enrollment rate should be reported as three-quarter time enrollment in the Quarter 1 report. Also report an apprentice's enrollment was adjusted in the corresponding payment month's circumstances.*

*If the apprentice is anticipated to have an approved SPP appeal (or already has an approved SPP appeal) to be awarded at full-time enrollment for January and April, then January and April should reflect a projected "full-time" enrollment. Also report*

*the apprentice's circumstance accordingly in the corresponding payment month's circumstances.*

*If the apprentice is not anticipated to have an approved SPP appeal and will not be eligible for WCG-A in January (but is projected to regain eligibility by April), the SF AA should report the anticipated enrollment status of the apprentice for January and April; however, the award for January would reflect "\$0." Also report the apprentice's circumstance accordingly in the corresponding payment month's circumstances.*

## **Reporting Apprentice Enrollment Circumstances**

SFAAs are asked to utilize this column, which corresponds with each payment month to report circumstances to give context to situations that can help reconcile the apprentice's record.

For reconciliation purposes, each apprentice's payment-period's enrollment status should reflect the actual enrollment level that the apprentice completed during the payment period. In situations where a change has occurred, use the corresponding payment month's data column to report an apprentice's circumstances. If the apprentice completed the requirements for the payment that was made, this column should be left blank.

For projection purposes, each apprentice's future-payment-period's enrollment status should reflect the expected enrollment level that the apprentice is anticipated to complete during future payment periods.

Input	Circumstance
Null (Blank)	Standard payment and enrollment for apprentice for the reported payment term.
1	Use Only for Reconciliation Reporting: Enrollment Status adjusted due to apprentice not meeting SPP for the payment they received.
2	Use Only for Reconciliation Reporting: Apprentice received a late or retroactive award payment.
3	Apprentice did not meet SPP, and they did not appeal, or their appeal was denied and is therefore ineligible for WCG-A during the reported payment term.  Enrollment Status should still be reported; however, the award payment should reflect \$0.
4	Apprentice granted SPP Appeal and is receiving WCG-A during the reported payment term.
5	Apprentice disenrolled from apprenticeship program.
6	Apprentice will journey out of program and will not be receiving payment during the reported payment term.
7	Apprentice's enrollment reduced due to approved circumstances such as extended illness, FMLA leave, or unemployment.
8	Apprentice completed (will complete) more than 2,000 OJT/144 RSI hours during fiscal year and is eligible for an additional WCG-A payment.
9	Other: Use WSAC's secure messages feature in the WSAC Portal to communicate circumstances.

## **Addressing Errors**

Upon completion and submission of the report, should you find error(s) within your report, correct the errors immediately and resubmit to WSAC through the secure messages feature on the WSAC Portal with an explanation of the error(s).

Should a change occur to an apprentice's record after submission that is *not* an error, ensure the change is recorded on your payment request file, but do not resubmit your report file with the change until the next quarterly report.