



**STATE NEED GRANT  
AND  
COLLEGE BOUND  
SCHOLARSHIP  
PROGRAM MANUAL  
2015-16**

NOVEMBER 2015

## Washington Student Achievement Council Staff

### *OPERATIONS - AWARDING, PAYMENTS, REPORTING, AND REPAYMENT*

<b>CARISSA GLASSBURN</b> Assistant Director	Phone E-mail	(360) 753-7841 <a href="mailto:carissag@wsac.wa.gov">carissag@wsac.wa.gov</a>
<b>VICTOR FERNANDEZ</b> Fiscal Analyst	Phone E-Mail	(360) 753-7623 <a href="mailto:victorf@wsac.wa.gov">victorf@wsac.wa.gov</a>
<b>VACANT</b> Receivables Coordinator	Phone E-Mail	(360) 753-7632 <a href="mailto:receivables@wsac.wa.gov">receivables@wsac.wa.gov</a>
<b>GRAY STERLING</b> Payment Coordinator	Phone E-Mail	(360) 753-7784 <a href="mailto:grays@wsac.wa.gov">grays@wsac.wa.gov</a>

### *CBS OUTREACH/OPERATIONS - CBS APPLICATION STATUS*

<b>BETH AHLSTROM</b> Assistant Director	Phone E-mail	(360) 753-7787 <a href="mailto:betha@wsac.wa.gov">betha@wsac.wa.gov</a>
<b>CHRISTINA RICHMOND</b> Program Manager	Phone E-Mail	(360) 753-7785 <a href="mailto:christinar@wsac.wa.gov">christinar@wsac.wa.gov</a>
<b>MALLORY BYRD</b> Program Specialist	Phone E-Mail	(360) 753-7792 <a href="mailto:malloryb@wsac.wa.gov">malloryb@wsac.wa.gov</a>
<b>RASHEL WISE</b> Program Coordinator	Phone E-Mail	(360) 753-7786 <a href="mailto:rashelw@wsac.wa.gov">rashelw@wsac.wa.gov</a>

### *MANAGEMENT - POLICY ISSUES*

<b>BECKY THOMPSON</b> Director	Phone E-mail	(360) 753-7840 <a href="mailto:beckyt@wsac.wa.gov">beckyt@wsac.wa.gov</a>
<b>STEVE THORNDILL</b> Associate Director	Phone E-mail	(360) 753-7851 <a href="mailto:stevet@wsac.wa.gov">stevet@wsac.wa.gov</a>

**Fax number for high school transcripts: 360-704-6218**

[www.wsac.wa.gov](http://www.wsac.wa.gov)

Portal: <https://fortress.wa.gov/wsac/portal/>

Financial Aid Counseling: [www.opportunitypathways.wa.gov](http://www.opportunitypathways.wa.gov)

Students and Parents: [www.readysetgrad.org](http://www.readysetgrad.org)

Agency phone number: (360) 753-7800

**STATE NEED GRANT AND COLLEGE BOUND SCHOLARSHIP  
PROGRAM MANUAL  
2015-16 UPDATES & REMINDERS**

**UPDATES**

◆ **100 percent Coordination between State Need Grant (SNG) and College Bound Scholarship (CBS)**

Per 2015 legislation, each eligible College Bound Scholar must receive a maximum State Need Grant award. The CBS award is determined after SNG and any other state grant aid has been awarded. Institutions are required to reserve sufficient SNG funds to assist all eligible CBS students for all terms during the year, including summer 1 and summer 2.

For non-CBS eligible students, institutions are permitted to institute individual campus priorities in awarding State Need Grant (e.g. prioritization based on level of need, MFI, previous recipients, gift equity, etc.) The Washington Student Achievement Council requires that copies of awarding policies be submitted each year for review and approval.

◆ **Changes to Self-Help Requirements**

- Elimination of the SNG self-help requirement for all eligible CBS Scholars.
- May waive the SNG self-help requirement for other SNG eligible students at institutions that have reduced their cost of attendance (COA) for all students by at least 25 percent below the Washington Financial Aid Association (WFAA) student budgets.
- May reduce the SNG self-help requirement to 12 percent for other SNG eligible students with reduced living expenses (“at-home” students).
- SBCTC Opportunity Grant, and Educational Training Vouchers (ETV), are now considered self-help for SNG.

◆ **Changes to Washington State Residency Determination for Tuition and Financial Aid Purposes**

Students with federal Deferred Action for Childhood Arrival (DACA) status may now qualify for resident tuition pursuant to the requirements detailed in [RCW 28B.15.012\(2\)\(a\)-\(d\)](#).

State Need Grant and College Bound Scholarship programs use the same statute to define residency and as a result students with DACA status who meet Washington state residency requirements may now be considered for both programs.

### ***State Need Grant***

Students with DACA status may now be considered Washington State residents under certain conditions. Washington State residency for SNG is defined as meeting one of the five conditions detailed in RCW 28B.15.012(2)(a)-(e).

Please note that:

- If the student is a U. S. Citizen or has federal DACA status, residency is determined using RCW 28B.15.012(2)(a)-(d).
- If the student is a non-U.S. Citizen and does not have federal DACA status, residency is determined using RCW 28B.15.012(2)(e).

Students meeting this requirement are sometimes referred to as “1079” eligible if they meet the provisions of HB 1079, first established in 2003.

### ***College Bound Scholarship***

Students with federal DACA status who meet residency requirements under RCW 28B.15.012(2)(a)-(d) and who applied for the College Bound Scholarship program as 7th or 8th graders are also now eligible for the CBS program if they meet all other program requirements - including enrollment requirements outlined in the Chapter 1.

#### **◆ Elimination of the SNG Transfer Fund**

Beginning in the 2015-16 year, the held-aside for SNG Transfer funds is eliminated. Funds previously held aside by WSAC for transfer students will be distributed during the SNG institutional allocation process. Institutions may hold a portion of their final SNG allocation for anticipated transfer students, but are not required to do so.

#### **◆ Clarification of Repayment Referral Process for Public Colleges**

WSAC clarified the timing and process for notification of state aid repayments. See the Public Payments Chapter 5 for more information.

#### **◆ Optional CSAW File Format Changes**

Optional fields have been added to the CSAW format, and changes will be effective December 2015. The new format provides the ability to include Passport to College Scholarship awards as well as designate individual term awards as either semester based or quarter based.

## REMINDERS

### ◆ **Former Foster Care Youth Priority**

Former foster care youth will receive SNG and CBS funding as long as they meet all eligibility criteria. Please contact the Council if you do not have sufficient funds in your regular SNG allocation to award students meeting these criteria. The foster youth fund should only be accessed if the institution has exhausted its SNG allocation at the time of award.

### ◆ **College Bound Scholarships for All Terms of Enrollment, Including Summers**

Ensure that all eligible CBS Scholars are awarded full State Need Grants and College Bound Scholarships for all periods of enrollment, including summers. WSAC data shows that, overall, 22-25% of CBS first time enrollments in the CTC and private two-year colleges, began in the winter, spring, or summer 2 terms. And, that about 5% of first time enrollments began after the fall term at four-year colleges. Institutions should review their data so as to predict the numbers of CBS students who will begin their enrollment later in the year.

### ◆ **Higher College Bound Scholarship and State Need Grant Summer 1 Award Amounts for Public Colleges**

Please refer to the 2014-15 SNG and CBS program manuals for public SNG and CBS award amounts to determine the term amount for summer students if summer is the first term at your institution. Refer to Chapter 2 for more information.

### ◆ **Accurate Reporting**

Please ensure that all served and unserved records submitted on your SNG Interim Reports are as accurate as possible. Correct or update future reports if changes are necessary. These data are critical to determine institutional funding levels and forecast program funding costs.

### ◆ **Students Needing Repayment Status Information**

Students with repayments incurred in 1998, or later wanting information about the status of their repayments should be instructed to call the Council's billing service, ECSI at 1-888-549-3274. When calling the students should reference school code "2H."

Students with repayments incurred during or before 1997, should instead be instructed to contact WSAC staff at 1-888-535-0747.

### ◆ **More Information at ReadySetGrad**

For more information on **state financial aid** information please visit [www.readysetgrad.org](http://www.readysetgrad.org).

For specific information on the Washington **State Need Grant**, visit [www.readysetgrad.org/college/state-need-grant](http://www.readysetgrad.org/college/state-need-grant)

For specific information on the **College Bound Scholarship**, visit [www.readysetgrad.org/college/college-bound-scholarship-program](http://www.readysetgrad.org/college/college-bound-scholarship-program)

## State Need Grant and College Bound Scholarship History and Operation

- 1969:** State Need Grant (SNG) Program was established.
- 1976:** Legislative intent noted to offset tuition/fees for low-income students.
- For every dollar increase in tuition, 24 cents in aid provided, above previous levels.
  - Reflected the portion of undergraduates on aid at that time.
  - Policy inferred that the state needs to “give back” to needy students when increasing tuition
  - Students were nominated, then ranked together according to need.
  - Grants were one-third of the difference between budget costs and family contribution.
- 1980:** For-profit institution participation was authorized.
- 1988:** Grant amounts changed from flat grant to variable in order to reflect Cost of Attendance differences supporting student choice.
- 1989:** Part-time students authorized.
- 1991:** A “fair share” fund distribution model was adopted creating campus “reserve funds” based on percentage of campus-eligible students divided by all eligible students.
- 1993:** Revised the eligibility and cost model to use MFI as a result of change in federal needs analysis – 50 percent MFI used initially.
- 1995:** MFI increased to 65 percent via budget process.
- 1996:** MFI decreased to 40 percent via budget process.
- 1998:** Award amounts based on public tuition rates.
- 2001:** MFI increased to 55 percent via budget process.
- 2005:** MFI increased to 65 percent via budget process.
- 2005:** Less-than-half-time eligibility pilot with 10 campuses.
- 2006:** Less-than-half-time eligibility pilot expanded to all.
- 2007:** Legislature established the College Bound Scholarship Program, allowing eligible 7<sup>th</sup> and 8<sup>th</sup> graders to sign up to receive scholarship support in college
- Maximum MFI for SNG increased to 70 percent.
  - Maximum MFI level for CBS established at 65 percent
- 2009:** SNG MFI ranges expanded from three to five categories for pro-rated awards via budget process.
- 2011:** SNG Awards for new students attending for-profit institutions reduced by half.
- 2011:** SNG Less-than-half-time eligibility pilot extended two years through the budget with the addition of a required outcomes study.
- 2012:** The first College Bound Scholarship students receive funding
- 2014:** The Legislature enacted the REAL Hope Act, granting SNG eligibility determination for undocumented students.
- 2015:** The Legislature required that all eligible CBS Scholars be awarded maximum SNG awards.
- The State Attorney General's Office indicated that students with Deferred Action for Childhood Arrival (DACA) status may be considered for in-state tuition and for State Need Grant and College Bound Scholarship eligibility under RCW 28B.15.012(2)(a)-(d).
  - SNG eligibility for less-than-half-time enrollment became permanent.

## **SNG & CBS REPORT AND FUNDING REQUEST TIMELINE**

May 2015	Request from the Council for institutions to update their “Institutional Agreement to Participate”
June 12, 2015	Last date for private institutions to request SNG funds for 2014-15 year
June 19, 2015	Last date for public institutions to request SNG payments for 2014-15 year
July 10, 2015	Final Year End Interim Reports (Reconciliation) due for 2014-15 year. Schools can begin requesting funds for summer (1st term) and fall terms
August 2015	SNG Archive updated with 2014-15 award data available on Portal*
November 6, 2015	Fall Interim Reports due
January 2016	Washington Application for State Financial Aid (WASFA) available for the 2016-17 academic year
February 5, 2016	Winter Interim Reports due
February 2016	First SNG Supplemental/Deobligation Survey Round (if applicable)
April 2016	Second SNG Supplemental/Deobligation Survey Round (if applicable)
May 6, 2016	Spring Interim Reports due
May 2016	State financial aid training and updates workshops
June 17, 2016	Last date for institutions to request SNG funds for 2015-16 year
June 30, 2016	Final date that 2015-16 WASFA form may be processed
July 8, 2016	Final Year End Interim Reports (Reconciliation) due
August 2016	Archive updated with 2015-16 awards available on Portal*

*\*Contingent on receipt of completed Reconciliation of Records from institutions.*



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# CHAPTER 1

## STATE NEED GRANT (SNG) AND COLLEGE BOUND SCHOLARSHIP (CBS)

### ELIGIBILITY DETERMINATION

**First: Determine if the student is an eligible College Bound Scholar.** College Bound students are identified through the CBS “Cruncher” located in the WSAC portal. CBS students, who meet all high school eligibility, are considered College Bound Scholars. College Bound Scholars, who meet all income and program requirements for that year to be considered for CBS funding, are identified throughout this manual as **eligible College Bound Scholars** or **eligible CBS Scholars**.

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

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

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

Initial Criteria for SNG and CBS for Eligibility Determination		
STUDENTS MUST	SNG	CBS
Meet HS Graduation Requirements	<input type="checkbox"/> HS graduation or GED	<input type="checkbox"/> Graduate from High School (HS) with a 2.0 GPA or higher <input type="checkbox"/> No felony convictions before HS graduation
Meet College Enrollment Deadline	<input type="checkbox"/> N/A	<input type="checkbox"/> Within one year of HS grad. (Typically the fall term a year after a June HS graduation)
Submit an Approved Application	<input type="checkbox"/> FAFSA or WASFA	<input type="checkbox"/> FAFSA or WASFA
Be a Washington Resident	<input type="checkbox"/> Meet residency requirements according to RCW 28B.15.012(2)(a)-(e) - Includes students with Deferred Action for Childhood Arrival (DACA) status that meet 28B.15.012(2)(a)-(d) requirements - Includes non-U.S. Citizens who meet 28B.15.012(2)(e), also known as “1079,” requirements	<input type="checkbox"/> Meet residency requirements according to RCW 28B.15.012(2)(a)-(d) - Includes students with DACA status that meet 28B.15.012(2)(a)-(d) requirements
Meet family income eligibility based on Median Family Income (MFI) level	<input type="checkbox"/> 70% MFI or less	<input type="checkbox"/> 65% MFI or less
STUDENTS AWARDS CANNOT	SNG	CBS
Exceed Maximum Term Usage	<input type="checkbox"/> 15 quarters/10 semesters	<input type="checkbox"/> 12 quarters/8 semesters
Exceed Grant Receipt Eligibility Window	<input type="checkbox"/> N/A	<input type="checkbox"/> 5 year usage window from year of HS graduation

Shared SNG/CBS Eligibility Areas	
<b>ALL SNG and ALL CBS SCHOLARS MUST:</b>	
<input type="checkbox"/>	Demonstrate financial need
<input type="checkbox"/>	Be Undergraduate students
<input type="checkbox"/>	Enroll in at least 3 credits per term
<input type="checkbox"/>	Enroll in eligible programs at eligible institutions
<input type="checkbox"/>	Meet the definition of a 'disadvantaged student,' 'needy student,' or be a former foster care youth
<input type="checkbox"/>	Be matriculated working towards a degree at that institution
<b>ALL SNG and ALL CBS SCHOLARS CANNOT:</b>	
<input type="checkbox"/>	Exceed 125% of established program length
<input type="checkbox"/>	Exceed maximum term usage
<input type="checkbox"/>	Be in Unsatisfactory Progress or Denied Status
<input type="checkbox"/>	Owe a repayment to any state or federal program
<input type="checkbox"/>	Be pursuing a 2 <sup>nd</sup> Associate degree within 5 years of earning an Associate degree after using more than 3 quarters of SNG and/or CBS funds
<input type="checkbox"/>	Be pursuing a 2 <sup>nd</sup> Bachelor's degree
<input type="checkbox"/>	Be pursuing a degree in Theology

**Financial Need and Income Cutoff**

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

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

For 2015-16, the income cutoff is 70 percent of the state's MFI for State Need Grant and 65 percent for College Bound Scholarship recipients. Chapter 2, *Calculating SNG and CBS Awards*, describes the income cutoff thresholds.

**Undergraduate Student**

An **undergraduate student** is a student who has not received a baccalaureate or professional degree. An institution may withhold payment of state aid to a student who has earned sufficient credits for, but has not received, a first baccalaureate degree.

**Enrolled for at Least Three Credits per Term**

A student must be enrolled in a minimum of three quarter credits or equivalent semester credits at a participating postsecondary institution to receive state aid.

## **Eligible Program**

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

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

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

**Note:** It is permissible to count needed remedial coursework toward the state aid enrollment requirement.

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

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

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

## **Disadvantaged Student**

A ***disadvantaged student*** is one who, by reasons of adverse cultural, educational, environmental, experiential, or familial circumstance, is unlikely to aspire to or enroll in higher education.

This may include a dependent student whose parents have not attained a college education, and/or whose family income is substantially below the state's median, and who is predetermined to be disadvantaged by participating in a means tested early awareness program designed to prepare the student for postsecondary education.

## **Needy Student**

A ***needy student*** is a post high school student at an institution of higher education who demonstrates to the office the financial inability, either through the student's parents, family, and/or personally, to meet the total cost of board, room, books, tuition, and incidental fees for any semester or quarter.

## **Former Foster Youth**

A **former foster youth** is defined as someone at least eighteen years of age, but not more than twenty-four years of age, who was a dependent of the Washington State Department of Social and Health Services at the time he or she turned eighteen. The student must also demonstrate financial need and meet all other eligibility requirements.

SNG awarding policies cannot be altered in order to serve more SNG recipients with foster youth funds in an effort to stretch the regular SNG allocation further.

## **125% of Program Limit**

State aid may not be awarded to a student who has exceeded 125 percent of the published length of his or her program. FAA's may exercise professional judgment to individual student situations when applying the 125 percent limit. These exceptions shall follow the flexibility granted to the FAA in applying the federal 150 percent limitation.

While the actual 125 percent limit cannot be changed, other circumstances can be recognized. For example, the school may do one of the following:

1. Choose the unit of measure that constitutes the published length of time.
2. Exclude remedial coursework up to 30 semester hours or 45 quarter hours.
3. Exclude English as a Second Language course work.
4. Re-start the timeframe after a change of program.
5. Consider other exceptional circumstances as documented by the student.

All use of professional judgment shall be applied judiciously, on a case-by-case basis, and shall be documented in the student's file.

## **Maximum Eligibility**

State aid recipients have a lifetime maximum of terms they can receive. Remaining eligibility is described by WSAC as Quarters of Eligibility Remaining (QER).

A SNG recipient may receive the grant for a maximum of five years. **Five years** means ten semesters, fifteen quarters, or the equivalent combination of the two at a full-time rate of enrollment.

CBS recipients may receive CBS funds for a maximum of four years. Four (4) years means: 12 quarters; 8 semesters; or the equivalent combination of the two at a full-time rate of enrollment.

The four-year scholarship may be used during any terms within the five-year period, even if enrollment is not continuous. The Council's CBS Cruncher and College Bound/State Need Grant Award Warehouse (CSAW) system will track the individual student's eligibility.

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

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

## **Unsatisfactory Progress or Denied Status**

*Unsatisfactory progress* means that in a previous term, the student failed to complete at least one-half (50 percent) of the minimum number of credits or clock hours for which state aid was received and has not yet earned reinstatement. *Denied* may also refer to a student's status when the student has not met the institution's qualitative standard or maximum timeframe policy. See Chapter 3 for more information.

## **Refund/Repayment**

All students must certify that they do not owe a refund or repayment for any state or federal student financial aid programs. The student may not be in default on a loan made, insured, or guaranteed under the Perkins, National Direct, or Federal Family Education Loan program, or a loan made through a state conditional loan program.

## **Second Associate Degree**

A student pursuing a second Associate degree is only eligible for additional state aid if five years have elapsed since the date the first Associate degree was conferred. This limitation only applies if the student received more than three quarters or two semesters of state aid before the first degree was awarded. A student may earn two Associate degrees concurrently.

Administrators may use professional judgment to determine if a student has met the Associate degree standard even if the degree is not yet conferred.

The archive report is updated quarterly with student associate degrees. Check eligible students against the archive to confirm eligibility before disbursement. The archive is available on the Council's Portal: <https://fortress.wa.gov/wsac/portal/>.

Note: Due to a delay between when Associate degrees are conferred and the Council receives data from institutions to update the archive, it is expected that colleges will work with other departments on campus to identify their own Associate degree recipients to prevent awarding state aid to ineligible students.

Certificates are not included in this limitation.

## **Previous Bachelor's Degree**

SNG recipients and CBS Scholars who have already earned a Bachelor's degree, including foreign Bachelor's degrees, are not eligible to receive additional SNG or CBS awards.

## **Theology Degree**

Students pursuing a degree in theology are ineligible to receive state financial aid. Each institution must determine whether the student is pursuing this type of degree in light of Washington State Constitution, Article 1 § 11, that no “public money or property shall be appropriated for or applied to any religious worship, exercise or instruction”.

To apply this constitutional prohibition, the institution may look to Washington Supreme Court decisions that interpret the constitutional provision as prohibiting “that category of instruction that resembles worship and manifests a devotion to religion and religious principles in thought, feeling, belief, and conduct; i.e., instruction that is devotional in nature and designed to induce faith and belief in the student.”

## **Resident for State Aid Purposes**

Residency definitions vary by financial aid program.

- State Need Grant = [RCW 28B.15.012\(2\)\(a\)-\(e\)](#)
- College Bound Scholarship = [RCW 28B.15.012\(2\)\(a\)-\(d\)](#)

Aid administrators must be able to distinguish between a resident determined eligible in the (a)-(e) category vs. the (a)-(d). Students qualifying under (e), also known as “1079” requirements, are eligible only for State Need Grant, not the College Bound Scholarship.

## **Washington Resident for State Need Grant**

Determine residency for State Need Grant recipients using [RCW 28B.15.012\(2\)\(a\)-\(e\)](#).

Students with Deferred Action for Childhood Arrival (DACA) status that are determined to be residents under (a)-(d) may participate in the SNG program provided they meet all other program requirements. This could include students that do not meet “1079” requirements in provision (e).

Provision **(e)** includes additional residency requirement as follows:

- Have graduated from a Washington high school or obtained a GED®.
- Have lived in Washington for three years prior to, and continuously since, earning the high school diploma or equivalent.
- Sign an affidavit (written promise) to file an application to become a permanent resident of the United States when eligible to apply.

For public institutions it is the same residency requirements implemented in 2003 for in-state tuition purposes, also known as “1079.” These students will be referred to as DREAMers throughout this manual.

## **Washington Resident for College Bound Scholarship**

College Bound Scholarship Program (CBS) limits eligibility to students qualifying as resident students pursuant to RCW 28B.15.012(2)(a)-(d).

Students with DACA status that are determined to be residents under (a)-(d) may participate in the CBS program provided they meet all other program requirements.

Students (including DREAMers without DACA status) that are determined to meet residency under (e) (also known as “1079” students) may not participate in the CBS program.

## **WA residents whose parent(s) move out-of-state**

Based on the state’s residency statutes (RCW 28B.15.012 (2) (d), a dependent student who:

- spent at least 75 percent of both his or her junior and senior years in high schools in Washington State; and
- whose parents or legal guardians were domiciled in Washington State for a period of at least one year within the five-year period before the student graduated from high school; and
- who enrolled in college within six months of leaving high school,

may continue to be considered a Washington resident for state financial aid purposes for as long as the student remains continuously enrolled for at least three quarters or two semester per calendar year.

If there are additional questions on an individual student’s residency, they may be sent to [sng@wsac.wa.gov](mailto:sng@wsac.wa.gov)

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

Since 1994, the Legislature has classified four specific groups as Washington residents for public tuition and fee purposes at public institutions.

This legislation DID NOT, though make individuals from the four groups below eligible for state financial aid programs. If individuals from these groups have established a domicile in Washington State, however, according to RCW 28B.15.012 (2) (a) through (d) for CBS and (a) through (e) for State Need Grant, then those individuals may be considered for funding from these two state programs.

These groups include:

1. **American Indians** - from Washington and Washington area tribes whose permanent residence is in Oregon, Idaho, or Montana.
2. **Military personnel, their spouse and dependents, or National Guard.**
3. **E-3, H-1, or L visa holders, their spouse and dependents**
4. **Students on exchange programs**

## **Conflicting Information**

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

DREAMers shall be treated the same as other SNG applicants when resolving conflicting information and performing other verification activities.

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

**No Application Fee** – No student shall be required to pay a fee to apply for state aid. Students applying for state aid must file either the **Free Application for Federal Student Aid (FAFSA)** form, as approved by the U.S. Department of Education, or for those not eligible for Federal student aid, the **Washington Application for Student Financial Aid (WASFA)**.

Instructions for students to complete the WASFA can be found at:

[www.readysetgrad.org/WASFA](http://www.readysetgrad.org/WASFA).

Access to information for WASFA students that have applied to your institution can be found in Access Group's "Need Access" application tool. Features there include:

- Web-based application for students
- Online and direct access for FAAs
- Federal EFC calculations
- Data corrections within system
- File extracts of applicant data
- Customized reports

Contact the Council at [sng@wsac.wa.gov](mailto:sng@wsac.wa.gov) to request a login to the Need Access system.

## **Ability to Benefit – applies only to SNG students**

The "Ability to Benefit" option does not apply to CBS students. CBS students must graduate high school with a 2.0 or higher GPA. Ability to Benefit and GEDs do not qualify as meeting the high school requirements for CBS.

State Need Grant applicants must have a high school diploma or its equivalent such as the GED. Equivalent standards include a high school equivalency certificate or a certificate of completion of a home study program recognized by the student's home state. For a student without a high school diploma or its equivalent, a school may use assessment measures used to place students in college-level courses or satisfactory completion of six college credits applicable to a degree or certificate offered by a college.

## **Fraudulent Information**

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

## **Consistent Policies**

Institutional policies shall apply consistently to state aid recipients and federal aid recipients, except when in conflict with state aid regulations (such as maximum time frame).

## **ELIGIBILITY MONITORING FOR SNG AND CBS**

Once a student receives a state aid award, the institution must monitor continued eligibility. The student must be issued a revised award letter when information is received that changes their state aid award.

The institution is required to verify student eligibility by:

- Checking the Council SNG **Archive** report (for SNG students)
- Confirming OK to Pay status in the CBS **Cruncher** (for CBS students only)
- Monitoring SAP status (Refer to Chapter 3)

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

The *archive* is a tool to assist institutions in determining whether or not a SNG student:

- Has exhausted or is approaching his or her five year limit of SNG eligibility. The archive lists students who are within two years of meeting the five year maximum, and displays the number of quarters of eligibility remaining (QER).
- Owes a repayment on a previously disbursed SNG award.
- Has received a prior Associate degree within the past five years and prior to that degree received more than two semesters or three quarters of SNG. The student's next eligible year and term are shown.
- Due to lag time in associate degree information updated to the WSAC system, the financial aid offices are expected to collaborate with other departments on campus to ensure that students that earn associate degrees at their institution are not awarded future SNG awards.

**It is the institution's responsibility to ensure that all students who receive a SNG have been checked against the final archive based on the three conditions listed above.**

The final archive is available each year in mid-August. It contains updated information on the prior year's SNG recipient exceptions. Institutions can upload data on their ready-to-award students to the Council's Portal: <https://fortress.wa.gov/wsac/portal/>. Results are downloadable into Excel. The downloadable file format can be found in the Public and Private Payment chapters.

In the period of time before the Council finalizes the archive data, the institution shall use the most recent data available in the archive as a basis for offering awards to students to minimize the need for late repackaging. Throughout the year, the archive is updated to reflect:

- Awards made to students attending institutions using the Real Time reporting method
- Updated repayment receivables information
- Quarterly associate degree updates

**NOTE: Check the archive before submitting any payment requests. Access can be requested by contacting your institutional administrator (usually the financial aid director at each institution) or Council staff at [sng@wsac.wa.gov](mailto:sng@wsac.wa.gov).**

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

Similar to the SNG Archive Report, campuses will need to use the CBS Cruncher at the time of awarding and again prior to each disbursement.

The CBS Cruncher is located in the Portal. From the main menu, select Program, then College Bound, then Cruncher. Step-by-step instructions for using the CBS Eligibility Cruncher are found in Chapter 4.

### **Matching CBS Valid Applicants to FAFSA and WASFA Filers**

The Council’s CBS valid applicant database is matched to incoming FAFSA and WASFA applications. FAFSAs are matched daily, while WASFA applications are matched weekly.

As soon as this match is made, the student’s data is uploaded to the Cruncher. CBS Students who file the FAFSA or WASFA are notified by the Council that their CBS application was successfully matched to their financial aid application. See an example of this email communication at the end of this chapter.

Using the **CBS Eligibility Cruncher**, institutions shall compare their student data against the database. Campuses are presented with a list of CBS students who matched to an incoming FAFSA or WASFA.

Note that the CBS Eligibility Cruncher does not determine all CBS eligibility criteria.

The CBS Cruncher checks for:

- Complete and valid CBS application on file with the Council
- High school graduation with a 2.0 or higher GPA
- That a student has enrolled within one year of high school graduation
- Within 5-year eligibility window
- Within 12 quarter usage limit
- Outstanding repayments
- Associate degrees

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

## 2015-16 College Bound Scholarship Processing Timeline

Month	Institution Action	Explanation
January and beyond	N/A	Students notified by the Washington Student Achievement Council that their CBS application is matched to FAFSA or WASFA*
February and beyond	<p>Use "CBS Cruncher" to identify eligible students for awarding.</p> <p><b>Continue identifying and awarding students</b></p>	<p>Campuses upload ready-to-award student SSNs into the CBS Cruncher in the WSAC Portal to identify valid CBS applicants. The "OKtoAward" column will be marked <u>Yes</u>.</p> <p>Continue to upload your lists of students to the Cruncher frequently to:</p> <ul style="list-style-type: none"> <li>• Identify new students added to the Cruncher</li> <li>• Determine students whose status may have changed using the Watchlist located in the Cruncher</li> </ul>
July and beyond	Confirm eligibility for awarded students prior to disbursement by viewing "OKtoPay"	<p>WSAC updates the Cruncher to reflect High School graduation data received from OSPI.</p> <p>Students who attended private school or were home schooled must be validated individually by either the WSAC or the institution.</p>
August/September	Real-Time Reporting campuses include CBS awards in CSAW	CSAW includes a field for the CBS award amount.
Fall and as needed	Request payment from WSAC	<p>Colleges will request payment for CBS via CSAW.</p> <p>Campuses will not receive an initial CBS allocation – funds will be added to reserves on a funds-requested basis.</p>
November, February, May, July	Submit Interim Reports	Institutions will upload SNG and CBS data simultaneously via the file format and address edits for both programs.

\* For 2015-16 WASFA matches occurred later. This should occur for 2016-17, however, on this schedule.

## CBS Cruncher Layout and Code Descriptions

Data that is entered only in the first year a CBS eligible student files a FAFSA	
SSN	9-digit number
LastName	Up to 75 characters
FirstName	Up to 50 characters
OKtoAward	Yes – Student is likely to meet or has met CBS eligibility requirements No – Student’s GPA is below 2.0 or has not met other CBS requirements Verify – Council doesn’t have information to say Yes or No
OKtoAwardLastUpdated	The most recent date the student’s OKtoAward status was changed Date format: d/m/yyyy h:m:s [AM PM]
OKtoPay	Yes – Student confirmed to have met all HS grad. requirements No – Student did not meet graduation requirements were not met or have yet to be confirmed
OKtoPayLastUpdated	The most recent date the student’s OKtoPay status was changed Date format: d/m/yyyy h:m:s [AM PM]
CBApplicantStatus	Valid CB Application – Complete CB application matched with FAFSA Invalid – Contact Council for Information Invalid – Failed to Meet CB App Deadline Invalid – Out of State Invalid – Could Not Match FAFSA to CB Application
HSGradYear**	4-digit number – estimated by CBS application or OSPI data OR Unknown
HSRequirementsMet*	Yes – Final OSPI data confirmed graduation requirements met Likely – Preliminary OSPI data indicates likelihood of meeting req. Unknown – WSAC doesn’t know if requirements have been met Unlikely – Preliminary OSPI data indicates meeting req. unlikely No – Final OSPI data confirmed grad. requirements not met
Data that will continue to be updated each year for all CBS students	
EnrollmentDeadlineMet*	Yes – Student enrolled in college within one year of H.S. graduation No – Student does not appear to have enrolled in college within one year n/a – One year has not passed since graduation
FiveYearEligibilityWindowOpen	Yes – Student is within the 5 year eligibility window No – The student’s 5 year eligibility period has passed
CBTermsUsed	Two Decimal places (e.g. 4.25, 6.00)
CBTermsRemaining	Two Decimal places (e.g. 4.25, 6.00)
InRepayment	No – Student is not in repayment Yes – Student is in repayment
NextEligibleAADegreeYear	(empty) or 4-digit number (The AA degree rule only applies to students that used more than 3 quarters of SNG/CBS funding to receive the first AA degree)
NextEligibleAADegreeTerm	(empty) or one of the following: Summer1 Fall Winter Spring Summer2
LastUpdated	The most recent date that <i>any</i> of the columns have been changed Date format: d/m/yyyy h:m:s [AM PM]
*	Information in these fields may be overridden by college financial aid staff or by WSAC staff. Documentation must be kept on file by the institution that overrides to substantiate the override, and a history of the timing and source of updates is available in the Cruncher field.
**	College financial aid staff may not override, but may contact WSAC.

## High School Graduation Year

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

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

## High School Requirements Met

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

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

Campuses are able to update the response to the “HS Requirements” field. The system will note which individual and which institution changed the response and all campuses will be able to view and accept the data as valid.

Campuses are not required to verify high school requirements but may under these circumstances:

- The CBS Student inquires and is able to provide a final transcript verifying they met the requirements.
- To expedite the process: Four-year campuses are encouraged to review their admissions information to determine if students met the high school requirements. This may be more expedient to verify graduation and GPA than the WSAC data match with OSPI.
- The CBS Student was home schooled: Campuses are asked to verify that the high school graduation requirement has been met for home schooled students in alignment with their admissions and financial aid policies.

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

## **Enrollment Deadline**

College Bound Scholars must enroll in college no later than the fall term (as defined by the institution), one academic year following high school graduation to be eligible for CBS Scholarship consideration. Adult Basic Education and Running Start courses count towards meeting the college enrollment deadline, even if taken while in high school. For example: A College Bound Scholar who graduated high school in the spring of 2014, would need to enroll in college by the fall term of 2015.

College Bound Scholars who do not enroll in college within a year of high school graduation are not eligible to receive CBS Scholarship assistance.

If the college has knowledge, however, that the student attended college within the one year window, but the Cruncher does not show “Yes” in the “Enrollment Deadline Met” column of the student’s record, the college can update this column to “Yes” as long as documentation is kept on file at the college. An example of this is if a student attended an out-of-state college within the one year window of time. In that case, the institution could later verify this attendance based on a review of the student’s academic transcript from the previous college.

## **Five Year Eligibility Window and Four Years of CBS Scholarship Usage**

Eligible CBS Scholars may receive CBS Scholarship assistance for a maximum of four academic years (or the equivalent) within five years of the fall term following their high school graduation. Eligible CBS Scholars must use the CBS scholarship within five years of August of their high school graduation year. After five years, the scholarship is no longer available.

For example: Students who graduated from high school in 2014-2015 must begin their college enrollment by fall 2016, and have through the summer term of 2020 to receive scholarship funding. When five years has expired, the Cruncher field will no longer show Ok to Award or Pay.

If CBS Scholars exhaust the use of their CB Scholarship funding, they may continue to receive SNG funding as long as they meet all other SNG requirements. In this case, however, the college would not be required to provide SNG funding as the student would no longer be considered an eligible CBS Scholar.

## **Students Who Do Not Appear in the Cruncher**

Students who inform the institution that they submitted the College Bound Scholarship application and received a College Bound certificate in middle school but are not in the Cruncher should be referred to the Council Outreach staff. College Bound staff will determine whether the student had a valid application on file.

WASFA applicants can be more difficult to match due to the SSN not always being available and different naming conventions on the CBS application and the WASFA. Contact the Council Outreach staff to inquire if the student has a valid CBS application. If the student does have a valid application, Council staff will work to match the two applications so the student will appear in the Cruncher.

## Campus Systems Preparation Instructions

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

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

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

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

## CBS Cruncher Instructions

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

Select 'College Bound' from the Programs drop down



Welcome to the WSAC portal.

This website is for use only by authorized WSAC staff, institution staff, employers, and students. This site is not for use by the general public.

Click on the Cruncher menu item.



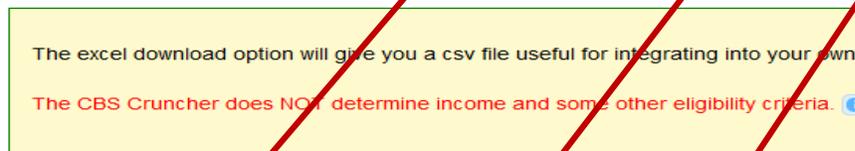
Welcome to the WSAC portal.

This website is for use only by authorized WSAC staff, institution staff, employers, and students. This site is not for use by the general public.

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



### CBS Eligibility Cruncher

A screenshot of the CBS Eligibility Cruncher search interface. It shows three tabs: "Search by Name", "Search by SSNs or SIDs", and "Search by File Upload". The "Search by Name" tab is selected. Below the tabs, there is a section titled "Search by full or partial name" with three input fields labeled "first", "last", and "mi". There are also "Search" and "CSV" buttons.

## Searching by Name

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

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

Search by full or partial name

first last mi

Show SIDs for this institution:

Search CSV

Showing 1-2 of 2 results

Name (last, first, SSN)	Date of Birth	SID (UW)	OK to Award	OK to Pay	HS Grad Yr	HS Req Met	Enrollment Deadline Met
Trevor, N (██████████)	██████████		No updated 8/16/2012	No updated 2/2/2012	2012 actual from OSPI	No	No
Trevour, A (██████████)	██████████		Yes updated 1/29/2013	Yes updated 7/29/2013	2013 actual from OSPI	Yes	n/a

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

## Searching by SSNs

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

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

123456789  
987654321  
999999999  
012345698

Show SIDs for this institution:

Search CSV

You are notified of SSNs that do not display results. Click the details link to see which SSNs did not match to a CBS application.

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

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

123456789  
987654321  
[REDACTED]

Show SIDs for this institution:  
[REDACTED]

include SSNs/SIDs in my watch list

Search CSV

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

Showing 1-1 of 1 results

Name (last, first, SSN)	Date of Birth	SID (UW)	OK to Award	OK to Pay	HS Grad Yr	HS Req Met	Enrollment Deadline
[REDACTED] Trevor N [REDACTED]	[REDACTED]		No <small>updated 8/16/2012</small>	No <small>updated 2/2/2012</small>	2012 <small>actual from OSPI</small>	No	No

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

## Searching by File Upload

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

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

The file must have either .csv or .txt extension, and contain only SSNs, separated by commas or white space (tabs, spaces, or new lines)

Select a file to upload [REDACTED] Browse...

Show SIDs for this institution:  
[REDACTED]

Search CSV

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

Showing 1-1 of 1 results

Name (last, first, SSN)	SID (UW)	OK to Award	OK to Pay	CBS App Status	HS Grad Yr	HS Req Met	Enr
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Proceed to the next section to learn how to interpret CBS Cruncher search results.

**Note:** Refer to the CBS Cruncher Layout and Code Descriptions.

## Interpreting the Search Results

The Council depends on graduation and GPA data from the Office of the Superintendent of Public Instruction (OSPI), high school registrars or transcripts provided by students to determine if College Bound students met the program’s eligibility requirements. The OSPI data includes students who attend public school and have given permission to share their information with the Council.

Those matched records are then matched with FAFSA and WASFA data to provide colleges with eligibility information for students who have both successfully applied for College Bound AND filed a FAFSA or WASFA.

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

Students who are later confirmed to have met the requirements will then be listed by the Council as “OK to Pay.” This confirmation occurs via data matches occurring between June and November 15.

Students who have valid applications but are not included in the OSPI match will be asked to submit their final transcript to the Council or the campus for determination. Either the institution or the Council can change the HS Req Met field after verifying the students GPA and graduation.

The Associate degree (AA\*) fields will display as indicated:

AADegreeEligible	Yes No
NextAAEligibleYear	4-digit number OR n/a
NextAAEligibleTerm	Summer 1 Fall Winter Spring Summer 1 n/a

\*AA degrees refer to all Associate degrees, including AAS.

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

Showing 1-15 of 173 results

Name (last, first, SSN)	Date of Birth	SID (UW)	OK to Award	OK to Pay	HS Grad Yr	HS Req Met	Enrollment Deadline Met	5-yr Elig. Open	CBS Ctrs Used	CBS Ctrs Remaining	In Repayment	Next Eligible AA Degree (term, year)	Last Updated
[redacted] Maurice, G	[redacted]	[redacted]	No <small>updated 4/23/2015</small>	No <small>updated 2/9/2015</small>	Unknown	No	na	No	0.00	12.00	No		4/23/2015
[redacted] Lynnae	[redacted]	[redacted]	No <small>updated 10/1/2014</small>	No <small>updated 12/6/2012</small>	Unknown	No	na	No	0.00	12.00	No		10/1/2014
[redacted] Britney	[redacted]	[redacted]	Yes <small>updated 1/22/2014</small>	No <small>updated 2/25/2013</small>	2011 <small>estimated from CSPI</small>	Likely	Yes <small>overridden by WSAC</small>	Yes	0.00	12.00	No		1/22/2014
[redacted] Trey, M	[redacted]	[redacted]	Yes <small>updated 2/14/2012</small>	Yes <small>updated 8/6/2012</small>	2012 <small>actual from CSPI</small>	Yes	Yes	Yes	5.00	7.00	No		1/15/2015
[redacted] Trevor, N	[redacted]	[redacted]	No <small>updated 8/16/2012</small>	No <small>updated 2/2/2012</small>	2012 <small>actual from CSPI</small>	No	No	Yes	0.00	12.00	No		1/23/2014
[redacted] Timothy, R	[redacted]	[redacted]	Yes <small>updated 3/11/2013</small>	Yes <small>updated 7/19/2014</small>	2012 <small>actual from CSPI</small>	Yes	Yes	Yes	0.00	12.00	No		7/19/2014

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

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

**Students cannot be paid CBS funds until there is a YES in the OK to Pay column.**

Name (last, first, SSN)	Date of Birth	SID (UW)	OK to Award	OK to Pay	HS Grad Yr	HS Req Met	Enrollment Deadline Met	5-yr Elig. Open	CBS Ctrs Used	CBS Ctrs Remaining	In Repayment	Next Eligible AA Degree (term, year)	WASFA Student	Last Update
[redacted] Lynnae	[redacted]	[redacted]	No <small>updated 10/1/2014</small>	No <small>updated 12/6/2012</small>	Unknown	No	na	No	0.00	12.00	No		No	10/1/2014
[redacted] Britney	[redacted]	[redacted]	Yes <small>updated 1/22/2014</small>	No <small>updated 2/25/2013</small>	2011 <small>estimated from CSPI</small>	Likely	Yes <small>overridden by WSAC</small>	Yes	0.00	12.00	No		No	1/22/2014
[redacted] Trey, M	[redacted]	[redacted]	Yes <small>updated 2/14/2012</small>	Yes <small>updated 8/6/2012</small>	2012 <small>actual from CSPI</small>	Yes	Yes	Yes	5.00	7.00	No		No	1/15/2015
[redacted] Trevor, N	[redacted]	[redacted]	No <small>updated 8/16/2012</small>	No <small>updated 2/2/2012</small>	2012 <small>actual from CSPI</small>	No	No	Yes	0.00	12.00	No		No	1/23/2014
[redacted] Timothy, R	[redacted]	[redacted]	Yes <small>updated 3/11/2013</small>	Yes <small>updated 7/19/2014</small>	2012 <small>actual from CSPI</small>	Yes	Yes	Yes	0.00	12.00	No		No	7/19/2014

**Communication to CBS Students when their first FAFSA or WASFA is received**

CBS students are sent one of the following two emails from WSAC the first time that a FAFSA or WASFA matches up with their CBS application.

## Email Communication to CBS students after FAFSA matches CBS application

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Your FAFSA application has been successfully matched with the College Bound Scholarship (CBS) application you submitted in middle school to the Washington Student Achievement Council (the Council).

### ***Find out what happens next and what you must do.***

**1. Review Your Student Aid Report (SAR)** – sent to you by the Department of Education after you submit your FAFSA.

- It summarizes the information you provided on the FAFSA and indicates whether your FAFSA is complete *or* that you need to provide more information.

#### **What You Must Do**

- Read all the information on the SAR. Is it correct and complete - did you list all the colleges you are considering?
- If your SAR has errors, login to your FAFSA at [www.fafsa.gov](http://www.fafsa.gov) and make corrections. Common errors include missing signatures, incorrect Social Security Number, Date of Birth, etc.
- After your parents file their taxes, log back on to your FAFSA and make the adjustments.

**2. Complete College Forms**

- In addition to filing your FAFSA, you must apply for admission to each college you hope to attend, and you must complete the colleges' individual financial aid forms.
- You must be admitted to a college before that school will send you a financial aid award.

#### **What You Must Do**

- Complete all the forms required by the prospective colleges, including Admissions and Financial Aid forms.
- If the college requests additional information from you, DON'T DELAY! Not responding could cost you admission or valuable financial aid dollars.
- If you need help keeping track of deadlines, use our application timeline at <http://www.readysetgrad.org/#12th-grade/ready/timeline>

**3. Fulfill the College Bound Scholarship Requirements**

- Graduate from high school or complete a home school program. GED recipients do not qualify.
- Graduate with a cumulative high school grade point average of 2.0 or higher on a 4.0 scale.
- Have no felony conviction.
- Be a U.S. citizen or eligible non-citizen based on the standards for federal student financial aid and have a Social Security number or other documentation when completing the FAFSA. For a complete definition of eligible non-citizen go to <http://studentaid.ed.gov/eligibility/non-us-citizens#i-am-a-non-u.s.>

**Note:** In order to receive the College Bound Scholarship, students must file the FAFSA which requires that they be U. S. citizens or eligible non-citizens with proper documentation.

Recent legislation (SB 6523) permits students ineligible for federal financial aid due to immigration status to apply for the State Need Grant. Please visit [www.readysetgrad.org/wasfa](http://www.readysetgrad.org/wasfa) for application details.

- Be accepted to an eligible college and register for classes in a timely manner.
  - For a list: <http://www.wsac.wa.gov/sites/default/files/2013-14.SNG.EligibleInstitutions.pdf>
  - Enroll in college no later than the fall term (as defined by the college) one academic year following high school graduation. For example, if you graduate by August 2014 you have until fall 2015 to begin using the Scholarship.
- Meet the income eligibility requirement. See the income chart at <http://readysetgrad.org/college/college-bound-median-family-income>

### What You Must Do

- Confirm with your high school counselor that you are on-track to graduate and that your cumulative grade point average (the average GPA for all your high school classes) is a 2.0 or higher.
- Apply to several eligible colleges that offer the program(s) you are considering. If there is an application fee, ask the Admissions office if you are eligible for a waiver.

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### Reminders

1. Get organized.
  - Choose one email address for college correspondence and check it often.
  - Create a financial aid file. Include copies of all the documents you receive and submit. Start with this email.
2. Share information with your parents/guardians/mentor so they can help.
3. College Bound is not a ‘full ride.’
  - To pay for the other costs – housing and food, transportation, and personal expenses, you may have federal grants, loans, scholarships, and work study. Find out about these programs at [studentaid.ed.gov/types](http://studentaid.ed.gov/types)
  - Learn common financial aid terms at [studentaid.ed.gov/glossary](http://studentaid.ed.gov/glossary)
4. Search for scholarships at the counselor’s office and online at [www.thewashboard.org](http://www.thewashboard.org).
5. While you are in college:
  - Complete a FAFSA every year by the priority filing date of February 1.
  - Meet your college’s Satisfactory Academic Progress (SAP) requirements.
  - Plan to finish your degree while you have financial aid available. You may receive your College Bound Scholarship for no more than four academic years within a five-year period.
6. Stay informed. Join the College Bound Listserv for current information about your Scholarship: <http://listserv.wa.gov/cgi-bin/wa?A0=WSAC-COLLEGEBOUND-CLASS-OF-2014>

Visit [www.collegebound.wa.gov](http://www.collegebound.wa.gov)

## Email Communication to CBS students after WASFA matches CBS application

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Your recent Washington Application for State Financial Aid (WASFA) has been successfully matched with the College Bound Scholarship application you submitted in middle school.

Previously, only students who were U.S. citizens or eligible non-citizens (as determined by the U.S. Department of Education) were able to receive the College Bound Scholarship. However, recent changes in Washington State now allow students with DACA (Deferred Action for Childhood Arrival) status, who meet all other College Bound criteria, including residency requirements, to receive the scholarship.

### COLLEGE BOUND SCHOLARSHIP REQUIREMENTS

- Live in Washington for at least one year and graduate from a Washington State high school (GED recipients do not qualify) with a cumulative GPA of at least 2.0 on a 4.0 scale.
- File the FAFSA or WASFA and meet the [income eligibility requirement](#), as determined by the financial aid office at your college.
- Enroll in an [eligible college](#) within one year of high school graduation. For example, if you graduate high school by August 2015, you have until fall 2016 to begin college.
- Have no felony convictions.

If you do not meet the College Bound Scholarship requirements or do not have DACA status, you may still be eligible for Washington's State Need Grant or other scholarships. Visit [www.readysetgrad.org/wasfa](http://www.readysetgrad.org/wasfa) for more information.

### NEXT STEPS

1. If you meet the College Bound Scholarship requirements and have DACA status, contact your college's financial aid office. You will need to provide your college with a copy of your "I-797, Notice of Action" before you can receive the scholarship.
2. Your college may have additional financial aid forms you need to file. Ask your financial aid office and be sure to submit forms and provide any information your college requires by their deadlines. Not doing so may result in losing your financial aid award.

### REMINDERS

1. The priority deadline for filing the WASFA is February 1. ***This does not mean you shouldn't submit a WASFA after February 1.*** Some types of financial aid are awarded on a first-come, first-served basis and filing by February 1 may give you priority.
2. You must file a WASFA each year that you are in college.
3. You must meet your college's Satisfactory Academic Progress (SAP) requirements.
4. College Bound is a four-year scholarship that must be used within five years of high school graduation. This means that it will only pay for four academic years in the first five years after you graduate. If you take longer to finish your program or degree, College Bound will not pay for it.
5. Stay informed. The College Bound email listserv sends periodic updates and reminders. Join at [www.collegebound.wa.gov](http://www.collegebound.wa.gov).



## CHAPTER 2

### CALCULATING SNG AND CBS AWARDS

#### **All Eligible College Bound Scholars Must Receive Maximum State Need Grant Funding**

Most, but not all, **eligible CBS Scholars** receive College Bound Scholarship funding each year. An eligible CBS Scholar who does not receive College Bound Scholarship assistance in a particular year, however, must still receive the maximum State Need Grant funding possible. All **eligible College Bound Scholars** must receive maximum SNG awards, and receive funding for all enrolled terms—including either Summer 1 or Summer 2.

The maximum SNG and CBS award amounts will vary based on the institution attended, the student's enrollment status, and the student's median family income (MFI) level. SNG award amounts may not be reduced for eligible CBS Scholars due to self-help policies or other institutional awarding policies such as gift equity policies.

An **eligible College Bound Scholar** must have a family MFI level of 65 percent or less to be eligible for College Bound Scholarship funding each year. Note that a CBS Scholar could be eligible for College Bound Scholarship funding for some years, and not eligible for others, if the family's MFI level exceeded 65 percent in one or more years.

#### **Deciding Which Additional Eligible State Need Grant Students to Fund from Those Students Not Eligible for College Bound Scholarship Assistance**

The maximum MFI level is 70 percent for a student to be eligible to receive SNG funding. When an institution can predict that they will not have sufficient SNG funds to fully award all eligible SNG students, who are not eligible College Bound Scholars, the institution must have written policies that describe which SNG eligible students will be awarded, and which students will not be awarded unless additional SNG funds become available later in the year.

The following are examples of what institutional policies could look like for the awarding of SNG to students not eligible to receive CBS funding. **Priority for Awarding SNG Funds to Eligible SNG Applicants (non-eligible CBS Scholars):**

##### **Example 1**

1. All students who meet the institution's on-time financial aid preference deadline.
2. Late students with MFI's of 50 percent or less – these will be awarded in a date order until all SNG funds are committed.

##### **Example 2**

1. All continuing SNG students who meet the institution's on-time financial aid preference deadline.
2. All new SNG students who meet the institution's on-time financial aid preference deadline also using the institution's approved gift equity policy.
3. All late students according to the dates their financial aid files were complete until all SNG funds are committed.

## MAXIMUM MEDIAN FAMILY INCOME LEVELS

This chart includes the five MFI levels that determine eligibility and award amounts for the SNG program. In addition, the 65 percent MFI level shows the maximum income amounts for CBS Scholars to be eligible to receive CBS funding.

Maximum Median Family Income (MFI) Levels for 2015-16 State Need Grant/College Bound Scholarship Program Eligibility					
Family Size	50%	55%	60%	65% CBS Maximum	70% SNG Maximum
1	\$22,000	\$24,000	\$26,000	\$28,500	\$30,500
2	\$28,500	\$31,500	\$34,000	\$37,000	\$40,000
3	\$35,000	\$38,500	\$42,500	\$46,000	\$49,500
4	\$42,000	\$46,000	\$50,500	\$54,500	\$58,500
5	\$48,500	\$53,500	\$58,500	\$63,000	\$68,000
6	\$55,500	\$61,000	\$66,500	\$72,000	\$77,500
7	\$56,500	\$62,500	\$68,000	\$73,500	\$79,500
8	\$58,000	\$63,500	\$69,500	\$75,000	\$81,000
9	\$59,000	\$65,000	\$71,000	\$77,000	\$83,000
10	\$60,500	\$66,500	\$72,500	\$78,500	\$84,500
11	\$61,500	\$68,000	\$74,000	\$80,000	\$86,500
12	\$63,000	\$69,000	\$75,500	\$82,000	\$88,000
13	\$64,000	\$70,500	\$77,000	\$83,500	\$90,000
14	\$65,500	\$72,000	\$78,500	\$85,000	\$91,500
15	\$66,500	\$73,500	\$80,000	\$86,500	\$93,500
16	\$68,000	\$74,500	\$81,500	\$88,500	\$95,000
17	\$69,000	\$76,000	\$83,000	\$90,000	\$97,000
18	\$70,500	\$77,500	\$84,500	\$91,500	\$98,500
19	\$71,500	\$79,000	\$86,000	\$93,000	\$100,500
20	\$73,000	\$80,500	\$87,500	\$95,000	\$102,000

### Adjustment for More than One Family Member in College

In the previous chart, the aid administrator shall increase the family size by one for every family in college beyond the first, excluding parents, when determining the maximum MFI amount (e.g. A family of five with two non-parents in college is treated as a family of six on the income MFI chart; a family of five with three non-parents in college is treated as a family of seven on the income MFI chart).

## **Determining Income for MFI Levels**

In most cases, income will be that reported on the FAFSA or the WASFA. Adjustments may be made through verification reviews and through professional judgment decisions of a financial aid administrator.

When calculating a “dependent” student’s income, count the parents’ adjusted gross income (AGI) and non-taxable income. Do not include the student’s income.

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

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

The financial aid administrator may (but is not required to) subtract the following allowable exclusions:

- Taxable earnings from need-based employment programs such as Federal Work Study and need-based employment portions of fellowships and assistantships.
- Taxable student grant and scholarship aid reported to the IRS in the AGI. This includes AmeriCorps benefits as well as grant and scholarship portions of fellowships and assistantships.
- Untaxed combat pay or special combat pay.
- Earnings from work under a cooperative education program offered by a college.

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

Child support income should be excluded from income calculations for Less-than-halftime students, but not from other enrollment categories.

Veteran’s benefits are treated in the same manner as for the purposes of eligibility for Title IV financial aid.

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

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

The “expected family contribution” is the amount that a student or the student’s family is expected to contribute to the cost of attendance based on a federal computation. The EFC is initially based on information submitted on the FAFSA or WASFA. In some cases, this EFC be adjusted by the financial aid administrator through a professional judgment decision.

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

The “cost of attendance” is the budget used by the financial aid administrator to reflect the student’s cost for the period of time for which the financial aid is being awarded. The COA includes tuition and fees, books and supplies, room and board, transportation, and miscellaneous/personal expenses.

Each year the Washington Financial Aid Association (WFAA) publishes several standard budgets that include all amounts except for tuition and fees that are determined by each institution. The WFAA student budgets for 2015-16 include three categories:

- Dependent living with parent(s)
- Independent living with parent(s)
- Not living with parent(s)

## **NEED AMOUNT**

The expected family contribution (EFC) is then subtracted from the student’s cost of attendance (COA) to determine the need amount. Need-based aid, such as SNG and CBS, must be within the need amount and cannot exceed the need amount.

### **Professional Judgment**

The aid administrator may, using “professional judgment”, adjust the resources up or down to more accurately reflect the family’s financial situation during the academic year. In general, adjustments shall be consistent with changes made for federal aid. The aid administrator shall document the reason for the variance in the student’s file. The aid administrator may consider assets when assets aren’t being considered for EFC computations (e.g. auto zero EFCs and simplified EFCs) for the purposes of SNG eligibility.

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

A student who has received the SNG in the previous year and whose family income has increased by no more than three percent may be eligible to receive the grant in the current year. Discretion is left to the aid administrator. This applies when the student’s current family income increases above the maximum MFI levels.

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

### **New College Bound Scholarship and State Need Grant Coordination**

Beginning in 2015-16, every eligible CBS Scholar must receive a maximum SNG award based on eligibility per the directive in the Legislative operating budget. The CBS Scholarship amount is then determined after SNG and any other state grant aid has been awarded.

## Summer 1 Award Amounts for Public Colleges

For public institutions with summer as the first term of the academic year (summer leaders), the 2014-15 SNG and CBS term maximums must be awarded for eligible CBS Scholars. These award amounts are treated outside of the 3 quarter/2 semester 2015-16 award amounts listed below. The 2014-15 SNG term amounts may be awarded to non-CBS State Need Grant recipients for summer, but is not required.

Please refer to the [2014-15 SNG and CBS manuals](#) for public SNG and CBS award amounts to determine the term amount for summer students if summer is the first term at your institution.

## SNG AND CBS AWARD AMOUNTS, BY SECTOR, FOR 3 QUARTERS/2 SEMESTERS

2015-16 Maximum Award Amounts to Eligible College Bound Scholars for 3 Quarters/2 Semesters**									
Institution/Sector	Total Maximum SNG and CBS to Eligible College Bound Scholars (up to 65% MFI)	Median Family Income (MFI) Levels							
		0% - 50%		>50% - 55%		>55% - 60%		>60% - 65%	
		SNG Max	CBS Max	SNG Max	CBS Max	SNG Max	CBS Max	SNG Max	CBS Max
University of Washington	\$11,611	\$10,344	\$1,267	\$7,241	\$4,370	\$6,724	\$4,887	\$6,206	\$5,405
Washington State University	\$11,345	\$10,351	\$994	\$7,246	\$4,099	\$6,728	\$4,617	\$6,211	\$5,134
Central Washington University	\$8,044	\$7,284	\$760	\$5,099	\$2,945	\$4,735	\$3,309	\$4,370	\$3,674
Eastern Washington University & CTC Applied Bachelor's Degree Programs	\$7,504	\$6,871	\$633	\$4,810	\$2,694	\$4,466	\$3,038	\$4,123	\$3,381
The Evergreen State College	\$7,941	\$7,262	\$679	\$5,083	\$2,858	\$4,720	\$3,221	\$4,357	\$3,584
Western Washington University	\$8,184	\$7,522	\$662	\$5,265	\$2,919	\$4,889	\$3,295	\$4,513	\$3,671
Private Four-year	\$11,904	\$8,517	\$3,387	\$5,962	\$5,942	\$5,536	\$6,368	\$5,110	\$6,794
WGU Washington	\$6,280	\$5,619	\$661	\$3,933	\$2,347	\$3,652	\$2,628	\$3,371	\$2,909
Community/Technical Colleges*	\$4,300	\$3,541	\$759	\$2,479	\$1,821	\$2,302	\$1,998	\$2,125	\$2,175
Private Career	\$4,467	\$2,823	\$1,644	\$1,976	\$2,491	\$1,835	\$2,632	\$1,694	\$2,773
Dependent Care Allowance	\$964	\$964		\$675		\$627		\$578	

\*Includes Northwest Indian College and Perry Technical Institute

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

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

The base grant award shall not exceed the actual tuition, service and activity fees charged to the eligible student on an annualized basis by more than \$100. This \$100 variance is only allowed in circumstances where a student's credit or enrollment level would otherwise require an award adjustment to ensure that the award does not exceed the cost of tuition.

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

The actual value of the individual eligible CBS Scholar award shall be the difference between the “Total Maximum SNG and CBS to Eligible College Bound Scholars” amount, minus the SNG Maximum, and the value of any other state funded grants or scholarships (gift assistance) the student receives. The award shall be further reduced if total need-based aid is in excess of need or the student attends part-time.

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

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

- **State Need Grant** – due to 100 percent coordination requirements, all CBS recipients must receive a maximum State Need Grant.
- **Passport to College Promise Scholarship** – a state scholarship program for current and former foster youth (students who receive Passport funds will likely have their maximum award met with a combination of State Need Grant and Passport scholarship funds).
- **Opportunity Scholarship** – A private/public program administered by the College Success Foundation to help low- and middle-income Washington residents earn bachelor’s degrees in science, technology, engineering, mathematics, and health care fields of study.
- **SBCTC Opportunity Grant** – The Opportunity Grant helps low-income adults train for high-wage, high-demand careers. It is administered by the State Board for Community and Technical Colleges.
- **SBCTC Worker Retraining Funds** – Workers who are unemployed or have been notified by their employers that they are about to be laid off may be eligible for these funds administered by the State Board for Community and Technical Colleges.
- **American Indian Endowed Scholarship** – A scholarship for financially needy students with close social and cultural ties to an in-state American Indian community, for pursuing undergraduate and graduate studies.

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

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

An example of this is an eligible CBS Scholar, who receives a full SNG award and a Passport to College Scholarship award of \$4,500, which together exceed the maximum required to be awarded to an eligible CBS Scholar.

In this case the CBS Scholar would not receive College Bound Scholarship funding for the year as the other awarded state aid would have exceeded the amount required to award to the student.

## Uneven Disbursements Permitted

Typically, awards are disbursed evenly throughout the academic year. The Financial Aid Administrator may award a greater proportion of the student's award in one term if the disbursement is justified by the student's costs, (i.e. extensive fees fall term that won't be charged the remainder of the year.)

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

## Minimum Awards

**The minimum CBS award amount is one dollar (\$1.00) per term.** If the CBS award amount is very small, however, and the student wishes to decline the award, the institution must maintain a written record of the award amount that is declined. This may occur when a student wishes to retain flexibility for future terms of CBS eligibility.

**The minimum SNG award amount is also one dollar (\$1.00) per term.**

Circumstances relevant to gift equity packaging policies, part-time enrollment, and other factors may reduce a student's SNG to a very low level. The Financial Aid Administrator may issue SNG awards as low as \$1.00 per term, but is not required to make a State Need Grant disbursement to a student if the total SNG award is less than \$100 per term. This also may be done to retain flexibility for future terms of SNG eligibility for the student.

## Maximum State Need Grant Awards

2015-16 Maximum State Need Grant Award Amounts for 3 Quarters/2 Semesters**					
Institution/Sector	Median Family Income				
	0% - 50% (full award)	51% - 55% (70% of full award)	55% - 60% (65% of full award)	61% - 65% (60% of full award)	66%-70% (50% of full award)
University of Washington	\$10,344	\$7,241	\$6,724	\$6,206	\$5,172
Washington State University	\$10,351	\$7,246	\$6,728	\$6,211	\$5,176
Central Washington University	\$7,284	\$5,099	\$4,735	\$4,370	\$3,642
Eastern Washington University & CTC Applied Bachelor's Degree Programs	\$6,871	\$4,810	\$4,466	\$4,123	\$3,436
The Evergreen State College	\$7,262	\$5,083	\$4,720	\$4,357	\$3,631
Western Washington University	\$7,522	\$5,265	\$4,889	\$4,513	\$3,761
Private Four-year	\$8,517	\$5,962	\$5,536	\$5,110	\$4,259
WGU-Washington	\$5,619	\$3,933	\$3,652	\$3,371	\$2,810
Community & Technical Colleges*	\$3,541	\$2,479	\$2,302	\$2,125	\$1,771
Private Career	\$2,823	\$1,976	\$1,835	\$1,694	\$1,412
Dependent Care Allowance	\$964	\$675	\$627	\$578	\$482

\*Includes Northwest Indian College and Perry Technical Institute

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

## **Dependent Care Allowance (DCA) Option for Eligible SNG Recipients**

The Dependent Care Allowance is an addition to the base State Need Grant. The student must be eligible to receive at least one dollar of a base State Need Grant in order to be considered for the DCA.

The allowance is \$964 for a full-time student attending the entire nine-month academic year, and is adjusted by MFI category and enrollment status, regardless of the number of qualifying dependents. Yearly DCA awards should be distributed evenly between terms.

The dependent must be living with the student and be someone other than the student's spouse. **Care** is defined as assistance provided to the dependent for which the student pays another person (someone outside of the student's household).

**To receive the DCA, the student must provide documentation that dependent care expenses are needed. Students who have dependent care needs covered by another agency or entity are not eligible for dependent care through the SNG program. DCA may not exceed the amount the student is required to pay in expenses.**

- If the student is married, with both student and spouse attending the same institution, only one DCA (or the equivalent split between them) may be awarded per family.
- Awarding the DCA is left to the discretion of the Financial Aid Administrator.
- DCA can be awarded as part of a 4th quarter or 3rd semester award.
- If a DCA is awarded to an eligible CBS recipient, the CBS award will be the same amount as the student would receive if the institution did not award a DCA.

## **ADJUSTING AWARD AMOUNTS**

The maximum SNG and CBS awards must be reduced under the following two conditions:

### **Part-Time Students**

Both CBS and SNG awards, including DCA in the case of State Need Grant, are reduced for part-time students based on their enrollment status. Students at  $\frac{3}{4}$  time enrollment are eligible for 75 percent of the maximum award for their MFI category, students  $\frac{1}{2}$  time are eligible for 50 percent of the maximum, and  $\frac{1}{4}$  time students are eligible for 25 percent of the maximum.

### **Attendance Less Than Nine Months**

CBS and SNG students attending only part of the full nine-month academic year receive a pro-rated share of the total annual award, including the DCA. For example: a student attending one of three quarters may receive one-third of the full year's total award.

## **Institutional Gift Equity Policies**

State Need Grant institutional gift equity policies do not apply to eligible College Bound Scholars. Eligible College Bound Scholars must receive the maximum SNG award for which they are eligible.

For all other SNG eligible students, the financial aid administrator may limit the student's State Need Grant award if receipt of the SNG, in combination with other gift aid, exceeds the institution's gift equity packaging policy.

The gift equity policy must be the same as that used to package aid for all other students and may not discriminate against SNG recipients. This policy must be sent to the Council each spring for review and approval.

While academic rankings may be used in gift equity packages, athletic and other special talents such as music and theatre are not permissible.

## **State Need Grant Self-Help Requirement**

Except in the following two circumstances, all SNG students are required to have a calculated amount of self-help as part of their Cost of Attendance.

The two exceptions are:

1. The self-help requirement for SNG recipients is waived for students who are eligible College Bound Scholars—since eligible CBS Scholars must receive the maximum SNG awards possible.
2. Students attending institutions whose standard published Cost of Attendance (for books & supplies, room & board, transportation and miscellaneous/ personal expenses) is 25 percent or less than the WFAA Student Budgets, may be considered to have their self-help requirement met and may therefore have their self-help requirement waived. Any institution wishing to use this exception should request this in writing to the Council.

### ***What is the self-help requirement for all other SNG students?***

The self-help contribution required for all other State Need Grant recipients is equal to the lesser of:

- 12 percent of a student's Cost of Attendance if the institution is using an "at home" Cost of Attendance for a student. In most cases this will mean using a "living with parent" budget for the student.
- 25 percent of the student's Cost of Attendance if the student's total annual cost is \$13,860 or less.
- \$3,465 if the student's Cost of Attendance is greater than \$13,860.

**Note:** Institutions may require higher self-help requirements than any of these items shown above (except for eligible CBS Scholars) if this is covered in their approved institutional gift equity policies submitted to the Council for review and approval.

**Note:** The \$3,465 amount has been determined by the Council. This assumes that a student could have earnings of at least the value of a minimum wage job (minus Social Security and Medicare taxes) for 12 hours per week for 33 weeks during the year.)

The 2015 minimum wage is \$9.47 per hour (minus \$0.72 per hour in taxes) equals net wages of \$8.75 per hour x 12 x 33 = \$3,465.

***When self-help is calculated for SNG students, what programs or items are considered as self-help?***

**Self-help includes:**

- Parent & family contributions or EFC
- Work Study
- Loans
- Merit-based aid
- AmeriCorps benefits
- VA benefits and waivers
- Institutional & Private Scholarships
- CSF Opportunity Scholarships
- SBCTC Opportunity Grants
- Education & Training Vouchers (ETV)
- Conditional Scholarship programs, including TEACH Grants (awarded as conditional loans or loan forgiveness in return for service after graduation)
- Governors' Scholarships for Foster Youth
- Passport to College Promise Scholarship (which has its own self-help requirement)
- Federal GEAR UP Grants
- Worker Retraining Funds
- Unmet need

***When self-help is calculated for SNG students, what are examples of programs or items not considered as self-help?***

**Self-help does not include programs such as:**

- Federal PELL Grants
- Federal SEOG Grants
- Institution-based grants

**Tips for determining if a source not listed above should be considered as self-help**

When determining if a source not listed above shall be treated as self-help, consider whether the level of effort to earn the source equates to the kind of effort necessary to earn other sources, such as a merit scholarship based on a substantial period of academic achievement.

As in other areas of professional discretion, aid administrators are encouraged to be both thoughtful and rigorous in their determinations and to document their judgments.

**Action to take if Self-Help requirements are not met before awarding SNG**

Reduce the SNG award accordingly if the self-help requirement cannot be achieved.

## **OTHER AWARDING CONSIDERATIONS**

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

It is possible for a student to receive additional terms of SNG and/or CBS within the same academic year.

For students receiving a fourth quarter or third semester SNG and/or CBS award, the value of the additional award is calculated as it would be for any regular term. Students receiving additional terms of aid will reach their maximum quarter limit more quickly than students engaged in the common three quarter/two semester enrollment pattern. In this scenario, it is permissible to exceed the grant amounts listed in the award chart.

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

State aid, combined with other aid meeting need, may not exceed the student's calculated need, except that a student will not be considered over-awarded if he or she receives additional funds after the institution awards aid if the total resources exceed his or her financial need by \$200 or less by the end of the academic year.

### **Changes in Need, MFI levels, or Other Aid Received That May Cause a Revision in SNG and/or CBS Awards after the Original Award has been made**

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

Examples:

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

If the aid administrator can reduce the award disbursements for future terms, however, and not repay funds already disbursed, that is permissible. The SNG award needs also to be reviewed to be sure the award is not over need, for example. Because this is an eligible CSB Scholar, however, no changes in the SNG award would need to be made with regards to self-help or gift equity policy of the institution.

- A SNG funded student (who is not an eligible CBS Scholar) receives additional aid, the MFI level changes, or the need changes. The aid administrator must review the award to make sure that the student is still eligible for the SNG amount originally awarded. This would include making sure that the required minimum self-help amount was still in place, that the gift aid equity policy (if applicable) was being followed, and that the proper MFI award amount was in place if there were changes in the family income or family size.

### **Payments cannot be made to Students for a Current Term after They Withdraw**

If students withdraw for a term without earning at least 3 credits, no additional SNG or CBS payments may be made to the students for that term on or after a student's official withdrawal date. *(Note: State policy differs from the Federal policy on this issue of post withdrawal disbursements.)*

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

Retroactive SNG and CBS awards and payments **MUST** be made to **eligible CBS Scholars** for a prior term(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 a student's rate of satisfactorily completed credits (must be at least 3 credits) determined by the institution at the end of the term(s).

### **Retroactive Awards and Payments for Previous Terms for Other SNG Eligible Students**

Retroactive SNG awards and payments MAY be made to eligible SNG students (who are not also eligible CBS Scholars) for a prior term(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 a student's rate of satisfactorily completed credits (must be at least 3 credits) determined by the institution at the end of the term(s).

### **Late Applicants**

The Financial Aid Administrator must reserve SNG funds in anticipation of late eligible CBS Scholars, to ensure that 100 percent coordination between CBS and SNG is achieved for all terms during the year, including summer. Institutions also may reserve SNG funds for late non-CBS Scholars, but are not required to do so.

### **Award Rounding**

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

### **Concurrent Award at Two Institutions**

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

If a school exercises this option, it should do so with the knowledge and cooperation of the second school.

## Fractional Last Term

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

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

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

QER = Quarters of eligibility remaining

SER = Semesters of eligibility remaining

QER x Full-time Award amount within MFI category

### **Quarter School Example:**

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

The calculation is:

$$.38 \times \$1,180 = \$1,448. \text{ Joe would be eligible for a } \$1,448 \text{ dollar award.}$$

### **Semester Institutions:**

QER / 1.5 = Semesters of Eligibility Remaining (SER)\*

SER x Full-time Award amount within MFI category

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

### **Semester School Example:**

Joe student has .38 Quarters of Eligibility remaining (QER). The full time award amount within Joe's MFI category is \$4,259. The calculation is:

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

Now, multiply the SER with the full time award amount within his MFI category.

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

## **AWARDING PRACTICES NOT PERMITTED**

### **Single Parents and Part-time Students**

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

### **Under-awarding**

Unless other awarding policies require reduced awards, is not permissible to disburse less than 100 percent of an eligible student's calculated award in an attempt to make limited funds stretch further.

## CHAPTER 3

### SATISFACTORY ACADEMIC PROGRESS

#### SATISFACTORY ACADEMIC PROGRESS (SAP)

Institutions are responsible for monitoring each recipient's *satisfactory academic progress*, as outlined in [WAC 250-20-021\(20\)](#) of the SNG rules, and in the institution's Council-approved institutional SAP policy.

The SAP policy is applicable to all state aid programs, including State Need Grant, College Bound Scholarship, State Work Study, and Passport Scholarship.

There are differences between state and federal SAP requirements including:

1. A maximum program length timeframe of 125% (state) versus 150% (federal).
2. A required **per term** SAP review for state aid
3. A quantitative standard requiring that at least one-half of the credits awarded are earned as compared to the new federal "pace" requirement.

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

- Is meeting *Satisfactory Academic Progress*.
- Is to be placed in *Warning Status* (probation).
- Is to be placed in *Denied Status* and therefore ineligible for further aid.

The institution's policy also shall include a process for reinstating ineligible students.

#### **Maximum Timeframe**

As stated in Chapter 1, state aid recipients must have completed less than 125 percent of the maximum length of their program in order to remain eligible.

#### **Quantitative Standard**

To meet minimum satisfactory academic progress standards, a student must complete at least one-half (50%) of the original minimum amount of credits for which the aid was calculated and disbursed.

Note that the minimum standard for full-time enrollment is 12 credits per term for institutions that base their enrollment on a credit system. For these institutions, 12 credits is considered the amount for which aid was calculated and disbursed even if the student enrolled for more than 12 credits. For three-quarter time students, 9 credits is considered the minimum and for half-time students 6 credit hours is considered the minimum.

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

## **Warning Status<sup>1</sup>**

**Warning Status** for state aid recipients is triggered when a student completes 50 percent, or more, but less than all of the credits for which the aid was calculated and disbursed.

For a full-time student at 12 credits, this means that if the student successfully completes 6 to 11 credits, the student must be placed in a warning status for the following term as it pertains to state aid.

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

## **Clock Hour Schools**

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

In petitioning the Council, the school must have a policy that rigorously restricts the number of hours that a student can fail to complete in any single payment period. The policy must also result in the student completing all clock hours for which aid was disbursed by the end of the academic year.

## **Denied Status**

**Denied Status** means that the student completed less than one-half of the minimum number of credits for which aid was disbursed. Each institution's policy must deny further disbursements of state aid beyond the conclusion of any term in which the student fails to complete at least 50 percent of the minimum number of credits for which the grant was disbursed.

## **Qualitative Standard**

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

## **Other conditions of SAP Policy**

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

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<sup>1</sup>To avoid confusion with the federal definition of "probation," the term "warning" is used throughout this chapter.

### **Professional Judgment/Appeals**

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

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

### **Reinstatement**

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

## **STUDENT WITHDRAWALS/REPAYMENT CALCULATIONS**

See Chapter 5 for required repayment policy information.



## CHAPTER 4

### REPORTING REQUIREMENTS

Participating institutions are required to submit eligible SNG and CBS student details via quarterly interim reports, including a year-end submission for reconciliation purposes, and an annual unit record report. Please refer to the Unit Record Report manual for details regarding that report.

#### INTERIM REPORT

The *Interim Report* is a quarterly data submission that includes student details for every:

- Eligible “served student” awarded the SNG.
- Eligible “unserved SNG student” who has not been awarded the SNG due to lack of funding.
- Eligible awarded CBS student.

WSAC uses interim reports to manage funding, redistribute de-obligated monies, and program evaluation. Data reported on the interim reports also provides the basis for SNG allocation determinations and CBS funding projections.

#### DUE DATES

Report	Due Dates
Fall Interim Report	November 6, 2015
Winter Interim Report	February 5, 2016
Spring Interim Report	May 6, 2016
Final Interim Report*	July 8, 2016

*\* The final Interim Report also serves as the year-end reconciliation and is due July 8, 2016.*

#### RECORD LAYOUTS

All institutions will use the College Bound/SNG Award Warehouse (CSAW) to fulfill the Interim Reporting requirement. The new layout for 2015-16, which includes new optional fields for Passport to College Scholarships and term type, is located at the end of this chapter. The new file layout can be used now, but the new fields won't activate in CSAW until the changes go live in December 2015.

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

## **ELIGIBLE AWARDED SNG AND CBS STUDENTS**

*Eligible awarded SNG students* refers to State Need Grant “served students,” who have either received a SNG payment, or who have had SNG funds committed (student has received an award letter) but not yet disbursed at the time of the report.

*Eligible awarded CBS students* refers to eligible College Bound Scholarship students who have either received a CBS payment, or who have had CBS funds committed (student has received an award letter) but not yet disbursed at the time of the report.

## **UNSERVED SNG STUDENTS**

First, please note that there can be no eligible CBS unserved students. All students that are eligible for CBS funds, and have room in their financial aid package, must be awarded CBS. In addition, CBS students cannot be unserved for SNG as all eligible College Bound Scholarship recipients must be served with a maximum State Need Grant based on the awarding procedures.

*Unservd SNG students* are those who are fully eligible to receive the SNG and are enrolled, but cannot be awarded due to the institution’s lack of funds. This includes eligible students who enrolled during a summer period but did not receive the SNG.

If institutions provide institutional funds to eligible SNG students in place of SNG funds due to lack of SNG funding, these students should be reported as unserved SNG students.

It is important that all students included in the unserved student population be validated as “eligible” and reported to the Council via CSAW based on **attempted** credits.

**Unservd student data contributes towards the amount of the SNG Allocation an institution will receive in the upcoming year, therefore it is extremely important for institutions to accurately report all of their eligible, but unserved students.**

The institution must report every enrolled SNG eligible student who has not been awarded the SNG due to lack of funding. This should include all eligible students with incomes up to 70 percent of the state’s median income.

**Enrolled SNG eligible students who are unserved or anticipated to be unserved for both current and future terms (Summer 1, Fall, Winter, Spring, and Summer 2) should be reported as unserved in all interim reports.**

Unservd student data should be carefully vetted for eligibility and accuracy before submitting data to the Council. If institutions are unable to verify the accuracy of the unserved data, a confidence factor shall be provided to the Council prior to reconciliation.

Here are examples of reasons a student **should not** be reported as an unserved SNG student for any terms where the following applies:

- Incomplete file
- Not enrolled
- Ineligible program
- Not eligible due to a prior Associate degree received
- MFI increase caused ineligibility
- Unsatisfactory academic progress status
- Not a Washington resident

**\*NEW\***

### **WSAC Review of Unserved SNG Students Not Included in the Unit Record Report**

Because unserved SNG students reported for one year impact the SNG funding for the next year, WSAC will compare an institution's unserved SNG students reported on the 2014-15 final interim report against their students reported on the institution's 2014-15 Unit Record Report (URR).

In most cases unserved SNG students will have received need-based aid from other sources and therefore be reported in the URR. If any reported unserved SNG students are found to have not actually enrolled during the 2014-15 year, a proportionate reduction in the institution's SNG allocation may be made for either the 2015-16 or 2016-17 year, based on the institution's preference.

### **SNG STUDENTS WHO ARE BOTH SERVED AND UNSERVED**

An SNG student may be both served and unserved within an academic year, but not for the same term. For example, a student who received the SNG for the fall and winter quarters, but did not receive the grant while enrolled in spring term, should be listed as unserved for spring term.

### **INSTRUCTIONS**

Detailed interim report submission instructions, including how to upload a file and address edits, are located later in this chapter.

#### **Edits**

CSAW rejects data in the form of edits that may or may not be overridden. All edits must be addressed individually, except informational edits. A complete list of edits is located in the instructions at the end of this chapter.

## Reporting Enrollment Status

In general, each student's term enrollment statuses should reflect the funding the student was eligible to receive, for both served and unserved students. The "census date" is the point of the term after which the grant awards are not adjusted for enrollment changes.

**Recipients:** Report the student's enrollment status for each term as of the date the SNG or CBS was disbursed or the census date, whichever is later.

**SNG Unserved:** If the student had other financial aid disbursed that term, report the enrollment status as of the date the majority of other financial aid was disbursed or the census date, whichever is later.

If the student had no financial aid disbursed for that term, report the enrollment status as of the date that the majority of other SNG student's received their term disbursements.

**Exceptions:** *Applies to both SNG and CBS Recipients and SNG Unserved*

- If a student received a full refund of tuition charges, the student's CSAW record must be updated so that it shows as not enrolled for that term. In addition, if the student had received SNG or CBS funds for that term, those funds must be returned to SNG or CBS.
- If a student received a partial refund and the SNG or CBS award was decreased, the enrollment status must also be updated (e.g. The student's original disbursement was based on 12 credits and the student's enrollment status was reported as full-time. Later tuition for 6 credits was fully refunded and the SNG award was adjusted to half-time. The SNG for the term and enrollment status must be updated to show half-time enrollment and the appropriate amount of SNG.)

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

## Secure Data Transmission

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

## **Security of Information**

All institutions are expected to treat information on the Council Portal in accordance with the Electronic Agreement contained in the Institutional Agreement to Participate. Institutions and individuals are granted access to data with the expectation that they protect the confidentiality of this information with the same level of care as they do any other student aid document.

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

Each institution must have one or more financial aid administrator(s) with a Council-assigned password. If you have forgotten your password, please click on the “forgot your password” link on the Portal login page.

## **RECONCILIATION REPORT BALANCE SHEET**

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

## **CSAW INTERIM REPORT – Starts on page 48**

# CSAW (COLLEGE BOUND/STATE NEED GRANT AWARD WAREHOUSE) INTERIM REPORT

## Basic Steps:

1. Log in to the WSAC Portal
2. Upload Student Data
3. Address Edits
4. Submit interim report

## Step 1: Log in to the WSAC Portal

Access the WSAC Portal at <https://fortress.wa.gov/wsac/portal/default.aspx>.

Your user name is your email address. If you do not know your password, you can reset your password.

From the menu up top, click on:

1. Programs
2. SNG
3. CSAW

## Step 2: Upload Student Data

For private institutions and public institutions using real-time reporting, by the time the first interim report comes around, files should already have been uploaded into your system.

Generate your file from data in your internal system and save it to your computer.

NOTE: Please see the file format at the end of these instructions.

Click the Upload link. Use the browse button to locate your file. Then click 'upload'.

The screenshot shows the top navigation bar of the CSAW portal with the 'Upload' button highlighted. Below the navigation bar, a yellow box contains a note: 'PLEASE NOTE: Each upload attempt represents a FRESH start. This means that each upload must contain ALL enrollment data for the current academic year.' Underneath the note, there is a file selection area with the text 'No file selected', a 'browse' button, and an 'upload' button. Arrows from the text above point to the 'Upload' button, the 'browse' button, and the 'upload' button.

While the file is uploading, a yellow progress bar will display the real-time status of your upload.

The screenshot shows the same portal interface as the previous one, but now a yellow progress bar is visible at the top right, displaying 'processing... 12.7% complete'. Below the progress bar, the text 'Processing file...' is visible. An arrow from the text above points to the progress bar.

After the upload completes you will be presented with a file summary. The file summary notifies you of errors, provides informational messages, displays an award overview by term, and summarizes changes from the file that was just uploaded to any existing data already in CSAW.

### File Summary Example

File summary

0 Errors 1 Informational-only messages [P](#)

**Award Overview**

	Amount	# Awards	Served	Unserved
Fall	\$14,431.00	5	5	0
Spring	\$14,376.00	6	6	0
<b>Total</b>	<b>\$28,807.00</b>	<b>11</b>	<b>11</b>	<b>0</b>

**Changes from this file**

SNG award-level changes		Student-level changes	
To be added:	11	To be added:	6
To be updated:	0	To be updated:	0
To be removed:	701	To be removed:	374
To be cancelled:	0		

[save file](#) [discard file](#)

A file upload that contains formatting errors cannot be saved until it is corrected and resubmitted. You will have the option to view each error by clicking on the magnifying glass logo next to “Errors.” A box will appear with a list of your errors. They are listed in chronological order. You have the option to download a list of all errors to a csv file.

An Informational-only message contains any headers in the file that are not recognized.

Upload Address Edits Search/Add Grant Amounts

File summary

0 Errors 1 Informational-only messages [P](#)

**Award Overview**

	Amount	# Awards	Served	Unserved
Summer 1	\$19,882.00	59	12	0
Fall	\$2,043,901.00	702	694	0
Spring	\$1,842,739.00	653	628	0
<b>Total</b>	<b>\$3,906,522.00</b>	<b>1,414</b>	<b>1,334</b>	<b>0</b>

**Changes from this file**

SNG award-level changes		Student-level changes	
To be added:	1,414	To be added:	737
To be updated:	0	To be updated:	0
To be removed:	701	To be removed:	374
To be cancelled:	0		

[save file](#) [discard file](#)

## SNG/CBS Interim Report Complete List of Edits

EditDescription	Overridable	Information
Applied baccalaureate is only allowed for Community and Technical colleges	FALSE	FALSE
Award Amount exceeds max award amount, but the cause is unclear	TRUE	FALSE
Award Amount exceeds max award amount, most likely due to a QER issue	TRUE	FALSE
Award Amount exceeds max award amount, most likely due to an enrollment status issue	TRUE	FALSE
Award Amount exceeds max award amount, most likely due to an MFI issue	TRUE	FALSE
Award amount must be greater than zero	FALSE	FALSE
Award amount must be non-negative	FALSE	FALSE
Cannot have awards for both summer terms at the same institution	FALSE	FALSE
Cannot pursue another Associate degree when one has already been awarded within 5 years of today	TRUE	FALSE
CBS student does not have a valid CBS application	FALSE	FALSE
CBS student does not meet HS requirements	FALSE	FALSE
CBS student failed to meet enrollment deadline	FALSE	FALSE
CBS student has 3 or less QER (informational only)	FALSE	TRUE
CBS student has exceeded five-year eligibility window	FALSE	FALSE
CBS student is not OK to Pay	FALSE	FALSE
CBS students must receive maximum SNG award	TRUE	FALSE
Combined enrollment status cannot exceed full-time for a single term	TRUE	FALSE
DCA amount exceeds max DCA amount, but the cause is unclear	TRUE	FALSE
Enrollment status cannot be Not enrolled unless the award has been cancelled	FALSE	FALSE
Family income exceeds CBS MFI threshold	FALSE	FALSE
Family income exceeds CBS MFI threshold, but has not increased by more than 3% since last year. Override this to enable the payment	TRUE	FALSE
Family income exceeds SNG MFI threshold	FALSE	FALSE
Family income exceeds SNG MFI threshold, but has not increased by more than 3% since last year. Override this to enable the payment	TRUE	FALSE
Family size cannot be greater than twenty	FALSE	FALSE
Family size must be greater than or equal to number in college	FALSE	FALSE
Family size must be greater than zero	FALSE	FALSE
No family income information could be found for this student	FALSE	FALSE
Number in college must be greater than zero	FALSE	FALSE
Number of SNG terms cannot exceed QER	FALSE	FALSE
Receivable balance cannot exceed the award amount	FALSE	FALSE
Served status is required	FALSE	FALSE
SNG and CBS repayments must be referred at the same time	TRUE	FALSE
SNG student has 3 or less QER (informational only)	FALSE	TRUE
Student Awarded CBS must have a served or unserved SNG award for the same term	FALSE	FALSE
Student has no QER for award	FALSE	FALSE
Student is OK to award, not OK to pay, and hasn't been awarded CBS (informational only)	FALSE	TRUE
Student is OK to pay but hasn't been awarded CBS	TRUE	FALSE
Student not found in CBS Cruncher	FALSE	FALSE
This student has unpaid receivables for a prior term	FALSE	FALSE
Total SNG awards exceed maximum eligible amount	TRUE	FALSE
Total SNG DCA exceeds maximum	TRUE	FALSE

Showing all 1 messages X

- Column 'INSTITUTIONCODE' is not recognized as a valid header and can be excluded from the file

download all errors to csv
close

If a valid header is not recognized it can be excluded from the file. You also have the option to download to .csv file.

Once all errors are reviewed and resolved, click on “save upload.” A progress bar will appear once you click on save, and will notify you when the file is done saving.

CSAW 2014-2015 processing... 97.38% complete

Upload
Address Edits
Request Funds
Interim Report
Search/Add
Grant Amounts

**Upload Preview**  
Click "save upload" below to finish the upload process.

save upload
discard upload

Award Overview		Total	Summer 1	Fall	Winter	Spring	Summer 2
SNG	Amount	\$38,395,588.00	\$0.00	\$19,347,944.00	\$0.00	\$19,047,644.00	\$0.00
	# Awards	10,164	0	5,124	0	5,040	0
	Served Awards	5,908	0	2,996	0	2,912	0
	Unservd Awards	4,256	0	2,128	0	2,128	0
CBS	Amount	\$1,341,760.00	\$0.00	\$670,880.00	\$0.00	\$670,880.00	\$0.00
	# Awards	1,120	0	560	0	560	0
<b>Total</b>	<b>Amount</b>	<b>\$39,737,348.00</b>	<b>\$0.00</b>	<b>\$20,018,824.00</b>	<b>\$0.00</b>	<b>\$19,718,524.00</b>	<b>\$0.00</b>
	<b># Awards</b>	<b>11,284</b>	<b>0</b>	<b>5,684</b>	<b>0</b>	<b>5,600</b>	<b>0</b>
<b>Change Preview Summary</b>		<b>Student-level changes</b>		<b>SNG award-level changes</b>		<b>CBS award-level changes</b>	
to be added		5,124		10,164		1,120	
to be updated		0		0		0	
to be deleted		0		0		0	
to be cancelled		-		0		0	

Once the save is complete, click on “finish upload and proceed to edits” to move on to the next step.

CSAW 2014-2015 saving... 100% complete

Upload
Address Edits
Request Funds
Interim Report
Search/Add
Grant Amounts

**Save complete!**

finish upload and proceed to edits

Award Overview		Total	Summer 1	Fall	Winter	Spring	Summer 2
SNG	Amount	\$38,395,588.00	\$0.00	\$19,347,944.00	\$0.00	\$19,047,644.00	\$0.00
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<b>Change Preview Summary</b>		<b>Student-level changes</b>		<b>SNG award-level changes</b>		<b>CBS award-level changes</b>	
to be added		5,124		10,164		1,120	
to be updated		0		0		0	
to be deleted		0		0		0	
to be cancelled		-		0		0	

### Step 3: Address Edits

During the interim reporting period, an Interim Report tab is provided. Click on the Interim Report tab to see if you have any edits.

CSAW 2014-2015 [redacted]

Upload | Address Edits | Request Funds | **Interim Report** | Search/Add | Grant Amounts

Welcome to the College Bound/SNG Award Warehouse!

To get started:

1. Upload
2. Address Edits
3. Request funds/Submit interim report

After clicking on the Interim Report tab, your edits will begin to load. If you do not have any edits, you will be given the option to submit your report.

Before submitting, review the Award Overview box to make sure the data looks correct.

CSAW 2014-2015 [redacted]

Upload | Address Edits | Request Funds | **Interim Report** | Search/Add | Grant Amounts

2014-2015 Winter Interim Report

Not yet submitted - Due on 4/2/2014 [view previous submissions](#)

If there are any uncorrected errors, this report cannot be submitted. After you have submitted your interim report, no changes will be allowed to be made until WSAC staff has finished processing. If you have any questions, please contact [SNG staff](#).

[Submit Interim Report](#)

Award Overview		Total	Summer 1	Fall	Winter	Spring	Summer 2
SNG <a href="#">.csv</a>	Amount	\$794,720.00	\$0.00	\$412,245.00	\$0.00	\$382,475.00	\$0.00
	Served	210	0	109	0	101	0
	Unserved	141	0	73	0	68	0
	# Awards	351	0	182	0	169	0
CBS <a href="#">.csv</a>	Amount	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	# Awards	0	0	0	0	0	0

[download a csv list of all awards](#)

Click the .csv button to view your award detail in Excel.

If you have edits, you will see a notice that you cannot submit due to uncorrected errors.

CSAW 2014-2015 [redacted]

Upload | Address Edits | Request Funds | **Interim Report** | Search/Add | Grant Amounts

2014-2015 Winter Interim Report

Not yet submitted - Due on 4/2/2014 [view previous submissions](#)

If there are any uncorrected errors, this report cannot be submitted. After you have submitted your interim report, no changes will be allowed to be made until WSAC staff has finished processing. If you have any questions, please contact [SNG staff](#).

Your report cannot yet be submitted due to uncorrected errors. Correct them at the [edits page](#).

Award Overview		Total	Summer 1	Fall	Winter	Spring	Summer 2
SNG <a href="#">.csv</a>	Amount	\$868,032.00	\$0.00	\$450,835.00	\$0.00	\$417,197.00	\$0.00
	Served	229	0	119	0	110	0
	Unserved	145	0	75	0	70	0
	# Awards	374	0	194	0	180	0
CBS <a href="#">.csv</a>	Amount	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	# Awards	0	0	0	0	0	0

[download a csv list of all awards](#)

CSAW		2014-2015																																																						
Upload	Address Edits	Request Funds	Interim Report	Search/Add	Grant Amounts																																																			
<b>2014-2015 Winter Interim Report</b>																																																								
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<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Award Overview</th> <th style="width: 15%;">Total</th> <th style="width: 15%;">Summer 1</th> <th style="width: 15%;">Fall</th> <th style="width: 15%;">Winter</th> <th style="width: 15%;">Spring</th> <th style="width: 15%;">Summer 2</th> </tr> </thead> <tbody> <tr> <td rowspan="4">SNG <a href="#">[i] csv</a></td> <td>Amount</td> <td>\$668,032.00</td> <td>\$0.00</td> <td>\$450,835.00</td> <td>\$0.00</td> <td>\$417,197.00</td> <td>\$0.00</td> </tr> <tr> <td>Served</td> <td>229</td> <td>0</td> <td>119</td> <td>0</td> <td>110</td> <td>0</td> </tr> <tr> <td>Unserved</td> <td>145</td> <td>0</td> <td>75</td> <td>0</td> <td>70</td> <td>0</td> </tr> <tr> <td># Awards</td> <td>374</td> <td>0</td> <td>194</td> <td>0</td> <td>180</td> <td>0</td> </tr> <tr> <td rowspan="2">CBS <a href="#">[i] csv</a></td> <td>Amount</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> </tr> <tr> <td># Awards</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>						Award Overview	Total	Summer 1	Fall	Winter	Spring	Summer 2	SNG <a href="#">[i] csv</a>	Amount	\$668,032.00	\$0.00	\$450,835.00	\$0.00	\$417,197.00	\$0.00	Served	229	0	119	0	110	0	Unserved	145	0	75	0	70	0	# Awards	374	0	194	0	180	0	CBS <a href="#">[i] csv</a>	Amount	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	# Awards	0	0	0	0	0	0
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	# Awards	0	0	0	0	0	0																																																	
<a href="#">[i] download a csv list of all awards</a>																																																								

To view and correct your edits, click the 'edits page' link

**Correcting Edits:** Correct Edits instead of performing an override. WSAC data analysis relies on data elements and cannot interpret text.

- **Rule:** If you can change the data to make the edit go away, do that! If you cannot, then proceed down below to the Overriding Edits section.

### Common Overrides that can be Addressed with Data Correction Instead of Overriding

Edit Name	Sample Incorrect Override Reason	Correct Data Change
Award Exceeds Max Award Amount	Eligible at time of disbursement-or-Enrolled FT	Update enrollment status to the status at time of disbursement
Award Exceeds Max Award Amount	Pursuing Bachelor's degree	Check the AB box on each term the student is enrolled in AB courses
Cannot Pursue Another Associate Degree	Pursuing Bachelor's degree	Check the AB box on each term the student is enrolled in AB courses
Cannot Pursue Another Associate Degree	Received Associate degree at end of winter	Delete subsequent unserved terms (i.e. spring and summer)
Award Amount Exceeds Max, Most Likely Because of MFI Issue	Awarded on original income reported on FAFSA	Change the income reported for the student to reflect what was used to award
Combined Enrollment Status Cannot Exceed Full-time	No aid was disbursed	Remove unserved records if you know student is not attending
Combined Enrollment Status Cannot Exceed Full-time	No financial aid my institution	Remove unserved records if you know student is not attending
Student is OK to Pay But Not Awarded CBS	MFI too high	Update income – the income being reported shows them within 65%

You can begin correcting edits while your file processes. Use the drop down to see the edit categories you have, and select one to begin work on.

CSAW 2014-2015

Upload **Address Edits** Request Funds Interim Report Search/Add Grant Amounts

Edits have not been processed download all edits into csv reprocess edits

**Edits** 17 total (3 informational)

**Student edits ( 10)**

Number of SNG terms cannot exceed QER	1 edits
SNG student has 3 or less QER (informational only)	3 edits
Total SNG awards exceed maximum eligible amount	6 edits

**SNG Award edits ( 10)**

Award Amount exceeds max award amount, but the cause is unclear	8 edits
Award Amount exceeds max award amount, most likely because of a QER issue	1 edits
Student has no QER for award	1 edits

Use the edit refresh button to refresh your edit list as the file processing completes.

You are provided with a list of edits in the category you selected. Review the information provided and make necessary changes to enrollment or award amount in this screen. You can use the enrollment drop down or change the award amount and save.

CSAW 2014-2015

Upload **Address Edits** Request Funds Interim Report Search/Add Grant Amounts

Edits have not been processed download all edits into csv reprocess edits

Return to List **Award Amount exceeds max award amount, but the cause is unclear** SNG Award edits 8 edits

SID	SSN	Name	Term	Enrollment	Main Awd Amt	Max Awd Amt	QER	MPI	New or Continuing	save	override
		Ross A	Spring	Full time	3858.00	\$0.00	1.5000	50%	Continuing Student	save	override
		Ross A	Fall	Full time	3859.00	\$0.00	3.0000	50%	Continuing Student	save	override
		Elizabeth A	Spring	Full time	3858.00	\$0.00	2.2500	50%	Continuing Student	save	override
		Elizabeth A	Fall	Full time	3859.00	\$0.00	3.7500	50%	Continuing Student	save	override

If you need to view more detailed student information to research the issue, click the link to the student's individual record.

After clicking on the link, the student detail will open in a new internet tab. To edit the award detail, click on the edit button.

Edits have not been processed [download all edits into csv](#)  
[reprocess edits](#)

---

[Return to List](#) Award Amount exceeds max award amount, but the cause is unclear SNG Award edits

---

**Ross A** [edit](#)

**3 Edits**

SID: None for this institution      Student is on SNG Archive      Student has no CBS Pledge  
 50% MFI      3.000 SNG QER      12.000 CBS QER

---

Showing awards for 2014-2015

Program	Summer 1	Fall	Winter	Spring	Summer 2	Total	
SNG Enrollment		Full time		Full time			<a href="#">details</a>
SNG Amount		\$3,859.00		\$3,858.00		\$7,717.00	
<b>Total</b>		<b>\$3,859.00</b>		<b>\$3,858.00</b>		<b>\$7,717.00</b>	

You can now change the data for the award in question. When done, click Save.

[Return to List](#) Award Amount exceeds max award amount, but the cause is unclear SNG Award edits

---

**Ross A** [save](#) [cancel](#)

Name:  ROSS   
last first middle

SID:

Income Info:     
fam. size # in college fam. income

---

	Enrollment Status	Served	SNG		DCA	CBS
			Awd Amt			Awd Amt
Summer 1	Not enrolled	Not Specified	<input type="text"/>		<input type="text"/>	<input type="text"/>
Fall	Full time	Served	3859.00	<a href="#">delete</a>	0.00	<input type="text"/>
Winter	Not enrolled	Not Specified	<input type="text"/>		<input type="text"/>	<input type="text"/>
Spring	Full time	Served	3858.00	<a href="#">delete</a>	0.00	<input type="text"/>
Summer 2	Not enrolled	Not Specified	<input type="text"/>		<input type="text"/>	<input type="text"/>

Click on Return to List to view your edits screen to proceed on your next edit. The record that you just corrected will disappear once you click the edit refresh button.

Edits have not been processed [download all edits into csv](#)  
[reprocess edits](#)

[Return to List](#) Award Amount exceeds max award amount, but the cause is unclear SNG Award edits

**[Redacted] Ross [Redacted]** [edit](#)

[Redacted] University

SID: None for this institution      Student is on SNG Archive [i](#)      Student has no CBS Pledge  
 50% MFI [i](#)      3.000 SNG QER [i](#)      12.000 CBS QER

Showing [Redacted] awards for 2014-2015

	Program	Summer 1	Fall	Winter	Spring	Summer 2	Total	
SNG	Enrollment		Full time		Full time			<a href="#">details</a>
	Amount		\$0.00 <a href="#">t</a>		\$0.00 <a href="#">t</a>		\$0.00	
<b>Total</b>								

### Overriding Edits

Override edits when you cannot update data to correct the record.

To override an edit, click the 'override' button.

CSAW 2014-2015

Upload **Address Edits** Request Funds Intern Report Search/Add Grant Amounts

Edits have not been processed [download all edits into csv](#)  
[reprocess edits](#)

[Return to List](#) Total SNG awards exceed maximum eligible amount Student edits [5 edits](#)

SID	SSN	Name	MFI	QER	Total Awards	Total Awarded	Max Amount	
	[Redacted]	Megan L	50%	0.5000	2	\$7,717.00	\$0.00	<a href="#">save</a> <a href="#">override</a> <a href="#">delete</a>
	[Redacted]	Elizabeth A	50%	3.7500	2	\$7,717.00	\$0.00	<a href="#">save</a> <a href="#">override</a> <a href="#">delete</a>
	[Redacted]	Eoster A	55%	12.0000	2	\$5,338.00	\$0.00	<a href="#">save</a> <a href="#">override</a> <a href="#">delete</a>
	[Redacted]	Teresa B	50%	5.0000	2	\$7,717.00	\$0.00	<a href="#">save</a> <a href="#">override</a> <a href="#">delete</a>
	[Redacted]	Alden R	50%	3.0000	2	\$7,717.00	\$0.00	<a href="#">save</a> <a href="#">override</a> <a href="#">delete</a>

You will be prompted to enter an override reason. When finished, click Submit.

Edits have not been processed [download all edits into csv](#)  
[reprocess edits](#)

[Return to List](#) **Total SNG awards exceed maximum eligible amount** student edits 5 edits

SID	SSN	Name	MFI	GER	Total Awards	Total Awarded	Max Amount	
		Megan L.	50%	0.5000	2	\$7,717.00	\$0.00	Awarded four or more terms of SNG submit cancel
		Elizabeth A.	50%	3.7500	2	\$7,717.00	\$0.00	save override delete
		Foster A.	55%	12.0000	2	\$5,338.00	\$0.00	save override delete
		Teresa R.	50%	5.0000	2	\$7,717.00	\$0.00	save override delete
		Alden R.	50%	3.0000	2	\$7,717.00	\$0.00	save override delete

Once you click Submit, the edit will disappear.

Once you have corrected all of your edits, the edit drop down will be empty.

Upload **Address Edits** Submit for Reimbursement Interim Report Search/Add Grant Amounts

select an edit message to view details

### Step 4: Submit Interim Report

Go back to the Interim Report tab and click Submit Interim Report.

CSAW 2014-2015

Upload Address Edits Request Funds **Interim Report** Search/Add Grant Amounts

**2014-2015 Winter Interim Report**  
 Not yet submitted - Due on 4/2/2014 [view previous submissions](#)

If there are any uncorrected errors, this report cannot be submitted.  
 After you have submitted your interim report, no changes will be allowed to be made until WSAC staff has finished processing.  
 If you have any questions, please contact [SNG staff](#).

Submit Interim Report

Award Overview		Total	Summer 1	Fall	Winter	Spring	Summer 2
SNG <a href="#">csv</a>	Amount	\$794,720.00	\$0.00	\$412,245.00	\$0.00	\$382,475.00	\$0.00
	Served	210	0	109	0	101	0
	Unserved	141	0	73	0	68	0
	# Awards	351	0	182	0	169	0
CBS <a href="#">csv</a>	Amount	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	# Awards	0	0	0	0	0	0

[download a csv list of all awards](#)

You will receive a confirmation that your report has been submitted.

CSAW 2014-2015

Upload Address Edits Request Funds **Interim Report** Search/Add Grant Amounts

**2014-2015 Winter Interim Report**  
 Submitted on 4/2/2014 [view previous submissions](#)

Your interim report has been submitted. Please acknowledge that the data submitted may vary slightly between now and when the WSAC finalizes your interim report, based on the review process.  
 If you need to make changes to your report or have any further questions, please contact [SNG staff](#).

Award Overview		Total	Summer 1	Fall	Winter	Spring	Summer 2
SNG <a href="#">csv</a>	Amount	\$794,720.00	\$0.00	\$412,245.00	\$0.00	\$382,475.00	\$0.00
	Served	210	0	109	0	101	0
	Unserved	141	0	73	0	68	0
	# Awards	351	0	182	0	169	0
CBS <a href="#">csv</a>	Amount	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
	# Awards	0	0	0	0	0	0

[download a csv list of all awards](#)

## CSAW File Upload Layout for All Institutions

A sample .csv file is also located at <http://www.wsac.wa.gov/FAA-resources>. Your file layout can be submitted in a different order if you choose to, but the header names must be identical to the sample file and are case insensitive.

Please note that Passport to College Scholarship awards will be ignored by CSAW until the new version of CSAW is released in December of 2015.

Field	Valid Inputs	Remarks
SSN	Numbers and hyphens	Nine-digit student identifier. SSN, or TIN, or WASFA ID for DREAMers. 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).
SchoolCode	Any characters	Unique identifier for this student, for this institution
LastName	Any characters	Required
FirstName	Any characters	Required
MiddleInitial		Optional
FamilySize	Integer	Required
NumberInCollege	Integer	Required
FamilyIncome	Number up to two decimal places	Family income used to determine SNG eligibility and award amount
Summer1EnrollmentStatus	('Full Time' or '1') ( 'Half Time' or '2') ( '3/4 Time' or '3') ( '< Half Time' or '5')	The enrollment status the student was eligible for at the time of disbursement
<b>Summer1TermType</b>	(Quarter or '1') (Semester or '2'), optional	If left blank or excluded from file, will use the default term type
Summer1AppliedBaccalaureate	('true' or 'y') ( 'false' or 'n')	This only applies to students at CTCs. All other institutions should leave this blank. Determines whether this student is enrolled in an applied baccalaureate program for this term
Summer1CBSAwardAmount	Number up to two decimal places	Maximum CBS award amount, minus specified state aid
Summer1SNGAwardAmount	Number up to two decimal places	Award amount, minus any DCA
Summer1SNGDCA	Number up to two decimal places	DCA amount, if awarded DCA
Summer1SNGAwardIsServed	('true' or 'y') ( 'false' or 'n')	Indicate whether this award is served or unserved.
<b>Summer1PTCAwardAmount</b>	Number up to two decimal places	If left blank, will assume all Passport students are being entered by hand

### CSAW File Upload Layout (Cont.)

Field	Valid Inputs	Remarks
FallEnrollmentStatus	('Not enrolled' or '0') ( 'Full Time' or '1') ( 'Half Time' or '2') ( '3/4 Time' or '3') ( '< Half Time' or '5')	The enrollment status the student was eligible for at the time of disbursement or the enrollment at the census date for SNG unserved students. If left blank, this will be set to Not enrolled
<b>FallTermType</b>	(Quarter or '1') (Semester or '2'), optional	If left blank or excluded from file, will use the default term type
FallAppliedBaccalaureate	('true' or 'y') ( 'false' or 'n')	This only applies to students at CTCs. All other institutions should leave this blank. Determines whether this student is enrolled in an applied baccalaureate program for this term.
FallCBSAwardAmount	Number up to two decimal places	Maximum CBS award amount, minus specified state aid
FallSNGAwardAmount	Number up to two decimal places	Award amount, minus any DCA
FallSNGDCA	Number up to two decimal places	DCA amount, if awarded DCA
FallSNGAwardIsServed	('true' or 'y') ( 'false' or 'n')	Indicate whether this award is served or unserved.
<b>FallPTCAwardAmount</b>	Number up to two decimal places	If left blank, will assume all Passport students are being entered by hand
WinterEnrollmentStatus	('Full Time' or '1') ( 'Half Time' or '2') ( '3/4 Time' or '3') ( '< Half Time' or '5')	The enrollment status the student was eligible for at the time of disbursement
<b>WinterTermType</b>	(Quarter or '1') (Semester or '2'), optional	If left blank or excluded from file, will use the default term type
WinterAppliedBaccalaureate	('true' or 'y') ( 'false' or 'n')	This only applies to students at CTCs. All other institutions should leave this blank. Determines whether this student is enrolled in an applied baccalaureate program for this term
WinterCBSAwardAmount	Number up to two decimal places	Maximum CBS award amount, minus specified state aid
WinterSNGAwardAmount	Number up to two decimal places	Award amount, minus any DCA
WinterSNGDCA	Number up to two decimal places	DCA amount, if awarded DCA
WinterSNGAwardIsServed	('true' or 'y') ( 'false' or 'n')	Indicate whether this award is served or unserved.
<b>WinterPTCAwardAmount</b>	Number up to two decimal places	If left blank, will assume all Passport students are being entered by hand

### CSAW File Upload Layout (Cont.)

Field	Valid Inputs	Remarks
SpringEnrollmentStatus	('Full Time' or '1') ( 'Half Time' or '2') ( '3/4 Time' or '3') ( '< Half Time' or '5')	The enrollment status the student was eligible for at the time of disbursement
<b>SpringTermType</b>	(Quarter or '1') (Semester or '2'), optional	If left blank or excluded from file, will use the default term type
SpringAppliedBaccalaureate	('true' or 'y') ('false' or 'n')	This only applies to students at CTCs. All other institutions should leave this blank. Determines whether this student is enrolled in an applied baccalaureate program for this term
SpringCBSAwardAmount	Number up to two decimal places	Maximum CBS award amount, minus specified state aid
SpringSNGAwardAmount	Number up to two decimal places	Award amount, minus any DCA
SpringSNGDCA	Number up to two decimal places	DCA amount, if awarded DCA
SpringSNGAwardIsServed	('true' or 'y') ( 'false' or 'n')	Indicate whether this award is served or unserved.
<b>SpringPTCAwardAmount</b>	Number up to two decimal places	If left blank, will assume all Passport students are being entered by hand
Summer2EnrollmentStatus	('Full Time' or '1') ( 'Half Time' or '2') ( '3/4 Time' or '3') ( '< Half Time' or '5')	The enrollment status the student was eligible for at the time of disbursement
<b>Summer2TermType</b>	(Quarter or '1') (Semester or '2'), optional	If left blank or excluded from file, will use the default term type
Summer2AppliedBaccalaureate	('true' or 'y') ( 'false' or 'n')	This only applies to students at CTCs. All other institutions should leave this blank. Determines whether this student is enrolled in an applied baccalaureate program for this term
Summer2CBSAwardAmount	Number up to two decimal places	Maximum CBS award amount, minus specified state aid
Summer2SNGAwardAmount	Number up to two decimal places	Award amount, minus any DCA
Summer2SNGDCA	Number up to two decimal places	DCA amount, if awarded DCA
Summer2SNGAwardIsServed	('true' or 'y') ( 'false' or 'n')	Indicate whether this award is served or unserved.
<b>Summer2PTCAwardAmount</b>	Number up to two decimal places	If left blank, will assume all Passport students are being entered by hand

#### Remarks

- Winter term fields are not required for Semester institutions.
- Use the Applied Baccalaureate fields to signify if a student is attending an applied baccalaureate program. This only applies to students at CTCs. All other institutions should leave this blank.
- The SchoolCode field is an optional field. It may be completed or left blank.
- The SNGAwardAmount fields may be left blank if the student is unserved for that term.
- All Enrollment Status and Boolean data type (yes/no) fields are not case-sensitive.

## CHAPTER 5

### SNG AND CBS PAYMENTS, REPAYMENTS, AND REPORTING FOR NON REAL-TIME REQUEST INSTITUTIONS

#### **Procedures for Payment Requests, Student Repayments, and Reconciliation**

*This chapter applies only to public institutions not using **the real-time payment request method**. Public institutions using the real-time payment request method should refer to Chapter 6.*

All public institutions referred to in this chapter are expected to generate their own checks or deposits to individual student accounts for state aid recipients.

All institutions will be expected to use the real-time payment request method for the 2016-17 year.

#### **PAYMENT REQUESTS**

Institutions must submit monthly payment requests online for both SNG and CBS via CSAW in the WSAC Portal (see instructions at the end of this chapter). The amount of funds requested must be disbursed to students within 30 days of receiving the funds. Funds will be delivered to the institution within two weeks of receiving the request.

The aid director at each institution must monitor which institutional staff has permission to submit cash requests. SNG and CBS funds can be requested at the same time on the Request Funds page in CSAW.

Each institution is expected to utilize all initial funds by mid-June of each year. **Any funds not disbursed are to be returned to the Council prior to June 30, or as soon as possible during the reconciliation period.**

#### **Deobligations and Supplemental Requests for SNG Funds**

Deobligations of SNG reserves or unused CBS funds can be accepted throughout the year. The sooner in the year funds are deobligated, the easier they are to redistribute to institutions that need them. **Late academic year deobligations are strongly discouraged.**

Supplemental SNG funds are disbursed on a funds available basis in rounds via a distribution model to make sure institutions receive a proportionate share. The distribution process takes into account the number of served and unserved eligible students reported on the last completed reconciliation report.

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

If students withdraw for a term without earning at least 3 credits, no additional SNG or CBS payments may be made to the students for that term on or after a student's official withdrawal date. *(Note: State policy differs from the Federal policy on this issue of post withdrawal disbursements.)*

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

Retroactive SNG and CBS awards and payments **MUST** be made to **eligible CBS Scholars** for a prior term(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 a student's rate of satisfactorily completed credits (must be at least 3 credits) determined by the institution at the end of the term(s).

### **Retroactive Awards and Payments for Previous Terms for Other SNG Eligible Students**

Retroactive SNG awards and payments **MAY** be made to eligible SNG students (who are not also eligible CBS Scholars) for a prior term(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 a student's rate of satisfactorily completed credits (must be at least 3 credits) determined by the institution at the end of the term(s).

## **ARCHIVE CHECK REPORT**

### **SNG Archive in the WSAC Portal**

Institutions are provided an interface to the SNG Archive page in the WSAC Portal to view records or download a CSV file.

When opting to download a CSV file, it will be in the following format:

Column Name	Data Type	Description
SSN	Integer	9-digit integer (no dashes)
LastName	String	Up to 75 characters
FirstName	String	Up to 50 characters
InRepayment	Boolean	Either yes or no
UsedSNGQuarters	Decimal	Up to 3 decimal places
RemainingSNGQuarters	Decimal	Up to 3 decimal places
NextEligibleAADegreeYear	Integer	4-digit integer, or empty
NextEligibleAADegreeTerm	String	Either blank or one of the following: Summer1 Fall Winter Spring Summer2

"AA Degree" refers to all types of Associate degrees.

## **DISBURSEMENT PROCEDURES**

The institution may disburse state aid funds by either providing the student with a direct payment, or by crediting the student's account. Public institutions are expected to follow the same disbursement policy that they use for federal aid.

### **Enrollment**

Disbursements may be made only after the institution confirms enrollment. Awards must be consistent with enrollment status at the time of disbursement.

### **Conditions of Award**

Prior to disbursement, the institution must inform each state aid recipient of his or her responsibilities to the program(s) through a "Conditions of Award" statement. A sample statement is located in Chapter 8.

The statement must be presented annually or delivered to the student through paper or electronic means. The conditions of award statement does not need to be signed by the student as long as the institution can provide assurances to the Council that the terms of the award were presented to the student. It is the institution's responsibility to maintain documentation that the conditions were presented to the student.

### **Power of Attorney Disbursements**

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

### **Unclaimed Property**

The Washington Student Achievement Council has determined that all state student aid awards that have been disbursed<sup>1</sup> and remain unclaimed after three years for private institutions and two years for public institutions, shall be remitted to the state of Washington Department of Revenue, Unclaimed Property Section.

Unclaimed property includes state student aid refunds or balances, usually issued in the form of a check, which are never cashed by the student. Public institutions are expected to make reasonable attempts to locate the student for two years, private institutions for three years, before remitting to Department of Revenue.

Note that the unclaimed federal student financial aid policy involves a different process than the state policy referenced here. The federal policy was established to ensure that federal student aid funds never escheat to a state, institution or third party.

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<sup>1</sup> Disbursed state student aid awards include those funds accepted and received by a student in the form of check or deposit to the student account, as part of the student's financial aid package.

## REPAYMENT OF UNUSED STATE AID FUNDS

Repayment is a student responsibility. If a state aid recipient fails to earn the funds he or she receives, the student is required to repay those funds according to the Council's universal repayment policy. ***The State Grant Repayment Policy Requirements are mandatory for all participating institutions.*** A copy of the policy is below.

The institution is responsible for notifying students that they are in repayment.

**Repayments of less than \$50 shall not be referred to the Council. All repayment obligations for deceased students are forgiven.**

## SNG & CBS REPAYMENT POLICY REQUIREMENTS

### General

State aid recipients, who withdraw from the institution, are expelled, or otherwise complete zero credits in any given term, must repay state grants and the College Bound Scholarship, on a prorated basis.

For the purposes of this policy, "Award" is the amount of state grant or College Bound Scholarship for which the student was eligible during the enrollment period—after the institution made any required adjustments for need and enrollment level. All monies, whether disbursed to the student account or directly to the student, shall be included in the repayment calculation.

### Authority

State Need Grant ([WAC 250.20.051\(4\)](#))

### Known Last Date of Attendance

- If a student's last date of attendance can be verified and is prior to or on 50 percent of the term, the state grant repayment will be based on the percentage of the term **not** completed, or the percentage of the scheduled hours remaining in the payment period for clock hour schools.
- If the last date of attendance occurs after **50 percent** of the term, the state grant award is considered 100 percent earned and no state grant repayment is due.

### **State grant repayment formula: Known last date of attendance, prior to or on 50 percent of the term**

1. The percentage of state grant earned is calculated by dividing days in attendance by calendar days in term. Scheduled breaks of five or more days should be excluded from the calculation.
2. Subtract the percentage of state grant earned from 100 percent; this equals the percentage of unearned state grant.
3. Multiply the percentage of unearned state grant by the grant amount.
4. Multiply the amount from step 3 by 50 percent to determine the state grant repayment due.

**Example: Known last date of attendance, prior to or on 50 percent of the term:**

A student is awarded \$400 for a state grant and completed 20 percent of the term prior to withdrawal. The state grant repayment is calculated as follows:

1. The unearned percentage equals 80 percent (100% less 20% completed).
2. Unearned aid equals \$320 (80% of \$400 state grant award).
3. The repayment equals \$160 (\$320 X 50% reduction).

**Unknown Last Date of Attendance**

If a student attends a portion of a term and withdraws with no verified last date of attendance, the state grant repayment will be 50 percent of the grant amount with no additional adjustments.

**No-Show Repayments**

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

**General repayment policies:**

1. Repayments are based on the state grant award amount, including enrollment and packaging adjustments.
2. Verified withdrawal dates after 50 percent of the term equate to 100 percent earned state grant.
3. Unofficial withdrawals/no known last date of attendance equate to repayment of 50 percent of the state grant award.
4. No shows are 0 percent earned and equate to repayment of 100 percent of the state grant.
5. Official withdrawals or verified last date of attendance repayment calculation:  
State grant award amount multiplied by the percentage of unearned state grant multiplied by the 50 percent reduction equals the state grant repayment due.
6. The 50 percent reduction applied at the end of the repayment computation addresses un-reimbursable start up education costs and reduces the barrier for students intending to return to institution.
7. Repayments of less than \$50 should not be referred to the Council.
8. Institution repayment refund policy – as follows.

**Public institutions** may choose from the following options:

- Return the repayment amount directly to the Council and collect from the students.
- During the current academic year, the institution may collect student repayments and deposit them into their institutional State Grant funds to be awarded to other eligible students.
- Refer students directly to the Council.

## Repayment Referrals for Public Institutions

As soon as the institution is aware that a student owes a state aid repayment, a repayment record must be entered into the WSAC Portal using the Submit Transmittal feature. There are two types of repayment accounts: *In Repayment* or *Institution to Bill*.

### *In Repayment*

To refer a repayment account to the Council for collection, select the “In Repayment” status in the Submit Transmittal function on the Portal. If an Institution to Bill record exists for the repayment already, convert the original Institution to Bill account to an In Repayment account using the instructions at the end of this chapter. **If a student is a recipient of both SNG and College Bound, the repayments shall be referred to the Council simultaneously to ensure seamless and transparent billing to the student.**

If students contact the institution regarding their repayment after it has been referred to the Council, the institution shall direct students to Council’s contracted billing service, ECSI, at 1-888-549-3274. **Instruct them to reference school code 2H. For debts incurred before the 1997 year, refer the student to the WSAC Receivables Coordinator at 360-753-7632 or [sng@wsac.wa.gov](mailto:sng@wsac.wa.gov).**

### *Institution to Bill Accounts*

The institution must create Institution to Bill records for accounts that the institution chooses to actively collect on during the academic year. Institution to Bill records shall be entered into the Portal at the time a repayment obligation is determined. Doing so prevents students in repayment status from receiving aid at another institution by placing them on the SNG Archive and flagging them on the CBS cruncher.

The institution may retain the repayment account within the academic year if it continues active collection procedures or if a student is making payments to the institution; however, the institution shall not accept payments from the student past June 30, of the current year, and shall refer the balance to the Council for billing no later than August 31, after the close of the academic year.

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

A reduction in the student award shall correspond with funds collected within the academic year for Institution to Bill accounts. Those funds may then be awarded to other students.

## Re-award or Return of Repayments

Beginning in 2015-16, all funds received at the Council for referred repayments for the current fiscal year will be added onto the overall SNG available funds for redistribution, and will not go back to individual institutions' reserves.

All funds collected at the institution from student repayments may be re-awarded to other eligible students within that program, if repayments are received in the same fiscal year as disbursed. If the student has an In Repayment account at the Council, but the institution accepts funds, the institution must cancel the account by using the Submit Transmittal feature so that the student will no longer be billed.

Institutions should not accept funds from students after the close of the fiscal year for state aid repayments. Students that owe state funds should be referred to the Council's contracted billing service, ECSI.

### State Aid Repayment Referrals

Basic Steps:

1. Log on to the WSAC Portal
2. Input student SSNs
3. Select year and term of Repayment
4. Enter student data and refer student to WSAC

#### Step 1: Log on to the WSAC Portal

1. Access the WSAC Portal.
2. Your user name is your email address. You assigned your password when you created your Portal account.
3. From the Home page, click on:
4. Programs, then SNG or CBS, then Submit Transmittal.

#### Step 2: Input Student SSNs

Use the Search tab to access a student individually, or use the Search by SSNs tab to enter multiple SSNs.

### Online Receivable Transmittal



The screenshot shows a search interface with three tabs: "Search by Name" (highlighted in orange), "Search by SSNs", and "Search by Receivable Status". Below the tabs, the "Search by Name" section is active, displaying the text "Search by full or partial name". There are three input fields for "last", "first", and "mi" names, and a "Search" button below them.

The Search tab allows you to either search by SSN or by name. Type the information either in the SSN box, or in the name boxes. Click Search.

Enter the student's information, and select the year and term for the receivable. Use the **Receivable Status** drop down to select **Institution to Bill, In Repayment, or Less than \$50.**

<b>Permanent Address:</b>			
<input type="text" value="██████████"/> <small>street</small>	<input type="text" value="PUYALLUP"/> <small>city</small>	<input type="text" value="WA"/> <small>state</small>	<input type="text" value="98374"/> <small>zip</small>
<b>Mailing Address:</b>			
<input type="text"/> <small>street</small>	<input type="text"/> <small>city</small>	<input type="text"/> <small>state</small>	<input type="text"/> <small>zip</small>
<b>Home Phone:</b>			
<input type="text" value="253"/>	<input type="text" value="222"/>	<input type="text"/>	<input type="text"/>
<hr/>			
<input type="text" value="2014-2015"/> <small>Academic Year</small>	<input type="text" value="Pierce College"/> <small>Institution</small>	<input type="text" value="Spring"/> <small>Term</small>	<input type="button" value="Save"/> <input type="button" value="Save &amp; Continue &gt;"/>
<b>SNG</b> Award found in CSAW		<b>CBS</b> Award NOT found in CSAW	
<b>Receivable Status</b> <input type="text" value="Institution To Bill"/>		Cannot create receivable for non-existent award after CSAW upload has been saved for final interim report.	

Click the **Save** button to save the record, or the **Save and Continue** button to save the receivable and move on to the next student.

## FINAL INTERIM REPORT - RECONCILIATION OF RECORDS

SNG and CBS records must be reconciled at year end at the time the Final Interim Report is submitted. For reconciliation, the institution must submit a data report detailing each student's receipt of aid on a term-by-term basis. The reconciliation record layout is the same as the layout used for the quarterly Interim Reports. The reporting details may be found at the end of the "Reporting Requirements" chapter.

### Deadlines

The year-end Reconciliation of Records report and any unexpended funds must be received by the Council no later than July 8, 2016. This reconciliation deadline is necessary for the Council to generate the final Archive Report for the following year.

### Cash Request Process for Public Institutions

1. First log in to the Portal at: <https://fortress.wa.gov/wsac/portal>  
Your user name is your email address. If you don't know your password, please contact the person who has Administrator rights for the Portal at your institution.
2. Once logged into the Portal, from the menu up top, click on:
  - a. Programs
  - b. SNG
  - c. CSAW

In CSAW click the “Cash Request” tab.



The screenshot shows the top navigation bar of the CSAW system. On the left, it says 'CSAW'. Next to it is a dropdown menu showing '2015-2016'. To the right of the dropdown is a button that says 'send a secure message to WSAC'. Below the navigation bar are four tabs: 'Upload', 'Address Edits', 'Cash Request' (which is highlighted with a blue background and a small blue icon), and 'Interim Report'. Below the tabs is a main content area with the heading 'Welcome to the College Bound/SNG Award Warehouse!'. Underneath the heading is the text 'To get started:' followed by a numbered list: '1. Upload', '2. Address Edits', and '3. Request funds/Submit interim report'. An arrow from the text above points to the 'Cash Request' tab.

3. You will be asked to enter:

- a. Your institution’s expenditures to date,
- b. The amount requested for each program, and
- c. The date of expenditures in this format (mm/dd/yyyy).

The fields must be completed before moving forward. If they are not completed, you will receive a red error message. If you are not requesting cash please enter a zero.

4. Once you have entered all of the information you will click the “Review Cash Request” button.
5. The information you entered will be summarized. Please verify the information is correct then click on “Submit Cash Request.”
6. Once the cash request has been submitted you will receive the following notice: “The cash request has been successfully submitted.”

If you have any questions regarding the cash request process please contact the Council at [sng@wsac.wa.gov](mailto:sng@wsac.wa.gov).



## CHAPTER 6

### SNG AND CBS PAYMENTS, REPAYMENTS, AND REPORTING FOR REAL-TIME REPORTING INSTITUTIONS

#### **Procedures for Electronic Fund Transfer Payment Requests, Student Repayments, and Reporting**

All private institutions must use the Electronic Fund Transfer (EFT) reimbursement method for paying students, and are required to front monies to eligible students and then request reimbursement from the Council.

Public institutions using real-time reporting will also use this same process for reporting and payments, but are not required to have previously disbursed funds to eligible students.

#### **ELECTRONIC FUND TRANSFER (EFT) REQUEST PROCEDURE**

##### **Payment Requests**

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

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

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

**NOTE:** The clock hour school payment request calendar also is located at the end of this chapter.

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

SSN  
Tax ID Number (TIN)  
9-digit Need Access number

Payment requests may be made any time from late-July through mid-June of the fiscal year. Payments for a new school year will not begin until the college's participation agreement is approved, all institutions are fully reconciled for the prior year, and the archive is completely updated. EFT payment requests will be processed within 24 hours of receipt whenever possible.

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

## SNG and ARCHIVE CHECK REPORT

### SNG Archive in the WSAC Portal

Institutions are provided an interface to the SNG Archive page in the WSAC Portal to view records or download a CSV file. When opting to download a CSV file, it will be in the following format:

Column Name	Data Type	Description
SSN	Integer	9- digit integer (no dashes)
LastName	String	Up to 75 characters
FirstName	String	Up to 50 characters
InRepayment	Boolean	Either yes or no
UsedSNGQuarters	Decimal	Up to 3 decimal places
RemainingSNGQuarters	Decimal	Up to 3 decimal places
NextEligibleAADegreeYear	Integer	4-digit integer, or empty
NextEligibleAADegreeTerm	String	Either empty or one of the following: Summer1 Fall Winter Spring Summer2

Please note: AA degree refers to all types of Associate degrees, not just Associate of Arts degrees.

### ASSOCIATE DEGREES RECEIVED AT PRIVATE INSTITUTIONS

Any private institution that grants Associate Degrees must report new degree recipients to the Council at the end the term the degrees were earned. Institutions are to report all new Associate degrees, not just those who received SNG or CBS funds. Files must be sent through the secure email function of the WSAC Portal to the [SNG@wsac.wa.gov](mailto:SNG@wsac.wa.gov).

#### Excel or CSV file format:

Field 1	SSN	9 Characters
Field 2	YYYY	4 Characters
Field 3	TERM	1 Character (one of the following)
		Summer1 1 Fall 2 Winter 3 Spring 4 Summer 5
Field 4	INST CODE	4 Characters

## **DISBURSEMENT PROCEDURES**

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

If a student does not enroll, withdraws from a program, reduces the enrollment rate, or does not claim funds within the 30 day period, institutions must adjust the student's award in CSAW. By reducing the award amount in CSAW, those funds will be freed up to award to other students.

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

**NOTE:** If you do not have reimbursements to offset your reduced awards by reconciliation, you must return the under-spent amount to the Washington Student Achievement Council.

### **Student Disbursement Options at Private Institutions**

At private institutions, each student must have the opportunity to receive an institution check that may be deposited at his or her own bank or to request that the state aid funds be applied to his or her student account at the institution. This is not required at public colleges.

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

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

If students withdraw for a term without earning at least 3 credits, no additional SNG or CBS payments may be made to the students for that term on or after a student's official withdrawal date. (*Note: State policy differs from the Federal policy on this issue of post-withdrawal disbursements.*)

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

Retroactive SNG and CBS awards and payments **MUST** be made to **eligible CBS Scholars** for a prior term(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 a student's rate of satisfactorily completed credits (must be at least 3 credits) determined by the institution at the end of the term(s).

## **Retroactive Awards and Payments for Previous Terms for Other SNG Eligible Students**

Retroactive SNG awards and payments **MAY** be made to eligible SNG students (who are not also eligible CBS Scholars) for a prior term(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 a student's rate of satisfactorily completed credits (must be at least 3 credits) determined by the institution at the end of the term(s).

## **Required Student Directive for Private Institutions**

Private institutions must use the Council's Student Directive Form to record a student's decision on where to apply their financial aid payment. The student's financial aid payment can be deposited directly into a student's account or disbursed in the form of a check based on their choice on the directive. For a copy of the student directive, see Chapter 7.

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

## **Conditions of Award Statements**

Prior to disbursement, the institution must inform the state aid recipient of his or her responsibilities to the program through a "Conditions of Award" statement. A copy of this statement is located in Chapter 7.

The statement must be presented or delivered to the student through paper or electronic means each year. The Conditions of Award does not have to be signed by the student as long as the institution can provide assurances to the Council that the terms of the state aid awarded were presented to the student. It is the institution's responsibility to maintain documentation that the conditions were presented to the student.

## **Power of Attorney Disbursements**

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

## **UNCLAIMED PROPERTY**

The Washington Student Achievement Council has determined that all state student aid awards that have been disbursed<sup>1</sup> and remain unclaimed after three years for private institutions and two years for public institutions, shall be remitted to the state of Washington Department of Revenue, Unclaimed Property Section.

Unclaimed property includes state student aid refunds or balances, usually issued in the form of a check, which are never cashed by the student. Public institutions are expected to make reasonable attempts to locate the student for two years, private institutions for three years, before remitting to Department of Revenue.

Note that the unclaimed federal student financial aid policy involves a different process than the state policy referenced here. The federal policy was established to ensure that federal student aid funds never escheat to a state, institution or third party.

## **STUDENT REPAYMENTS**

Repayment is a student responsibility. If a grant recipient leaves an institution during an academic term in which he or she receives a SNG, the student is required to repay SNG funds according to the Council's universal repayment policy.

### **The State Grant Repayment Policy Requirements are Mandatory for all Participating SNG Institutions.**

Private institutions are responsible for repaying the Council for overpayments resulting from calculation error and for student repayments. Institutions shall reduce the student's award to reflect the amount the student was eligible to receive. Private institutions collect funds back from the student and cannot transfer collection to the Council.

An institution can re-award student repayments to other students if the repayments and awards fall within the current academic year. If repayments are for a prior year, the institution must send a check to the Council.

All repayments for deceased students are forgiven.

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<sup>1</sup> Disbursed state student aid awards include those funds accepted and received by a student in the form of check or deposit to the student account, as part of the student's financial aid package.

## SNG AND CBS REPAYMENT POLICY REQUIREMENTS

### General

State Grant recipients, who withdraw from the institution, are expelled, or otherwise complete zero credits in any given term, must repay the SNG and CBS programs on a prorated basis.

For the purposes of this policy, "Award" is the amount of state grant or College Bound Scholarship for which the student was eligible during the enrollment period, after the school made any required adjustments for need and enrollment level.

All monies, whether disbursed to the student account or directly to the student, shall be included in the repayment calculation.

### Authority

State Need Grant ([WAC 250.20.051\(4\)](#))

### Known Last Date of Attendance

- If a student's last date of attendance can be verified and is prior to or on 50 percent of the term, the state grant repayment will be based on the percent of the term **not** completed (or the percent of the scheduled hours remaining in the payment period for clock hour schools).
- If the last date of attendance occurs after **50 percent** of the term, the state grant award is considered 100 percent earned and no state grant repayment is due.

**State grant repayment formula: Known last date of attendance, prior to or on 50 percent of the term.**

1. The percentage of state grant earned is calculated by dividing days in attendance by calendar days in term. Scheduled breaks of five or more days should be excluded from the calculation.
2. Subtract the percentage of state grant earned from 100%; this equals the percentage of unearned state grant.
3. Multiply the percentage of unearned state grant by the grant amount.
4. Multiply the amount from step 3 by 50% to determine the state grant repayment due.

**Example: Known last date of attendance, prior to or on 50 percent of the term:**

A student is awarded \$400 for a state grant and completed 20% of the term prior to withdrawal. The state grant repayment is calculated as follows:

1. The unearned percentage equals 80% (100% less 20% completed).
2. Unearned aid equals \$320 (80% of \$400 state grant award).
3. The repayment equals \$160 (\$320 X 50% reduction).

### **Unknown Last Date of Attendance**

If a student attends a portion of a term and withdraws with no verified last date of attendance, the state grant repayment will be 50% of the grant amount with no additional adjustments.

### **No-Show Repayments**

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

### **General repayment policies:**

1. Repayments are based on the state grant award amount, including enrollment, and packaging adjustments.
2. Verified withdrawal dates after 50% of the term equate to 100% earned state grant.
3. Unofficial withdrawals/no known last date of attendance equate to repayment of 50% of the state grant award.
4. No shows are 0% earned and equate to repayment of 100% of the state grant.
5. Official withdrawals or verified last date of attendance repayment calculation:
6. State grant award amount multiplied by the percent of unearned state grant multiplied by the 50% reduction equals the state grant repayment due.
7. The 50% reduction applied at the end of the repayment computation addresses un-reimbursable start up education costs and reduces the barrier for students intending to return to school.
8. Repayments of less than \$50 should not be referred to the Council.
9. Institution repayment refund policy.

**Public institutions** may choose from the following options:

- Return the repayment amount directly to the Council and collect from the students.
- During the current academic year, the institution may collect student repayments and deposit them into their institutional State Grant funds to be awarded to other eligible students.
- Refer students directly to the Council.

**Private institutions** should return state grant repayments directly to the Council and collect from the students.

## **INFORMATION FOR CLOCK HOUR SCHOOLS**

In order to equate the clock hour programs to the credit-hour programs, the following policy makes the annual award amount equitable at both types of institutions.

### **Payment Periods**

1. Payments will be made for 300 clock hour increments within a quarter term payment schedule.
2. Payments may be requested once every ten weeks for individual students. The eligible student may receive up to five payments in one fiscal year.
3. Additional payments shall not be disbursed until the previous payment's clock hours have been earned/completed. Exceptions may be made based on the institution's probationary policy (see Chapter III), if that policy was approved as part of the Institutional Agreement to Participate.
4. For a full-time, full-year (900 clock hours) student in good standing, the school is required to submit payment requests for at least three payment periods (equivalent to three quarterly payments). Institutions have the option of distributing more than three payments within an academic year.

### **Program Lengths**

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

A payment request can be submitted for students nearing completion of their program with between 150 and 299 remaining hours.

### **Remainder Hours - Award Percentages**

75 - 149 hours	=	25% of a full time award
150 - 224 hours	=	50% of a full time award
225 - 299 hours	=	75% of full time award
300+ hours	=	100% of full time award

### **Academic Year Cross-Over Programs**

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

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

## Clock Hour Payment Request Calendar

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

*Assign the payment based on when the majority of the enrollment will occur.*

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

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

## REQUESTING SNG AND CBS FUNDS

### Basic Steps:

- Log on to the WSAC Portal
- Upload your file
- Fix any file format errors
- Address edits
- Review students and submit for reimbursement

### Instructions:

- Access the WSAC Portal at <https://fortress.wa.gov/wsac/portal>
- Your user name is your email address. If you don't know your password, contact the person who has administrator rights for the Portal at your institution.
- Once logged into the Portal, from the menu up top, click on:
  1. Programs
  2. SNG
  3. CSAW

CSAW		2014-2015			
Upload	Address Edits	Request Funds	Interim Report	Search/Add	Grant Amounts
<p>Welcome to the College Bound/SNG Award Warehouse!</p> <p>To get started:</p> <ol style="list-style-type: none"> <li>1. Upload</li> <li>2. Address Edits</li> <li>3. Request funds/Submit interim report</li> </ol>					

Generate your file data in your internal system and save it to your computer.

**NOTE:** Please see file format at the end of these instructions. Each upload attempt represents a fresh start. This means that each upload **MUST** contain **ALL** enrollment data for the current academic year.

Click the Upload link. Use the browse button to locate your file. Then click 'Upload.' While the file is uploading, a yellow progress bar will display the real-time status of your upload.

After the upload is completed you will be presented with a file summary. The file summary notifies you of formatting errors, provides informational messages, displays an award overview by term, and summarizes changes from the file that was just uploaded to any existing data already in CSAW.

**File Summary Example:**

File summary

0 Errors

1 Informational-only messages [P](#)

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**Award Overview**

	Amount	# Awards	Served	Unserved
Fall	\$14,431.00	5	5	0
Spring	\$14,376.00	6	6	0
<b>Total</b>	<b>\$28,807.00</b>	<b>11</b>	<b>11</b>	<b>0</b>

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**Changes from this file**

SNG award-level changes		Student-level changes	
To be added:	11	To be added:	6
To be updated:	0	To be updated:	0
To be removed:	701	To be removed:	374
To be cancelled:	0		

[save file](#)
[discard file](#)

A file upload that contains formatting errors cannot be saved until it is corrected and resubmitted. You will have the option to view each error by clicking on the magnifying glass logo next to "Errors." A box will appear with a list of your errors. They are listed in chronological order. You have the option to download a list of all errors to a csv file.

An Informational-only message contains any headers in the file that are not recognized

If a valid header is not recognized it can be excluded from the file. You also have the option to download to .csv file.

Once all errors are reviewed and resolved, click on "save upload." A progress bar will appear once you click on save, it will notify you when the file is done saving. Once the save is complete, click on "finish upload and proceed to edits" to move on to the next step.

Click on Address Edits. Your edits will begin to load. If you do not have any edits, you can proceed to any of the other tab. If you have edits, it's best that you take care of these now so that you can submit for reimbursement for these students. This also will prevent you from submitting your interim report if the edits are not addressed.

Once in the edit page, refer to the processing bar in the upper right corner. You can see the progress of your file bouncing against the edits.

### Select Awards to Reimburse

- Let me choose all awards for an entire term(s)
- Let me upload a list of existing students
- Let me choose individual awards

You can begin correcting edits while your file processes. Use the drop down to see the edit categories you have, and select one to begin work on.

Use the edit refresh button to refresh your edit list as the file processing completes.

You are provided with a list of edits in the category you selected. Review the information provided and make changes to enrollment or award amount in this screen, if necessary. You can use the enrollment drop down or change the award amount and save.

If you need to view more detailed student information to research the issue, click the link to the student's individual record.

After clicking on the link, the student detail will open in a new internet tab. The award that has an issue will be flagged with a **!!!** symbol.

To edit the record, click on the edit button. You can now change the data for the award in question. When done, click Update.

Go back to the Edits screen to begin work on your next edit. The record that you just corrected will disappear once you click the edit refresh button. In some cases an edit cannot be resolved by changing data. In this case, you would override the edit.

To override an edit, click the 'override' button. You will be prompted to enter an override reason. When finished, click Submit. Once you click Submit, the edit will disappear.

Once you have corrected all of your edits, the edit drop down will be empty. You may have "informational only" edits, these do not need to be addressed. You may now search for students that you just uploaded or proceed to Submit for Reimbursement. Click on Submit for Reimbursement. You are presented with 3 options on selecting awards to reimburse.

The **first option (all awards for entire term(s))** is a quick way to access your students that are ready to be reimbursed. You will be presented with a breakdown of awards ready to be reimbursed by term after selecting 'Let me choose all awards for an entire term(s).'

Click the check box next to the term and program you wish to submit. Once checked, the Selected Amount box on the top of your screen will update. This shows the dollar amount of what is to be submitted. For your convenience, remaining balance is also reflected.

After selecting your term, click on 'Preview and Submit.' This presents you with the detail list of students and their award amounts to be reimbursed. It defaults to every student checked; these are the ones to be submitted for reimbursement. If you don't want to 'select all', click in the check box to unselect an award.

The last step before submitting is the disclaimer box if you are a private institution. Please check this box of you agree. You may now click on 'Submit for Reimbursement.'

By submitting this reimbursement request for state financial aid, I certify that each student: meets this program's eligibility requirements, has a student directive on file, and has been paid the amount specified with institutional funds. Adjusted awards must all flow through a non-interest bearing account.

The **second option (upload a list of existing students)** is used for submitting a list of all the students in CSAW that you would like reimbursement for via a file upload. The format is .csv or .txt with SSNs/SIDs separated by commas, tabs or new lines.

Let me upload a list of existing students

Submit a list of all the students in CSAW that you would like reimbursement for:

.csv or .txt file with SSNs/SIDs separated by commas, tabs or new lines

Which terms should the students in the file be reimbursed for?

Summer 1     Fall     Winter     Spring     Summer 2

Program	Selected Amount					Total	Allocation	
	Summer 1	Fall	Winter	Spring	Summer 2		Available	Remaining
SNG	\$0.00	\$4,259.00	\$0.00	\$0.00	\$0.00	\$4,259.00	\$88,715.22	\$84,456.22
CBS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	n/a	n/a
<b>Total</b>	\$0.00	\$4,259.00	\$0.00	\$0.00	\$0.00	\$4,259.00	n/a	n/a

Select Awards to Reimburse

Let me choose all awards for an entire term(s)

	SNG	CBS	Total
Summer 1	<input type="checkbox"/> \$0.00	<input type="checkbox"/> \$0.00	\$0.00
Fall	<input checked="" type="checkbox"/> \$4,259.00	<input type="checkbox"/> \$0.00	\$4,259.00
Winter	<input type="checkbox"/> \$5,679.00	<input type="checkbox"/> \$0.00	\$5,679.00
Spring	<input type="checkbox"/> \$77,835.00	<input type="checkbox"/> \$1,129.00	\$78,964.00
Summer 2	<input type="checkbox"/> \$0.00	<input type="checkbox"/> \$0.00	\$0.00
<b>Total</b>	\$87,773.00	\$1,129.00	\$88,902.00

**NOTE:** This is different from the file you uploaded in the Upload section. You must upload students into CSAW before using this method of submitting for reimbursement.

Browse to your saved file, click on Preview and Submit. This presents you with the detail list of students and their award amounts to be reimbursed. It defaults to every student checked, meaning these are the ones to be submitted for reimbursement. If you wish to not 'select all', click in the check box to unselect an award.

Last step before submitting is the disclaimer box. Please check this box to approve. You may now click on 'Submit for Reimbursement.'

The **third option (choose individual awards)** gives you the opportunity to manually look for student awards. You can either use the Search box and search for an individual or click on the SSNs/SIDs tab to search for multiple awards.

Let me choose individual awards

**Search** **SSNs/SIDs**

Student:      
SID SSN Last Name First Name

Show awards for: Winter ▾

0 awards selected

After selecting the award(s), click on Preview and Submit. This presents you with the detail list of students and their award amounts to be reimbursed. It defaults to every student checked, meaning these are the ones to be submitted for reimbursement. If you wish to not 'select all', click in the check box to unselect an award.

Last step before submitting is to read the disclaimer box and check by approving. You may now click on 'Submit for Reimbursement.'

If you have any questions regarding CSAW please contact the State Need Grant team at: [sng@wsac.wa.gov](mailto:sng@wsac.wa.gov).



## CHAPTER 7

### CONDITIONS OF AWARD AND DIRECTIVES

#### Forms Used to Provide Required Notification to Students

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

Prior to the first disbursement of state aid every year, each institution must inform all state aid recipients of their responsibilities to the program through a "Conditions of Award" statement. A template for the statement is located below.

The statement must be presented annually or delivered to the student through paper or electronic means. The conditions of award statement does not need to be signed by the student as long as the institution can provide assurances to the Council that the terms of the SNG award were presented to the student. It is the institution's responsibility to maintain documentation that the conditions were presented to the student.

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#### **Conditions of Award**

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

In order to receive this financial assistance you will need to comply with the following conditions. If you have questions or find that you cannot comply with these conditions, please contact the financial aid office.

1. You do not owe a repayment to any federal or state grant nor are you in default on a state or federal student loan.
2. You must meet the minimum eligibility requirements for the program(s) awarded.
3. If you do not attend or if you withdraw from your classes, you may owe a repayment of all or part of the award amount(s).
4. The offer of this financial assistance is subject to, and conditioned upon, the availability of funds. The Washington Student Achievement Council and the institution through which the grant or scholarship is awarded reserve the right to withdraw, reduce, or modify the awards due to funding limitations or due to changes in circumstances which affect your eligibility for the program(s).
5. You must maintain academic progress standards following your institutions policies for state aid programs. You must not pursue a degree in theology or hold a bachelor's degree.

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

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

Private institutions must use the Council's Student Directive Form which follows to record a student's decision on where to apply their state financial aid payment(s) each term. The student's financial aid payment can be deposited directly into a student's account or disbursed in the form of a check based on their choice on the directive. In addition, institutions:

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

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

**STUDENT DIRECTIVE FOR DISBURSEMENT OF STATE STUDENT AID**

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

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

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

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

**Please choose one of these options:**

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

**OR**

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

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

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

\_\_\_\_\_  
Date

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

**NAME of Institution**

**Address**

**Address**

**Address**

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

\_\_\_\_\_  
Date