

## 3600 REHABILITATION TRAINING

**3604 Maximum Fees Allowable Amount for Sponsorship of Training.** ~~The maximum amount the Division will pay for training costs will not exceed the current tuition and fee rate for baccalaureate programs at the highest in-state public institution of higher education. Normally this will be West Virginia University (WVU) or Marshall University (MU).~~

~~A. *Clients Receiving Federal Financial Aid.* For clients receiving federal financial aid, the maximum amount cannot exceed the client's unmet need as determined by the institution's Financial Aid Office as this would create an over-award in the individual's financial aid package. Books and supplies are not included in the maximum fee calculation and may be provided even in excess of unmet need if their purchase does not create an over-award that results in a reduction of federal financial aid.~~

~~B. *Clients Not Receiving Federal Financial Aid.* For clients not receiving federal financial aid, the maximum training costs will remain at the fee rate for baccalaureate programs at the highest in-state public institution of higher education. Books and supplies are not included in the maximum fee calculation.~~

The Division will only authorize for **tuition, fees, books, and supplies.** For the purpose of sponsorship, academic fees (e.g., lab fees, certification testing, and examination costs) are considered to be part of tuition and fees. The Counselor will provide counseling and guidance to the client regarding how they will pay the remainder of their costs (e.g., room and board, transportation, personal expenses, and miscellaneous costs) through all other third party resources. The Division's maximum allowable amount should not be confused with "unmet need."

A. *Tuition and Fees.* The maximum amount the Division will pay for training costs will not exceed the current tuition and fee rate at the highest in-state public institution of higher education. Usually this will be either West Virginia University (WVU) or Marshall University (MU).

1. *Undergraduate Degrees.* The amount for tuition and fees for baccalaureate training will not exceed the current tuition and fee rate at the highest in-state public institution of higher education. Other levels of undergraduate training (e.g., certificates and associate degrees) will be based on the cost of the specific degree the client is seeking, but not to exceed the baccalaureate rate. The Division will only sponsor up to the cost of the degree.

2. Post-Baccalaureate Degrees. The Division's financial participation for a post-baccalaureate degree will not exceed the current tuition and fee rate at the highest in-state public institution of higher education for graduate classes in the client's field of study. Post-baccalaureate training is subject to the consideration of the *Economic Resource Survey* or *Student Financial Plan*. (The Student Financial Plan will be available only if the client is receiving specific graduate financial assistance, e.g., teaching assistant, resident assistant, tuition waivers or loans.)

B. Books and Supplies. Books and supplies are not included in the Division's maximum sponsorship amount for tuition and fees. Books and supplies may be provided up to the amount established on the *Student Financial Plan* after determining the Division sponsorship amount for tuition and fees, but will not be provided in excess of the remaining unmet need. If no Student Financial Plan is available, then books and supplies will be provided at cost, not to exceed the following guidelines:

1. Books. The Division will purchase only textbooks required for the scheduled classes outlined on the course syllabus. Books may be authorized at cost up to the Financial Aid Office maximum, unless this creates an over-award in the client's financial aid package.

2. Supplies. Supplies are those goods required to complete the training program. Items may include, but are not limited to, notebook paper, pencils, pens, dictionaries, printer consumables (ink and paper), storage media (such as CD-R discs or flash drives), and calculators. The total allowable amount that may be paid for supplies is \$160.00 dollars per twelve-month year. Items such as tools, work apparel, uniforms, computers, printers, and external peripheral devices are **not** considered supplies but may be purchased when needs are identified and the purchase is justified by the Counselor as a training requirement (generally such items may be purchased under other policy provisions found elsewhere in this manual).

**3604.1 Maximum Fee for Collegiate Summer School.** The maximum payment for each college summer school session will not exceed the current tuition and fee rate at the highest in-state public institution of higher education. The *Student Financial Plan* does not include costs for summer school sessions, therefore, the Counselor will utilize the *Economic Resource Survey*. Payment for summer school room and board will be allowed only with approval from the Assistant Director of Field Services. Books and supplies may be provided in

~~accordance with information contained in Training Services and Economic Need found later in this section. Transportation maintenance for summer school may be provided in accordance with Section 4300.~~

**3604.2 Out-of-State or Private Institutions.** The Counselor will encourage the client's attendance at in-state public colleges or universities whenever the individual's field of study is available within the state.

A. *Maximum Amount Fee.* The maximum amount fee for out-of-state or private institutions will not exceed the current rate for baccalaureate program ~~tuition and fees~~ at the highest in-state public institution of higher education and will be based on the specific degree the client is seeking. ~~Exceptions may occur only when the client has exhausted all available financial aid, including loans, and has a remaining balance of unmet need utilizing the Student Budget established by the training institution. Requests for exceptions will be submitted through channels to the Assistant Director of Field Services.~~

### **3605.2 Training Services and Economic Need Tests**

A. *Expected Family Contribution as Basis for Economic Need.* ~~The Expected Family Contribution (EFC) is the amount a client and/or family can be expected to contribute toward the client's educational costs. All data used to calculate a client's EFC are from information the client and/or the client's family provides on the *Free Application for Federal Student Aid* (FAFSA). Regardless of whether the client qualifies for financial aid, the EFC serves as the basis for determining the level of economic need of clients sponsored by the Division in all higher educational institutions that receive federal aid. The EFC amount indicated by the institution's FAO applies only to training costs such as tuition, room and board, books and supplies, and maintenance. After the EFC and financial aid from other sources have been applied, the Counselor may provide assistance not to exceed the maximum unmet need.~~

B. *Economic Need.* ~~If the client is receiving Division sponsorship, tuition and fees, maintenance, transportation, and placement/training equipment are subject to consideration of economic need. The two economic need considerations are the *Economic Need Survey* and the *Student Financial Plan*. The *Economic Need Survey* will be utilized for institutions not receiving federal aid while the *Student Financial Plan* will be utilized for institutions receiving federal aid.~~

1. *SSI and/or SSDI Recipients.* ~~Individuals receiving Supplemental Security Income (SSI) and/or Social Security Disability Insurance~~

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(SSDI) are subject to federal guidelines using the *Student Financial Plan*; however, if the institution does not utilize federal aid, SSI and/or SSDI recipients are not subject to the *Economic Need Survey*.

2. ~~*Books and Supplies.*~~ Books and supplies are not subject to the Division's economic needs test.

a. ~~*Books.*~~ The Division will purchase only textbooks required by the scheduled classes as outlined on the course syllabus. Books may be authorized at cost unless this creates an over-award in the client's financial aid package.

b. ~~*Supplies.*~~ Supplies are those goods required to complete the training program. Items include, but are not limited to, notebook paper, pencils, pens, dictionaries, printer consumables (ink and paper), storage media (CD-Rs/flash drives), and calculators. The total amount that may be paid for supplies is \$80 per year (12-month period) regardless of term length. Items such as tools, work apparel, uniforms, computers, printers, and external peripheral devices are **not** considered supplies but may be purchased if identified and justified as a training requirement. Generally these items may be purchased under other policy provisions and will be justified by the Counselor.

C. ~~*Support Services While in Training.*~~ The Division's economic need exemption schedule will be used to determine the level of the client's contribution for all other costs such as physical or mental restoration services, rehabilitation technology, or other support services needed while the client is in training. However, if the client receives SSI or SSDI, other support services will not be subject to economic need.

There are two economic need tests: the *Student Financial Plan* and the *Economic Resource Survey*. The *Student Financial Plan* (from the FAFSA) will be utilized for institutions receiving federal aid. The *Economic Resource Survey* will be utilized for institutions not receiving federal aid.

A. *Student Financial Plan as the Economic Need Test.* For clients receiving federal financial aid, the maximum amount the Division will sponsor cannot exceed the client's unmet need as determined by the institution's Financial Aid Office as this would create an "over-award" in the individual's financial aid package. The Expected Family Contribution (EFC) from the *Student Financial Plan* is the amount a client and/or family can be expected to contribute toward the client's education costs. All data used to calculate a client's EFC are from

information the client and/or the client's family provides on the FAFSA. The EFC appears on the *Student Financial Plan* as the "Family's Total Financial Contribution" and remains the same regardless of which educational institution the client elects to attend. The client or the client's family is expected to contribute the EFC amount indicated by the Financial Aid Office. the Counselor may not use Division funds to assist with the EFC. Such efforts will result in an over-award in the client's financial aid package. After the EFC and financial aid from other sources (as identified on the Student Financial Plan) have been applied, the Counselor may provide assistance toward tuition, fees, books and supplies, but not exceeding the maximum unmet need.

*B. Economic Resource Survey as the Economic Need Test.* For clients not receiving federal financial aid, the maximum training costs will remain at the fee rate for the highest in-state public institution of higher education. The maximum amount the Division will pay toward tuition, fees, books and supplies will be based on the cost of the specific degree the client is seeking (e.g., certificate, associate, baccalaureate, graduate, or post-graduate). The Division's Economic Resource Survey will be used when the following occurs:

*1. Training Institution Does Not Receive Federal Financial Aid.* The Division's policies related to funding of training services in institutions of higher education do not apply. However, the Division's economic need test does apply. In the client is eligible, grants or other forms of third-party aid should be obtained and utilized prior to authorization of services by the Division.

*C. SSI and/or SSDI Recipients.* Individuals receiving Supplemental Security Income (SSI) and/or Social Security Disability Insurance (SSDI) are subject to federal guidelines regarding the *Student Financial Plan*. However, the Division's economic needs tests do not apply regarding SSI or SSDI recipients if the institution does not utilize federal financial aid.

## **3606 Types of Vocational Training.**

### **3606.5 Tutorial Training.**

*A. General.* Tutoring services are subject to economic need tests. The Counselor will assure that the tutor is qualified by education and experience to present the academic tutoring in a qualified manner.

B. *Post-Secondary*. When tutorial training is needed at the post-secondary level, the Counselor will refer the client to the tutoring service offered by the college, university, community college, or other post secondary training institution.

1. *Non-Specialized*. Non-specialized tutorial training is generally offered to clients free of charge. If free tutoring is not available to the client through the training institution, the Division will pay the tutor's usual and customary fee not to exceed the rate allowed by the Board of Education in the county where the services are being provided.

2. *Specialized*. The Counselor may authorize specialized tutoring if required due to the client's disability and if provision of tutoring services will remove or circumvent barriers to completion of training. The Counselor must document the client's need for specialized tutoring, such as verification and recommendation from student support services.

**3606.9 College Training.** College training is defined as training that will lead to an associate, baccalaureate, or post graduate degree upon completion. College training may be provided to the client to prepare for placement in any occupation within the range of professional, managerial, technical, and related fields for which a college degree is traditionally required. Training in institutions of higher education will be provided consistent with the client's needs, capabilities, and goals. Sponsorship in four-year and post graduate degree college programs should be provided only after full consideration has been given to associate degree and other vocational training programs.

A. *Sponsorship Conditions*.

1. *Vocational and Psychological Assessment*. Through appropriate vocational and psychological assessment, the Counselor will determine that the client is intellectually, psychologically, and emotionally ready for college. It must be verified that the client has the functional capability, maturity, and other qualifications that normally predict success in college. The Counselor will encourage the client to pursue vocational areas and fields of major study that will not be negatively affected by the individual's disability.

2. *Institutional Admissions Requirements*. The client must meet all admissions requirements established by the institution of higher education that the client plans to attend.

3. *Full-Time Requirement.* Clients attending an institution of higher education must be enrolled as full-time students as defined by the institution of higher education and must complete at least ~~28~~ 30 hours per school year. Hours earned in summer school will count toward meeting the ~~28~~ 30 hours requirement. Exceptions may be made with District Manager approval only with documented evidence of disability related or extenuating circumstances that interfere with the client's ability to maintain full-time requirements or to complete 30 hours per school year.

4. *Grade Point Average (GPA) Requirements.*

a. *Semester and Cumulative GPA Requirements.* The client must maintain at least a 2.0 GPA each semester in addition to maintaining a cumulative 2.0 GPA for continuing Division financial sponsorship.

b. *Major Field GPA Requirement.* The client must maintain at least the cumulative GPA required by the institution for the individual's major field of study.

c. *Exceptions.* In order to allow the client an opportunity to meet the minimum 2.0 GPA requirement when disability related or other extenuating circumstances have prevented achievement of the required GPA (e.g. exacerbation of the client's disability that precludes attendance or family disruptions that interfere with attendance and class work), Division financial sponsorship may be continued for one additional semester at the discretion of the District Manager. If the client cannot consistently maintain the minimum cumulative GPA required for the individual's major field of study, the Counselor will reassess the justification for training.

d. *Developmental Courses.* Clients may take developmental courses if they complete a minimum of nine non-developmental hours of courses per semester. All developmental coursework will count toward calculating the client's overall GPA. Exceptions may be granted by the District Manager.

e. *Verification.* Prior to sponsorship of the next term, the client must submit a copy of his/her grades to the Counselor of Record. Failure to provide a copy of grades will result in cancellation of payment on any previously submitted authorization to the institution. The institution will be notified in writing on the authorization that payment for tuition or other costs is contingent upon the client's maintenance of required GPA standards. The client likewise will be

advised that all Division sponsorship will be discontinued if the required GPA is not maintained.

5. *Financial Aid Requirement.* No Division funds may be authorized until all third party benefits have been explored. Each client is required to apply for available federal, state, and private financial aid on a year-by-year basis. Clients who are in programs ineligible for federal financial aid (e.g. graduate programs and short term training due to the length or type of service) are exempt from this requirement. Sponsorship may begin if the application is received prior to the beginning of the following semester. A copy of the Student Aid Report (SAR) is not necessary if the *Student Financial Plan* is available. However, if the training facility's Financial Aid Office is unable to provide the Division with the *Student Financial Plan*, the SAR and the client's financial aid award letter is required to obtain the Expected Family Contribution (EFC) and to identify all available third party resources.

6. *Criteria for Summer School Sponsorship.* The Counselor should discuss the client's reasons for attending summer school to determine if summer school attendance is ~~the most cost effective alternative to obtaining~~ necessary to obtain college credits toward completion of the academic program. Full-time enrollment in summer school is not required. Fourteen summer school credit hours sponsored by the Division will constitute one semester and count toward the cumulative ten-semester limit for sponsorship. Summer school may be counted toward completion of the thirty (30) credit hours per year requirement. Coursework must apply toward completion of the program. Sponsorship is subject to the Division's economic needs test since no Student Financial Aid Plan is available. The Division will only pay the actual costs for tuition, fees, books and supplies, not to exceed the current fees of the highest in-state public institution of higher education.

B. *Additional Conditions for Associate Degree Sponsorship.* An associate degree is awarded upon completion of at least two, but fewer than four years of work beyond the secondary level.

1. *General.* The client must meet the preceding criteria appearing in college sponsorship conditions. Additionally, in order to be considered for Division sponsorship in an associate degree program, the client must:

a. Have earned a GED or a cumulative GPA of at least 2.0 on a standard high school diploma; and,



b. Complete the ACT with a minimum composite score of 16, except when at least one of the following applies:

(1) The client scores at least 14 on the ACT due to limitations presented by a learning disability, ADD/HD, other cognitive deficit(s), or sensory impairment; or,

(2) The client graduated from high school more than five years prior to the request for sponsorship; or,

(3) Without Division sponsorship the client completes at least 12 credit hours, 9 of which must be non-developmental classes, within one term and earns a GPA of at least 2.0 in that term.

2. *Maximum Period of Sponsorship.* The maximum period of Division sponsorship for an associate degree will not exceed one additional semester beyond that required to complete the associate degree.

3. *Matriculation Agreements.* If the client successfully completes an associate degree program that has a matriculation agreement with a baccalaureate program, the Division will consider continued sponsorship not to exceed a total of ten semesters. Exceptions may be granted by the District Manager.

C. *Additional Conditions for Baccalaureate Degrees.*

1. *General.* The client must meet the preceding criteria appearing in college sponsorship conditions and have earned a GED or a cumulative GPA of at least 2.0 on a standard high school diploma.

2. *Standardized College Testing.* The Enhanced American College Testing Assessment (ACT) and the Scholastic Aptitude Test (SAT) are excellent benchmarks for the Counselor to assist the client in determining if a college program is the individual's best option. The ACT produces a student profile that estimates the client's academic potential for various colleges and judges the appropriateness of the client's educational and vocational plans.

a. *Minimum Requirements.* Sponsorship for a baccalaureate degree program may be provided if the client attains a minimum composite score

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of 19 on the ACT or a minimum combined score of 910 on the SAT. The ACT or SAT is required for Division sponsorship whether it is required for admission into the college in which the client plans to enroll. In order to gain admission into a specific degree program, the client may be required to obtain a higher ACT or SAT score. For example, a college of engineering may require a minimum ACT score of 20. If so, the Division will require the minimum standard established by the institution for sponsorship purposes. In those instances where the institution requires an ACT or SAT score above the Division's minimum standard yet allows admission on a provisional basis, sponsorship may be provided if the client's scores meet the Division's minimum.

b. *Exceptions.* Clients not meeting ACT or SAT requirements may be considered for future sponsorship if:

(1) The client scores at least 17 on the ACT or 830 on the SAT due to limitations presented by a learning disability, ADD/HD, other cognitive deficit(s), or sensory impairment; or,

(2) The client graduated from high school more than five years prior to the request for sponsorship; or,

~~(3) Without Division sponsorship and within one term the client completes at least 12 credit hours, 9 of which must be non-developmental classes, with a 2.0 GPA in that term; or,~~

(4) (4) The client who is deaf plans to attend either Gallaudet University or the National Technical Institute for the Deaf (NTID).

3. *Maximum Period of Sponsorship.* Division sponsorship for baccalaureate degree training will not exceed a total of 10 semesters. Summer school sessions sponsored by the Division are included in this maximum, with each 14 credit hours of summer school constituting one semester toward the 10-semester limit. To ensure the client is enrolled in courses needed for the field of major study and appropriate toward attainment of a degree, the Counselor will conduct a degree audit at least annually to review the courses scheduled by the client for the upcoming term(s). Exceptions to the 10-semester limit will be granted only when the need for an extension is the result of disability related or extenuating circumstances that prevent the client from completing college within 10 semesters. Requests for approval of such extensions must be submitted in writing to the

District Manager and require final approval by the Assistant Director of Field Services.

D. *Conditions for Post Baccalaureate Training.*

1. *General.* Graduate training beyond the baccalaureate level may be provided only if a master's degree is required for employment in the client's chosen vocational goal.

2. *Documentation.* The Counselor will document the need for graduate training on the *Program Explanation*. A vocational goal that necessitates post baccalaureate training requires documented evidence that the client has the intellectual abilities and motivation to succeed at the post baccalaureate level. Additionally, the client's IPE must include a written stipulation that graduate training is contingent upon the client's academic success in the undergraduate program and the individual's acceptance and admission to an appropriate graduate program offering training in the chosen vocational field.

3. *GPA Requirements.*

a. *To Enter Graduate Program.* The client must have a cumulative undergraduate GPA of at least 2.75 and meet admissions criteria as defined by the institution the client plans to attend.

b. *For Continued Sponsorship.* The client must maintain either a 3.0 semester GPA or the institution's standard, whichever is higher.

4. *Maximum Period of Sponsorship.* The maximum period of sponsorship is limited to eight full-time semesters (quarters, terms, etc.) for a master's degree. If the client's vocational goal requires longer, the Counselor may proceed only with District Manager approval.

5. *Full-Time Requirement.* Clients attending college at the post baccalaureate level must be enrolled as full-time students (as defined by the institution in which the individual is enrolled) for consideration of Division sponsorship.

~~6. *Sponsorship Limits.* The Division's financial participation for a post baccalaureate degree will not exceed the current tuition and fee rate at the highest in-state public institution of higher education for baccalaureate classes in~~

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~~the client's field of study and is subject to the consideration of economic need policies. The Division's limit on post baccalaureate financial assistance will be stated clearly on all IPEs in which post baccalaureate training is planned.~~

~~E. *Grants and Financial Aid Resources.* Grants, work study programs, and certain student loans are based upon the client's financial need. Student aid is determined by the Financial Aid Officer (FAO) after submission of the financial need application to the appropriate agency. The *Free Application for Federal Student Aid* (FAFSA) is used by most schools. The FAFSA is used for Pell Grants, Supplemental Educational Opportunity Grants (SEOG), work study, and others, including the West Virginia Higher Education Grant. The FAFSA provides basic information used to determine eligibility for most need based financial aid programs because it establishes the expected family contribution (EFC). There is no charge to complete the FAFSA. The FAO is responsible for establishing student budgets for all students. The Division has an agreement with FAOs to establish the joint budget and joint agency participation for students with disabilities. This agreement utilizes the *Student Financial Plan*. In accordance with federal agreements and the joint agreement with FAOs, special needs of students with significant disabilities are considered and may exceed the normal budget for that student. Before submitting the initial *Student Financial Plan* to the FAO, the Counselor must include the client's special needs on the form. The *Student Financial Plan* must be completed annually if Division funds are to be utilized.~~

~~1. *Client's Financial Participation.* The amount of the family's contribution toward college costs will be based on the expected family contribution (EFC) that is calculated with completion of the FAFSA. The EFC appears on the *Student Financial Plan* as the "Family's Total Financial Contribution" and remains the same regardless of which educational institution the client elects to attend. The client or the client's family is expected to contribute the EFC amount indicated by the FAO. The Counselor may not use Division funding to assist with the EFC. Such efforts will result in an over-award in the client's financial aid package. However, the family's contribution may be applied toward costs of personal expenses and/or travel that are part of the student's budget, reserving other fixed costs such as tuition, fees, and room and board for any available financial aid.~~

1. Grants. Pell Grants, Supplemental Educational Opportunity Grants (SEOG), and others, including the West Virginia Higher Education Grant, are awarded based on the FAFSA. The FAFSA provides basic information used to determine eligibility for most need-based financial aid programs because it

establishes the expected family contribution (EFC). There is no charge to complete the FAFSA.

3. 2. Work Study. When the *Student Financial Plan* includes work study activities as a resource, the client will be expected to participate in the work study program. Exceptions will be granted to a client who is receiving benefits or assistance through a government program that considers work study as income, thus potentially reducing or eliminating the client's benefits or assistance. If the client and Counselor have concerns about the client's ability to perform certain work study activities, arrangements will be made with the FAO to identify more appropriate work study opportunities, if any, that are consistent with the client's abilities and limitations. If no suitable arrangements can be made for a work study opportunity, the Counselor may discuss other options with the client and advise the FAO of the reasons for withdrawing from the work study program.

3. Scholarships are awarded based on academic performance and other criteria specific to the grantor. Some scholarships are designated for specific training costs, such as the Promise Scholarship much be applied toward to client's tuition and fees. Counselors must apply any such provisions to the designated cost(s) as the calculated the amount of Division sponsorship.

2. 4. Student Loans. Several types of direct student loans having low interest rates and flexible repayment plans are available through the U. S. Department of Education. Repayment is deferred until after the student graduates. Clients may apply for subsidized and/or unsubsidized loans.

a. *Subsidized Loans.* In order to receive a subsidized loan the client must demonstrate financial need. Subsidized loans often are made available to students who still have a remaining need after other needs-based financial aid has been applied. When a client receives a subsidized loan, the government pays the interest while the client is in school. The Division will not require clients who attend in-state public institutions of higher education to accept student loans. A subsidized loan will not be included in the calculation of available funding unless the client chooses to accept the subsidized loan. Generally, there are two types of subsidized loans:

(1) *Stafford Loans.* A Stafford Loan may be granted by Direct Lending Schools whereby the educational institution grants loans directly to the student and/or parents. These loans are governed by the Federal Direct Student Loan Program (FDSLPL). Under the Federal Family Education Loan Program

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(FFELP), loans also may be provided by private lenders such as banks or credit unions. Regardless of lender, all loans offer the same interest rates and are guaranteed against default by the federal government.

(2) *Perkins Loans.* The Perkins Loan is awarded to undergraduate or graduate students with exceptional financial need. A Perkins Loan is a campus-based program with the educational institution acting as the lender using a limited pool of funds provided by the federal government.

b. *Unsubsidized Loans.* Unsubsidized loans are available to any student regardless of financial need. Like subsidized loans, repayment is deferred until after graduation. The student is responsible for payment of the interest incurred with the loan, but may elect to pay only the interest while in school or defer the interest payments along with the loan balance until after graduation. The Division will not require clients who attend in-state public institutions of higher education to accept student loans. An unsubsidized loan will not be included in the calculation of available funding unless the client chooses to accept the unsubsidized loan.

~~4. *Financial Aid Formula to Determine Unmet Need.* The student budget established by the FAO will be considered as the client's actual costs in regard to Division sponsorship. To determine the maximum amount of financial assistance that may be provided by the Division, the Counselor first must deduct the EFC amount designated by the FAO. From the remaining balance, the Counselor will deduct all grants, work study programs, scholarships, and loans that the client chooses to accept. The remainder is the most the Division may pay up to the maximum allowed for college training without creating an over-award. To illustrate: Total Student Budget — EFC — other financial aid resources and loans accepted by the client = balance the Division may pay without creating an over-award.~~

F. *Student Budget.* The Financial Aid Office (FAO) is responsible for establishing student budgets for all students. The student budget established by the FAO will be considered as the client's actual costs in regard to Division sponsorship. The Division has an agreement with the FAO to establish the joint budget and joint agency participation for students with disabilities. The agreement utilizes the *Student Financial Plan*. In accordance with federal agreements and the Division's joint agreement with FAO, special needs of students with significant disabilities are considered and may exceed the normal budget for that student. Before submitting the initial *Student Financial Plan* to the FAO, the Counselor

must include itemized costs of “Special Student Needs” on the form. The *Student Financial Plan* must be completed annually if Division funds are to be used.

*G. Determining Division Sponsorship.* The Division will only sponsor tuition, fees, books and supplies toward an academic training program. It is important to ensure that the Division’s sponsorship for tuition, fees, books and supplies cannot exceed the Unmet Need. To determine the maximum amount of financial assistance that may be provided by the Division, the Counselor will utilize following five-step process:

*Step 1. Determine unmet need.* Using the Student Financial Plan provided by the FAO, the Counselor must determine the Unmet Need. First, deduct the Expected Family Contribution (EFC) amount from the Student Budget amount. Then, deduct all grants, work study programs, and scholarships, along with any loans the client chooses to accept. The remainder is the Unmet Need and is the most the Division may pay for tuition, fees, books and supplies (up to the maximum allowed for college training) without creating an over award. The following formula illustrates:

**Total Student Budget,**  
**Minus EFC,**  
**Minus other financial aid resources**  
**and any loans accepted by the client,**  
**Equals the Unmet Need.**

*Step 2. Determine Total Tuition and Fees.* To determine the total tuition and fees amount, the Counselor will use the figures for the tuition, general fees, and any special fees as provided by the FAO, then add those figures together. The following formula illustrates:

**Tuition,**  
**Plus General Fees,**  
**Plus Special Fees,**  
**Equals Total Tuition and Fees.**

*Step 3. Determination Tuition and Fees Remaining Balance.* The Counselor will deduct any scholarships that are specifically designated for tuition from the Total Tuition and Fees (from Step 2). This usually is the Promise Scholarship but might include other scholarships. If the Student Financial Plan lists other scholarships but does not designate them for tuition, the Counselor may

need to contact the FAO to confirm how they will be applied. The following formula illustrates:

**Total Tuition and Fees,**  
**Minus Scholarships designated for tuition,**  
**Equals Tuition and Fees Remaining Balance.**

Step 4. Determine Sponsorship Amount for Tuition and Fees. To determine the amount the Division may pay for tuition and fees, the Counselor will subtract the Tuition and Fees Remaining Balance (Step 3) from the Unmet Need (Step 1). The balance is the amount the Counselor may pay for tuition and fees, up to the Division's maximum amount, as long as an Unmet Need balance is still available and an over-award is not created. The following formula illustrates:

**Unmet Need,**  
**Minus Tuition and Fees Remaining Balance,**  
**Equals Division Sponsorship Amount for Tuition and Fees**

Step 5. Determine Division Sponsorship for Books and Supplies. Division sponsorship of books and supplies will be dependent on the availability of an Unmet Need balance after Division sponsorship of tuition and fees has been calculated. If no remaining Unmet Need is available, then books and supplies cannot be purchase by the Division. If an Unmet Need balance is available, then books and supplies can be purchased up to the FAO amount, so long as an over-award is not created. The Counselor will deduct the Division Sponsorship Amount for Tuition and Fees (Step 4) from the Unmet Need (Step 1). The balance is the Remaining Unmet Need and the amount the Division may pay toward books and supplies. The following formula illustrates:

**Unmet Need,**  
**Minus Division Sponsorship Amount for Tuition and Fees,**  
**Equals Division Sponsorship Amount for Books and Supplies.**

**3607 Procedure for Financial Aid Coordination for College Training.** These procedures apply to both in-state and out-of-state colleges that participate in the Federal Financial Aid Program. When the client is considering a school, the FAFSA will be sent to the FAO for each school under consideration. The client will advise the Counselor as to which college is selected. The client then will assume responsibility for contacting the FAO.

### **3607.1 Completing the *Student Financial Plan.***



A. When a school is selected, the client and Counselor will complete Part 1 of the *Student Financial Plan* and include an itemized estimate of the costs of “Special Student Needs,” if applicable. ~~which~~ The plan will be signed by the client and, if a minor, by the client’s guardian. The Counselor will send a copy to the FAO, who will complete Part 2 (except for item “DRS Authorization”) and return it to the Counselor.

B. The Counselor will enter details of “DRS Authorization,” ~~if any~~ for tuition, fees, books and supplies only, based on the Division’s sponsorship calculations. The amount the Division is to pay will not exceed the amount annually budgeted by the FAO, ~~unless the client’s special needs have been considered and agreed to by the FAO. If the Division amount exceeds the amount budgeted by the FAO, an over-award will exist making it necessary for the FAO to reduce funding from the school to eliminate excess funding.~~ The Counselor will ~~forward~~ return a copy to the FAO as permanent record of the Division’s participation, if any, in the client’s *Student Financial Plan*.

C. A new *Student Financial Plan* will be prepared for each academic year in which the client is in college training.

**3607.2 Establishing Residency Status.** Clients enrolling in a West Virginia public institution of higher education shall be assigned a residency status by the institution for admission, tuition, and fee purposes. West Virginia domicile may be established upon completion of at least 12 months of continued presence within the state before the date of registration, provided that such 12 month presence is not primarily to attend any institution of higher education in West Virginia. If the institution rules that the client must pay out-of-state tuition and fees, the client should request an appeal for relief. The client will provide the Counselor with results of the appeal.

### **3608 Liaison Counselors**

A. *Assignment.* The District Manager will assign a Counselor to serve as Liaison Counselor for each training facility located within the respective district. ~~Contact the~~ The Supervisor of Transition and Education and Employment Programs ~~for information about~~ will maintain a statewide list of Liaison Counselor assignments.

B. *Role of the Liaison Counselor.* The Liaison Counselor will:

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1. Establish and maintain a close relationship with the training facility and become thoroughly knowledgeable about the facility's programs;
2. ~~Meet with the referral~~ In the instance of a referral from the training facility, contact the Counselor of Record in order to facilitate case development ~~in the instance of a referral from the training facility;~~
3. Establish and maintain a working relationship with the training facility's Disability Services Office;
4. Maintain and disseminate information ~~to clients, Counselors, and applicable persons~~ regarding disability services available through the training facility;
5. Establish and maintain a working relationship with the training facility's registrar, bursars, and FAO; and
6. ~~Establish and maintain a working relationship with the training facility's housing office~~ Report Fall and Spring semester academic dates and the training facility's refund policy to the Supervisor, Transition and Education Programs.
7. ~~Establish and maintain information regarding accessible housing;~~
8. ~~Act on behalf of the Counselor of Record in emergencies or as requested; and,~~
9. ~~Assist the client and Counselor of Record with training facility appeals.~~

**3609 Counselor of Record Responsibilities.** The Counselor of Record has primary responsibility to monitor the client's progress in the training program. The Counselor of Record will notify the appropriate Liaison Counselor of the client's name, case identification number, territory number, contact information for the Counselor of Record, and client departure.