DVR Training Grant Online Portal Update

Summer 2018

Central Office DVR Staff

Department of Workforce Development

WISCONSIN
DWD

Training Agenda

2018-2019

- Roles of DVR, FAO and the DVR Student
- Annual System Entry Responsibilities and Timeframes
- System Updates
- Questions and Resources
- Process Overview

Division of Vocational Rehabilitation Role

- Create Training Grant
- Enter in student details, credential and MSG
- Process to FAO
  - Initial
  - Review with Consumer and make adjustments (exceptions)
  - Process for Payment
- Notify FAO with known changes (New information enrollment or credit changes)

Financial Aid Office Role

- Enter school details
- Processing DVR training grant
  - Initial completion for academic year
  - Send to DVR for review
  - Verification/Adjustment by term at census date
- Notify DVR with known changes (New FA availability, enrollment or credit changes)

DVR Consumer Role

- Apply for FAFSA (October 1)
- Sign Training Grant
- Review TG with DVR prior to start of term
- Notify FAO or DVR with changes (New information related to enrollment or credit changes)
- Required to provide grades and schedule at each term and proof of graduation.

Annual System Entry

- Please ask any new personnel to create an account as soon as possible so that they can begin processing DVR training grants.
- All schools will have from July 2-July 11 to update term configuration and census dates.
- DVR staff will be creating new Training grants starting July 16th.
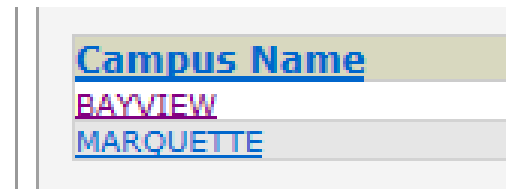
To update your school:

1.) Login to the system

2.) Review the College tab for accuracy

3.) Select the Campuses tab

4.) Select the campus you want to update

Annual System Entry

Check or Update:

Number of Terms

Summer School

Full-time credits

Graduate credits

Special Instructions

FAO Contact

This information MUST be entered in before updating Census Dates!

FAO Campus Information

|	
FAO College Name:	MARQUETTE
Campus Name:	MARQUETTE
Active:	☑
City:	MILWAUKEE
Payment/Remittance Address:	⌄
Undergraduate Activity Code:	052 Training: 4 yr Univsty/College ⌄
Graduate Activity Code:	056 Training: Graduate/Doctorate ⌄
Number of Terms per School Year: Include optional terms (Summer) in the Term count	3 ⌄
Where is Summer in the School Year:	○ Start ⦿ End ○ No Summer Term
Full-Time Undergrad Credits: Number of credits a student must earn to be considered full time for the school year.	24
Full-Time Graduate Student Credits: Number of credits a student must earn to be considered full time for the school year.	18
Special Instructions:	Books are included in the Cost of attendance.
	Text Limit: 4000	Text Entered: 46
FAO Contact:	ULRICH,BETH ⌄
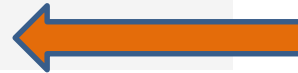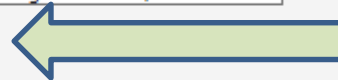
Annual System Entry

Click the Add/Update box

Add/Update Census Dates

Select 2018-2019

Add a new Census Date

Start of the new Census Date: 2018 - 2019

Save   Cancel

Enter the Census dates

Add new Census Dates
A Census Date is required for each Term available but can be changed later.

Term 1

Term 1 Census Date: 09/05/2018

Term 2

Term 2 Census Date: 01/30/2019

Term 3: Summer

Term 3 Census Date: 06/17/2019

Save   Cancel

Annual System Entry

The updated census dates will now be displayed.
SAVE the page.

Census Dates

Note: Click link under Action to display Census Dates for previous School Years)

School Year	Terms and Census Dates
2018 - 2019	Term 1 - 09/05/2018 Term 2 - 01/30/2019 Term 3 - 06/17/2019

Credit calculation

The Training grant will calculate the amount based on credits.

$208.34 per credit*

-Allows for more accurate funds to the student.

-The TG is flexible and takes into account various credit allocations.

*277.78 for graduate credit

Calculation by term

Training grants will not be issued for more than the credits taken by term and will top out at full-time.

Any adjustments + or - will be applied to the term and **will not** be added to or deducted from the next term.

- The Financial Aid Office can now select a notification option when a new form is sent for calculation.
- On the Personnel Tab:

Send Emails when new Message received:	☑
Send Emails when new Forms routed:	☑

Updates: Calculations flexible

- The Training Grant can now be modified up until a payment is created by DVR staff.
- This will allow for changes to be made and not force payments to be done outside of the DVR portal.

What is the DVR unmet need?

Tuition and Fees

Books and Supplies

Transportation

Dependent Care Expenses

Other Costs Required

Minus

Family Contribution

Financial Aid

Need based scholarships

Who can I contact if I have questions?

email: DVRFAO@dwd.wisconsin.gov

Policy questions: Jessica Holton

Portal questions: Jenny Wendlandt

Should the FAO complete the training grant for the whole year?

Yes. Please complete all terms except summer and include all known costs and resources (financial aid). Those fields will be adjustable each term as the TG is forwarded to you from DVR. DVR is able to help make some cost projections with consumers.

What do we do if we don't know if a scholarship is need based?

> Please make a comment in the resources section of the training grant and DVR will work with the consumer to identify what type of scholarship it is.

Where do we list other things, such as WI GI Bill waiver, third party billing, or employer reimbursement?

> Please make a comment in the resources section.

Why would a school receive a check in one semester but a purchase order in the next?

This was likely an error. This past year due to the "locking" of the calculations it became necessary to process payments outside of the TG portal. If you received a PO for a Financial Aid Eligible program the payment was not expedited and it should have been.

Why does DVR process exceptions?

DVR consumers sometimes have situations that need to be addressed by granting an exception to the typical funding process. Exceptions are provided for students who need additional costs to be covered due to their disability or other reasons.

Continued eligibility for student financial aid requires the student to be making Satisfactory Academic Progress (SAP). By federal law and regulations, college policies for measuring SAP must not only consider the grades earned by the student, but also the pace of progress toward a degree. The pace requirement is called the 150% Rule.

DVR can allow a student to receive funds from DVR beyond the 150% rule. DVR staff must case note discussion and approval from a Director or Supervisor. DVR students cannot be funded for failure to make Satisfactory Academic Progress due to poor grades or academic standing. *Example: Retraining for IPE goal due to acquired disability.*

If a student does not provide:

❑Grades (for previous term)

❑Schedule (for current term)

❑Signed TG form

Prior to the school census date, they cannot be provided funding for that term.

Please direct any questions to DVR.

Process Overview TG Status Descriptions

Training Grant Status	Action taking place
Draft	When DVR creates a TG for the school year Also Automatically creates an Authorization
Blank TG w/Signature	Draft TG with signature collected or scanned in IRIS.
Submitted to FAO	Draft TG sent to FAO in IRIS. FAO completes initial estimate.
Estimate received from FAO/Review w/Consumer	Estimated TG sent back to DVR from FAO
Waiting for census date/FAO Confirmation	Waiting for census date and confirmation or adjustment of TG amount
Waiting for PO Payment	Payment steps need to be completed to: 1.)Approve the PO 2.)Complete Receiving 3.)Route to CCP 4.)Payment issued to School by CCP
Completed/Closed	Term has ended (Completed) or school year has ended (Closed)

TG Status Tab

Available Statuses:

- ○ Draft
- ● Blank TG w/Signature
- ○ Submitted to FAO
- ○ Estimate received from FAO/Review w/Consumer
- ○ Waiting for census date/FAO Confirmation
- ○ Waiting for PO Payment
- ○ Completed/Closed

Status Change History

Status Changed By	Date Changed	Status Description
Kathleen Enders	5/3/2017 1:50:24 PM	Blank TG w/Signature

DVR creates a TG for the school year

- Dropdown to select school, year, additional funds details, school and campus-Opens a TG for the student

- Automatically creates an Authorization and entry on Work List

- Pulls school information to configure the TG for the academic year.

- DVR: collects signature student ID, details for MSG and credentials, instructions (optional)

- DVR verifies Grades and Schedule

- DVR hits **SEND**

FAO to complete initial estimate

FAO will divide academic year cost of attendance and resources (student aid or expected family contribution) by the number of terms and enter them for the year. **SEND**

Students who have not completed ALL
necessary steps may have a delay
in TG processing :

                FAFSA completed

                Approved for enrollment

                No holds

DVR to Review estimated TG with consumer

- Review the cost of attendance figures and the resources identified on the TG form. [Print screen] with student and enter casenote to reflect discussion.

- The DVR training grant is not intended to cover all expenses for a student. It is a grant that takes into account other resources.

- If funding is adequate, no exception is needed. If funding is not adequate, discuss why the student thinks they require more funds. The student can contact the school for information about their financial aid package.

- If an exception is requested, use form included on the term page.

Add Exception

- After review (and any exceptions) **SEND**

FAO to confirm or adjust credits, cost of attendance or resources at census date

After the census date the FAO will make any necessary adjustments and return
TG to DVR for payment via expedited check. **SEND**

Adjustments

- If a student drops a class or withdraws.
- DVR will abide by the schools pro-rated refund policy.
- A check should be sent to DVR if a refund is due. Follow Fiscal Manual instructions.
- The refund should be applied to the term in which it is effective and **should not** be applied to another term.

Questions?

DVR Resources

DVRFAO@dwd.wisconsin.gov

Policy: Jessica Holton (414) 216-7566

Portal: Jenny Wendlandt (608) 516-6469

http://dwd.wisconsin.gov