



Policy No. 306	Subject: Financial Assistance for Post-Secondary Training
Section: Services	Revised: 05/2018
Signature: Brandy McOmber, Resource Manager	Version: FINAL

1. DEFINITIONS

Financial assistance is provided to job candidates participating in post-secondary education who are students in good standing and making satisfactory progress toward their employment goal. The fee schedule rate established by IVRS for Basic Assistance is based on the grade level the job candidate is in college. It calculates tuition and fees (not including application or equipment fees), supplies (not including equipment or tools), and books. The fee schedule amounts are based upon full-time status. Summer tuition availability and rates are determined annually. A reduction in the total amount authorized from the fee schedule is only calculated when the Basic Assistance through IVRS would reduce grants from Federal, State and local governments, or non-merit scholarships. Staff should refer to the published fee schedule for established rates for post-secondary funding. Staff may also utilize the Academic Terms by Vendor report located in IRSS to identify the established fee amounts for a particular college or program.

2. AGENCY EXPECTATIONS

Post-secondary training requires an in-depth discussion of the individual’s strengths and resources to be successful in college. All job candidates attending a post-secondary institution are expected to receive the following counseling and guidance services in order to make an informed choice about the institution they choose to attend and the requirements for success:

- a. Financial Literacy: All job candidates prior to starting college shall receive a thorough analysis of their financial resources and the costs of attending college. The budget worksheet should be utilized as a tool to facilitate this discussion and must be updated at least annually, or as often as needed to assist the job candidate. The



budget worksheet must be completed for anyone requesting IVRS Basic Assistance regardless of whether they are considered a dependent for tax purposes.

- b. **Informed Choice:** IVRS staff notifies the job candidate of other colleges that are less costly that offer the same academic vocational program. Regardless of the institution the job candidate attends, the tuition and fees authorized is consistent depending on the level the job candidate is in college according to the standard fee schedule. In this manner, the job candidate may maximize the amount of funding received by attending a community college during the first two years of school or may exercise informed choice and attend a university or a more expensive school instead. This informed choice discussion assists job candidates in understanding that a choice of a more expensive school means they may possibly have additional debt upon completion of that program.
- c. **Comparable Services and Benefits:** IVRS staff should discuss with the job candidate how any tuition assistance IVRS provides will be applied to the job candidate's financial situation. The budget worksheet discussion helps to identify all areas of need a job candidate may have in relation to attending college programs identified in the Individualized Plan for Employment (IPE). IVRS staff should also discuss other programs available in the community that may also provide financial assistance to the job candidate for college. In this way, IVRS staff are also exploring comparable services and benefits with the job candidate and assuring the job candidate has a good understanding of the costs of college, how these costs will be handled, and how IVRS Basic Assistance will be spent. This financial analysis allows the job candidate to understand what IVRS will fund and how to attend college in a cost effective manner. All job candidates who are attending a program that qualifies for Federal Financial Aid must provide a copy of their financial aid award letter regardless of whether or not they qualify for financial aid or private pay. Application for FAFSA must be completed annually.

3. IVRS BASIC ASSISTANCE

When it does not reduce grants or non-merit scholarships from Federal, State or local entities, the total IVRS Basic Assistance may be authorized, as identified in the fee



schedule. IVRS staff may need to communicate with the school the job candidate is planning to attend as well as any Federal, State or local entity providing assistance. If IVRS staff determine that IVRS Basic Assistance reduces funding from any of those entities, then the amount authorized may be less than the IVRS Basic Assistance amount or no assistance at all depending upon the impact on those comparable benefits.

- a. Whenever possible, the total IVRS Basic Assistance amount is authorized directly to the institution of higher education. In some instances, this is not possible (i.e. parent works at the school and therefore tuition is covered, or the institution does not allow for overpayment). In these situations, up to the IVRS Basic Assistance amount can be applied towards those categories that fall within IVRS Basic Assistance (books, fees, supplies) to another entity. If job candidate preference is to purchase or rent books elsewhere (i.e. an online bookstore), then this amount can be authorized to that entity, but would be subtracted from the IVRS Basic Assistance amount. IVRS staff must ensure that IVRS Basic Assistance does not reduce those grant sources.
- b. The IVRS Basic Assistance supports job candidates in a post-secondary program as follows:

Community Colleges:

- i. When a job candidate is attending a program of study at an Iowa community college that qualifies for Federal Financial Aid, the amount authorized is based on the established rate for that community college. When a job candidate is attending a community college that is out-of-state, please refer to the "Private or Out-of-State Colleges" section listed in this policy.
- ii. When a job candidate is attending a program of study at a community college that does not qualify for Federal Financial Aid, the amount authorized is the established percentile rate.

Regent Institutions:

- iii. When a job candidate is attending a program of study at a Regent Institution and is a freshman or sophomore, the amount authorized is at the "Other (1st & 2nd yr)" rate listed on the fee schedule.



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- iv. When a job candidate is attending a program of study at a Regent Institution and is at the junior or higher level, the amount authorized is at the established rate for that Regent institution (junior, senior, graduate, post-graduate).
- v. When a job candidate must attend a program of study at a Regent institution as a freshman because attending first at a community college would delay their graduation rate because the courses for their major begin as freshman, the amount authorized is at the junior or higher level established rate for that Regent institution. This requires an exception; refer to the “Exceptions” section of this policy.
- vi. When a job candidate attends a Regent institution for medical school, law school, veterinary school, or dental school, the amount authorized is at the corresponding established rate on the fee schedule.

Private or Out-of-State Colleges:

- vii. When a job candidate attends a private or out-of-state college and is a freshman or sophomore, the amount authorized is at the “Other (1st & 2nd yr)” rate listed on the fee schedule.
- viii. When a job candidate attends a private or out-of-state college and is at the junior or senior level, the amount authorized is at the “Other (3rd & 4th yr)” rate.
- ix. When a job candidate attends a private or out-of-state college and is at the graduate level, the amount authorized is at the “Other (Graduate)” rate.
- x. When a job candidate attends a private or out-of-state college for medical school, law school, veterinary school, or dental school, the amount authorized is at the corresponding established rate on the fee schedule.
- xi. Schools specific to disability needs (i.e. Gallaudet, RIT) are considered private colleges and therefore follow the same guidelines listed within this section.

Other Programs:

- xii. Programs:
- xiii. When a job candidate is attending a program of study at another institution not mentioned above and the program does not qualify for Federal Financial

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Aid (i.e. air transportation studies through an airport), the amount authorized is at the established percentile rate. Staff will want to contact the school to identify the length of the program. The fee schedule amount can be paid monthly or per term based on the needs of the school or program. If the amount paid is monthly, the calculation is based on the total cost of the program multiplied by the established percentile rate then divided by the number of months in the program. NOTE: Occupational skills trainings and other programs typically offered through Community Rehabilitation Providers are not considered post-secondary trainings and information on these can be located elsewhere in policy.

- xiv. When a job candidate is attending a program of study at another institution not mentioned above, and the program of study qualifies for Federal Financial Aid (i.e. Cosmetology), then the amount authorized would be according to the level the job candidate is in college: “Other (1st & 2nd yr)” for freshmen and sophomores; “Other (3rd and 4th yr)” for juniors and seniors. Staff will want to contact the school to identify how the school bills for the program. If the school bills monthly, then the amount authorized is the “Other” rate above, divided by the number of months required for attendance. If the school bills per term/semester, then the amount authorized is the “Other” rate above divided by the number of terms/semesters in the school year.
 - xv. Hi-SET expenses (books, tutoring, classes and tests) are not considered post-secondary costs. If there is a charge, it can be paid for in the same way as other services, using the R-406 financial inventory.
 - xvi. For specialized programs designed specifically for individuals with intellectual, developmental, or similar disabilities (i.e. REACH, BUILD, NEXT), these are not funded under the post-secondary training. Please refer to the published rates/classes for funding of these programs.
- c. If a job candidate has graduated from a college program then returns to school to study a different discipline, the job candidate is funded according to the year the college considers the job candidate in the new discipline. If a job candidate changes their college major multiple times, the IVRS counselor should be involved in a



- conversation with the job candidate. Goals should be mutually agreed upon by the job candidate as well as the IVRS counselor.
- d. When a job candidate comes off the waiting list or begins a program during the semester, a prorated authorization may be written if:
 - i. There is evidence that the job candidate is, has been, or will be successful in completing a college plan;
 - ii. An IPE has been written and agreed to by the counselor and job candidate;
 - iii. The job candidate and IVRS staff have engaged in the same financial discussions and analysis listed above;
 - iv. The authorization is written to the college and it decreases a loan amount but does not decrease grant awards; and
 - v. The prorated amount does not exceed the percentage of time the job candidate has yet to complete in the current semester.
 - e. Part-time attendance is defined as enrollment in fewer credit hours than what the school considers full time for Federal Financial Aid purposes. Job candidates must be making satisfactory academic progress according to the college major. Job candidates must take a sufficient number of hours, without having to repeat courses due to an extensive delay in completing coursework because of part-time status. Job candidates must present a plan completed with the school that shows the classes to be completed on a part-time basis and still achieve the degree.
 - f. There is nothing in policy that requires IVRS to fund any college program hours that have been failed or dropped. The maximum number of hours that could be funded a second time is 12 across a program of study. Paying for courses being audited are included in the 12-hour retake policy. Using this guidance, the IVRS funding of audited classes is part of the counseling discussion.
 - g. Remedial courses are those courses that are necessary to assist the student to develop the academic background necessary to attend college. These courses are related to math, reading and writing and are designed to assist individuals in



achieving a minimum level of success in college coursework. Remedial courses may be supported as long as the individual maintains satisfactory progress.

- h. Job candidates will not be expected to pay anything for personal assistance services, reader services, or interpreter services needed to participate in the VR program. VR will not pay for these services when it is another program's legal responsibility.
- i. IVRS does not authorize Basic Assistance for job candidates currently on financial aid suspension due to failure to make reasonable progress, as defined by the school.
- j. No Basic Assistance should be authorized to job candidates in default on a student loan, unless it has been documented that the student has made maximum efforts to work out a satisfactory repayment agreement. An exception is required for these instances.

4. ADDITIONAL IVRS FINANCIAL ASSISTANCE BEYOND IVRS BASIC ASSISTANCE

When a job candidate requests additional assistance for tuition, fees, books and supplies beyond the IVRS Basic Assistance amount in the fee schedule, then staff may consider those additional costs through an exception. This determination is based on the comprehensive financial planning discussions and the unmet need identified. If, through the financial planning discussion, a job candidate makes a choice inconsistent with their available resources, the staff person must document that decision in an R-413 case note. A job candidate's choice to proceed despite there being a more affordable option available does not equate to an unmet need. Typically, the reason for additional funding is determined based on: disability costs/needs; extra expenses as a result of the rehabilitation program; and the IPE goal.

- a. Job candidates are expected to access comparable services and benefits. Typically, there is an Expected Family Contribution (EFC) amount established by the Financial Aid office, which is mandated by Congress. When there is an EFC requirement, IVRS does not have the authority to waive that requirement. There are formal procedures the job candidate may access through the college/university Financial Aid office to determine if the EFC can be reduced or waived. Without that waiver, IVRS must consider the amount of the EFC in the calculation.



- b. When IVRS staff have completed their due diligence and believe additional funding is necessary to support more than the IVRS Basic Assistance, then an exception is requested justifying their support. There are two formulas IVRS staff must utilize when calculating the balance or unmet need. The appropriate formula to use is based on whether or not the college program the job candidate is attending qualifies for Federal Financial Aid. Those two formulas include:

Formula for Programs that Qualify for Federal Financial Aid:

$(\$ \text{ Actual Cost of: Tuition/Fees/Books/Supplies}) \text{ minus } (\text{Expected Family Contribution} + \text{Non-Merit Scholarships} + \text{Federal, State, Local Grants} + \text{IVRS Basic Assistance}) = \text{Balance or Unmet Need.}$

Formula for Programs that Do Not Qualify for Federal Financial Aid:

$(\$ \text{ Actual Cost of: Tuition/Fees/Books/Supplies}) \text{ minus } (\text{Non-Merit Scholarships} + \text{Federal, State, Local Grants} + \text{IVRS Basic Assistance}) \text{ minus the R-406 Job Candidate Participation Rate} = \text{Balance or Unmet Need.}$

*Social Security beneficiaries have a 0% Job Candidate Participation Rate

- c. IVRS staff must provide the comprehensive financial planning described under the “Agency Expectations” section of this policy. If after this conversation, the job candidate is requesting assistance beyond the IVRS Basic Assistance amount and the IVRS counselor denies the decision, the job candidate should be informed that they can request an exception to the supervisor. The supervisor will review the case to determine if the decision was correct and respond accordingly. Depending upon the results of the supervisory review, the job candidate may receive additional funds through the exception or may be denied. The denial letter must be provided to the job candidate at that point with their mediation/appeal rights and information on CAP.

5. SERVICES IN SUPPORT OF POST-SECONDARY EDUCATION

Some job candidates may identify additional services beyond the IVRS Basic Assistance that are disability-related and necessary to achieve the goal listed on their IPE and



remediate the extra financial burden. Funding for these services are based on the R-406 Financial Inventory and are considered separate from the IVRS Basic Assistance. Staff should refer to the appropriate policy when considering funding these services for a job candidate attending post-secondary education. The following are some examples of these services. There may be additional IVRS expenditures not identified in this list; these would also be authorized under the applicable service category and the policies applicable to those areas should be followed:

- a. Tools and Equipment
- b. Computer Purchases
- c. Certifications and Occupational Exams
- d. Uniforms
- e. Housing

6. EXCEPTIONS

The following requires supervisory approval:

- a. Authorizing for services when there is no unmet need.
- b. Authorizing for services beyond the IVRS Basic Assistance amount.
- c. Authorizing for the full amount when there is an EFC level established by the FAFSA. Job candidates whose families will not assist in college should be directed to the Financial Aid office to determine if their EFC can be waived. Supervisors and staff do not have the authority to waive a congressional mandate.
- d. Authorizing the junior or senior rate for job candidates in their first or second year of college at a university because the college program requires discipline-specific courses to be taken at that level and to do otherwise would extend the number of years in college (i.e. architecture classes start in the freshman year and to go to a community college would extend the college program beyond four years).
- e. Paying more than the prorated amount for IVRS Basic Assistance for a job candidate whose IPE was developed after the semester has started.
- f. Authorizing for summer school when it has been determined that summer funding is not available.
- g. Exceeding the 12 hours of retaken classes.



- h. Requesting funding for a job candidate that has defaulted on a student loan (evidence that the job candidate has made attempts to rectify the situation that are reasonable is required).
- i. Authorizing beyond any of the provisions set forth in policy.

7. APPLICABLE FORMS

- a. [Budget Worksheet](#)
- b. [Financial Inventory \(R-406\)](#)
- c. [Request for Exception to Policy](#)