# FINANCIAL AID HANDBOOK



2022-2023

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# FINANCIAL AID HANDBOOK

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# FINANCIAL AID HANDBOOK

### **ACKNOWLEDGEMENTS**

Many individuals provided valuable input in the development of this handbook. Appreciation is extended to the Financial Aid Committee who spent countless hours dedicated to developing a handbook that can serve as a reference guide for school administrators, financial aid officers and the support personnel providing financial aid services to our students.

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### • • INTRODUCTION • •

The Financial Aid Handbook was developed to assist school-based administrators, Financial Aid Officers (FAOs), business managers, and the clerical staff who facilitate and provide financial aid services to students enrolled in selected post-secondary education programs at Title IV eligible schools in the district. The intent is to provide guidelines and procedures for the delivery of services to students in accordance to federal, state and district policies and procedures; however, it is not all-inclusive since regulations and processes are continuously being revised and updated. It also serves as a guide to establish uniformity and consistency for M-DCPS school sites through the provision of financial aid services to students enrolled in eligible Career Technical Education (CTE) programs. Components of this handbook can also be accessed at http://adulted.dadeschools.net/.





### • • CHAPTER I • • STUDENT FINANCIAL AID PROGRAM

The financial aid programs provided by Miami-Dade County Public Schools (M-DCPS) post-secondary educational centers make it feasible for students who would normally be deprived of a career/technical education, due to limited funds, to obtain the education they require. This is based upon the principle that a post-secondary education should not be a privilege reserved only for those who can afford it. Educational opportunities should also be made available to students of families with limited financial resources.

### **PHILOSOPHY AND INTENT**

M-DCPS post-secondary educational centers subscribe to the following:

- The primary purpose of the financial aid program is to provide assistance to students who, without such aid, would be unable to attend school.
- Financial assistance could consist of Federal Financial Aid (Pell and FSEOG Grants), District
  Financial Aid Program (DFAP), Work Study Grants, Tuition Exemption, and scholarships
  which may be offered to students in a single form or in various combinations, called
  packaging.
- Financial assistance is meant to supplement the efforts of the student and/or the student's family. Both the student and the student's family are expected to make a maximum effort to assist with post-secondary educational expenses. This is referred to as Expected Family Contribution (EFC).
- The total amount of financial assistance offered to students shall be limited to the amount of the educational costs that are greater than all other resources available.
- In determining the amount of other available resources, the financial aid program shall take into account the financial support expected from income, assets, and other resources available to students and/or parents. All factors affecting the family's financial strength shall be considered, including other dependents, debts, and/or monetary obligations.





#### **POLICIES & PROCEDURES**

The following are policies, procedures, processes, and links to websites that provide technical assistance and resources for FAOs, administrators, and school site personnel assigned to provide financial aid services to students. They comprise guidance, definitions, and information related to the administration and processing of financial aid.

#### **ACADEMIC YEAR**

For financial aid purposes, the academic year is 900 clock hours in length or 36 weeks. These hours commence on the student's first day of attendance in an eligible CTE program. The academic year is used to calculate Satisfactory Academic Progress (SAP) and schedule the disbursement of financial aid funds.

### **CENTRAL PROCESSING SYSTEM (CPS)**

All schools must be able to exchange data with the CPS. Schools must be able to receive Institutional Student Information Records (ISIRs), from CPS, submit corrections to ISIR data to CPS, and add the federal school code to a student's record if needed. Schools may also choose to enter and submit a FAFSA on a student's behalf. Additional information on CPS can be accessed at <a href="https://fsawebenroll.ed.gov/">https://fsawebenroll.ed.gov/</a>.

### **CLERY ACT DISCLOSURE SECURITY POLICY**

Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act (Section 485(f) of the HEA, Title 34 C.F.R 668) is a federal statute requiring Title IV schools to comply with the following:

- Collect classify, maintain and count crime reports and crime statistics.
- Issue timely warnings and emergency notifications to students and employees.
- Publish an annual security report with both statistics and policy statements to include compliance with the Violence Against Women Act.
- Submit annual crime statistics to the U.S. Department of Education (ED).
- In situations with campus police or security, departments must maintain a daily crime log.
- School crime statistics will be provided by the Miami-Dade Schools Police (MDSP).
- All HEA Title IV eligible schools must have their crime statistics posted on the schools'
  websites and make these reports available to students, employees, and the community.

### **COMMON ORIGINATION AND DISBURSEMENT SYSTEM (COD)**

The COD system is the ED system for processing all award and disbursement data for participants who are awarded Pell Grants. It is a tool for processing and viewing Pell Grants, as well as for assisting schools with troubleshooting and problem resolutions. The COD allows users to track the funding levels, dates, and amounts of all cash receipts and returns of cash. It provides users the ability to





view Pell Grants and provides a report request function to assist schools in reconciling data between their institutions and the COD system, both throughout the processing year and in year-end closeout requirements. The COD website can be accessed at <a href="https://cod.ed.gov/">https://cod.ed.gov/</a>.

### **CONSTITUTION DAY**

Institutions must comply with the Consolidated Appropriations Act, 2005. The law states that "each educational institution that receives federal funds for a fiscal year shall hold an educational program to commemorate the United States Constitution on September 17<sup>th</sup> of such year for the students served by the educational institution." The law requires that Constitution Day be held on September 17<sup>th</sup> of each year, commemorating the September 17, 1787 signing of the Constitution. However, when September 17<sup>th</sup> falls on a Saturday, Sunday, or holiday, Constitution Day is held during the preceding or following week.

### **CONSUMER INFORMATION**

The Code of Federal Regulations (CFR) 668.41-49 requires post-secondary institutions to make certain information available to prospective and enrolled students/parents, prospective and current employees, the general public, and the ED. Consumer disclosures should be posted on the school's website which should include the following information which is not all-inclusive:

- Institutional and financial assistance information for students
- Clery Act/campus security statistics.
- Code of Student Conduct
- Constitutional and Citizenship Day
- Drug and alcohol prevention policy
- Gainful employment
- Family Educational Rights and Privacy Act (FERPA)

Additional information on the consumer disclosure mandate can be obtained from Chapter 6 of the Federal Student Aid Handbook and which can be accessed at <a href="https://ifap.ed.gov/e">https://ifap.ed.gov/e</a>.

### **CITIZENSHIP STATUS**

A student must be one of the following to be eligible to receive Federal Student Aid (FSA):

- A U.S. Citizen or national,
- A U.S. permanent resident or other eligible noncitizen, or





A citizen of the Freely Associated States: the Federated State of Micronesia, the Republic
of Palau, and the Marshall Islands. These students can only receive aid from select FSA
programs.

To determine whether applicants are citizens, all applications are matched with social security records. If there is a complete match with the student's social security number, name, date of birth, and U.S. citizenship; the CPS will determine the student to be a citizen. The SAR and Institutional Student Information Record (ISIR) will have a match flag (but no comment) indicating that the student's status has been confirmed.

If the applicant is a non-citizen and provides an alien registration number (A-number or ARN) on the FAFSA, the ED will submit the records to the Department of Homeland Security, in order to check and verify noncitizen current immigration status.

A student's citizenship status only needs to be checked once during the award year. If the status is eligible to receive the Pell Grant at the time, it remains so for the rest of the award year. For additional information on citizenship status and regulations, please review Volume 1, Chapter 2 of the FSA Handbook which can be accessed at <a href="https://ifap.ed.gov/e">https://ifap.ed.gov/e</a>.

### **COST OF ATTENDANCE**

The Cost of Attendance (COA) is an estimate of a student's educational expenses. Said expenses could include tuition and fees, books, supplies, transportation, room and board, and if applicable, dependent care. Costs related to disability may also be covered.

### **DRUG-FREE SCHOOLS AND COMMUNITIES ACT**

The Drug-Free Schools and Communities Act Amendments of 1989 and the Drug Free Workplace Act of 1988 require all schools and institutions of higher education to adopt and implement a program to prevent the illicit use of drugs and the abuse of alcohol by students and employees on school property. Post-secondary institutions under the auspices of The School Board of Miami-Dade County, Florida must adhere to federal, state, and local laws as well as regulations governing illegal drugs and the abuse of drugs and alcohol.

The Drug-Free Schools and Communities Act Amendments of 1989 require an annual distribution in writing to each student (regardless of the length of the student's program of study) and employee of the following:

- Standards of conduct that clearly prohibit the unlawful possession, use, or distribution of
  illicit drugs and alcohol by students and employees on its property or as part of any of its
  activities;
- A description of applicable legal sanctions under Federal, State and local laws;
- A description of the health risks associated with illicit drugs and the abuse of alcohol;





- A description of available drug or alcohol counseling, treatment, or rehabilitation or reentry program; and
- A statement of the disciplinary sanctions that the institution will impose on students and employees.

### **EDCONNECT**

Edconnect is a Windows-based File Transfer Protocol (FTP) program that enables users to send and receive FSA information electronically. Users collect data on their PCs or computer systems and transmit the collected data in batches over the Student Aid Internet Gateway (SAIG) using Edconnect. The appropriate Title IV Application System receives the data, processes the data, performs any required data base cross-referencing, and returns the processed data to the user's SAIG mailbox, where it is downloaded to the user's PC or system with Edconnect. Additional information and technical information guides can found at <a href="https://www.fsadownload.ed.gov">https://www.fsadownload.ed.gov</a>.

### **EDEXPRESS FOR WINDOWS**

EdExpress is a financial aid management software package or Title IV financial aid administrators and officers provided by the ED. With EdExpress, individuals can manage Title IV financial aid application data, package awards, and exchange origination and disbursement data with the Common Origination and Disbursement (COD) System for the Pell Grant Program. Additional information and technical reference guides can be found at <a href="https://www.fsadownload.ed.gov">https://www.fsadownload.ed.gov</a>.

### **ELIGIBILITY REQUIREMENTS**

In order for students to receive financial assistance from federal, state or district financial aid programs, they must:

- Apply for admission and submit documentation required by the desired school and receive notification of admittance;
- Not be receiving Title IV financial aid concurrently from another institution;
- Be enrolled as a regular student in an eligible program;
- Complete a Free Application for Federal Student Aid (FAFSA). This must be completed for each year of enrollment. The application can be accessed at <a href="http://www.fafsa.ed.gov/">http://www.fafsa.ed.gov/</a>;
- Have a verifiable financial need based upon the Student Aid Report (SAR) or the Institutional Student Information Report (ISIR) in relation to the institutional cost of attendance;
- Be one of the following to receive FSA:
  - A U.S. Citizen or national;
  - A U.S. permanent resident or other eligible noncitizen; or
  - A citizen of the Freely Associated States: the Federated State of Micronesia and the Republic of Palau and the Marshall Islands. These students can only receive aid from selected FSA programs.
  - Please visit <u>www.studentaid.ed.gov</u> for additional information on eligibility criteria;





- Need to maintain SAP in accordance with school policy and procedures. SAP is based on grades and pace of program completion. Students must complete their program within 150% of the length of the total scheduled hours for the program.
- Not be in default on a Federal Perkins Loan or any loans under the Federal Family of Educational Loan Programs (FFELP) made available through M-DCPS or other institutions, or have made satisfactory arrangements to repay a defaulted loan, and must not have borrowed in excess of the loan limits under any Title IV program.
- Not owe refunds on a Federal Pell Grant, or any other Title IV grant.
- Have a signed Statement of Registration Compliance indicating that they have either registered with the Selective Service or are not required to register. Please visit <a href="https://www.sss.gov/">https://www.sss.gov/</a> for additional information.
- Have a signed Statement of Educational Purpose indicating that they will use the money only
  for expenses related to attending school. This mandatory for Federal Pell Grant recipients
  (See Appendix 1).
- Hold a high school diploma or GED® diploma. A diploma can be from a foreign school if it
  is officially verified as equivalent to a U.S. high school diploma. The high school diploma
  must be recognized by the Department of Education of the state from which it was issued.
  A state certificate is acceptable if received by a student after the student has passed a
  state authorized examination that the state recognizes as the equivalent of a high school
  diploma as required by Chapter 34 CFR 600.2.
- Not be enrolled in any high school completion program or hold a bachelor's degree or higher.
- Comply with attendance policies, safety regulations, and the *Post-Secondary Code of Conduct*.
- Comply with federal requirements regarding felony drug conviction policy in accordance with section 421(a) (1) of the Controlled Substances Act.
- Receive and sign the check list of Registration Information You are Required to Know, FM 6827 (See Appendix 2)

#### **ENROLLMENT STATUS**

For the purpose of the financial aid program:

- 1. Full-time enrollment status is 24 or more clock hours per week.
- 2. Three-quarter time enrollment status 16-20 clock hours per week.
- 3. Half-time enrollment status is at least 12 to 15 clock hours per week.
- 4. Less than half-time enrollment status is less than 11 clock hours per week.





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

EFC is the number that is used to determine student eligibility for federal student aid. This number results from the financial information provided by the student in the FAFSA application. EFC is reported to the student on the Student Aid Report (SAR).

The EFC formulas use the financial information students provide on the FAFSA to calculate the EFC. FAOs subtract the EFC from students' COA to determine individual need for federal student financial assistance as well as selected district financial aid.

### FREE APPLICATION FOR FEDERAL STUDENT AID (FAFSA)

The FAFSA is the form used by the U.S, Department of Education to collect information and determine an applicant's EFC by conducting a "needs analysis" based on the applicant's personal information. The EFC is used to determine an applicant's eligibility for federal grants and loans. Other agencies, such as states and schools, may use the information to award other types of aids. Students can download a copy of their FASFA information to make informed decisions about finances and assets at <a href="http://www.fsadownload.ed.gov">http://www.fsadownload.ed.gov</a>.

### **FAMILY EDUCATIONAL RIGHTS AND PRIVACY ACT (FERPA)**

Policies and procedures concerning the privacy of student records are governed by the Family Education Rights and Privacy Act of 1974 (Public Law 93-380). FERPA sets limits on the disclosure of personally identifiable information from school records and defines the rights of students to review records and request changes to them.

### FEDERAL PELL LIFETIME ELIGIBILITY USED (LEU)

The Consolidated Appropriations Act, 2012 (Public Law 112-74) established regulations relative to Federal Pell Lifetime Eligibility. This law significantly impacted the Federal Pell Grant Program. Effective, July 1, 2012, students are now limited to 600% of Federal Pell Grant eligibility during their lifetime. This change affects all students, regardless of when or where they received their first Federal Pell Grant. Students who have received 600% Federal Pell Grant as of 2011-2012 will no longer be eligible to receive a Federal Pell Grant beginning with the Fall 2012 semester and thereafter. Students may view their FSA history by logging on to <a href="https://studentaid.ed.gov/sa/">https://studentaid.ed.gov/sa/</a>.

#### FINANCIAL AID PROGRAMS AVAILABLE AT SELECTED SCHOOLS

### **District Financial Aid Program (DFAP)**

This is a district, need-based grant program. Students must complete a FAFSA and be
enrolled in a career/technical program. Awards may vary but cannot exceed tuition (not
applicable toward materials, ID fees, textbooks or supplies). Awards are determined by
the school and are based upon need and availability of funds. Please refer to School Board
Policy 2450- Adult, Post-Secondary, Career and Community Education (See Appendix 17).





 Students receiving DFAP funds who do not maintain SAP will be denied approval for future awards. Students, who fail a class while receiving funds from DFAP or Fee Waiver, will not receivethis assistance to repeat the course. Students must follow the attendance and academic guidelines established by the school. Students must complete FM 6498 DFAP/Fee Waiver Application. No DFAP is allowed for students taking CTE classes strictly for personal or hobby use (See Appendix 3).

### **Federal Pell Grant Program**

 Federally funded grants are awarded by the ED to students who demonstrate financial need. The Pell Grant is available to students who enroll in an eligible Title IV program and meet all other requirements set by the ED. Applications for FSA can be accessed through the internet at <a href="https://www.fafsa.ed.gov/">www.fafsa.ed.gov/</a>.

### Federal Supplemental Opportunity Grant (FSEOG)

• Federally funded grant program awarded to eligible students receiving federal financial aid who demonstrate financial need. Awards are calculated by school's Financial Aid Office and are determined by need and availability of funds. Students must complete an error free FAFSA each year to be considered for this aid. Not all schools participate in this program.

### **Fee Waiver Program**

- This is a District need based grant program. Awards may vary but cannot exceed tuition (not applied toward materials, ID fees, textbooks or supplies). Awards are determined by the school and are based on need and the availability of funds.
- The student must not be receiving other sources of financial aid from the school for that trimester. An application must be submitted each term and the applicant must be able to provide documentation to verify financial need. SAP and attendance must be maintained to continue receiving a fee waiver. No Fee Waivers are allowed for students taking classes strictly for personal or hobby use. (See Appendix 3)

#### CareerSource South Florida (CSSF)

This is a federally funded agency that provides training vouchers to unemployed and
economically disadvantaged students. The vouchers cover tuition, material and ID fees,
and books. Students are referred to a participating CareerSource South Florida Center
where they can complete the necessary application. Student must also complete a FAFSA.
This program is coordinated through the Department of Labor and Employment Security.
Information can be found at http://www.careersourcesfl.com/.





## STATE OF FLORIDA PROGRAMS – FLORIDA DEPARTMENT OF EDUCATION, OFFICE OF STUDENT FINANCIAL ASSISTANCE (OSFA)

All State programs require a student to meet the Florida residency requirements as defined by the Florida legislature.

#### Florida Work Experience Program

• The Florida Work Experience Program (FWEP) is a need-based program providing eligible Florida students with work experiences to complement and reinforce their educational and career goals. FWEP is a decentralized State of Florida program, which means each eligible participating college, university, Florida College (public community college), career center operated by a district school board, and educator preparation institute determines application procedures, deadlines, student eligibility, and award amount. The student will demonstrate financial need by completing the FAFSA in time to be processed error free by the deadline specified by the institution.

### Florida Bright Future Scholarships

 These are academically-based scholarships that include the Academic Top Scholars, Florida Academic Scholars, Florida Medallion Scholars and the Gold Seal Vocational Scholars. These are awarded to graduating high school seniors. The award amounts are determined by the State of Florida. Students must be enrolled for at least 12 hours per week or 180 minimum clock hours per trimester.

### Florida Public Post-secondary Career Education Student Assistance Grant Program (FSAG)

Florida Student Assistance Grant (FSAG) Program is a need-based grant program available to
Florida residents enrolled in certificate programs of 450 or more clock hours at participating
Florida colleges (public community colleges) or career technical centers operated by district
school boards. Each participating institution determines application procedures, deadlines,
and student eligibility. Please visit <a href="www.floridastudentfinancialaid.org">www.floridastudentfinancialaid.org</a> for additional
information on State of Florida sponsored programs, grants, and services.

### **VETERANS' EDUCATIONAL BENEFITS PROGRAM (VA)**

Selected schools are approved for veterans training. If a student is a veteran of the United States Armed Forces, he/she may be eligible for veteran educational benefits. Eligibility is determined by the Department of Veterans' Affairs. Applications for educational benefits are available from the school's VA certifying official or online at <a href="http://www.benefits.va.gov/gibill/">http://www.benefits.va.gov/gibill/</a>. Veterans are permitted to receive educational benefits only for the length of time approved for their program by the State of Florida Department of Veterans' Affairs.

#### **G5**

G5 is used to draw down Title IV funds as well as make returns of excess cash electronically. The site provides continuous reporting capability for an institution's funding by program and year. This site





also assists with R2T4 and reconciliation of funds for award years. The G5 website can be accessed at <a href="https://www.g5.gov/">https://www.g5.gov/</a>.

### HIGH SCHOOL DIPLOMA REQUIREMENTS- ACADEMIC QUALIFICATIONS

To receive FSA funds, a student must be qualified to study at the post-secondary level. A high school diploma or an equivalent is required. A high school diploma can be from a foreign school if it is officially verified as equivalent to a U.S. high school diploma. An equivalent of a high diploma, such as a GED® diploma, is acceptable if the diploma is recognized by the Department of Education of the state from which it was issued. A state certificate is acceptable if received by a student after the student has passed a state authorized examination that the state recognizes as the equivalent of a high school diploma in accordance to the Code of Federal Regulation 600.2. Please refer to Dear Colleague Letter GEN-14-06 and Volume 1- Student Eligibility of the Federal Student Aid Handbook that can be accessed at <a href="https://ifap.ed.gov/ifap/">https://ifap.ed.gov/ifap/</a> (See Appendix 19). Technical colleges have a district office that is responsible for evaluating the validity of a student's high school completion if the institution has reason to believe that the proof of high school completion submitted is not valid or was not obtained from an entity that provides secondary school education. Prospective students must provide original documents.

### **INSTITUTIONAL STUDENT INFORMATION RECORD (ISIR)**

The ISIR contains all information reported on the FAFSA that includes key processing results and National Student Loan Data System financial history. The term ISIR refers to all processed student information records that are sent electronically to institutions by the Central Processing System

(CPS). ISIRs are sent to schools through the Electronic Data Exchange (EDE), the ED's electronic service that enables schools to send electronic data and receive resulting processed electronic data from CPS and other FSA systems. The ISIR and the SARS contain the same information in different formats. The ISIR Guide can be accessed at the IFAP Website or at <a href="https://fsadownload.ed.gov/index.htm">https://fsadownload.ed.gov/index.htm</a>.

### NATIONAL STUDENT LOAN DATA SYSTEM (NSLDS)

NSLDS is the national database of information about student federal student loans and grants. It provides a centralized integrated view of federal loans and grants during their complete life cycle, from aid approval through disbursement, repayment, deferments, delinquency and closure. Information and data for NSLDS are received from various sources. The NSLDS Professional Access web site can be accessed at <a href="https://nsldsfap.ed.gov/nslds\_fap/">https://nsldsfap.ed.gov/nslds\_fap/</a>.

#### **NEED ANALYSIS**

The process of analyzing a student's financial need, known as "Need Analysis", focuses on determining how much the family reasonably can be expected to contribute towards the student's education. Traditionally, determination of an applicant's need is achieved by collecting information about the family's income, assets, and living expenses. For the FSA programs, the law specifies a need analysis formula that produces the EFC. The EFC and the school's COA are used by the school to establish the student's need as well as to award grants and campus-based aid. The school may request other documents to determine the need for non-federal aid.





### **NET PRICE CALCULATOR REQUIREMENT**

In accordance with the Higher Education Opportunity Act, each post-secondary institution that participates in Title IV FSA programs must post a net price calculator on its website that uses institutional cost of attendance data to provide estimated net price information to current and prospective students and their families based on a student's individual circumstances. This calculator should allow students to calculate an estimated net price of attendance at an institution (defined as cost of attendance minus grant and scholarship aid) based on what similar students paid in a previous year. The net price calculator is required for all Title IV eligible institutions.

### **TEXTBOOK INFORMATION**

In accordance with consumer information requirements, the Department requires institutions to disclose the program(s) textbook information electronically or in print to students. The textbook information requirement was added by the Higher Education Opportunity Act of 2008, and took effect on July 1, 2010. The institution must list title, ISBN, verified retail textbook pricing information for both required and recommended materials charged by the school. For further guidance refer to the *Federal Student Aid Handbook*, Volume 2, Chapter 6.

All technical colleges adhere to Miami-Dade County School Board Policy "2531 - Copyrighted Works" in compliance with copyright laws and fair use guidelines. Students are reminded that a copyright is the legal protection of intellectual property that is provided for by the laws of the United States to the owners of copyright. Types of works that are covered by copyright law include, but are not limited to, literary, dramatic, musical, artistic, pictorial, graphic, film and multimedia works. Many people understand that printed works such as books and magazine articles are covered by copyright laws but they are not aware that the protection extends to software, digital works, and unpublished works and it covers all forms of a work, including its digital transmission and subsequent use. Any unauthorized distribution of copyrighted material, including unauthorized peer-to-peer file sharing, is subject to civil and criminal liabilities. For more information regarding copyright expectations and penalties please visit the U. S. Copyright Office website at <a href="https://www.copyright.gov/">https://www.copyright.gov/</a>.

### **LEAVE OF ABSENCE POLICY (LOA)**

A Leave of Absence (LOA) is a temporary interruption in a student's program of study and should only be requested in emergencies and extenuating circumstances. The student will not incur any additional charges while on LOA. LOA will extend the student's contract. Upon return, a new enrollment contract and dates are used to calculate awards.

The following are acceptable reasons for a leave of absence but not limited to: military, medical, jury duty, loss of job, family emergency, employment emergency or other reasons which demonstrate the student's circumstance.

It is the student's responsibility to requests a LOA before the leave. A LOA must be submitted in writing, and must be both signed and dated. Written requests for leaves of absences shall include the reason for the request and the amount of time needed. All LOAs must have prior approval by the FAO.





Leaves of absence shall be reasonable in duration, preferably not to exceed 45 calendar days. Technical Colleges highly discourages any requests for an additional leave of absence; however, South Dade Technical College may grant more than one LOA if an unforeseen circumstance arises. The LOA, together with any additional leaves of absence, must not exceed a total of 180 days in any 12-month period.

If a student does not return from an approved LOA, the student is treated as a withdrawn student effective the first day of the leave and a return calculation of FSA will be performed.

Students requesting a leave of absence must:

- Inform their financial aid advisor of their request and discuss financial aid implications, as appropriate.
- Submit a written and signed request for Leave of Absence and include the following information:
  - Beginning and ending dates of the LOA requested and
  - Reason for the LOA request

Late requests may be considered for approval if they include an explanation of the unforeseen circumstances that prevented the earlier submission of the request. All students are encouraged to submit requests as soon as possible to allow South Dade Technical College adequate time to process the request.

#### **RETURN TO TITLE IV**

When a Return of Title IV funds is required, both the institution and the student have a responsibility for returning funds. Funds that are not the responsibility of the school to return, must be returned by the student. The school can exercise the option to collect any funds from the student that must be returned. The percentage of Title IV aid earned is determined by dividing the number of clock hours scheduled to have been completed as of the withdrawal date in the payment period by the total clock hours in the payment period.

A student who receives Title IV funds and wishes to withdraw at or before 60% of the pay period is required to return a portion of unearned federal financial aid. He may owe tuition, fees or a repayment of federal funds to the school. The institution will return Title IV funds based on the R2T4 calculations no later than 45 days after a student's withdrawal date. The amount of the return is determined by the FAO. The institution will return the lesser amount of the aid, as compared to the institutional charges, multiplied by the percentage of unearned aid. This amount will be the difference between Title IV aid due from the school, and the amount of Title IV aid to be returned. Any federal financial aid that a student is required to repay will be returned to the Department of Education by institution on the student's behalf. If the student did not receive all earned financial aid funds and has completed at least 60% of the payment period, a post-withdrawal disbursement may be due. All post-withdrawal disbursements are applied to the student account first. If the R2T4 calculation results in a credit balance on the student's account, the credit balance must be disbursed to the student as soon as possible but no later than 14 days after the calculation of the R2T4.





Since the school does not process any type of student loans, any unearned Title IV funds are returned in the following order:

- PELL Grant
- Iraq and Afghanistan Service Grants
- FSEOG
- TEACH Grants

The FAO notifies the student, in writing, of the revised disbursement after the Return to Title IV Funds calculation is completed. If the student owes unpaid tuition and / or fees, the student is responsible for the full payment due to the institution. Students who do not comply with payment of tuition and fees to the school, will have a financial administrative hold. The student will not be able to enroll in any Miami-Dade County Public Schools until this obligation is satisfied.

The FAO submits a monthly list of withdrawn financial aid recipients with calculated R2T4 to an administrator and monitors the process to ensure that all funds are returned to Title IV accordingly.

### **COMPLAINT/GRIEVANCE PROCESS**

During orientation, all students are provided with an electronic copy of the Institutional Catalog and Student Handbook. These documents provide detail procedures for filing informal and formal complaints. An informal grievance is an alleged violation, misunderstanding or misinterpretation of school policy by any member of the student body.

The purpose of this grievance procedure shall be to settle equitably, at the lowest administrative level possible, differences and issues relating to school policy. This procedure does not apply to alleged discrimination relating to race, sex, disability, or other federally legislated civil rights. The proceedings shall be kept as informal and confidential as may be appropriate at all levels of the procedure. Each grievance level shall be observed and used in proper order. Exceptions may be made in emergencies.

#### **Level One** (Informal Procedures)

The aggrieved person must first discuss their grievance with their immediate supervisor with the objective of resolving the matter informally. It is acknowledged that the teacher is the student's immediate supervisor. The aggrieved person and the supervisor shall confer on the grievance with a view toward arriving at a mutually satisfactory resolution of the complaint. If, as a result of the discussion between the complainant and the supervisor the matter is not resolved to the satisfaction





of the complainant, then the aggrieved shall set forth the grievance in writing to the administrator of Student Services to include:

- The nature of the grievance within five (5) days
- The result of previous discussion
- Dissatisfaction with decisions previously rendered

The administrator of Student Services shall communicate the decision to the aggrieved in writing within three (3) school days of the written grievance.

### **Level Two** (Formal Procedures)

Formal grievance procedures for students apply to those situations in which students believe themselves to be victims of discrimination based on gender, race, color, religion, ethnic or national origin, political beliefs, marital status, age, sexual orientation, social and family background, linguistic preference, or disability.

These formal complaint procedures also apply to situations in which students believe themselves to be victims of harassment, including sexual harassment.

If the aggrieved student is not satisfied with the disposition of the grievance at level one, they may within five (5) school days present their grievance to the Principal. The Principal and the aggrieved will meet and the aggrieved may have mutually agreed upon representation present.

This must be done within five (5) school days after the decision from level two.

If the aggrieved person is not satisfied with the disposition of the grievance at level two, they may file the grievance in writing to:

Office of Postsecondary Career and Technical Education
Miami-Dade County Public Schools
1450 NE Second Avenue
Miami, Florida 33132





This institution is accredited by the Accrediting Commission of the Council on Occupation Education. Concerns which cannot be resolved with the School and/or District may be referred to:

Accrediting Commission of the Council on Occupational Education
7840 Roswell Road, Building 300 Suite 325
Atlanta, GA 30350
Phone (770) 396-3898
e-mail: puckettg@council.org





### **PARTICIPATING SCHOOLS**

The following schools are authorized to offer Federal and District Financial Aid for eligible programs as listed on their Program Participating Agreements (PPAs).

D. A. Dorsey Technical College – Federal School Code – 041646 www.dorseytechnicalcollege.com 305.693,2490

George T. Baker Aviation Technical College – Federal School Code – 030798 www.bakeraviationtechcollege.com 305.871.3143

Lindsey Hopkins Technical College – Federal School Code – 005586 www.lindseyhopkins.edu 305.324.6070

Miami Lakes Educational Center and Technical College – Federal School Code – 016400 <a href="https://www.miamilakes.edu">www.miamilakes.edu</a>
305.557.1100

Robert Morgan Educational Center and Technical College – Federal School Code- 016919 <a href="https://www.robertmorgantech.net">www.robertmorgantech.net</a> 305.253.9920

South Dade Technical College – Federal School Code – 042092 <u>www.southdadetech.edu</u> 305.247.7839

The English Center – Federal School Code – 035704 www.tecmiami.com 305.445.7731





#### **PAYMENT SCHEDULE**

- 1. Financial aid disbursements are scheduled as students meet requirements in accordance with Chapter 3 of the current *Federal Student Aid Handbook* and Chapter 1 of *Federal Student Aid Blue Book* that can be accessed at <a href="https://ifap.ed.gov/ifap/">https://ifap.ed.gov/ifap/</a>.
- 2. Payment periods for full-time and part-time programs are scheduled as follows:
  - a. Program payment periods:
    - (1) For programs of 900 hours or more in length, the payment period is 450 hours representing half of the academic year.
    - (2) For programs that are 899 to 600 hours in length, the payment period is half of the program length.
- 3. The award year is dependent upon the date of the application for financial aid made by a student and the first day of attendance. Multiple disbursements may be made within a single payment period; however, making multiple disbursements within a payment period does not create a new or additional payment period.
- 4. A student is ineligible when it becomes mathematically impossible for him or her to complete a program within 150% of the length of the hours scheduled for the program.
- 5. Disbursements will not be approved unless the student meets the criteria to maintain SAP.

#### POLICIES AND CONDITIONS CONCERNING FINANCIAL AID AWARDS

- 1. Awards are contingent upon actual receipt of funds from the federal, state and/or district funding sources.
- 2. The Financial Aid Office reserves the right to revise or cancel an award at any time because of changes in financial or academic status of students.
- 3. Students must report to the Financial Aid Office any other financial assistance (scholarships, loans, grants, fee waivers, veterans' benefits, and social security income) not previously reported.
- 4. Students may register with a deferment based on expected financial aid award. Deferments must not exceed the financial aid eligibility for the payment period. Students are responsible for the difference between the deferment and the registration costs. Students must approve and sign deferment agreements for tuition, books and supplies (See Appendices 14, 15 and 16). After registration, any money owed will be deducted from the actual award received for the student. Once these deductions have been made, the balance of awards will be disbursed to students.
- 5. Students must notify the Financial Aid Office immediately of any changes in name, address, marital status, felony drug conviction, or enrollment status with appropriate verification documentation.
- 6. Financial aid awards are not renewed automatically. A new FAFSA application must be submitted





each year. New forms are available each year and can be accessed at http://www.fafsa.ed.gov/.

- 7. Students selected for Verification based on SAR or ISIR indicators must comply with the requested information as specified on page 33 of this Handbook.
- 8. Students are responsible for picking up any grant checks within a reasonable period of time after the disbursement date. If students have not picked up their payments within 20 business days after the last date that their enrollment ends in that award year, the institution may credit the students' account only for allowable outstanding charges for the award year incurred by students while they were eligible in accordance with the Code of Federal Regulations 34 CFR 690.78(c), Federal Pell Grant Program. Attempts to contact students who do not pick up grant checks must be documented.
- Intentional false statements or misrepresentations on any of the federal financial aid application materials will subject students to a fine or imprisonment, or both, under provisions of federal law.
- 10. SAP as defined on page 24 must be maintained in order to receive financial aid.
- 11. Awards are based on continuous enrollment without interruption. If students withdraw from school, awards may become null and void. Students must see the FAO to reactivate the award should they re-enter. The award may then be recalculated.
- 12. Financial aid checks that have not been picked up and issued to students will be returned to the funding source. Eligibility of the reissuance of funds will be determined on a case by case basis.

### PRIVATE EDUCATION LOAN APPLICANT SELF-CERTIFICATION FORM

Title IV institutions are required to provide the Loan Self-Certification form, and the information needed to complete the form to an enrolled or admitted applicant (or to the parent of an enrolled or admitted student) upon the applicant's request for a Private Education Loan Self-Certification form. An institution may post an exact copy (pdf) of the Self-Certification form on its website for applicants to download or it may provide a paper copy directly to an applicant through its Financial Aid Office. In accordance with 34CFR 668.14(b) (29) (ii), an institution must, upon the request of the applicant, discuss the availability of federal, state, and institutional financial aid services.

### **PROGRAM PARTICIPATION AGREEMENT (PPA)**

A PPA is an agreement between the ED and a post-secondary institution that affirms that the institution has been approved to participate in the FSA program. A PPA conditions the initial and continued participation of an eligible institution in any FSA program on compliance with all the applicable regulations and any conditions specified in the PPA. An institution's PPA applies to each branch and other location of the institution that meets applicable requirements. Changes to a PPA must be completed by the school and signed by the Principal Chief Operations Officer (CEO) before being submitted for processing to the ED. The programs listed on the PPA will be eligible for Title IV





federal financial aid funds in addition to those approved to participate in the Experimental Program initiative.

## NATIONAL STUDENT LOAN DATA SYSTEM (NSLDS) - ENROLLMENT STATUS REPORTING

Provisions of the Consolidation Appropriations Act of 2014 (Pub. Law No. 113-76) requires the Federal Department of Education (ED) to submit to Congress a report of enrollment and graduation information on Federal Pell Grant and Loan recipients. All Title IV schools are required to report the enrollment status of students who are Pell Grant recipients or have received a Title IV subsidized loan.

### **REFUND POLICY**

Students are eligible for a full refund of Adult, Post-secondary CTE tuition, test fees and insurance fees if withdrawn within 5 days of the beginning of the class start date or the student registration date, whichever is later. Adult General Education (Adult High School, ESOL, ABE and GED®) Block Tuition, ID fees, lab fees, AGE test and application fees are non-refundable after class starts unless the course is canceled. The five (5) days shall not apply to CTE courses less than three (3) weeks or ninety (90) hours in duration. In such cases, the request for withdrawal must be made prior to the course meeting more than two (2) days. A student is entitled to a full refund of fees if a course is canceled by the school principal or designee, provided that the student was not reported for membership during the Workforce Education Fund survey period in which the class was counted. If so, only those fees in excess of the State requirement shall be refunded.

Refunds when due, can be made without requiring a request from a student. The school must forward an Application for Refund by Check/Credit (Form-2057, Rev. 08-14) to the student and it must be completed and approved for all eligible refunds. A request for refund must be made within forty-five days of the withdrawal date. Students withdrawn for disciplinary reasons pursuant to the Adult Student Code of Conduct are not entitled to a refund of any tuition and fees. Students who paid fees but were entitled to a waiver, voucher or agency payment shall be entitled to a refund of those fees paid only if required evidence of said waiver, voucher or agency payment is presented to the school within 15 school days of the beginning of the term.

In cases of unusual or extraordinary circumstances (such as illness, death in the family, etc.) that preclude a student's enrollment, the school principal/designee may honor a request for full or partial refund of fees provided that:

the request is made in writing prior to the end of the course and supporting documentation (where appropriate) is provided.

Students who receive FSA (Title IV funds) and withdraw from their program will receive a refund based on the Federal post-withdrawal calculation formula R2T4. For additional information, contact the Financial Aid office. If student fees are subsidized by an agency and the student withdraws, that agency is eligible for a refund only if student attendance is less than 50 percent of the scheduled hours and if the request is made in writing.





#### REPAYMENT POLICY- FEDERAL PELL GRANT STUDENTS

If students withdraw from school before the disbursement date, they may not be eligible to receive the full award for the payment period. In accordance Title 34 Part 668.22 CFR, the school will only collect monies which the students have charged (deferred) against their Federal Pell Grant for tuition, registration, and program costs. The student will be responsible for any remaining balances not covered by the Federal Pell Grant award.

### **STUDENT AID INTERNET GATEWAY (SAIG)**

All schools need to enroll at this site in order to exchange data with various department systems within the U.S. Department of Education. It allows data exchange between schools and the Central Processing System (CPS), the Common Origination and Disbursement (COD) system, and the National Student Loan Data System (NLSDS). It also provides the ability to transmit the annual Fiscal Operations Report and Application to participate in the Federal Campus-Based Programs (FISAP) to provide FSEOG by participating schools. Information on SAIG can be accessed at <a href="https://fsawebenroll.ed.gov">https://fsawebenroll.ed.gov</a>.

### STUDENT AID REPORTS (SAR)

A SAR is a report provided to an applicant by the EDshowing the applicant's FAFSA information and the amount of his or her EFC. SARs are paper or electronic documents that are sent to the student or printed from the FAFSA on the Web and FAA Access to CPS online Web sites. SARS and ISIRs contain the same processed student information in different formats. The Central Processing System (CPS) adds comment codes and text to the student's transaction to provide information to the student and the FAO about the student's FAFSA status. These codes also indicate whether a student is selected for the verification process.

#### STUDENTS CONVICTED OF POSSESSION OR SALE OF DRUGS

A federal or state drug conviction, while a student is receiving Title IV, and can disqualify a student from receiving FSA funds. The student self-certifies eligibility when applying for aid. A FAO does not have to confirm this unless they have conflicting information. The Anti-Drug Abuse Act of 1988 includes provisions that authorizes federal and state judges to deny certain federal benefits, including student aid, to individuals convicted of drug trafficking or possession. The Central Processing System (CPS) website maintains a hold file of individuals who have received such a judgment.

### STUDENTS WITH INTELLECTUAL DISABILITIES

Students with intellectual disabilities can receive funds from the Pell Grant, FSEOG and FWS programs if they are enrolled in a Comprehensive Transition and Post-Secondary Program (CTP) as defined in Section 760 of the Higher Education Act. A CTP program is a degree, certificate, non-degree, non-certificate program that is designed to support students with intellectual disabilities who want to continue their education at a post-secondary institution to prepare for gainful employment.

The school must apply to the ED to have the program judged as eligible. The institution must submit an updated Electronic Application for approval to participate in the Title IV FSA program (eApp).





The application must include a detailed description of the CTP program and must indicate how the program meets all of the regulatory requirements. The institution must also notify its accrediting agency of its CTP program. The CTP program should be included in the self-study an institution prepares for its next comprehensive reaffirmation. Please refer to the Dear Colleague Letter GEN-11-01, January 2011 and Chapter 1, School Determined Requirements of the FSA Blue Book and Volume 1, Student Eligibility and Volume 2, School Eligibility in the FSA Handbook that can be accessed at <a href="https://ifap.ed.gov/ifap/">https://ifap.ed.gov/ifap/</a>.

### SATISFACTORY ACADEMIC PROGRESS (SAP)

SAP is a required measurement of a student's academic progress towards their academic goal. Progress must be measured by both grade-based (qualitative) and time/pace of completion (quantitative) standards. For programs lasting one year or less, SAP must be accessed at the end of each payment period. For programs lasting more than one year, SAP must be assessed annually corresponding with the end of a payment period. SAP must be measured cumulatively. The Code of Federal Regulations, CFR 668.34 requires that schools establish satisfactory progress standards and policy for students applying for and receiving federal aid. This regulation requires that the Financial Aid Office review all periods of a student's enrollment history to determine if a student is making SAP towards an educational objective. The policy must include grade requirements (qualitative) and pace of completion (quantitative) standards.

The SAP form must be utilized by the FAOs in order to document and monitor students' progress at the successful completion of 67% of the maximum scheduled hours for which the student is enrolled. The SAP Report form (FM 5431) is completed by teachers and returned to the FAO. It will indicate the student's current attendance data as reflected in the Electronic Gradebook and their pace towards program completion, as well as the student's current grade based on weekly academic assessments derived from class/shop work, externships, and other practicum which appear in the electronic gradebook as well as in the district's Students Information System (SIS). (The school official will confirm a student's attendance to ensure they have successfully completed the 67% of the maximum scheduled hours for which they are enrolled).

The SAP criteria that are expected from all students are as follows:

- Successfully complete 67% of the maximum scheduled hours for which the student is enrolled\* for most programs.\* The Federal Aviation Administration requires that 85% of the maxium scheduled hours for Airframe and Powerpoint programs.
  - The number of payment periods for which students will be awarded financial aid will be limited by the number of hours required to complete the program.
  - The period of eligibility commences from the date students enter the program
  - The quantitative measure is based on the calendar time and based on the student's clock hours.





### Clock Hour Pace Example:

- At 450 scheduled hours, student completed 300 hours: 300/450= 67%\*,
- Expressed in calendar time, 10 weeks/15 weeks = 67 %.
- If this criterion is not met, the student is no longer eligible for financial aid and their award will be canceled.

If a student fails to make SAP as reflected on the Satisfactory Academic Progress Report form, a meeting will be held with the student and the FAO. The student will be placed on "Financial Aid Warning" for one payment period. The FAO will closely monitor the student's progress. The student is eligible to continue receiving financial aid.

### **STUDENT APPEAL PROCESS**

If a student fails to achieve SAP, while on "financial aid warning", he/she will become ineligible for a financial aid award. On a case by case basis, students may be recommended to appeal in order to be placed on "financial aid probation". They will submit a Financial Aid Student Appeals form (FM 6863) obtained from the FAO in order to request an appeal. All requests for appeal will be heard by the school's Financial Aid Appeals Committee which will be comprised of an administrator, FAO, guidance counselor, and the respective career/technical department chairperson. The committee shall convene as needed and will carefully review all information and documentation related to the student's appeal. The student must submit information regarding why they failed to make SAP, and what has changed that will allow him/her to demonstrate satisfactory academic progress at the next evaluation. The committee will render a written decision to the student within 48 hours of the appeal hearing, using the Student Appeals form (FM 6863). The decisions of the Financial Aid Appeals Committee are final.

If the student's appeal is approved, a meeting will be held with the student and the FAO and the student will then be placed on "Financial Aid Probation" status for one payment period. Students will be entitled to one (1) appeal's hearing during the entire length of their program (See Appendix 5). FAOs, guidance counselors and career/technical teachers will work together in order to closely monitor a student's progress while on "financial aid probation" and should the student regain SAP during the next evaluation, he/she will be considered as being in academic compliance and their eligibility will be reinstated. The student's SAP must be cumulative and not just for the payment period. If a student does not make SAP while on "financial aid probation", a meeting will be held with the student and the Financial Aid Officer and the student will be informed that they will be ineligible for the payment period following their "unsatisfactory" academic progress report. Students will be financially responsible for their academic expenses until they have successfully reestablished SAP. Through the consistent and daily use of Student Information System (SIS), FAOs will effectively monitor all students' hours and academic grades in order to make the necessary SAP determinations.

Students who transfer will have their hours and grades attempted and earned at the previous school counted towards their SAP within the time-frame of enrollment. If a student withdraws, his/her existing hours and grades attempted and earned upon re-entering will be counted towards their SAP within 150% of the length of the program. Awards will be recalculated when needed, to ensure proper compliance with the SAP policy.





For additional information on SAP, please refer to <a href="https://ifap.ed.gov/FSAAssessments/">https://ifap.ed.gov/FSAAssessments/</a> SatisfactoryAcademicProgress.html for Financial Aid Professionals.

### TWO FACTOR AUTHENTICATION (TFA)

Two-Factor Authentication (TFA) is the security process through which authorized school financial aid personnel are required to enter two forms of "authentication" to access FSA systems. TFA requires each authorized user to log in with a traditional User ID and password as well as provide One-Time Password (OTP) generated by a registered token device that is in the physical possession of the user. All authorized users will be required to log in to the eCampus-Based Website using a TFA token in addition to the FSA user ID and password.

### **VERIFICATION OF FAFSA INFORMATION**

All students who have completed a FAFSA are subject to verification of the information submitted when completing their application. Students are selected by verification by CPS. This verification must be completed before the student can receive federal aid. Verification flags are noted on a student's SAR or the ISIR received by the school. Schools have the authority to contact students for documentation and information needed to address verification requirements and student must comply with the requested information. Student must submit the required documents requested for verification within the established timelines to maintain eligibility for federal financial aid. The verification process is in accordance to Title 34, Articles 668.51-61, of the Code of Federal Regulations (CFR).

### **VERIFICATION OF FLORIDA RESIDENCY**

As a result of Florida Statute 1009.21, which took effect on July 1, 2010, and Florida Statute 1009.22, which became effective on July 1, 2011, applicants seeking to enroll in CTE courses where tuition fees are assessed, must show proof of Florida residency. Those who can show proof of Florida residency will be eligible for the in-state tuition fees. Those who cannot show proof of residency will be charged out-of-state fees for career and technical education programs only. Florida residency for tuition purpose is defined as documented proof that a student has lived or resided in the State of Florida for twelve (12) consecutive months. This does not refer to other definitions of residency established by other entities, including the U.S. Citizenship and Immigration Service (USCIS).

### **POLICIES AND PROCEDURES**

The financial aid offices housed in M-DCPS post-secondary educational centers were established to coordinate all services and sources of financial assistance offered to eligible students.

- 1.In accordance with established procedures, all students applying for financial aid must submit appropriate application forms to the Financial Aid Office and complete other required processes as applicable. Federal financial aid will be processed when the Financial Aid Office receives a valid ISIR/SAR in addition to other required documents.
- 2. All awards for financial aid shall be administered through the Financial Aid Office, depending upon the availability of funds.





- 3. Eligible students will be given consideration for all programs administered by the Financial Aid Office. Aid packages may consist of one or more grants in any combination that, in the opinion of the FAO, most appropriately meets students' needs.
- 4. M-DCPS post-secondary educational centers will not discriminate in the awarding of financial aid. The centers must adhere to laws under the Title VI Civil Rights Act of 1964, the Title IX Protection Act, the Privacy Act of 1974, the Rehabilitation Act of 1973, and the Age Discrimination Act.
- 5. Designated program progress reports for adult students must be completed by instructors for all students receiving federal financial aid and must be submitted to the FAO. All attended hours for PELL (financial aid) students must be posted weekly in the electronic gradebook. This is part of monitoring SAP for students on financial aid programs. These reports may also be provided to community-based organizations as appropriate.
- 6. The financial aid committee members, as assigned by each post-secondary educational center, will serve as an appeals board for students. Committee members should include a school administrator, FAO, a guidance counselor, and faculty member.
- 7. The Federal Grant Disbursement Authorization form (FM 6854) is to be prepared by the Financial Aid Office and transmitted to the Business Office to prepare for the disbursement of Pell Grant funds (See Appendix 11).

### **RECORDS AND FILE MAINTENANCE**

- 1. Accurate records and files must be maintained to support the eligibility criteria of each student who has received financial assistance to ensure compliance with federal, state, and district policies and procedures.
- 2. It is highly recommended that the Financial Aid Office develop and maintain a "checklist "of documents and forms needed to verify and support the financial aid awarded to students. These files will also be required for audit and program reviews (See appendices 20 and 21).
- 3. Individual student master files are maintained by the Financial Aid Office for each student receiving assistance. These records must contain all approved forms and valid documents that reflect the type and amount of assistance provided and received by student.
- 4. The Financial Aid Office serves as an information clearinghouse for detailed and summary data reports regarding student aid programs.
- 5. All records of financial assistance are to be retained for five years following submission of the fiscal operations reports and must be maintained in fireproof file cabinets that can be locked in a secure area.
- 6. All school personnel with access to student financial records and files must be cleared and approved by the school principal.

### **ACCOUNTING AND FINANCIAL TRANSACTION FILES AND HANDBOOKS**

All post-secondary educational centers maintain accounting files, financial aid manuals, and ledgers which are easily accessible. These documents and materials should include:





### 1. Manuals/documents and handbooks

- a. Accounting records, ledgers and logs, of funds for student financial aid programs supported by federal, state, and district funding.
- b. Compilation of Student Aid Regulations, Title 34 Code of Federal Regulations (CFR).
- c. FSA publications that can be accessed at <a href="https://www.ifap.ed.gov/ifap/publications.jsp">www.ifap.ed.gov/ifap/publications.jsp</a>
- d. IFAP Dear Colleague Letters that can be accessed via the Internet at <a href="https://ifap.ed.gov/ifap/">https://ifap.ed.gov/ifap/</a>
- e. The Federal Student Aid Handbook for Financial Aid Professionals.
- f. Access to ISIR/SAR and Verification Guidelines.
- g. The M-DCPS Financial Aid Handbook and School Board Policy 2450.
- h. The Post-secondary Code of Student Conduct http://adulted.dadeschools.net/
- i. M-DCPS campus crime statistics published by the M-DCPS School Police available via the internet or hard copies in compliance with Clery Act mandates.

### 2. Files, forms, reports and audits

- a. Program Participation Agreements (PPA) (past and present) to include the following:
  - Letters of eligibility,
  - All materials and applications used to establish eligibility,
  - Signed letter from ED certifying eligibility,
  - Primary Destination Point Administrators signed documents and
  - Eligibility and Certification Approval Report.
- b. Notification of tentative and final funding levels as well as any appeals notification (kept on a per-award-year basis)
- c. Pell Grant Disbursement Acknowledgment List (completed electronically)
- d. Student budgets (kept on a yearly basis)
- e. Any audit reports and responses
- f. A master list of all students receiving aid on an award-year basis and the award amounts according to funding source
- g. Individual student files (active and inactive)
- h. Fiscal Operations Report/Application for Funds (FISAP) and all related information which is to be filed by fiscal year if applicable.
- i. NSLDS enrollment status reports
- j. Evidence of reconciliation of Title IV award years





#### FISCAL REPORTING AND IPEDS - ROLE OF FINANCIAL AID OFFICER

- 1. Within 30 days of disbursement, the FAO prepares the Common Origination and Disbursement (COD) for submission to ED. This report identifies individual Federal Pell Grant student payments for a specific payment period with projected future payments for the remainder of the award year.
- 2. Annually prepares FISAP for submission no later than October 1<sup>st</sup> to ED. that serves as the application for schools that participate in the FSEOG program.
- 3. Assists with preparing appropriate sections of the Integrated Post-secondary Educational Data System (IPEDS) survey related to financial aid.
- 4. Works with the Business Office to ensure the Reconciliation of Pell Grant funds provided to the school. This is a mandatory function to ensure Title IV funds are accounted for and reconciled against funds received and disbursed.
- 5. As required by Title 34, Parts 668.15 and 668.16, Code of Federal Regulations (CFR), all Title IV schools must adhere to the separation of functions and operations of the Financial Aid Office and the Business Office. The functions of authorizing payments and disbursing of funds are separated to ensure that no single office or individual exercises both functions for students receiving financial aid funds.
- 6. The duties of staff in the Financial Aid Office and the Business Office must be clearly divided in each school in order to maintain a system of check balances.

### STUDENT FILES, FORMS AND DOCUMENTS

Student file folders must include required forms, documents, and evidence of financial need to support the request and approval of financial assistance. A menu of items has been provided that can be used to develop a file folder checklist, depending upon the financial aid services provided by the school (See Appendix 19). The following are the basic requirements for student folders.

- 1. Checklist, developed and maintained by the FAO, identifying all of the documents and forms needed to process a student's financial aid application for the eligible programs and services offered by the schools (See Appendix 20.)
- 2. The Post-secondary Educational Center Financial Aid Application (FM 5467) obtained at the time of initial application (See Appendix 7). This application form is not mandatory for students applying for Federal Pell Grant Title IV programs unless the school requires the applicant to complete the form. However, it is highly recommended for the purpose of maintaining current information, and for ensuring that information is consistent among various documents. This form is required for students applying for DFAP/Fee Waivers and other school based financial aid services.
- 3. An accurate Institutional Student Information Report (ISIR) or SAR.





- 4. COD-Pell History Lifetime Eligibility Used History.
- 5. Statement of Educational Purpose (including a default/refund statement) (See Appendix 1).
- 6. Verification Review Sheets if selected, and appropriate copies in accordance with the *Application* and *Verification Guide* (See Appendix 21).
- 7. Award(s) notification(s) issued from various organizations as well as from those issued by the post-secondary education center.
- 8. High school diploma or GED® or official transcript from a state-recognized institution.
- 9. Return to Title IV (R2T4) work sheets, if applicable.
- 10. Evidence of SAP for every disbursement period.

### **PROFESSIONAL JUDGEMENT**

1. The FAO may, on a case-by-case basis, adjust one or more of the data elements used to calculate the EFC. The FAO may need to adjust the data elements during the award year to reflect a student's change of circumstances. For example, if a wage-earning parent dies after the student's first payment period, the FAO could adjust the adjusted gross income in the EFC to reflect the loss of income. In order for the FAO to consider such circumstances, students must provide, in writing, a detailed account of the incident, and produce documentation to substantiate the claim. All decisions of the FAO are final.

Examples of appropriate forms of documentation include the following:

- Medical expenses medical bills, doctors' statements, and cancelled checks
- Death of household member obituary clipping from the newspaper and/or a death certificate.
- Change in income check stub, tax return, and W-2 forms
- Separation/divorce copies of court documents and legal papers
- Marriage copy of a marriage license
- Birth hospital bills and a birth certificate
- Wage determination and unemployment forms

### **VERIFICATION POLICIES AND PROCEDURES**

Post-secondary educational centers adhere to the following verification principles:

1. The institution must ensure that financial aid funds are awarded to eligible students in an equitable and consistent manner.





- 2. In order to qualify for federal financial aid funds, applicants must meet the standards established for verification. Family-reported information must be within a reasonable tolerance range in accordance with the current application and Chapter 4 of Federal *Financial Aid Handbook* that can be accessed at <a href="http://www.ifap.ed.gov/">http://www.ifap.ed.gov/</a>.
- 3. Institutional policies, outlining required forms and procedures that are to be used to fulfill verification standards, are made available to applicants for financial aid.
- 4. Verification procedures must be uniformly applied to all federal financial aid programs. The institution will verify all applicants selected by ED or the institution and will require transfer students previously selected for verification to re-verify their information.

### A. Verification/Documentation

- 1. For applicants selected through ED, the institution will verify the required items specified in the current FAFSA application and complete the appropriate worksheet based on the verification status of the student.
- 2. The institution will resolve and document discrepant application information for all applicants.
- 3. The FAO will enter a verification status code (V,W,S or blank) code in the COD system for students who receive Pell grants, regardless of whether they are selected for verification or not.

#### B. Applicant's Responsibility

- 1. Applicants selected for verification by ED or the institution are required to provide requested information or documentation as per current *Federal Student Aid Handbook, Application and Verification Guide* in order to be eligible to receive Title IV student aid funds. The Financial Aid Office reserves the right to request additional documentation as they deem necessary to complete the verification process. Any additional documents/information will be identified by the FAO on the Missing Information Request Form, (FM 6848) (See Appendix 6).
- 2.If applicant's dependency status has changed during the award year or the original applications were filed incorrectly, applicants must file a corrected form reflecting the changed status, unless the change is from a change in marital status.
- 3.Selected applicants must certify and/or update the household size and number of family members in post-secondary education to reflect accurate data as of the date of verification.





#### C. Time Period Limitations

- 1. Failure to provide documentation or information within 20 business days will result in the following:
  - a) The institution may not disburse any federal grants for applicants who fail to provide requested documentation within the time frame.
  - b) The institution may accept requested documentation after the specified time period and award aid to such applicants when the verification has been completed.

#### D. Tolerances

- 1. For the Federal Pell Grant Program, the institution will not recalculate the EFC for applicants. Students will resubmit their SAR/ISIR if applicant information changes as a result of verification or the institution may input the changes electronically with the appropriate documentation signed by the student.
- For all Pell financial aid applicants, the institution will have students resubmit the SAR/ISIR, if there are any errors. Calculation will be performed by the ED. The institution may input the changes electronically only with the appropriate documentation signed by the student.

#### E. Notification

- 1. The institution will inform applicants of verification procedures and requirements through written and/or verbal communication.
- 2. The institution will notify applicants of the results of the verification through written and/or verbal communication.
- 3. For the Federal Pell Grant Program, the institution will notify students if a dollar error in their application information would increase their Federal Pell Grant awards. The institution may pay on the student's original SAR/ISIR and should encourage students to resubmit it. The institution may input the changes electronically with the appropriate documentation signed by the student.

### F. Discrepancy Resolution

After the institution has made a reasonable effort to resolve any discrepancies that results in the applicant receiving funds on inaccurate or miscalculated information the institution will notify ED accordingly.





#### 5. Verification Items

The verification items for which students will need to provide documentation in order to fulfill the verification process include:

- Adjusted Gross Income (AGI)
- Education credits
- Tax-exempt interest
- Income earned from work
- Number in College
- U.S. Income tax paid

- Identity/Statement of Educational Purpose
- Untaxed IRA distributions
- IRA deductions and payments
- Other untaxed income
- Household size
- High school completion status

The verification process will be considered complete when a student has successfully submitted all requested verification documentation within the required twenty (20) business day timeline. A meeting will be held with the student and FAO at submission in order to review and confirm that all of the proper and required verification documents have been provided. Follow-up meetings will be held with the student and the FAO in order to notify students if their EFC or financial aid amounts change, discuss the procedures for correcting FAFSA data, request any additional documentation which may be needed to complete verification, and review the results of the verification process.

Any student who does not submit to the FAO the necessary and required verification documentation within the established timeline, will result in the forfeiture of their Pell Grant for the award year and the student must return any Pell funds already received for the year. The Financial Aid Office reserves the right to require students to submit other information and supplemental documentation when deemed necessary in order to complete the verification process.

#### 6. Fraud Referral

Title 34 Code of Federal Regulations CFR 668.16 (g) Standards of Administrative Capability require an institution to refer to the Department's Office of Inspector General (OIG) any credible information indicating that an applicant for Title IV FSA may have engaged in fraud or other criminal misconduct in connection with his or her application. Remember that fraud is the intent to deceive as opposed to a mistake. If you suspect such intent on the part of a student, report it to the OIG by telephoning 1-800-MISUSED. Additional information on the verification process can be found on Chapter 4 of the FSA Handbook that can be access at <a href="https://ifap.ed.gov/ifap/">https://ifap.ed.gov/ifap/</a>.





### 7. High School Diploma

To receive FSA funds, a student must a have a valid high school diploma or an equivalent (Official transcript must be submitted.) Foreign/international diplomas must be officially verified as an equivalent to a U.S. high school diploma. State issued, Department of Education GED® diplomas are accepted.

Private high school and home school diplomas are evaluated by the school counselor and FAO for approval.

Original and legible documents must be submitted with the financial aid application. Presenting falsified or fraudulent documents will result in denial of admission and possible criminal prosecution.

### **PACKAGING POLICIES**

Packaging refers to evaluating the financial need of a student and awarding aid in an equitable and consistent manner.

- 1. Financial need is calculated according to the center's budget minus family/student contributions. After estimated needs are established, the FAO should look at all available aid resources relative to student's needs. The FAO will also take into account any aid received from other sources and subtract this from the need.
- 2. The Financial Aid Office will attempt to meet student needs, depending upon available resources. Aid packages are built in the following sequence until financial needs are met:
  - FSAG (Florida Student Assistant Grant)
    - Federal Pell Grant
    - Federal Supplemental Opportunity Grant (FSEOG)
    - District Financial Aid Program (DFAP)

Examples of allowable packaging that include discretionary disbursement based upon financial need are

- DFAP
- Pell Grant
- Pell Grant and FSEOG
- Pell Grant, FSEOG, and DFAP
- Pell Grant, Homeless Waivers, and FSEOG
- Pell Grant, FSEOG

Packaging may also include industry sponsored scholarships and vouchers from various agencies.





### CHAPTER III FINANCIAL AID OFFICE ADMINISTRATIVE PROCEDURES

#### STUDENT PROGRAM CHANGES

Students may change programs within a related field and still be eligible to receive financial aid as long as they maintain all other eligibility requirements. For each program change, students will establish a new timeframe for completion of the new program, taking into consideration the hours completed in the previous program if the hours are applicable to the new program. A change to a different program area will result in funds being returned to Title IV (R2T4). Students are limited to one program change without completing the original program.

#### FINANCIAL AID COMMITTEE AND RESPONSIBILITY

Committee members are assigned by the principal of each institution. The committee's responsibility is to make decisions on appeals for those students who fail to maintain satisfactory academic progress.

#### FEDERAL PELL GRANT DISBURSEMENT POLICIES AND PROCEDURES

All financial aid applicants may apply for this grant. This federally-funded grant is available to all eligible students who demonstrate financial need and who enroll in an eligible certificate program of at least 600 hours. The award amount is determined through the federal formula. The FAFSA can be accessed at www.fafsa.ed.gov.

- 1. The following procedures must be followed when completing an application:
  - Complete the FAFSA form.
  - Complete M-DCPS "Post-secondary Institution/Area Technical Center Financial Aid Application, (FM-5467) if requested by school (See Appendix 7).
  - Submit an error free ISIR or SAR to the Financial Aid Office.
  - Complete and submit verification documentation as indicated on the SAR or ISIR provided to the school if applicable.
  - Provide additional verification information upon request.
- 2. In order for students to be eligible and receive financial assistance from federal, state or district financial aid programs, they must:
  - Apply for admission, submit documentation required by the school, and receive notification of admittance to the desired program.
  - Not be receiving Title IV Financial Aid concurrently from another institution.
  - Be enrolled as a regular student in an eligible program.
  - Complete an error-free FAFSA.
  - Have verifiable financial need based upon the SAR/ISIR in relation to the institution's cost of attendance.
  - Be one of the following to receive FSA:





## • • CHAPTER III • • FINANCIAL AID OFFICE ADMINISTRATIVE PROCEDURES

- U. S. citizen
- U. S. national (includes natives of American Samoa or Swains Island)
- U. S. permanent resident who has an I-151, I-551, or I-551C (Permanent Resident card)
- Please visit <u>www.studentaid.ed.gov</u> for additional information on eligibility criteria.
- Need to maintain SAP in accordance with school policy.
- Not be in default on a federal Perkins loan or any loans under the Federal Family of Educational Loan Programs (FFELP) made available through M-DCPS or other institutions, or have made satisfactory arrangements to repay a defaulted loan, and must not have borrowed in excess of the 150% subsidized loan limits under any Title IV program.
- Not owe refunds on a Federal Pell Grant, or any other Title IV grant.
- Have a signed statement of registration compliance indicating that they have either registered with the Selective Service or are not required to register.
- Have a signed Statement of Educational Purpose stating that they will use the money only for expenses related to attending school.
- Hold a high school diploma or GED® diploma. A diploma can be from a foreign school if is officially verified as equivalent to U.S. high school diploma. The high school diploma must be from a State recognized secondary institution (See Appendix 19).
- Not be enrolled in any high school completion program or hold a bachelor's degree or higher.
- Comply with attendance policies, safety regulations, and the *Code of Conduct for Post-secondary Students*.
- Comply with federal requirements regarding felony drug conviction policy in accordance with section 421(a) (1) of the Controlled Substances Act.
- 3. Award amounts are based on the following criteria:
  - Students' EFC index as indicated in the ISIR,
  - Actual costs of attendance,
  - Number of clock hours enrolled, and
  - The total number of clock hours to be completed in the program.
- 4. Processing Procedures
  - a. Students receive the SAR from the ED.
  - b. Students must assist in obtaining the following information for submission to the Financial Aid Office:
    - All verification documents reflected on the SAR/ISIR if necessary;
    - Completed Post-secondary Institution/Area Technical Center Financial Aid





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Application form (FM-5467) (See Appendix 7),

- Provide additional verification documentation, if needed.
- c. The Financial Aid Office will
  - Review students' files and check the Student Information System (SIS) to determine
    if they are renewal students or have other financial aid information on file. A file
    must be prepared for new students;
  - Obtain student signatures on the input document for the initial FAFSA application or for a correction if either is submitted electronically by the school;
  - Assist students in correcting misinformation on the Information Review form, Part II
    of the ISIR, and will resubmit it if necessary;
  - Prepare the Financial Aid Award Letters (FM-5471) (See Appendix 8);
  - Cross-reference documents in student files to ensure that required forms are enclosed and the information provided appears reasonable and consistent. If information is incomplete, unreasonable, and/or inconsistent, additional information must be requested from students;
  - Verify selected files in accordance with current ED regulations;
  - Calculate the award based upon the current year's ED regulations by using the Federal Pell Grant Payment Worksheet (FM-7034) (See Appendix 9); and
  - Review students' records to determine eligibility for other types of school based financial aid programs.

#### 5. Disbursement Procedures – Role of Business Office

Disbursements are payments of funds to students. These payments will be made directly to students in the form of a check prepared by the Institution's Business Office. Prior to disbursement, the Automatic Clearing House/ Electronic Funds Transfer (ACH/EFT) Payment Request Record (FM-6826) is completed by the FAO with the required information, including the amount of funds needed (See Appendix 10). The request is submitted electronically using ED G5 website. ED confirms the request with a control number. Within three working days after the request is made, funds should be available at the institution's bank in the federal funds account.

- a. Disbursements will be made two times within an award year.
- b. The students will be paid retroactively for any hour completed during a previous payment period (within the same award year) for which students were eligible for payment.
- c. Prior to any disbursement, the following must be completed for all students:
  - Check and verify that students have maintained SAP;







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- Review the progress for each student for the required attendance and academic progress;
- Determine award amount for that payment period; and
- The Financial Aid Office will process the award, complete the "Federal Grant Disbursement Authorization" (FM-6854), and transmit it to the Business Office (See Appendix 11). Students will then be notified;
- Before the grants are disbursed, the disbursement form is checked against school records to identify other aid received;
- Valid Florida photo ID and/or current school photo ID must be shown and verified when picking up and signing for checks; and
- When the overage check becomes void, the institution will return the remaining funds to the appropriate Title IV account.





#### FEDERAL SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANT (FSEOG)

FSEOG is a federally funded grant awarded to students who demonstrate significant financial need. Awards are determined by FAO of participating post-secondary institutions. FSEOG annual awards range from \$50 to \$1,000. All Federal Pell Grant applicants are considered for this grant based upon eligibility and availability of funds. For additional information access <a href="http://www2.ed.gov/programs/fseog">http://www2.ed.gov/programs/fseog</a>

- 1. Application procedures and eligibility requirements follow those of the Federal Pell Grant.
- 2. Selection Criteria:
  - a. Students must have an accurate SAR or ISIR;
  - b. Awards will be made to students with the lowest EFC;
  - c. From the eligible list of recipients, first priority will be granted to full-time students who are enrolled at the time of awarding; and
  - d. Maximum FSEOG awards will be determined annually according to the funds available at each center.
- 3. Processing Procedures To determine FSEOG awards, the Financial Aid Office will:
  - a. Review the SAR/ISIR.
  - b. Determine eligibility.
  - c. Prepare award letters to be sent to students.
  - d. Prepare the "Federal Grant Disbursement Authorization" and forward it to the Business Office.
  - e. Review academic progress for continued eligibility at the end of the payment period.
- 4. Disbursement Procedures

Disbursement Procedures for FSEOG will be the same as the Federal Pell Grant.

#### **BUSINESS AND ADMINISTRATIVE OFFICE PROCEDURES**

The primary role of the Business Office in regard to federal or other financial aid is the disbursement of funds as authorized by the Financial Aid Office.\*

\*For the purpose of this document, Business Office refers to the following personnel: Business Manager, Treasurer or Cashier. Individual functions of these persons will be determined at the discretion of the principal or his/her designee.

#### PROGRAM ASSESSMENT "SYSTEM OF CHECKS AND BALANCES"

The institution must ensure that the Financial Aid Office is adequately staffed with qualified personnel to carry out the functions outlined in this handbook. The institution must also ensure that





their administrative procedures for its financial aid program include an adequate system of internal checks and balances.

This system separates the functions of authorizing payments and disbursing or delivering funds so that no one person or office exercises both functions for any student receiving FSA funds. Small schools are not exempt from this requirement, even though they may have limited staff. Individuals working in either authorization or disbursement may perform other functions as well but not both authorization and disbursement.

#### **DEPARTMENTAL AUDITS AND PROGRAM REVIEWS**

Audits and program reviews are conducted to measure the efficiency and effectiveness of the operation of the financial aid program and to determine compliance with federal and state regulations in addition to the District's *Manual of Internal Funds Accounting*. Please refer to Chapter 2, Program Integrity of the *FSA Handook* that can be accessed at <a href="https://ifap.ed.gov/">https://ifap.ed.gov/</a>

#### 1. Non-Federal Audits

- a. Federal regulations require the school to audit, or have audited under its direction, all Federal Pell Grant, FSEOG, FWSP, and DFAP transactions to determine the fiscal integrity of financial transactions and reports and to assure that such transactions are in compliance with applicable laws and regulations.
- b. Annual audits will be performed in accordance with the appropriate ED Audit Guide. For newly established financial aid programs, the M-DCPS, Office of the Controller should be provided information required for the Single Audit Report from the post-secondary educational center. Audit reports are submitted to the Regional Office of the Inspector General.
- 2. Federal Program Reviews The ED periodically conducts reviews of federal student financial assistance programs. During a program review, activities related to student financial aid programs are examined for compliance with federal, state, and institutional policies, procedures, and regulations as well as for compliance with acceptable fiscal management practices.

#### **GRANT DISBURSEMENT**

The Financial Aid Office forwards the Federal Grant Disbursement Authorization (FM - 6854) to the Business Office. This document provides the names of students, student ID #'s, and the dollar amounts that each student is entitled to receive for that disbursement period.

The Business Office must review the disbursement authorization to determine total funds needed. The available cash on hand is subtracted from the total funds needed for the current disbursement to determine the additional funds that will be requested.

Post-secondary educational institutions that participate in the FSEOG program must determine the





matching portion for this grant in accordance with federal guidelines.

The Automatic Clearing House/Electronic Funds Transfer (ACH/EFT) Payment Request Record (FM-6826) (See Appendix 10) is completed by the FAO, who requests the amount of funds needed. The request is submitted electronically using ED's G5 website. ED confirms the request with a control number. Within three working days after the request is made, funds should be available in the federal funds account at the institution's bank.

Refer to <a href="https://ifap.ed.gov/CashManagementInfo/">https://ifap.ed.gov/CashManagementInfo/</a> for additional information and overview on cash management regulations and the G5 system can found at <a href="https://ifap.ed.gov/ifap/byTopic.jsp?function=50">https://ifap.ed.gov/ifap/byTopic.jsp?function=50</a>

Prior to disbursement, the availability of funds must be verified with the bank. The Business Office then verifies enrollment of the students through SIS and prints schedule screen.

The Business Office then completes the Federal Grant Disbursement Authorization Form (FM-6854) (See Appendix 11) in the following areas:

- 1. Tuition and fees assessed through SIS
- 2. Books
- 3. Supplies
- 4. Other items
- 5. Remaining amount to be issued to students.
- 6. Records check numbers after writing checks (The Financial Aid Office notifies students when checks are available for pick-up)
- 7. Collects signatures of students and records the date of checks issued upon presentation of a valid Florida photo ID from students.

Following check disbursement, a copy of the completed Federal Grant Disbursement Authorization is returned to the Financial Aid Office. The Business Office advises the Financial Aid Office of any checks that were not picked up by students. Attempts to contact students who do not pick up grant checks **must be documented**.

#### **FISCAL REPORT RESPONSIBILITY**

- 1. Complete a monthly Bank Reconciliation (FM-5208) (See Appendix 12) of the Federal Funds Account. Submit the reconciliation, along with monthly financial reports for Internal Fund to the district office in accordance with district requirements.
- 2. Submit a fiscal end-of-year summary of transactions for the Federal Funds Account along with the end-of-year Monthly Financial Report, Financial Aid Accounts (FM-6926)





(See Appendix 13) and Bank Reconciliation (FM-5208) to the District Office.

3. Verify the FISAP application financial data needed by the financial aid office.

#### FINANCIAL AID DISBURSEMENT RECORDS

The Business Office maintains the following records for each student receiving Federal Financial Aid:

- 1. Original check requisitions and copies of the Federal Grant Disbursement Authorizations are filed numerically by check requisition.
- 2. Copies of the check requisitions and copies of the Federal Grant Disbursement Authorizations with Book Authorizations (FM-4013) (See Appendix 14), Tuition Deferments (FM-5419) (See Appendix 15) and Books and Supplies Deferment FM 6809 (See Appendix 16), class schedules, tuition payment. (i.e.: cash agency charge) miscellaneous charges, Withholding Authorization Form (FM-5423) (See Appendix 17) and any other supporting documentation for authorized charges filed alphabetically by student.

#### **ADMINISTRATIVE OFFICE RESPONSIBILITY**

School principals or designees are responsible for signing financial aid checks and reviewing, approving, and submitting financial aid documents to ED and district offices in a timely manner.

Prior to signing financial aid checks, principals or designees must:

- 1. Confirm the availability of the financial aid funds in the federal bank account as indicated on The School's G5 Payment Request Authorization.
- 2. Compare the Federal Grant Disbursement Authorization figures with the dollar check amount for recipients of financial aid.

The following reports should also be reviewed by principals or designees:

#### 1. Monthly reports

- a. Monthly Bank Reconciliation (FM-5208), noting if the federal bank account balance agrees with the Monthly Financial Report, Financial Aid Accounts (FM-6926).
- b. Monthly Financial Report, Financial Aid Accounts (FM-6926) which provides a summary of monthly expenditures and receipts in the federal bank account that must agree with the ending figures on the Bank Reconciliation (FM-5208).

#### 2. Annual reports

- a. Review the Summary of Transactions to assure there is a match with total disbursements and receipts on the federal ledger cards.
- b. Review FISAP expenditures to assure there is a match with total disbursements on the





ledger cards and that interest earned in **excess** of \$250 is returned to ED at the end of the school year.

c. Submit three originals of the fiscal end-of-year summary of transactions for the Federal Funds Account, end-of-year Monthly Financial Report, Financial Aid Accounts (FM-6926) and Bank Reconciliation (FM-5208) to the District Office.

#### **DESTINATION POINT ADMINISTRATOR**

The Business Manager or designee must have review access as a Destination Point Administrators to verify the funds that are being drawn down for the school. The school's Primary Point Destination Administrator must provide access to G5.

#### **RECONCILIATION OF FINANCIAL RECORDS**

The Business Office must work closely with the Financial Aid Office to conduct mandatory reconciliation of federal aid funds by award years which is a fiduciary responsibility for Title IV eligible schools. Reconciliation is a process in which financial records are compared and discrepancies are resolved.

Funding cancellation occurs 5 years after the end of the award year. (Pell 2017-2018 funding will cancel effective September 30, 2023 {5 year cycle}). Schools must fully reconcile to \$0 balance. No further disbursement or adjustment data reported to COD and no funds are available from G5 for the award year. Most schools should be able to reconcile and complete processing well before closeout deadlines.

The reconciliation process should be conducted monthly. Refer to Chapter 5 of the *Federal Student Aid Handbook* or Chapter 8 of *Federal Student Aid Blue Book* for additional information. The Handbooks can be accessed at <a href="https://ifap.ed.gov/ifap/">https://ifap.ed.gov/ifap/</a>.





### ACRONYMS USED IN THE FEDERAL FINANCIAL AID HANDBOOK

ACH/EFT ...... Automatic Clearing House/Electronic Funds Transfer

**COA** Cost of Attendance

COD Common Origination and Disbursement System

CPS Central Processing System

**DFAP** District Financial Aid Program

**DOE** Department of Education

ED....... United States Department of Education

**EFC** Expected Family Contribution

FAO ..... Financial Aid Officer

FAT ..... Financial Aid Transcript

FAFSA ..... Free Application for Federal Student Aid

FERPA Family Educational Rights and Privacy Act

**FISAP**..... Fiscal Operations Report/Application for Funds

**Program** 

FSEOG Federal Supplemental Educational Opportunity Grant

FWSP Federal Work Study Program

GAPS Grant Administration and Payments System

GE Gainful Employment

GED® ...... General Educational Development

**HEA**..... Higher Education Act of 1965

IFAP ...... Information for Financial Aid Professionals

ISIR Institutional Student Information Report

IPEDS ...... Integrated Post-secondary Educational Data System







### ACRONYMS USED IN THE FEDERAL FINANCIAL AID HANDBOOK

LEU Lifetime Eligibility Used

M-DCPS Miami-Dade County Public Schools

NSLDS National Student Loan Data System

Office of Inspector General

**OSFA** Office of Student Financial Assistance

PPA Program Participation Agreement

PGDA Pell Grant Disbursement Authorization

PGOA Pell Grant Origination Authorization

R2T4 ...... Return to Title IV

SAIG Student Aid Internet Gateway

SAP Satisfactory Academic Progress

SAR Student Aid Report

SIS Student Information System

VA Veteran Educational Benefits Program

VTS...... Vocational Tracking System

WIA Workforce Investment Act





#### TECHNICAL RESOURCES AND WEBSITES

Please feel free to visit the following websites for additional information on federal, state and district financial aid program policies and procedures and related services:

College Navigator: <a href="http://nces.ed.gov/collegenavigator">http://nces.ed.gov/collegenavigator</a>

Central Processing System (CPS): <a href="https://fsawebenroll.ed.gov">https://fsawebenroll.ed.gov</a>

Common Origination and Disbursement System (COD): https://cod.ed.gov

Federal Student Aid (FSA) Download-Software and Manuals: <a href="https://fsadownload.ed.gov/index.htm">https://fsadownload.ed.gov/index.htm</a>

Federal Student Aid: https://studentaid.ed.gov/sa/

Federal Student Aid Handbook: <a href="https://ifap.ed.gov/ifap/byAwardYear.jsp?type=fsahandbook">https://ifap.ed.gov/ifap/byAwardYear.jsp?type=fsahandbook</a>

Financial Aid Tool Kit: <a href="https://financialaidtoolkit.ed.gov/tk/">https://financialaidtoolkit.ed.gov/tk/</a>

Florida College Access Network: <a href="http://floridacollegeaccess.org/">http://floridacollegeaccess.org/</a>

Florida Department of Education Office of Student Financial Assistance: <a href="http://www.floridastudentfinancialaid.org/">http://www.floridastudentfinancialaid.org/</a>

Free Application for Federal Student Aid-FAFSA: www.fafsa.ed.gov

FSEOG: <a href="http://www2.ed.gov/programs/fseog">http://www2.ed.gov/programs/fseog</a>

G5: https://www.g5.gov/

Great Lakes Educational Loan Services, Inc.: https://www.mygreatlakes.org

Information for Financial Aid Professionals (IFAP): https://ifap.ed.gov/ifap/

Integrated Post-secondary Education Data System (IPEDS): http://nces.ed.gov/ipeds

Miami-Dade County Public Schools (M-DCPS) http://www.dadeschools.net







### TECHNICAL RESOURCES AND WEBSITES

M-DCPS Adult and Community Education: <a href="http://adulted.dadeschools.net">http://adulted.dadeschools.net</a>

M-DCPS Division of Student Services: <a href="http://studentservices.dadeschools.net/fafsa.asp">http://studentservices.dadeschools.net/fafsa.asp</a>

My Student Download: <a href="https://nslds.ed.gov/npas/index.htm">https://nslds.ed.gov/npas/index.htm</a>

National Student Loan Data System: <a href="https://nsldsfap.ed.gov/nslds\_FAP/">https://nsldsfap.ed.gov/nslds\_FAP/</a>

National Center for Education Statistics: <a href="https://nces.ed.gov/">https://nces.ed.gov/</a>

Publications: https://ifap.ed.gov/ifap/publications.jsp

Student Aid Internet Gateway; <a href="https://fsawebenroll.ed.gov">https://fsawebenroll.ed.gov</a>

Tools for Schools: <a href="http://ifap.ed.gov/ifap/toolsforschools.jsp">http://ifap.ed.gov/ifap/toolsforschools.jsp</a>

U.S. Department of Education: <a href="http://www.ed.gov/">http://www.ed.gov/</a>

U.S. Department of Veterans Affairs: <a href="http://www.benefits.va.gov/">http://www.benefits.va.gov/</a>

Veteran Affairs Education and Training: <a href="http://www.gibill.va.gov/">http://www.gibill.va.gov/</a>





#### APPENDICESMEANING

#### **APPENDIX 1**

**FM-5415** – Identity and Statement of Educational Purpose

#### **APPENDIX 2**

**FM-6827** – Registration Information You Are required To Know

#### **APPENDIX 3**

**FM-6498** – District Financial Aid Program (DFAP)/Fee Waiver Application

#### **APPENDIX 4**

**FM-5431** – Satisfactory Academic Progress (SAP) Report

#### **APPENDIX 5**

FM-6863 - Financial Aid Student Appeals Form

#### **APPENDIX 6**

**FM-6848** – Missing Information and Additional Documentation Request Form

#### **APPENDIX 7**

FM-5467 – M-DCPS Financial Aid Application

#### **APPENDIX 8**

FM-5471 - Financial Aid Offer

#### **APPENDIX 9**

**FM-7034** – Federal Pell Grant Payment Worksheet

#### **APPENDIX 10**

FM-6826 - ACH/EFT Payment Requested Record

#### **APPENDIX 11**

**FM-6854** – Federal Grant Disbursement Authorization

#### **APPENDIX 12**

FM-5208 - Bank Reconciliation

#### **APPENDIX 13**

**FM-6926** – Monthly Financial Report - Financial Aid Accounts

#### **APPENDIX 14**

**FM-4013** – Authorization for Charge of Books and Supplies

#### **APPENDIX 15**

FM-5419 - Tuition Deferment

#### **APPENDIX 16**

FM-6809 – Books and Supplies Deferment

#### **APPENDIX 17**

FM-5423 – Withholding Authorization Form

#### **APPENDIX 18**

School Board Policy- 2450

#### **APPENDIX 19**

Financial Aid Student Folder Checklist

#### **APPENDIX 20**

Student Financial Aid and File Checklist- Sample

#### **APPENDIX 21**

Student Verification Checklist- Sample





## • • APPENDIX 1 • •



# MIAMI-DADE COUNTY PUBLIC SCHOOLS OFFICE OF POSTSECONDARY CAREER AND TECHNICAL EDUCATION

Eligibility for Federal Financial Aid

Identity and Statement of Educational Purpose

(To be signed at the Institution)

The student must appear in persor	າ at		to
	(Name of Postseco	ndary Educatio	onal Institution)
verify his or her identity by present such as, but not limited to a driver will maintain a copy of the student and the name of the official at the	's license, other state-is: t's photo ID that is anno	sued ID, or pas tated with the	sport. The institution date it was received
In addition, the student must sign,	in the presence of the i	nstitutional off	icial, the following:
Stat	ement of Educational P	urpose	
I certify that I,		am the i	ndividual signing this
(Print Stud	dent's Name)		
Statement of Educational Purpose receive will only be used for educa			•
	for	the	school year.
(Name of Postsecondary Education	nal Institution)		
(Student's Signature)	(Date)	(Stude	ent ID Number)





#### APPENDIX 2 • •



#### MIAMI-DADE COUNTY PUBLIC SCHOOLS

Office of Postsecondary Career and Technical Education Financial Aid Office

Registration Information You are Required to Know

- In order to determine aid eligibility all required documentation must be submitted to the Financial Aid Office in a timely manner.
- All necessary/required documents must be received before any/all tuition deferments are issued.
- Satisfactory Academic Progress (SAP) must be maintained at the point of review, which is at the completion of the 1st payment period in the financial aid academic year, in order to be eligible to receive financial aid for the subsequent payment period.
- As a student you have received the financial aid packet at the time of applying for financial aid and know that you are accountable to be familiar with the information. The SAP policy is detailed for both the qualitative and quantitative measurements and you must be aware that this is a key component in which financial aid eligibility is determined.
- Should you fail SAP during the payment period being reviewed, due to mitigating circumstances, you are entitled to one (1) successful appeal during your vocational training.
- Your Pell Grant Award is based on YOUR clock hours completed. All hours previously paid must be completed before your next payment period begins.
- It is the responsibility of all South Florida Workforce and Vocational Rehabilitation clients to notify their respective agency of any/all grant money received.
- All tuition and fees owed to this post-secondary institution shall be satisfied prior to any financial aid award checks being issued to the student.
- Students will be notified when all financial aid award checks are available and must present valid Florida ID when picking up & signing for checks.
- Awards are issued at least once per payment period.
- You must notify the Financial Aid Office, if you are withdrawing from a program or making any changes to your schedule.
- Post withdrawal Disbursements and Return of Title IV funds will be calculated at the time that withdrawal has been determined. The return of federal funds or tuition not satisfied by the post withdrawal award will become the responsibility of the student. Arrangements must be made to satisfy any balance.

I have read and I under	rstand all the above	information	outlining my	responsibilities	for receiving
financial aid.					

Students Signature	Date
--------------------	------





## • • APPENDIX 3 • •

Clear Forms





Miami-Dade County Public Schools Office of Postsecondary Career and Technical Education DFAP/Fee Waiver Application

Last Namo:	Datc	Student I.D. Number:	
Last Name.	First Name:	Middle In	itial:
Address:	City:	Zip Co	ode:
Section Number	Course Nam	e	Amount
		_	\$ 0.0
			\$ 0.0
			\$ 0.0
		Total Amount	\$ 0.0
	ove information is true and I underst ation that is required by law.	and my application will not be co	nsidered until I hav
		Student S	Signature
	FOR OFFICE USE O	NLY	
	ct Financial Aid Program (DFAP) is det pected Family Contribution (EFC) of <7		or Federal Student
	ligible student is automatically eligib ined fee waiver eligibility.	e for a FEE Waiver. Any of the fol	lowing documents
<ol> <li>can be used to determ</li> <li>A signed tax return*</li> <li>W-2 forms*</li> <li>Notarized statement</li> <li>Supplemental Nutrit</li> <li>Evidence of Unempl</li> </ol>	ined fee waiver eligibility.  To fincome from the student ion Assistance Program (SNAP) food soyment compensation	tamp authorization.	
1. A signed tax return* 2. W-2 forms* 3. Notarized statement 4. Supplemental Nutrit 5. Evidence of Unempl 6. Consistent attendant	ined fee waiver eligibility.  of income from the student ion Assistance Program (SNAP) food s	tamp authorization.	
<ol> <li>can be used to determ</li> <li>A signed tax return*</li> <li>W-2 forms*</li> <li>Notarized statement</li> <li>Supplemental Nutrit</li> <li>Evidence of Unempl</li> <li>Consistent attendar as determined by so</li> </ol>	ined fee waiver eligibility.  To fincome from the student ion Assistance Program (SNAP) food soyment compensation are and Satisfactory Academic Progres	tamp authorization. s (SAP) in any program of study fo	r one full trimester
can be used to determ  1. A signed tax return*  2. W-2 forms*  3. Notarized statement  4. Supplemental Nutrit  5. Evidence of Unempl  6. Consistent attendar as determined by so  * All social security nur	ined fee waiver eligibility.  Tof income from the student ion Assistance Program (SNAP) food soyment compensation are and Satisfactory Academic Progreschool administration in mbers must be redacted prior to retain	tamp authorization. s (SAP) in any program of study fo	r one full trimester
can be used to determ  1. A signed tax return*  2. W-2 forms*  3. Notarized statement  4. Supplemental Nutrit  5. Evidence of Unempl  6. Consistent attendar as determined by so  * All social security nur the student.	ined fee waiver eligibility.  To fincome from the student ion Assistance Program (SNAP) food soyment compensation are and Satisfactory Academic Progress shool administration mbers must be redacted prior to retain or Signature	tamp authorization.  s (SAP) in any program of study for the study for t	r one full trimester
can be used to determ  1. A signed tax return*  2. W-2 forms*  3. Notarized statement  4. Supplemental Nutrit  5. Evidence of Unempl  6. Consistent attendar as determined by so  * All social security nur the student.  Administrator/Counsel  This application for Di	ined fee waiver eligibility.  To fincome from the student ion Assistance Program (SNAP) food soyment compensation are and Satisfactory Academic Progress shool administration mbers must be redacted prior to retain or Signature	tamp authorization.  Is (SAP) in any program of study for a copy. Original documents many Date	r one full trimester oust be returned to

FM-6498 Rev. (08-19)







## • • APPENDIX 4 • •







Clear Forms

## Miami-Dade County Public Schools Office of Postsecondary Career and Technical Education

#### Satisfactory Academic Progress Report

Today's Date:		
Student Name:		
Student ID:		
Program Name:		
Date Entered Program:		
Date Expected To Complete Program:		
<ol> <li>Student is performing at a minimum</li> <li>Yes</li> <li>No</li> <li>Student is satisfactorily completing of Yes</li> <li>No</li> <li>certify that the above is true and corn</li> </ol>	outcomes at a rate to finish the program v	within the timeframe listed above
Instructor's Printed Name	Instructor's Signature	Date
3. Student has successfully completed	67% of maximum scheduled hours.	
Yes		
No		
Registrar's Printed Name	Registrar's Signature	Date

Upon completion, please return this form to the Financial Aid Office

FM-5431 Rev. (05-19)





## • • APPENDIX 5 • •



## Miami-Dade County Public Schools Office of Postsecondary Career & Technical Education

#### FINANCIAL AID STUDENT APPEALS FORM

Academic Year	`	
	Date:	_
Last Name:	First Name:	_
Student ID: I	Program of Study:	-
Reason for Appeal: (Please provide any documentation that w	ill support your statement)	
	Approved: Denied:	



FM-6863 Rev. (04-13)



## • • APPENDIX 5 • •



Miami-Dade County Public Schools
Office of Postsecondary Career & Technical Education

## Financial Aid Committee STUDENT APPEALS FORM

Last Name:	First Name:			
Program of Study:	Hours Atte	Hours Attended:		
Hours Enrolled:	Percentag	<del> </del>		
Name, Title	Approved	Denied	Date	
1.				
2				
3				
4				
5				
	Approved:	Denie	d: 🗆	





## • • APPENDIX 6 • •



#### **MIAMI-DADE COUNTY PUBLIC SCHOOLS**

Office of Postsecondary Career & Technical Education
FINANCIAL AID OFFICE
MISSING INFORMATION/ADDITIONAL DOCUMENTATION
REQUEST FORM

			Date		
Na	me		Student ID		
De	ar Applicant:				
Но	e are processing your financial assis wever we cannot complete process r office. All letters from a third perso	ing ı	until the items checked below are		
	Financial Aid Application	ı (FN	1-5467)		
	Free Application for Fed	eral	Student Aid (FAFSA) (mail to prod	ess	or or submitted online)
	Copy of mother's Federa	al (IR	S) tax return Transcript for		<u> </u>
	Copy of father's Federal	(IRS	s) tax return Transcript for		
			RS) tax return Transcript for		
	Copy of spouse Federal	(IRS	s) tax return Transcript for		
	Statement of non-filling	form	for		
	Student Aid Report (SAI	R) (a	Il 3 parts)		
	Copy of Alien Registration				
	Completed and signed F	ede	ral Verification Worksheet		
	Other:				
	-				
	<del></del>				
		۵.			
FII	nancial Aid Office Representative		•		
	I understand the failure to submit result in the cancellation of any final balance. This may also result in the I	ncial	aid deferment, and that I will have	to pa	y the subsequent
Stı	udent's Signature:		Date:		
Ρle	ease Return to:				
0	George T. Baker Aviation Technical College 3275 NW 42 Avenue Miami, Florida 33142	0	D. A. Dorsey Technical College 7100 NW 17th Avenue Miami, Florida 33147		The English Center 3501 SW 28 Street Miami, Florida 33133
0	Lindsey Hopkins Technical College 750 NW 20 Street Miami, Florida 33127	_	Miami Lakes Educational Ctr. and Technical College 5780 NW 158 Street Miami Lakes, Florida 33014	_	Robert Morgan Educational C and Technical College 18180 SW 122 Avenue Miami, Florida 33177
	South Dade Technical College 109 NE 8th Street Homestead, Florida 33030				



FM-6848 Rev. (01-15)



## • • APPENDIX 7 • •



#### **MIAMI-DADE COUNTY PUBLIC SCHOOLS**

Office of Postsecondary Career & Technical Education FINANCIAL AID APPLICATION

INSTRUCTIONS TO APPLICANTS:	Specify the center you plan to attend.				
Answer every question.	D. A. Dorsey Technical College				
2. Type or print legibly in ink.	☐ The English Center ☐ G. T. Baker Aviation Technical College				
3. Sign on the reverse side.	☐ G. T. Baker Aviation Technical College ☐ Lindsey Hopkins Technical College				
<ol> <li>Return the completed form to the financial aid office.</li> </ol>	☐ Lindsey Hopkins Technical College ☐ Miami Lakes Educational Center and Technical College ☐ Robert Morgan Educational Center and Technical College ☐ South Dade Technical College				
PERSONAL DATA:					
Name	Last Four (4) Digits of SS #				
Last First M.I.					
Permanent Address Street	Date of birth// Sex: M or F				
Street					
City State Zip Telephone No. ()	Place of birth City State Country				
Where will you reside during the academic year?	U.S. citizen? Yes No No				
with parentsother	If No, are you a permanent resident?				
Race:	Yes No No				
Black, Non-Hispanic	Do you have a high school diploma or G.E.D?				
Hispanic	Yes No				
Asian American/Pacific Islander	Do you have a bachelor's or equivalent degree or				
American Indian/Alaskan Native	higher? (including foreign) Yes No				
Multiracial					
· · · · · · · · · · · · · · · · · · ·	Name of high school attended				
Marital Status: No. of dependents	<u> </u>				
Ages of dependents					
	Which certificate of study program will you enter?				
Spouse's name	<u> </u>				
Is spouse a student? Yes No					
If Yes, where?	Expected starting date (month/year)				
	77				
FINANCIAL DATA:					
When do you anticipate enrolling for program:	Have you ever received a student loan?				
( Fall Trimester)	Voc. No.				
(Winter Trimester)	Yes No No				
( Spring/Summer Trimester)	If Yes, who was (were) your bank lender(s)?				
Have you received aid from any of the area technical					
centers in Miami-Dade County in prior years?					
Yes No					
If Yes, indicate center name					







## • • APPENDIX 7 • •

Name of School	City	State	Attended From	Attended To	Degree Received
CERTIFICATION STATEMENT (	ON REFUNDS, D	EFAULT, AN	D EDUCATION	IAL PURPOSE	
CERTIFICATION STATEMENT ( I certify that I do not owe a refund on ar repay any defaulted loan, and have not use all Title IV money received only for	ny grant or loan, am r borrowed in excess	not in default on of the loan limit	any loan, have ma s, under Title IV p	ade satisfactory ar rograms, at any ir	rangements to
I certify that I do not owe a refund on ar repay any defaulted loan, and have not use all Title IV money received only for	ny grant or loan, am r borrowed in excess expenses related to	not in default on of the loan limit my study at:	any loan, have ma s, under Title IV p	ade satisfactory ar rograms, at any ir	rangements t
I certify that I do not owe a refund on ar repay any defaulted loan, and have not	ny grant or loan, am r borrowed in excess expenses related to his application is true pendent verification	not in default on of the loan limit my study at:	any loan, have ma s, under Title IV p to the best of my	ade satisfactory ar rograms, at any ir knowledge and I a	rangements to estitution. I wi
I certify that I do not owe a refund on ar repay any defaulted loan, and have not use all Title IV money received only for I declare that information reported in the this information may be subject to inde	ny grant or loan, am r borrowed in excess expenses related to his application is true pendent verification	not in default on of the loan limit my study at:	any loan, have ma s, under Title IV p to the best of my	ade satisfactory ar rograms, at any ir knowledge and I a	rangements to estitution. I wi

FM-5467 Rev. (01-15)







### • • APPENDIX 8 • •







Clear Forms

#### Miami-Dade County Public Schools Office of Postsecondary Career & Technical Education

## Financial Aid Offer Student ID:

_		
Dear	Stin	-tnah

Name: \_\_

We are pleased to offer you the financial aid listed for the \_\_\_\_\_ academic year.

			DIS	BURSEMEN1	rs		
	First	Period	Second	Period	Third	Period	
	Hours:		Hours:		Hours:		
	Weeks:		Weeks:		Weeks:		
	<b>1</b> <sup>st</sup>	2 <sup>nd</sup>	3 <sup>rd</sup>	4 <sup>th</sup>	5 <sup>th</sup>	6 <sup>th</sup>	
AWARD NAME	hours:	hours:	hours:	hours:	hours:	hours:	TOTAL
NAIVIL	weeks:	weeks:	weeks:	weeks:	weeks:	weeks:	
Federal Pell Grant							
FSEOG							
DFAP							
Fee Waiver							
FSAG-CE							
Other:							
Other:							

Each of these offers is contingent upon you maintaining Satisfactory Academic Progress in your program and continuous enrollment. We reserve the right to revise your offer due to changes in your financial status, enrollment status, changes in regulations, or availability of funds.

Financial Aid Officer's Signature: _	 Date:	
· ·		

 $By signing \ below, I \ acknowledge \ that \ I \ have \ received \ information \ regarding \ the \ satisfactory \ progress \ requirements \ for \ financial \ aid.$ 

Student's Signature:	D	Date:		
			FM-5471 Rev.	. (08-19)





#### APPENDIX 8 • •

#### FINANCIAL AID STANDARDS OF ACADEMIC PROGRESS

M-DCPS Technical Colleges, in conjunction with Federal regulations, have established the following Standards of Satisfactory Academic Progress which must be met to receive financial aid.

A. To make Satisfactory Academic Progress a student must:

- Receive a satisfactory Progress Report of a minimum grade C at the evaluation period (qualitative measurements).
- 2. Complete 67% of the maximum scheduled hours for which the student was enrolled. Adjustments to this requirement may be applicable for students with verified disabilities (quantitative measurements).
- 3. Satisfactory progress will be evaluated at the end of the first payment period and prior to subsequent payment periods if applicable.
- B. If a student fails to make satisfactory progress at the evaluation point, he/she will not be eligible for the payment period following "Unsatisfactory" Academic Progress report. The student is then financially obligated for expenses incurred until eligibility is reestablished. If the student attains satisfactory progress during the next evaluation, financial aid will be reestablished.

#### C. Time Frame

```
Program = 900 Hours
Maximum Time Frame = 900 Hours x 1.50 = 1,350 Hours
SAP = 67% of Maximum Scheduled Hours
```

A student who exceeds the maximum hours of eligibility will be considered as not making satisfactory progress and will no longer be eligible for financial aid for that program.

#### D. Appeals of Satisfactory Progress

If a student is notified of cancellation of his/her financial aid offer, he/she has the opportunity to appeal such action. The appeal should be in writing and should include the following documents:

- 1. Letter from student describing mitigating circumstances.
- 2. Physician's note and/or records if the appeals are based on medical reasons.
- 3. Any additional supporting documents.

The decision of the committee is final. The student will receive written notification of decisions. Reinstatement of financial aid after appeals are denied can be achieved if the student, attends a trimester without financial assistance and maintains satisfactory progress for that payment period. The student may be granted only one appeal for the length of their program.

If a student fails to make Satisfactory Academic Progress as reflected on the Satisfactory Academic Progress Report form, a meeting will be held with the student and the Financial Aid Officer. The student will be placed on "Financial Aid Warning" for one payment period. The Financial Aid Officer will closely monitor the student's progress. The student is eligible to continue receiving financial aid.

#### **PAYMENTS**

Awards will be disbursed in two to three disbursements during a payment period representing a % of the possible hours and weeks in that academic year. Subsequent payments are contingent upon the maintenance of Satisfactory Academic Progress by the student. Furthermore, if a student does not complete the hours and weeks paid for during the first payment period, his/her subsequent payments will commence upon completion of previous hours and weeks. Checks will be held for 21 days after the last day of the student's enrollment for the award year. Any checks not picked up by that date may be voided.

FM-5471 Rev. (08-19)





## • • APPENDIX 9 • •



#### **MIAMI-DADE COUNTY PUBLIC SCHOOLS**

## Office of Postsecondary Career & Technical Education

#### FEDERAL PELL GRANT PAYMENT WORKSHEET

dent ID #:		Length o	f Academi	c Year In Hours:		
gram Name:		First Day	Of Class:			
e of Residence:		Other De	ependents	s: (Y/N) :		
		AWARI	D YEAR	AWARD YEAI	R	AWARD YEAR
Cost of Attendance (COA)	1.					
2. Expected Family Contribution (EFC)	2.					
a. Total hours paid in prior Award Year (AY)	a.					
b. Previous hours attended/not eligible	b.					
c. Eligible hours to be paid	C.					
Scheduled Award full-time Annual Award taken from Pell Payment Schedule						
<ul> <li>For programs of at least one year</li> <li>In total length, the schedule award</li> <li>equals the annual award.</li> </ul>	3a.					
b. For programs less than one year, the Annual Award must be prorated as follows: Annual Award Weeks of full time instructional program Weeks of instructional time in academic year						
\$	3b.					
					ı	
SUMMARY AWARD	AW	/ARD	AWA	RD YEAR		TOTAL
TOTAL AMOUNT PAID TOTAL HOURS TO BE COMPLETED						



FM-7034 Rev. (08-14)



## • • APPENDIX 9 • •

4. Ex	pected payments should be c	alculated as follows for ite	ms 4a, b, c, d, e, and f.	AWARD YEAR	DATE
Sched		k hours in payment period k hours in academic year	_ = payment for payment period		
a.	Expected payment for first p				
	900 Eligible Hrs. =	Clock Start/Stop =	/		
	Total Weeks =	SAP = Qualitative	/ Quantitative		
b.	Expected payment for secon				
	\$ X 900	= \$			
	Eligible Hrs. =	Clock Start/Stop =	/		
	Total Weeks =	SAP = Qualitative	/		
C.	Expected payment for third \$ X				
	900				
	Eligible Hrs. =	_ Clock Start/Stop =	/		
	Total Weeks =	SAP = Qualitative	/ Quantitative		
d.	Expected payment for fourt				
	\$X	= \$			
	900 Fligible Hrs. –	Clack Start/Stan -	/		
	Total Weeks =	SAP = Qualitative	/		
e.	Expected payment for fifth	navment neriod			
c.	\$ X				
	900				
	Eligible Hrs. =	Clock Start/Stop =	/		
	Total Weeks =	SAP = Qualitative	/		
f.	Expected payment for sixth				
	\$ X	= \$			
	900	Clark Chart (C)	,		
	Eligible Hrs. = Total Weeks =				
	TOTAL ANGERS =	_ SAY = Qualitative	/ Quantitative		





## • • APPENDIX 10 • •



#### **MIAMI-DADE COUNTY PUBLIC SCHOOLS**

#### Office of Postsecondary Career & Technical Education

Automatic Clearing House/Electronic Funds Transfer (ACH/EFT) to be completed by Financial Aid Officer and sent to Business Manager/Designee to verify funds to be disbursed for Federal Financial Aid.

## ACH/EFT PAYMENT REQUEST RECORD (G5 Hotline 1-888-336-8930)

LINE 1	DISBURSEMENT TOTAL	\$(WHOLE DOLLARS ONLY)
LINE 2	CASH ON HAND	\$(WHOLE DOLLARS ONLY)
LINE 3	AMOUNT REQUESTED	\$(WHOLE DOLLARS ONLY)
I certify tha	at the above amount is the	actual Federal Pell portion of cash on hand in the
Federal Pel	l account ofSchool	Name as of
Signature _	Business Manager/Designee	Title
LINE 4 PR	REPARED BY: SIGNATURE	Financial Aid Officer Date
LINE 5 CC	ONTROL NUMBER:	Obtained from the school's G5 Payment Request Notification. Print hardcopy and attach to this form for verification and audit
	·	has been deposited in the federal bank account
	Date	
Signature		
	Business Manager / Designee	



FM-6826 Rev. (04-13)





## • • APPENDIX 11 • •



#### MIAMI-DADE COUNTY PUBLIC SCHOOLS

Office of Postsecondary Career & Technical Education

#### FEDERAL GRANT DISBURSEMENT AUTHORIZATION

 $\label{eq:decomposition} \mbox{Directions: The business office must complete remaining columns as outlined in the Miami-Dade County Public Schools' $$\underline{\mbox{Financial Aid Handbook.}}$$ 

NAME STUDENT ID	AME AMT				OUNT CREDITED			CK.#	STUDENT'S SIGNATURE	DATE
OTOBERT ID	DISBURSED	VOC. TUITION.	ADULT TUITION	FEES	BOOKS	OTHER	CREDIT BALANCE			

Page \_\_\_\_ of \_\_\_\_



FM-6854 Rev. ( 04-13)



## • • APPENDIX 12 • •

	BANK RECONCILIATION OFFICE OF AC						
		$AS\;OF_{-}$	Month Dov	_ /		ID ACCOUNTING 1 of 2	
SCHOOL NAM			Month, Day	Year	WORK LO		
BANK NAME				ACCOU			
BANK STATEN	MENT DATE		STAT	TEMENT RALA	NCE Positive □		
ADJUSTMENT	CHECK ADDD	OPRIATE BOX TO IDE	NTIFY IF POSITIVE O	R NEGATIVE BALA	NCE Positive \$\(\text{Negative}\)\$		
DEDUCT 1) [	DEPOSITS NOT F	OSTED TO MSAF					
DEPOSIT NO.	DEPOSIT DATE	DEPOSIT AMOUNT	DEPOSIT NO.	DEPOSIT DATE	DEPOSIT AMOUNT		
					SUBTOTAL	s < > (	
ADD 2) (	CHECKS NOT PO	STED TO MSAF	COMPUTER SYST	TEM AS OF CL	OSING DATE:		
CHECK NO.	CHECK DATE	CHECK AMOUNT	CHECK NO.	CHECK DATE	CHECK AMOUNT		
	<del></del>						
	- <del></del>						
ADD 2) [	DEDOCITE IN TR	ANCIT: (Attach o	any of volidated s	danaait alin/a) )	SUBTOTAL	\$ (	
ADD 3) [ DEPOSIT	DEPOSITS IN TRA	ANSIT: ( <u>Attach c</u> DEPOSIT	DEPOSIT	DEPOSIT SIIP(S).)	DEPOSIT		
NO.	DATE	AMOUNT	NO.	DATE	AMOUNT		
					SUBTOTAL \$	(3	
	OTHER ADJUSTI maker's name of	MENTS: (ie., NSI NSF check(s).)	F checks, bank c	harges, overaç			
	CLUSTMENT	AMOUNT	ADJ	IUSTMENT	AMOUNT		
					\$	(4	
DEDUCT 5)	OUTSTANDING (	CHECKS (from pa	nge 2)		SUBTOTAL \$	<u>&lt; &gt; (5</u>	
- •		ALANCE (Sum of	1 thru 5)		SUBTOTAL \$	(6	
	<b>SAVINGS/INVES</b> BANK NAME(S)/DO	TIMENTS CPS MONEY MARKE	ET POOL ACCO	UNT NO.	AMOUNT		
				\$_			
				\$			
			TOTAL	\$\$	IVESTMENTS \$	(7	
8)	TOTAL CASH (S	Sum of 6 & 7)	TOTAL	. SAVINGS/III	\$ \$ \$		
The undersign	ed hereby certify	that this Bank Re	conciliation is co	mplete and acc	curate.	<u> </u>	
Secretary/	ame		Signature		Date Signed	ı	
Principal's	u				Date		
Name 878-5309			Signature		Signed	M-5208 Rev (01-08)	





## • • APPENDIX 12 • •

9	AS OF	ONCILIATION oth, Day  / Year	OFFICE OF ACCOUNTING INTERNAL FUND ACCOUNTING Page 2 of 2
SCHOOL NAME			WORK LOC. NO
BANK NAME		ACCO	UNT NO

#### **OUTSTANDING CHECKS LIST**

DATE	CHECK NUMBER	AMOUNT	DATE	CHECK NUMBER	AMOUNT	DATE	CHECK NUMBER	AMOUNT

TOTAL OUTSTANDING CHECKS \$

(Carry over balance to subtotal 5, Page 1)



878-5309

FM-5208 Rev. (01-08)





## • • APPENDIX 13 • •

#### Miami-Dade County Public Schools

#### MONTHLY FINANCIAL REPORT

				J. ( )		
		FINA	NCIAL AID ACCOUNT	S		
This report is to be filed at cumulative and the last repor		-				ounty School Board. It is
SCHOOL			REPORT F	OR MONTH		
			PREPARED	) BY		
		RECEIP	PTS		DISBURSEN	MENTS
	THIS N		YEAR TO DATE	THIS N	MONTH	YEAR TO DATE
FUND	CASH	TRANSFER	Including Transfers	CASH	TRANSFER	Including Transfers
1. PELL						
2. S. E. O. G.						
3. Other	_					
4. Other	_					
5. VOIDS						
6. Pell R2T4						
7. Admin. Allowance						
8. Interest						
9. Return of Other Funds						
10. Misc.						
TOTALS	0.00		0.00	0.00		0.00
Balance at Beginning	Month		Year (1)	Month xxxxxxxxxxx		Year xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx
Balance at Close	xxxxxxxxxx		xxxxxxxxxxxxxxxxxx			
Balancing Totals	0.00		0.00	0.00		0.00
Note: (For Items 1 - 5) (	1) This figure rem	ains constant.	(2) This should be same	as (4) and (3) s	hould be same	as (5).
Compute year-to-date to preceding month's report		by adding curr	ent month transactions (	including transfe	ers) to the year	r-to-date totals from the
Accounts Payable \$		(total of all o	utstanding bills as of date	e of report.)		
Interest posted for the month	in the amount of	\$				
Total interest posted year to	date \$					
I certify that this financial rep	ort covering the p	eriod of		through		is correct.

Signed \_\_\_



FM-6926 (08-13)

Principal



## • • APPENDIX 14 • •



# Miami-Dade County Public Schools Office of Postsecondary Career & Technical Education AUTHORIZATION FOR CHARGE BOOKS AND SUPPLIES

CENTER _				C	ATE	
NAME				STUDEN	NT ID #	
<u>Bi</u>	lling Agenc	Y	<u>Amount</u>			
	Rehab./VOCI		\$	Instru	uctor (Signature)	
	C (		\$			
	S/CUHA (1 O		\$	Author	rization (Signature)	
□ FELL (	Grant (	ear /	\$ \$	Author	ization (Signature)	
Teach			\$			
☐ Other			\$	Booksto	ore Clerk (Signature)	
			ВООК	STORE CHARGES		
QNTY U	nit #. Book	s Supplies	DESC	CRIPTION OF ITEMS	UNIT COST	TOTAL
			ceipt of Goods)	TOTAL BOOKSTORE CHARGI	ES \$ 0.00	

Business Office/Treasurer Agency/Financial Aid Office Bookstore Student/Teacher





## • • APPENDIX 15 • •



#### MIAMI-DADE COUNTY PUBLIC SCHOOLS

Office of Postsecondary Career & Technical Education

#### **TUITION DEFERMENT**

PROGRAM  STUDENT VACS ID. NO.  I. FINANCIAL AID OFFICE  This statement is to certify that the above named student is eligible for a tuition deferment based on a projectedaward of \$for theTrimester.  Date  Financial Aid Office  II. REGISTRATION/BUSINESS OFFICE  I authorize that \$ for my tuition be deducted from my award.  Date  Student's Signature  I understand that if, for any reason, I don't qualify for enough aid to cover these charges, I will be responsible for payment of balance, if any.  Student's Signature		STUDENT'S NAME	SCHOOL
This statement is to certify that the above named student is eligible for a tuition deferment based on a projectedaward of \$for the		PROGRAM	STUDENT VACS ID. NO.
deferment based on a projectedaward of \$for the	I.		
II. REGISTRATION/BUSINESS OFFICE    I authorize that \$ for my tuition be deducted from my award.    Date		deferment based on a projected	
Date Student's Signature  I understand that if, for any reason, I don't qualify for enough aid to cover these charges, I will be responsible for payment of balance, if any.		Date	Financial Aid Office
I understand that if, for any reason, I don't qualify for enough aid to cover these charges, I will be responsible for payment of balance, if any.	II.		tion be deducted from my award.
qualify for enough aid to cover these charges, I will be responsible for payment of balance, if any.  Registration/Business Office		Date	Student's Signature
	qua I w	alify for enough aid to cover these charges, ill be responsible for payment of balance, if any.	Registration/Business Office
	Cop	by to: BUSINESS OFFICE FINANCIAL AID	BOOKSTORE STUDENT REGISTRATION



FM-5419 Rev. (03-14)



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#### **MIAMI-DADE COUNTY PUBLIC SCHOOLS**

Office of Postsecondary Career & Technical Education

#### **BOOKS AND SUPPLIES DEFERMENT**

PROGRAM  STUDENT VACS ID. NO.  FINANCIAL AID OFFICE This statement is to certify that the above named student is eligible for books and supplies deferment based on a projectedaward of \$for the		STUDENT'S NAME		SCHOOL
This statement is to certify that the above named student is eligible for books and supplies deferment based on a projectedaward of \$for the		PROGRAM		TUDENT VACS ID. NO.
Authorized Book Allowance \$ Financial Aid award.  I authorize that \$ for my books and supplies be deducted from my award.  Date Student's Signature Bookstore Clerk Signature  understand that if, for any reason, I don't ualify for enough aid to cover these charges, will be responsible for payment of balance, if any. tudent's Signature	This stat	tement is to certify that the above nent based on a projected		
Authorized Book Allowance \$ for my books and supplies be deducted from my award.  Date Student's Signature Bookstore Clerk Signature  understand that if, for any reason, I don't ualify for enough aid to cover these charges, will be responsible for payment of balance, if any. tudent's Signature		Date	F	inancial Aid Office
Date  Student's Signature  Bookstore Clerk Signature  understand that if, for any reason, I don't ualify for enough aid to cover these charges, will be responsible for payment of balance, if any. tudent's Signature	II. <u>BOOKS</u>	STORE		
Date  Student's Signature  Bookstore Clerk Signature  understand that if, for any reason, I don't ualify for enough aid to cover these charges, will be responsible for payment of balance, if any. itudent's Signature	Authoriz	zed Book Allowance \$	Financi	al Aid
understand that if, for any reason, I don't ualify for enough aid to cover these charges, will be responsible for payment of balance, if any. itudent's Signature	I author	ize that \$ for my	books and supplies be de	educted from my award.
ualify for enough aid to cover these charges, will be responsible for payment of balance, if any. tudent's Signature		Date	Student's Signature	Bookstore Clerk Signature
Please attach completed <i>Authorization for Charge Books and Supplies,</i> FM-4013	qualify for e will be resp	enough aid to cover these charges, consible for payment of balance, if any	<i>i</i> .	
Please attach completed <i>Authorization for Charge Books and Supplies,</i> FM-4013				
Please attach completed Authorization for Charge Books and Supplies, FM-4013				
Please attach completed Authorization for Charge Books and Supplies, FM-4013				
opy to :   BUSINESS OFFICE   FINANCIAL AID   BOOKSTORE   STUDENT   REGISTRATION				_



FM-6809 Rev. (05-20)



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## Miami-Dade County Public Schools Office of Postsecondary Career & Technical Education

#### Withholding Authorization Form

			, autnorize Financi	
	ness Office to Withhold fro	-	nt credit balance the followin	ig cost
Please che	ck tuition or services for v	which funds wil	be withheld and cost of eac	h.
	AGE Tuition	\$		
	AGE Out-of State Tuition	\$		
	Other	\$	Explain:	
Total \$				
Student	t Name (print)			
Student	t Signature		Date	
Copy to:				
	ess Office cial Aid nt			



FM-5423 Rev. (05-19)



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Book Policy Manual Section 2000 Program

Title ADULT, POST-SECONDARY CAREER TECHNICAL AND COMMUNITY EDUCATION

Code po2450 Status Active

Adopted May 11, 2011 Last Revised April 29, 2020

#### 2450 - ADULT, POST-SECONDARY CAREER TECHNICAL AND COMMUNITY EDUCATION

A basic and high school continuation program shall be provided as an opportunity for anyone over compulsory school age who is not attending high school in this District. Program procedures are contained in the Adult and Career Technical Education Procedures Handbook.

#### **GED Eligibility**

A person who is not at least eighteen (18) years of age may be permitted to take the General Educational Development (GED) tests upon submission of a statement of justification recommended by the Superintendent. The statement of justification shall be based on at least one of the following circumstances:

- A. The candidate justifies a need to be employed that would prevent school attendance.
- B. The candidate is a parent who does not have access to child care.
- C. The candidate justifies health condition(s) that would prevent school attendance.
- D. The candidate desires to enter a vocational program, a college or university or military service.

#### **Postsecondary Programs and Fees**

A fee schedule shall be established for students enrolled in adult basic, adult secondary, career technical certificate education, or other adult programs, who are reported for funding through the Workforce Development Education Fund. The Florida legislature annually establishes fees for the adult and career technical education program in accordance with the General Appropriations Act. In addition, provisions are made in this policy for financial aid and fee/tuition waivers, disposition of funds collected, community-based organizations, self-supporting classes, private sector instruction, special textbook or supply items, and capital improvements, technology enhancements or equipping buildings.

Adult and vocational education services are provided to adults in the following areas:

A. Adult General Education (Adult Secondary and Adult Basic Education)

1. Students who demonstrate functional literacy skills at/or below the eighth grade level and are studying to achieve literacy.





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2. Students earning credit required for a high school diploma and/or preparing for the Test of General Educational Development (GED).

Tuition is charged to this category of students.

3. Students who have a high school diploma and demonstrate functional literacy skills at/ or above the ninth grade level require specific improvement of academic or learning skills before pursuing post-secondary education goals to obtain or maintain employment, or to benefit from postsecondary adult vocational education programs.

Students in this category pay fees as established by the General Appropriations Act. Additionally, the School Board may charge any additional fees authorized by Florida law or State Board of Education Administrative rule.

4. No fees are charged to students who are fee exempt based on State law.

Students not counted for funding purposes will be assessed fees equal to, but not exceeding, the cost of providing such programs.

#### B. Career Technical Education

- 1. Students enrolled as postsecondary adult vocational certificate pay fees as established by the General Appropriations Act. Additionally, the Board may charge any additional fees authorized by Florida statute or State Board of Education Administrative rule.
- 2. Students taking adult postsecondary vocational courses for personal or hobby use will pay fees equal to, but not exceeding, the cost of providing such programs.
- 3. No fees are charged to students who are fee exempt based on State law.

Career Technical Education services provided to students classified as non-resident for tuition purposes as defined in State statute pay fees accordingly.

#### Financial Aid and Fee/Tuition Waivers

#### A. Financial Aid

A fee may be assessed to postsecondary adult vocational and adult secondary students to pay in full or in part, the fees of eligible postsecondary adult vocational certificate and adult secondary students with demonstrated financial need. Each center will maintain documentation as required by State Board of Education Administrative Rule.

Students in COE accredited centers when eligible may utilize financial aid from Federal or State





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assistance programs. Financial aid information is available through the area technical center counseling offices.

#### B. Fee/Tuition Waivers

Fee/Tuition waivers may be granted by the principal or designee when necessary to assure an education opportunity for students who have financial needs which cannot be met by existing sources of student financial aid and as authorized by law or rules of the State Board of Education. No fee waivers are allowed for students taking adult vocational classes for strictly personal or hobby use and students identified above.

School Operations will allocate such fee waivers as may be available based upon need and requests of the various adult and area technical centers. Allocations will be made for each fiscal year and when depleted no additional waivers will be granted unless additional funds become available. Annual allocations may not exceed the maximum established annually in the General Appropriations Act.

Each center receiving a fee waiver allocation shall maintain complete documentation as required for each waiver issued.

#### C. Scholarships

The Board may establish scholarship funds using donations to help students who need financial assistance to pay fees, who are enrolled in adult secondary, adult life-long learning, and postsecondary adult vocational education programs.

#### D. Deferred Fees/Installment Payments

#### 1. Deferred Fees

Fees for students qualifying for and receiving grants, loans, or scholarships or for whom fees are being paid on their behalf by an employer, association, or governmental agency may be deferred. Students for whom or from whom deferred fees have not been collected by the end of the trimester in which they registered will not be allowed to register for subsequent courses until all financial obligations have been met.

#### 2. Installment Payments

Students in need of installment payments may pay fees for regular courses through an installment payment schedule if they register before the beginning of the course, before the trimester or within twenty-one (21) calendar days of the beginning of the term.

At least 1/3 of the fee must be paid at the time of registration. All fees must be paid no later than the end of the sixth week in the trimester. Fees must be paid in one lump sum when





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students register on or after twenty-two (22) calendar days after the course or trimester has begun.

#### **Disposition of Fees Collected**

- A. All tuition collected will be forwarded to Treasury Management.
- B. All other monies collected at adult education centers shall be properly receipted and deposited directly into the center's internal funds.

#### Community Based Non-Profit Organizations (CBOs), Public Agencies, and Private Businesses

The District may enter into affiliating agreements with community-based non-profit organizations (CBOs), public agencies, and private businesses that may wish to provide unique classroom or laboratory instruction that will significantly enhance the employment opportunities of students enrolled in these programs.

#### **Veterans Benefits and Transition**

The Board shall permit for the GI Bill and Vocational Rehabilitation and Employment Program beneficiaries to attend eligible education or training courses for up to ninety (90) days pending payment from the Veterans Administration (VA) for the course. To be eligible, the beneficiary must provide a certificate of eligibility for entitlement to educational assistance (valid/current VAF 28-1905) and written request to use the entitlement. Documentation must be submitted no later than the first day the course or training commences. The ninety (90) day period starts on the date when the District certifies tuition and fees following receipt of the required documents.

The District shall not impose a penalty, deny access to classes or facilities, or require the beneficiary to borrow additional funds to cover tuition and fees due to late payments for the VA. The State Approving Agency (SAA) or the VA may act to approve or disapprove certain courses or education, which may be subject to a waiver by the VA.

#### **Private Sector Instruction**

Private businesses/agencies may request adult vocational or basic education classes that qualify for Workforce Development Education Funds but do not have sufficient enrollment to support the class/program. The District may cooperate with these businesses/agencies through an agreement approved by the Superintendent where the business/agency will pay the difference between projected workforce Development Education Funds earned and the actual program cost. All other fees applicable in this policy shall be contracted prior to the operation of such a class/program.

#### **Self-Supporting Classes**

Students enrolling in non-reimbursed classes will pay a fee to cover the cost of instruction. The amount





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will be variable depending on the expense for offering the course. In all instances, the salaries, fringe benefits, and supplies furnished will be included in the costs.

The Superintendent shall develop and implement administrative procedures to make schools available to citizens of the District for these purposes and to implement this policy.

Effective 7/1/11

Revised 8/6/14

Revised 4/29/20

#### © Miami-Dade 2020

Legal <u>F.S. 1003.435</u>

F.S. 1004.93 F.S. 1004.94

The Veterans Benefits and Transition Act - 2018 (38 USC Sections 3679, 3698(c, 1, C), P.L. 115-407, Sections 103-104)





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#### FINANCIAL AID STUDENT FOLDER CHECKLIST MENU

The following are recommended forms and documents that may be included in a students' file folder depending upon the financial assistance being provided by the school. Financial Aid Officers can use this menu to develop a checklist of required documents to support the eligibility criteria and need of financial assistance for their students (See Appendix 21). These are not all inclusive and schools should only include items specific to their programs and services. Please be advised that student records are confidential and all M-DCPS personnel must adhere to federal, state and district policies and procedures governing this matter.

#### PELL GRANT FILE FOLDER CHART

Copies of Student's Driver License, U.S. Passport, U.S. Birth Certificate or Certificate of Naturalization, or U.S. Resident Card-(verification process if applicable)

COD-Pell History Lifetime Eligibility Used History

Federal Pell Grant Payment Worksheet-FM 7034

Financial Aid Award Letters-FM 5471

Florida Public Postsecondary Career Education Student Assistance Grant (FSAG) Disbursement Eligibility Report Printout-if eligible

High School Diploma or GED® Diploma or Official Transcript from an accredited institution

Identity and Statement of Educational Purpose FM 5415

Institutional Student Information Record (ISIR)

M-DCPS -Books and Supplies Deferment Form-FM 6809

M-DCPS-Financial Aid Application FM-5467-(If required by school)

M-DCPS-Tuition Deferment Form -FM 5419

Missing Information Request Form-FM 6848-(Verification Process if applicable)

Professional Judgment Documentation-(if applicable)

Program Withdrawal/Termination dates-Gradebook/DIYH

Registration Information You Are Required To Know-FM-6827

Return To Title IV- R2T4 Worksheets- (If Applicable)

Student Information/Biographical Display from VACS

Satisfactory Academic Progress Form- FM-5431

Printout- Fees by Course

Printout Waiver/Agency Billings

Verification Worksheets- depending on the Verification Tracking Groups Requirements(if applicable)

Withholding Authorization Form- FM 5423





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#### **DISTRICT FINANCIAL AID PROGRAM (DFAP FILE FOLDER CHART)**

Career Technical Educational Program Progress Chart- (if applicable)

Financial Aid Application - FM 5467

ISIR/Institutional Student Information Record- Evidence of FASFA Completion

Program Training Plan- (if applicable)

Signed and approved DFAP/FEE Waiver Application- Form FM 6498

Student Schedule DisplayNACS Printout

TABE TEST Testing Data Printout from FOCUS

Printout Waiver/Agency Billings

#### FEE WAIVER FILE FOLDER CHART

Career Technical Educational Program Progress Chart- n applicable

**Evidence of Unemployment Compensation** 

Financial Aid Application FM-5467

Gradebook Student Attendance Detail-Data In Your Hands Printout

M-DCPS Satisfactory Academic Progress Reports FM 5431

Notarized Statement of Income

Program Training Plan- (if applicable)

Signed and approved DFAP/FEE Waiver Application- Form FM 6498 Signed Income Tax Returns

Supplemental Nutrition Assistance Program (SNAP) food stamp authorization Student Schedule

Vocational Student Attendance Summary-Data In Your Hands Printout

W-2 Forms





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#### **SAMPLE**

#### STUDENT FINANCIAL AID FILE CECKLIST

Academic Year:		State Date:		
	■ SELECTED FOR VERIFICATION	☐ NOT SELECTED FOR VERIFICATION		
STUDENT NAME:		STUDENT ID:		
☐ FINANCIAL A	AID APPLICATION			
☐ VALID ISIR C	DR SAR			
□ DOCUMENTATION LOG				
☐ FEDERAL PELL GRANT PAYMENT WORKSHEET				
☐ FINANCIAL AID OFFER COPY				
☐ REVIEWED NSLDS HISTORY ONLINE AND ADDED STUDENT TO TRANSFER MONITORING 0 RECORDS OF				
UNTAXED IN	ICOME, SUCH AS WELFARE/AFDC/AD	C, SS BENEFITS, ETC. 0 PROFESSIONAL JUDGEMENT		
DOCUMENT	TATION (if applicable)			
□ VERIFICATION WORKSHEET 1, (if applicable)				
■ IMMIGRATION STATUS/RESIDENCY DOCUMENTATION				
☐ FEDERAL TAX FORM FOR BASE YEAR (1040-1040A-1040EZ, IRS TRANSCRIPT)				
SNAP DOCU	MENTATION (if applicable)			
☐ STUDENT RE	ECEIPT FOR FEDERAL AID DISBURSED			
□ SATISFACTORY ACADEMIC PROGRESS REPORT (SAP)				
☐ WITHDRAWAL/ TERMINATION/ WORKSHEET (Return of Title IV if applicable)				
☐ RETURN OF TITLE IV CALCULATION FROM FAS (if applicable)				
☐ ACADEMIC (	CALENDAR			
EOI DER CREAT	TED RV	DATE		





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#### **VERIFICATION CHECKLIST (SAMPLE)**

The items checked below must be submitted to complete the verification of information entered in your FAFSA application (Pell Grant students only). All information may be Subject for verification depending upon the comments on your Institutional Student Information Record (ISIR) or your Student Aid Record (SAR).

 🗕 2019 Original IRS Transcript and your 2019 Tax Return with your W2
 2019 Original Parent's IRS Tax Transcript and 2019 Tax Return/With W2
_ Completed Verification Worksheet- Yellow Fann (signed by parent)
_ Copy of High School Diploma/GED® and high school transcript*
_ Verification of High School Diploma, if obtained out of the U.S.
_ Child/Children's Birth Certificate/s
Original Certificate of Citizenship or Naturalization
_ Proof of SNAP benefits (food stamps)
_ U.S. Passport
_ 1-94 Card
_ Resident Card
_ Florida Driver's License
_ Proof of Child Support
_ Proof of Legal Guardianship
Proof of dependent or ward of court since turning age 13
_ Proof of Homeless status (letter from shelter)
_Status Letter from Selective Service
_ Correct FAFSA ("Make Corrections" for the 2014-2015 FAFSA)
 Notarized Letter from an adult that provides the majority of your support for 2013 to the present.
This is necessary for independent status students only that are unemployed and receiving support
from a friend or family member.

\_ DATE: \_

STUDENT'S SIGNATURE:





#### ANTI-DISCRIMINATION POLICY FEDERAL AND STATE LAWS

**THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA** adheres to a policy of nondiscrimination in employment and educational programs/activities and strives affirmatively to provide equal opportunity for all as required by:

- Title VI of the Civil Rights Act of 1964 prohibits discrimination on the basis of race, color, religion, or national origin.
- Title VII of the Civil Rights Act of 1964 as amended prohibits discrimination in employment on the basis of race, color, religion, gender, or national origin.
- Title IX of the Education Amendments of 1972 prohibits discrimination on the basis of gender.
- Age Discrimination in Employment Act of 1967 (ADEA) as amended prohibits discrimination on the basis of age with respect to individuals who are at least 40.
- The Equal Pay Act of 1963 as amended prohibits gender discrimination in payment of wages to women and men performing substantially equal work in the same establishment.
- Section 504 of the Rehabilitation Act of 1973 prohibits discrimination against the disabled.
- Americans with Disabilities Act of 1990 (ADA) prohibits discrimination against individuals with disabilities in employment, public service, public accommodations and telecommunications.
- The Family and Medical Leave Act of 1993 (FMLA) requires covered employers to provide up to 12 weeks of unpaid, job-protected leave to "eligible" employees for certain family and medical reasons.
- The Pregnancy Discrimination Act of 1978 prohibits discrimination in employment on the basis of pregnancy, childbirth, or related medical conditions.
- Florida Educational Equity Act (FEEA) prohibits discrimination on the basis of race, gender, national origin, marital status, or handicap against a student or employee.
- Florida Civil Rights Act of 1992 secures for all individuals within the state freedom from discrimination because of race, color, religion, sex, national origin, age, handicap, or marital status.
- Title II of the Genetic Information Nondiscrimination Act of 2008 (GINA) prohibits discrimination against employees or applicants because of genetic information.
- Boy Scouts of America Equal Access Act of 2002 no public school shall deny equal access to, or a fair opportunity for groups to meet on school premises or in school facilities before or after school hours, or discriminate against any group officially affiliated with Boy Scouts of America or any other youth or community group listed in Title 36 (as a patriotic society).
- Veterans are provided re-employment rights in accordance with P.L. 93-508 (Federal Law) and Section 295.07 (Florida Statutes), which stipulate categorical preferences for employment.

#### In Addition:

School Board Policies 1362, 3362, 4362, and 5517 - Prohibit harassment and/or discrimination against students, employees, or applicants on the basis of sex, race, color, ethnic or national origin, religion, marital status, disability, genetic information, age, political beliefs, sexual orientation, gender, gender identification, social and family background, linguistic preference, pregnancy, citizenship status, and any other legally prohibited basis. Retaliation for engaging in a protected activity is also prohibited.



Revised: 08-2022 AUGUST 2022