

New Training Expenditure Worksheet Instructions

This worksheet is a tool to plan training services. It is to be completed yearly for **ALL** training cases including short-term training, continuing education, college, graduate school, and training institutions where financial aid is not available. Disability related services are to be addressed throughout the rehabilitation process on the IPE and are **not** to be included on this form.

Any individual planning on attending training must apply for financial aid by filing the Free Application for Federal Student Aid (FAFSA). A copy of the Student Aid Report (SAR) must be in the case record prior to an authorization being made for training expenditures.

This form is a guide to help the counselor determine the maximum amount of tuition and other training assistance to be authorized. Appropriate comparable benefits must be explored and utilized as outlined in Federal and State regulations and Department policy. Negotiation is strongly encouraged to maximize resources to successfully serve the greatest number of eligible individuals.

Part A Tuition/Book Award Calculation (Requires SAR Only)

SAR - The FAFSA should be completed and a new SAR submitted to the counselor each year. **EXCEPTION:** If the individual files the FAFSA and is not eligible for any need-based financial aid (including grants or loans), a new SAR is not required in subsequent training years if there has been no substantive change in family income, dependency status, or school of attendance. The initial SAR should be used to complete the form.

Adjusted Gross Income: Add together both the student and family adjusted income amounts and enter the sum.

Number in Household: Enter the appropriate number in household from SAR.

Tuition Amount Per Term: Enter the actual tuition cost of the training institution or the highest state rate for tuition per term (whichever is lowest).

EXCEPTIONS: **1)** Tuition and initial registration fees may be provided at post-secondary programs for individuals who are deaf recognized by the United States Congress as national programs without limitation to highest state rate. Enter actual amount of tuition. **2)** Training that is not available through state-supported training institutions may be provided at the published catalog rate of the institution. Enter actual amount of tuition.

Sliding Scale Percentage: Use the adjusted gross income and number in household to determine the maximum allowable percentage for tuition. A lower percentage may be negotiated. Enter the agreed upon percentage.

EXCEPTIONS: **1)** Tuition and initial registration fees may be provided at post-secondary programs for individuals who are deaf recognized by the United States Congress as national programs without regard to financial needs testing. Enter negotiated rate up to 100%. **2)** Tuition and initial registration fees may be

provided to individuals who receive SSI or SSDI as a result of their disability without regard to financial needs testing. Enter negotiated rate up to 100%.

Estimated Tuition Award Per Term: Multiply the percentage and the tuition amount. Enter the product.

Tuition/Book Award Per Term: Enter the estimated amounts to be authorized for all applicable terms and calculate the totals.

*******NOTE:** Stop if only tuition/books/disability related costs are planned. Submit the Training Expenditure Worksheet to the Student Financial Aid Office (SFAO) at the training institution.*****

If the estimated tuition and/or book awards result in an overaward or would preclude the individual from receiving a grant for which he/she would otherwise be eligible, the SFAO will return the worksheet for adjustments. The counselor should be notified within ten (10) working days if adjustments are needed. Authorizations should not be made until after the SFAO has had time to request adjustments.

PART B - Requires SAR and FAN

Complete only when assistance with services other than tuition, books, and/or disability related services are planned.

COLUMN A (RESOURCES)

Estimated Family Contribution: Enter the Estimated Family Contribution (EFC) which can be found on the SAR or on some Financial Aid Notification (FAN) forms from the training institution.

Total of All Financial Aid Awards: Enter the total amount of all accepted financial aid awards reported on the FAN.

Yearly Tuition From Part A: Enter the Yearly/Total Tuition Assistance recorded in Part A.

Yearly Books From Part A: Enter the Yearly/Total Books Assistance recorded in Part A.

Total Resources: Add EFC, Total Financial Aid Awards, Total Tuition Assistance to be provided by DVR, and Total Book Assistance to be provided by DVR and enter the sum.

COLUMN B (OTHER TRAINING COSTS)

Cost of Attendance: Enter the Cost of Attendance as reported on the FAN or in a memorandum from Central Office.

Total Resources: Enter Total Resources from Column A.

Remaining Expenses: Subtract Total Resources from Cost of Attendance for estimate of remaining expenses.

If the Total Resources exceed the Cost of Attendance, the consumer should be advised of the possibility of an overaward. It is not the responsibility of DVR to meet the total remaining expenses. The 25% or greater consumer share of tuition **must** be met through resources other than DVR. The consumer is responsible for seeking out additional funding sources such as loans, work study or part time employment.

DVR Assistance for Other Training Costs (Not to Include Disability Related Costs): Services in this section are generally subject to economic needs testing as determined on the DVR 2. Counselors should utilize the household income information from the SAR to update the Financial Assessment section of the DVR 2 before determining if excess income should be applied to other training expenses.

When services in addition to tuition, books, and/or disability related costs are planned for students, it is expected practice that the case record contain a justification of why the available resources were insufficient for the individual to participate in training. This justification should include a description of how the available resources will be utilized for training expenses. If agreed upon services are justified after economic need has been applied and appropriate comparable benefits have been considered, enter actual amount.

Submit to SFAO: If the estimated tuition and/or book awards along with the other planned services (excluding disability related costs) result in an overaward or would preclude the individual from receiving a grant for which he/she would otherwise be eligible, the SFAO will return the worksheet for adjustments. The counselor should be notified within ten (10) working days if adjustments are needed. Authorizations should not be made until after the SFAO has had time to request adjustments.