



Financial Aid Policies and Procedures 2015-2016

**Northwest Tech.....creating success in
education, the workplace, and life.**

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FINANCIAL AID POLICIES AND PROCEDURES

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STATEMENT OF PURPOSE

Federal regulations mandate that institutions have written policies and procedures. The purpose of this handbook is to record policies and procedures surrounding the delivery of financial aid at Northwest Technology Center (also referred to in this handbook as NWTC). If no policy or procedure addresses a given issue, the Financial Aid Director is expected to use professional judgment based upon the intent of all financial aid programs and practices (see Professional Judgment section of this handbook).

This handbook

- Sets forth the institution's policies in regard to student aid and describes the procedures which must be taken to implement these policies.
- Provides general procedures in order that a systematic and consistent approach may be taken in the operation of all programs; ensuring that similar operations will be handled in a uniform manner.
- Provides quick reference to various practices.
- Facilitates the orientation and training of personnel when changes occur.

FINANCIAL AID REFERENCE DOCUMENTS

In addition to the Federal Student Financial Aid Policy and Procedures Manual, other regulations which affect student aid will be adhered to. These regulations and guides are as follows

- Student Handbook and Student Consumer Information Handbook
- Federal Student Financial Aid Handbook
- Federal Registers (Financial Aid Legislation)
- U.S. Department of Education Audit Guide
- OASFAA Newsletters
- The Blue Book
- EDConnect User's Guide and Technical Reference
- EDEExpress User's Guide and Technical Reference
- Higher Education Act as amended
- EFC Formula Guide
- Dear Colleague Letters from the Department of Education
- NSLDS Reference Materials
- SFA Policy Bulletins
- SAR and ISIR Reference Materials

MISSION STATEMENT/FINANCIAL AID PHILOSOPHY/HISTORY/POLICY DEVELOPMENT

NWTC Mission Statement

The mission of NWTC is "Creating success in education, the workplace, and life."

Financial Aid Philosophy

NWTC believes that everyone who desires training should have the opportunity of attending school regardless of their financial situation. We continue to promote financial assistance opportunities to eligible students who might otherwise be depriving themselves of the benefit of technology training. The primary purpose of the financial program at NWTC is to provide financial assistance to students who, without aid, would be unable to attend school. Financial assistance is offered in the form of grants, scholarships, and federally funded programs. Financial assistance is viewed only as supplementary. The student and the family of a student, when applicable, are expected to make a maximum effort to assist with educational expenses.

It is the policy of NWTC to award federal financial aid in accordance with federal regulations and guidelines pertaining to the type of assistance requested.

Confidentiality and Inspection of Student Financial Aid Records

All information (written or oral) that a student and/or family reveals in the process of seeking assistance is confidential. Access to this information is restricted to the Financial Aid Director and the Financial Aid Assistant. Application materials become the property of NWTC upon submission and are maintained in the student's file.

Length of Time to Maintain Student Records

Federal Regulations require that student files be maintained for the current award year and three years beyond closing of the previous award years. A student's file ultimately includes the student's FAFSA application, SAR/ISIR and all related documentation.

Electronic Statement of Account

The Financial Aid Director maintains Electronic Statements of Account by fiscal year in financial aid files. This document transmits information about the school's Pell Grant authorization. As the authorization amount increases, a new Statement of Account will be sent to the school. Electronic Statements of Account summarize current and future payment data submitted via Origination Records and Disbursement Records. The Financial Aid Director reconciles the statement.

Pell Processed Disbursement List/Financial Aid Excel Spreadsheet

The Financial Aid Director uses the Pell Processed Disbursement list and a school developed Excel spreadsheet recording disbursements to students to reconcile total disbursements made. These two reports should equal. The total disbursed is then reconciled with G5 and the Electronic Statement of Account.

The Business Office/G5

The Business Manager at NWTC, Gina Martin, maintains the records of the money ordered through G5. She uses computer entry to track the receipt and disbursements of federal money from the General Fund.

Description of Accounts

General Fund: All receipts and disbursements of cash related to the Pell Grant Program are recorded in this account.

Financial Aid Office Hours

Financial Aid Office hours are from 8:00 a.m. to 4:00 p.m. Monday through Friday.

Financial Aid Workshops/Meetings

The Financial Aid Director attends Oklahoma Department of Career and Technology Education Financial Aid meetings, OASFAA meetings, U.S. Dept. of Education Delivery System Workshops, Fiscal Administrator Training Workshops and VA Conferences.

Student Consumer Information

Please see the Student Consumer Information Handbook at www.nwtech.edu/policies.htm, or obtain a hard copy of the handbook in the Central Office on each campus, in the Counselors' Offices, or in the Financial Aid Office.

Persons Designated to Provide Student Consumer Information and Distribution of Forms

Angie Flynt, Central Office Secretary at Alva, and Amanda Robinson, Central Office Secretary at Fairview, are designated as having the responsibility for distributing disclosure requirements, applications, student forms and general information to current and prospective students at NWTC.

Consumer Information from the U.S. Department of Education

The U.S. Department of Education provides comprehensive student aid information to students and their families through the *Student Aid on the Web* site at <http://studentaid.ed.gov>.

Registered with Selective Service

A male applicant at least 18 years of age and born after December 31, 1959 must be registered with Selective Service.

Undergraduate Status

An applicant states on the FAFSA application that she/he does not have a Bachelor's degree. Students who have undergraduate bachelor degrees are not eligible for the Pell grant.

Determination of Financial Need

NWTC employs the Federal Needs Analysis Methodology in assessing financial need and eligibility for Title IV Assistance. The Federal Needs Analysis Methodology is based on the following philosophy of financial aid

- to the extent that they are able, parents have the primary responsibility to pay for their children's education
- parents will, as they are able, contribute funds for their children's education
- students, as well as their parents, have a responsibility to help pay for their education
- the family should be accepted in its present financial condition

A needs analysis system must evaluate families in a consistent and equitable manner, while recognizing that special circumstances can and do alter a family's ability to contribute. Four broad categories of family resources are examined in need analysis. They are

- parent's/student's income
- parent's/student's assets
- number in household
- number in college (post-secondary education)

Regular Student/Enrollment Status/Eligible Program Status

An applicant must be regular student which is defined as a student who is enrolled in an eligible program (an eligible program/major for Pell purposes must be at least 600 clock hours and 23 weeks in length) is working toward a certificate and is attending at least part-time (15 clock hours per week).

High School Diploma/GED/Home School Equivalency

An applicant must have a high school diploma (this can be from a foreign school), GED or a home school equivalency in order to qualify for a Pell Grant: **EXCEPTION: A student who has enrolled in a Title IV eligible program and has qualified for Title IV by passing an independently administered, approved Ability to Benefit (ATB) test may be eligible for a Limited Pell Grant award.**

Default/Overpayment Status

An applicant signs a statement when completing the FAFSA stating that they are not in default on federal student loans or have made satisfactory arrangements to repay it, and that they do not owe money back on a federal student grant or have made satisfactory arrangements to repay it. A student who is defaulted on federal loans or who is in Pell overpayment status is not eligible for further Title IV assistance unless and until satisfactory arrangements for repayment are made. Students in default on loans must have a letter from the holder of the loan stating that the student has made satisfactory repayment arrangements and is eligible for Title IV funds or the Financial Aid Director must receive a new Institutional Student Informational Record (ISIR) and National Student Loan Data System (NSLDS) report showing that the default status has been resolved before any funds may be disbursed.

Valid SSN

An applicant must have a valid Social Security Number. **EXCEPTION: Students from the Republic of Marshall Islands, the Federated States of Micronesia or the Republic of Palau.**

Students should review all the information on the SAR. If any changes are necessary, the student can make corrections online using his/her FSA ID, or the student can resubmit by mail part two of the SAR to the Pell Grant processor following the directions for making corrections on the form, or the Financial Aid Director can submit the corrections electronically. After submission of any corrections, if necessary, and if the student meets all eligibility requirements, they will receive an award letter notifying them of the amount of their Pell Grant award, any required documents, and projected payment schedule.

Students who applied for financial aid the previous year may qualify to use a renewal FAFSA. The student may access the renewal application online by using their FSA ID. On the renewal the student should correct or update his or her information and submit it to the processing center. The school will receive an Institutional Student Information Record (ISIR). The student will receive a SAR Information Acknowledgement by mail in three to five working days for their inspection. The student must sign a copy of the ISIR certification, have a copy of the signed renewal notice, or have an electronically signed ISIR for their financial aid file. This ISIR will be used to determine the student's award.

IRS Data Retrieval Tool

The IRS Data Retrieval Tool allows student and parents who are using FAFSA on the Web and who have already submitted their federal tax return to electronically transfer their tax data from the IRS database. While use of this is voluntary, **students and parents are strongly encouraged to use the IRS Data Retrieval Tool** because it is accurate, efficient, and useful for verification and corrections.

PROCESSING STUDENT RECORDS

Preparation of Student Financial Aid Folder

The Financial Aid Director prepares the student's folder by making a label for the file showing the student's name and social security number. The aid director also looks at the past years' student files and keeps the previous years' records with the new file.

Procedure for Handling Missing Financial Aid Information

If information is missing, the Financial Aid Director requests the student to bring missing documents. Once documentation is submitted, it is filed in the student's financial aid file.

Procedure for Handling Conflicting Financial Aid Information

The Financial Aid Director reviews documents to make sure there is no conflicting information in the file. If conflicting information exists, the student is contacted in an attempt to resolve any conflicts. If no conflicts exist, the Aid Director proceeds with processing.

Procedure for Handling Void Financial Aid Applications

The Financial Aid Director reviews comments on the letter explaining why the SAR/ISIR is void. If the applicant submits a void application, the Aid Director assists the applicant in the interpretation of the letter and the corrective actions that may be required. The usual problem is failure of the student and/or parent to sign the original application either with a "wet" signature, or sign electronically with a FSA ID.

Procedure for Handling Rejected Financial Aid Applications

Comments will appear on the Student Aid Report (SAR) explaining the application rejection and indicating the action the applicant may take to correct his information so that eligibility may be determined. The Financial Aid Director's role is the same as with the void application stated above.

Procedure for Handling Ineligible SAR/ISIR

If the eligibility letter states that the EFC (Expected Family Contribution) is too high for a Pell Grant, the Financial Aid Director checks information on the information Review Form for accuracy. If correct, the applicant is probably ineligible. If the information is not correct, the applicant should resubmit a FAFSA correction, or have the Financial Aid Director make corrections with the student's (and parent's if the

enrollment. The student should always be included in the number enrolled in college. Others can be included only if they are counted in the household size and will be attending a postsecondary educational institution at least half-time (6 credit hours per semester for at least one term or 15 clock hours per week for one term) in the current award year. These individuals must also be working toward a degree or certificate leading to a recognized educational credential at a Title IV eligible school. **Dependent students must exclude parents as number enrolled in college.**

Adjusted Gross Income (tax filers)

Acceptable documentation for independent students (and spouse) is a copy of the student's federal income tax return transcript and W2's for the base year; for dependent students, a copy of parents and student's federal income tax return transcript, along with W2's for the base year is acceptable documentation. Students and student's parents who have successfully use the IRS Data Retrieval Tool on the FAFSA are considered verified from their IRS information that has been transferred from the IRS into the FAFSA.

Income Earned from Work (non filers)

Acceptable documentation for non-filers is a signed statement, the appropriate Verification Worksheet certifying their non-filer status listing all the sources and amounts of income earned from work. In lieu of such a statement, the person can also provide W-2 forms for all their income for the base year.

U.S. Income Tax Paid (tax filers)

Acceptable documentation for independent students is a copy of the student's federal income tax return transcript along with W2's for the base year; for dependent students, a copy of parents and student's federal income tax return transcript along with W2's for the base year is needed. Students and student's parents who have successfully used the IRS Data Retrieval Tool on the FAFSA are considered verified from their IRS information that has been transferred from the IRS into the FAFSA.

Child Support Paid (all applicants)

Acceptable documentation is the appropriate Verification Worksheet completed and signed by student and/or parent or a signed statement.

SNAP/Food Stamps (all applicants)

Acceptable documentation is the appropriate Verification Worksheet completed and signed by student and/or parent or a signed statement or agency documentation.

Education Credits (tax filers)

Acceptable documentation is the federal tax transcript.

IRA/Keogh Deductions (tax filers)

Acceptable documentation is the federal tax transcript.

Foreign Income Exclusion (tax filers)

Acceptable documentation is the federal tax transcript.

Interest on Tax-Free Bonds (tax filers)

Acceptable documentation is the federal tax transcript.

Untaxed Income (tax filers)

Acceptable documentation is the federal tax transcript.

High School Completion Status

Acceptable documentation is a copy of a high school diploma, GED or recognized equivalent of a high school diploma, homeschool equivalency, or a copy of the applicant's final high school transcript.

Verification Status Codes

A Verification Status Code of "V" – Verified indicates the Financial Aid Director has completed verification and all information is correct.

A Verification Code of "W" – Without Documentation indicates that verification is required, but the verification process is not completed and a first disbursement has been made. **NWTC requires verification to be completed prior to any disbursement. Therefore, the status code "W" is never used.**

A Verification Status Code of "Blank" – A blank space indicates that the SAR/ISIR was not selected for verification by CPS or NWTC.

Unusual Enrollment History (UEH) Flag

The UEH flag with a "C" Code on the ISIR indicates that the student has had an unusual enrollment history with regards to the receipt of Title IV funds. The school is required to review the student's academic records to determine if the student received academic credit at the schools that the student attended during the previous four award years using information from the National Student Loan Database System (NSLDS) as well as academic transcripts that the student provides from previously attended schools. Documentation from both the student and third parties may be required to explain any discrepancies.

Verification of Other Information

The SAR/ISIR will often have comments requiring the Financial Aid Director to verify specific items. For example: Citizenship status must sometimes be verified.

Conflicting Information That Cannot Be Resolved

If the school and student cannot resolve conflicts that may occur regarding verification, the case will be referred to the U.S. Department of Education, Student Validation Branch. Cases of suspected fraud will be referred to the Regional Office of the Inspector General if they cannot be resolved locally. Based on verification completion the grant is determined according to the guidelines set by the U.S. Department of Education. No financial aid disbursements will be made until verification is complete.

AWARDING TITLE IV AID

Awarding Title IV Aid

The Pell Grant Program is a federally funded grant program, which, for the **2015-16** academic year provides up to **\$5,775** to full time postsecondary students and up to **\$2,888** to postsecondary students who are enrolled at least half time. The purpose of the program is to provide a foundation of aid to needy students. An academic year at NWTC is one in which a student completes a minimum of 26 weeks and 900 hours of instruction. NWTC awards federal financial aid according to federal regulations and guidelines. The method of computation is applied to all dependent and independent students uniformly.

Award Year/Academic Year

Funding for the Pell Grant program is provided based on an award year basis. The award year begins on July 1st of one year and extends to June 30th of the next year. For Pell Grant payments to students, an **academic year of 900 hours/26 weeks** (with a payment period of 450 hours/13 weeks) is applicable to Career Majors/Programs that are 900 hours or greater. For Career Majors that are less than 900 hours, the payment period is one half of the total hours of the Career Major.

EFC Formula

The Expected Family Contribution (EFC) is the amount a family can be expected to contribute toward a student's college costs. Financial aid administrators determine an applicant's need for federal student aid from the U.S. Department of Education and other sources of assistance by subtracting the EFC from the student's cost of attendance. The EFC formula is used to determine the EFC and ultimately determine the

Department of Education. The Department processes it and returns it back to NWTC to import from EdConnect, the federal electronic mailbox.

Determination of Cost of Attendance

Pell Grant cost of attendance is used to determine Pell Grant payments to students. Cost of attendance for purposes of the Pell Grant is the cost of tuition and fees for a full time student for a full academic year plus an allowance for room and board, books, supplies, transportation and personal expenses incurred by the student for a full academic year.

Determination of Scheduled Award

Once the Pell Cost of Attendance is determined, the Financial Aid Director determines the scheduled award on the full time regular payment schedule for Pell Grants for the award year. The full time chart is always used regardless of the student's actual enrollment status.

Tuition/Fees

Tuition cost is **\$2.00 per hour for in-district adults and is \$4.00 per hour for out-of-district adults. Adult Fees are \$.50 per hour.** For Practical Nursing tuition and fees, please see the section below. Tuition and fees for each major are given on program sheets located in the Central Offices of each campus, the Counselors' Offices, and may be viewed online at www.nwtech.edu/majors.

Tuition/Fees for the Practical Nursing Program

Tuition and fees for Practical Nursing are **\$5,570.00 for in-district adults and \$7,765.00 for out-of-district adults.** These costs include tuition and fees paid to NWTC for Practical Nursing. The tuition for the Practical Nursing Program is divided into three tuition payment periods. Fees paid by students directly to private vendors for background checks, drug screening, insurance, and testing are **\$420.00.**

Practical Nursing fees may vary for each student depending on what the student may already have available to them. Students will not be required to buy items/supplies that they already own if the items/supplies are deemed sufficient for use in the program and are approved as such by the Practical Nursing Director/Instructor. Differences in fees will be approved by the Practical Nursing Director/Instructor and will be documented for each student. Please see Practical Nursing information in the Practical Nursing Handbook in the Central Offices in Alva or Fairview, contact the Practical Nursing Director, Diane Duffy at 580-327-0344, or view the information online at www.nwtech.edu.

Career Major Selection Form (CMSF)

Once the student has begun attending classes, the student and the instructor will complete a Career Major Selection Form. This form evaluates the educational plan for the student outlining the career major chosen, any advanced standing credit granted, the total number of clock hours for the student to complete the major, all certification requirements/courses to be completed, and the expected completion date.

Pell Grant Calendar and Calculation Worksheet

To facilitate Pell Grant calculations, a Pell Grant Calendar and Calculation Worksheet have been developed at NWTC. The procedures for using this worksheet are as follows

- The Financial Aid Director completes the top portion of the Calendar and Calculation Worksheet with student's name, major, dependency status, district status, and dates of attendance.
- The Financial Aid Director completes the appropriate cost of attendance.
- The Financial Aid Director determines the payment periods, classifies payment periods into award years and shows the expected disbursement for each payment period in the award year.
- The Financial Aid Director adds the expected disbursement for each payment period to determine total expected disbursement.

This sheet becomes a part of the student's file and serves as both a worksheet and support to assist the aid director in calculations concerning days attended, why a student received a particular award, etc.

Advanced Standing Credit can also be issued to NWTC students who complete one major at NWTC and then enroll in another, or those who may change from one major to another. In order for credit from one program/major to be transferred to another program/major at NWTC, the new major into which credit is being transferred should have courses that are applicable to the new major and are in the same scope and sequence.

Financial Aid recipient's hours for their program/major and their financial aid award will be adjusted accordingly by the Financial Aid Director for the Advanced Standing Credit. If prior or advanced standing credit is granted to a student for previous educational or training experiences, such credit will be documented in the student's file, and **the student will not be charged tuition or fees for the advanced standing credit hours.**

Post Military Education and Advanced Standing Credit

The Board of Education at NWTC recognizes that service members acquire knowledge and skills during military duty and has established procedures which permit veterans to attain advanced academic standing linked to military service or other education, training or experience. In accordance with the Post-Military Service Occupation, Education and Credentialing Act, NWTC will award appropriate academic credit in its education programs consistent with the experience, education and training of military personnel. NWTC's award of advanced standing in accordance with the Act will supplement its existing procedures for advanced standing credit for career majors.

Principles of Excellence for Educational Institutions Serving Service Members, Veterans, Spouses, and Other Family Members (Shopping Sheet)

In carrying out the principles of Executive Order 13607, NWTC commits to voluntarily provide a Shopping Sheet to veterans and service members before they decide to attend school.

Course Repetitions and Determination of Award Disbursement

Students wanting to repeat a specific program/major must have permission of the instructor and Assistant Superintendent to do so.

NOTE: A repeated class is NOT eligible for a federal financial aid award at NWTC.

Award Notification

If a student meets all eligibility requirements and all required documentation is received (including verification documents if necessary) and the student's financial aid file is complete, then the amount of the grant will be calculated by the Financial Aid Officer according to federal regulations. The student will then receive an award notice that contains the amount of the Pell Grant they are expected to receive for that academic year, along with disbursement procedures. The student will be contacted by the Financial Aid Office to complete the necessary paperwork and sign their Pell Award Form/Contract.

Rights and Responsibilities of Recipients

Right-to-Know

- The institution's accrediting and licensing organizations
- All programs offered and detailed information regarding each program of interest
- Information on financial aid, including criteria for eligibility and methods of disbursement
- Information on the school
- Cost of Attendance
- Information on students' rights under FERPA
- How satisfactory academic progress is determined, including eligibility and appeals
- The institution's refund policy
- The institution's annual campus security report
- Drug and alcohol policies
- Gainful Employment
- Net Price Calculator

SATISFACTORY ACADEMIC PROGRESS (SAP)

Explanation of Satisfactory Academic Progress

Satisfactory Academic Progress (hereafter referred to as SAP) means a student must be proceeding in a positive manner toward fulfilling certificate requirements in a specific length of time. Students must be in good standing and making satisfactory progress according to the institutional standards before receiving Title IV assistance. Good standing means that the student is capable of enrollment or continued enrollment. Initially this means that the student is admissible to an educational program as demonstrated by high school diploma, GED, or home school equivalency. Later this means that the student is performing well enough in terms of progress, grades, and the institutional attendance policy to continue enrollment. The institutional attendance policy states that the student may be absent no more than 10% in a pay period. For example, a student in a 420 hour pay period may be absent no more than a total of 42 hours. Three tardies will count as one absence (three hours). This 10% of absences is considered excused and will not have to be added to the student's pay period. This policy is distributed to students upon enrollment, and is given to all financial aid students in the form of the Disbursement Authorization document upon receiving their financial aid contract.

The first disbursement of Title IV funds for first time entering students at NWTC requires no progress report provided the first disbursement is issued during the initial pay period of training for a new student. At the end of their first payment period students must be making SAP according to the standards stated in this section of the handbook. Other students, that is students **with** previous course work at NWTC, must have maintained SAP for that previous course work in order to receive initial or further assistance.

Students may take up to 50% longer than the normal time of their program/major to complete that program/major and still be regarded as being in good standing. However, a student **WILL NOT BE ELIGIBLE** for Title IV federal financial aid once he/she has received aid for the total number of approved hours in the program/major.

Example: A student is enrolled in a 600 hour program/major. The maximum time a student can attend NWTC in that 600 hour, 23 week program/major is 34.5 weeks. An eligible student would receive Title IV aid for the 600 clock hours, but the student could take an additional 11.5 weeks to complete the program/major if the student was not able to complete the program/major in 600 clock hours (provided that space is available in the class); however, that student **WILL NOT** receive Federal Financial Aid for the additional 11.5 weeks. The student would also be charged fees for the additional hours as is stated in our Student Handbook found at www.nwtech.edu or in hard copy in the counselor's office, the Asst. Superintendent's Office or the Central Office. **In no instance can the student receive aid for more hours/weeks than those for which the program/major is accredited/approved.**

Satisfactory Academic Progress (SAP) Components

There are three components to SAP: qualitative, quantitative, and attendance.

Qualitative Component

Each student's cumulative grade will be reviewed at the completion of the scheduled clock hours and weeks for that payment period using a progress report provided to the instructors by the Financial Aid Director and then returned to the Financial Aid Director by the student's instructor. Students must maintain a cumulative grade of "C" or better for all past course work. If the student's grade is below a "C," then the student will be placed on Financial Aid Warning status. A grade of I is regarded as unsatisfactory academic progress for the purpose of Title IV aid administration.

Quantitative Component

The maximum time frame for completing a program is no more than 150% of the program in accordance with the student's enrollment status (i.e. full-time or part-time). The increment for measuring a student's progress will be each payment period. A student must be proceeding in a positive manner toward fulfilling certificate requirements in a normal length of time. At NWTC this means the student must have completed a minimum of at least 67% of the scheduled learning objectives/course work for the payment period. The

must file a written request within 5 days of receiving written notification by the Financial Aid Director of their financial aid suspension status. The appeal form can be found in the Financial Aid Director's office or online at www.nwtech.edu/fianaid. The appeal policy states that the student's appeal should include information and/or evidence as to why the student failed to make SAP, and should also include what has changed that will now allow the student to make SAP at the next evaluation period.

Also included in the appeal should be any mitigating circumstance which contributed to the suspension status. Mitigating circumstances may include but are not limited to serious illness experienced by the student, accident resulting in severe injury to the student, or death in the student's immediate family. Other circumstances may be classified as mitigating if they are serious in nature, prevent the student from attending classes, and are deemed to be so by the Financial Aid Appeal Committee. (The Financial Aid Appeal Committee is made up of the student, an instructor, counselor, Financial Aid Director, Assistant Superintendent and a neutral party designated by the Assistant Superintendent).

The Financial Aid Appeal Committee will meet in person with the student and the written appeal will be reviewed by the committee. If the committee believes it necessary, they may require the student to provide further documentation (such as a letter from a doctor) to substantiate or explain the mitigating circumstances. The student will be informed in writing within five school days as to the status of the appeal. The student will then either be denied further Title IV aid on the grounds of unsatisfactory progress, or Title IV aid will be reinstated. If the appeal is granted and the student's aid is reinstated, he/she must still complete all hours in the previous pay period if hours are still owed before receiving additional aid. A student who has been granted an appeal will now be on a **probationary status** must continue to make SAP during all subsequent payment periods. (Please see the Financial Aid Probation Status section in this handbook.)

By granting an appeal the Financial Aid Appeal Committee has agreed that the student will **be able to make SAP by the end of the next payment period. In some cases, a student may be placed on an academic plan that will ensure the student's ability to meet SAP standard by a specific point in time during the next pay period.** If it is felt by the Financial Aid Appeal Committee that an academic plan is needed, the plan will be provided in writing by the instructor and will be signed by the Financial Aid Appeal Committee and the student. The academic plan will then become part of the student's financial aid file and classroom plan of study.

If a student is denied an appeal after financial aid suspension, then that student is responsible for paying tuition and/or fees in full **no later than the tenth day of the next pay period** unless other arrangements are made and agreed upon by both the business office and the Assistant Superintendent. If the student whose appeal has been denied comes back into compliance with the SAP standards during this financial aid suspension payment period, then they may once again become eligible for financial aid assistance but will continue to be on probation status for all following pay periods.

Suspended Status Student Transferring to a New Program/Major

A student who is suspended in a program/major, and who then transfers to or comes back to a new program/major at NWTC, and who has hours from the previous program/major that would transfer into the new program/major will remain on suspended status if the hours that are transferred render the student to be out of compliance with the SAP requirements. If the transferred hours do not render the student to be out of SAP compliance, then that student would be eligible for financial aid in the new program/major. A student who is on suspended status comes back in a new program/major in which none of the previous hours would transfer into the new program/major is eligible for aid in the new program/major from hour one.

- School error, for instance, when a student's award is taken incorrectly from the Pell Payment Schedule, or when the school pays a student who is not making SAP
- Required recalculations, when a student never begins attending class or withdraws from school after receiving a cash disbursement for living expenses
- Optional payments, for instance, when the school makes an interim disbursement to a student selected for verification, but the student never completes verification. (NWTC does not make disbursements until verification is complete; therefore, this is a situation that should not occur at NWTC)

Overpayment Due to Institutional Error

If the Financial Aid Director discovers an overpayment due to aid office error, she will adjust the student's total award to compensate for the error, if possible. If not possible, NWTC will make repayment to the Pell Program and attempt to recover repayment from the student.

Overpayment Due to Incorrect Data

If the overpayment is due to incorrect data on the SAR/ISIR, the Financial Aid Director will assist the student in correcting the SAR/ISIR. The Aid Director will withhold subsequent payments until the corrected SAR/ISIR is received. If possible, the Aid Director adjusts the total award. If this is not possible, then the Aid Director will attempt to collect overpayment from the student. If the overpayment cannot be collected from the student, the Aid Director will consult the Federal Student Financial Aid Handbook to determine if referral to the U.S. Department of Education is appropriate. If so, the student's case will be referred to the U.S. Dept. of Education Debt Collection Service (DCS) for collection.

Receipt of Additional Student Funding Resources

A Pell Grant is an entitlement program. A Pell Grant is never to be adjusted downward because a student receives additional resources during the award year.

WITHDRAWAL AND INSTITUTIONAL REFUND

Withdrawal Process

A student wishing to withdraw from NWTC prior to the end of a semester and/or financial aid disbursement period must provide notice to the school either in writing or verbally. This is an official withdrawal. Students are given a letter grade at the time of withdrawal. Students making SAP at the time of their withdrawal who return to the same program/major within 180 days are considered to be in the same payment period. Written or verbal notice should be submitted to the NWTC Counselor and Attendance Officer/Central Office Secretary. The notice should contain the date the student will cease attendance and the reason for the withdrawal. The official withdrawal date is the date the student has the withdrawal form signed by the administration; however, for Title IV Return of Funds Calculations, the last date of attendance is always used for scheduled hours of attendance in a pay period. After this, the following process will be followed:

- The notice will be forwarded to the student's instructor to obtain the student's grade, progress rate, and attendance at the time of the withdrawal.
- The notice will also be immediately forwarded to the Financial Aid Office if the student is on financial aid.
- The Financial Aid Office will calculate any refunds due to the Title IV program and notify the student in writing within thirty days.
- The student will be billed for any refunds due to the Federal Financial Aid programs.
- If the student has not repaid the funds within 45 days after certified mail notification by NWTC, the repayment due will be posted to the National Student Loan Data Base showing the student is ineligible for further funding.
- If the student has not repaid the funds within 45 days, the Collection Department of the U.S. Department of Education will be notified.

the Financial Aid Office), and a leave of absence has not been requested (or one has been requested but denied) on the 10th day of non-attendance the student will be unofficially withdrawn upon that day.

The last date of attendance is the date used as the calculation for scheduled hours for the student's attendance on the Return of Title IV Funds Calculation Worksheet. The portion of a federal grant that the student is entitled to receive is calculated on a percentage basis by comparing the total number of hours in a payment period to the hours scheduled to complete in the payment period upon the student's last day of attendance. For example, if the student completes 30% of the payment period, he/she earns 30% of the assistance that he/she was originally scheduled to receive. This means that a percentage of the scheduled award remains unearned and must be returned to the Department of Education. Once a student has completed more than 60% of the payment period, he/she has earned all (100%) of the grant money for that pay period.

Once the amount of Title IV aid earned by the student and school is determined by the Financial Aid Office, the student will receive a certified letter stating how much Title IV aid was earned. The letter will also explain if the student has an outstanding balance that is owed to the school for tuition and fees. The student must realize that tuition and fees may be offset from the amount earned by the student.

Upon withdrawal, if the amount earned by the student is greater than the amount disbursed, then a post-withdrawal calculation is performed (see the Post-Withdrawal Disbursements section of this handbook). If the amount earned by the student is less than the amount disbursed, then a Title IV Return of Fund calculation is performed. If the amounts earned and disbursed are equal, no further action is taken.

Example 1: A student receives a Pell Grant in the amount of \$2,888 for a payment period that is 450 clock hours in length. As of the student's last date of attendance, the hours scheduled to be completed for the payment period are 350 of the 450 hours, which is 77.78%. In this case, neither the student, nor the school owe any money back.

Example 2: A student receives a Pell Grant in the amount of \$1,882 for a payment period that is 300 clock hours in length. As of the student's last date of attendance, the hours scheduled to be completed for the payment period are 63 of the 300 hours, which is 21.00%. The student had tuition and fee charges of \$600 which were paid for with the Pell Grant. The Return of Title IV Funds calculation determines that the student is required to repay \$72 to the Federal Pell Grant program. This calculation also determines that NWTC is required to return \$474 to the Federal Pell Grant program. Please refer to the Return of Title IV funds worksheet at the back of this handbook to see what calculations are involved or contact the Financial Aid Director for more information.

Aid to Be Returned

If the student receives more Pell Grant monies than the amount earned, NWTC or the student or both, must return the unearned funds. When a return of Pell Grant funds is due, NWTC and the student may both have a responsibility for returning funds. Whatever funds are not returned by the school must be returned by the student. The student's repayment obligation is determined after the school's earned/unearned funds are calculated. NWTC will return all unearned funds within 30 days from the date Financial Aid Director determines the student withdrew. Necessary funds will be returned to the Federal Pell Grant Program by the Business Office by reducing the authorization drawn from G5, by electronic transfer payment through the G5 system.

If a student owes a repayment to the Pell Grant Program, NWTC will notify the student by certified mail within 30 days that he/she must repay the overpayment. In the notification NWTC will inform the student that:

- The student owes an overpayment of Pell Grant funds

When Professional Judgment is used, the Financial Aid Director completes the appropriate section(s) of the School Use box on the SAR/ISIR or the FAA adjustment box on the EdExpress ISIR tab. This indicates to CPS that a data element or dependency status has been changed.

Areas in Which Professional Judgment Can Be Exercised

The NWTC Financial Aid Director authorizes case-by-case adjustments in the following areas:

Data items used to calculate EFC, which may include

- Unusual medical or dental expenses not covered by insurance
- Extended family support
- Elementary and secondary education tuition and dependent care expenses
- Unusual debt
- Income reduction
- Loss of job due to circumstances other than being fired or quitting job
- Death of family provider
- Dependency Status
- Satisfactory Academic Progress (SAP)

Dependency Status and Professional Judgment

Students are automatically considered to be independent if they meet the following criteria:

- They were born before January 1, 1992
- The student will not be working on a master's or doctorate program during the school year
- The student is married as of the date he or she applies
- The student has children and provides more than half of their support
- The student is an orphan or a ward of the court (or has been a ward of the court at any time since the age of 13)
- The student is a veteran of the U.S. armed forces
- The student is currently serving on active duty in the U.S. Armed Forces for purposes other than training
- The student has certain dependents (other than a spouse or children) that live with the student and the student provides more than half of their support
- The student is or was an emancipated minor as determined by a court in his state of legal residence
- The student was determined to be homeless or to be an unaccompanied youth by his high school or school district homeless liaison at any time on or after July 1, 2014
- The student was determined to be an unaccompanied youth who was homeless by a director of an emergency shelter or transitional housing program funded by the U.S. Department of Housing and Urban Development at any time on or after July 1, 2014
- The student was determined to be an unaccompanied youth who was homeless or was self-supporting and at risk of being homeless by a director of a runaway or homeless youth basic center of transitional living program at any time on or after July 1, 2014
- The student is or was in a legal guardianship as determined by a court in his state of legal residence

The Financial Aid Office has the authority to make students (who do not meet the above criteria) independent under special circumstances using Professional Judgment. Special circumstances must be documented and a copy of the documentation must be maintained in the student's file. Examples of special circumstances include, but not limited to:

- An abusive relationship with the family
- A student who has been abandoned by parents
- Incarceration of both parents

The Financial Aid Director adjusts the student's dependency status by recording a Dependency Override code of "1" in EdExpress. The Aid Director may also cancel a dependency override that another school performed. To do this, the Aid Director records a code of "2" in EdExpress. Dependency overrides can also be recorded by marking the D/O oval on a paper FAFSA.

Misrepresentation includes the dissemination of a student endorsement or testimonial that a student gives either under duress or because the school required the student to make such an endorsement or testimonial to participate in a program.

Substantial Misrepresentation

Substantial misrepresentation is defined as any misrepresentation on which the person to whom it was made could reasonably be expected to rely, or has reasonably relied, to that person's detriment. Substantial misrepresentations are prohibited in all forms, including those made in any advertising, promotional materials, or in the marketing or sale of courses or programs of instruction offered by the institution.

Misrepresentation Sanctions

If the Department of Education determines that an eligible institution has engaged in substantial misrepresentation, it may

- revoke the eligible institution's Program Participation Agreement;
- impose limitations on the institution's participation in the FSA programs;
- deny participation applications made on behalf of the institution; or
- initiate a proceeding against the eligible institution under subpart G of 34 CFR 668.

Relationship with the Department of Education 34 CFR 668.75

An eligible institution, its representatives, or any ineligible institution, organization, or person with whom the eligible institution has an agreement may not describe the eligible institution's participation in the Title IV, HEA programs in a manner that suggests approval or endorsement by the U.S. Department of Education of the quality of its educational programs.

FRAUD

Explanation of Fraud

There are difficult situations where students and/or parents purposefully misrepresent information in hopes of obtaining additional assistance. The Financial Aid Director is required to have a policy of referral when confronted with actual or suspected cases of fraud and abuse.

Policy for Fraud

Students and parents who willfully submit fraudulent information will be investigated to the furthest extent possible. All cases of fraud and abuse will be reported to the proper authorities.

Procedures for Fraud

If, in the Financial Aid Director's judgment, there has been intentional misrepresentation, false statements or alteration of documents which have resulted in the awarding or disbursement of funds for which the student is not eligible, the Aid Director will notify the student and schedule an appointment to discuss the situation with the student. If the student does not make an appointment, the Aid Director may

- Not process a financial aid application until the situation is resolved satisfactorily
- Not award financial aid
- Cancel financial aid
- Determine that financial aid will not be processed for future years

Fraudulent situations will be forwarded to the Office of the Inspector General of the Department of Education, at 755-2270 or 1-800-MIS-USED.

Method and Frequency of Disbursement

Students are advised of awards by the Financial Aid Director after receipt of a list from OSRHE of eligible recipients who are attending NWTC. Payment is by check, usually twice during a nine-month enrollment period. Checks are sent to the school and disbursed by the Central Office Secretary.

Oklahoma's Promise

Purpose of the Oklahoma's Promise

This is an Oklahoma Scholarship for students that take a required list of academic classes in high school and meet a GPA of 2.5. Student eligibility is determined by the Oklahoma State Regents of Higher Education (OSRHE). Students will be required to file FAFSA for the award year of their first year of attending a post-secondary education institution which will provide the required second income verification.

Application Procedures

This scholarship is applied for by the student at their high school when they are in the 8th, 9th or 10th grade.

Eligibility Requirements

Eligibility is dependent upon enrollment in a program that is offered through a cooperative agreement, co-enrollment at the degree granting institution with which NWTC has an alliance agreement. Criteria for continued eligibility and re-establishing eligibility are based upon the same satisfactory progress requirements for PELL. Students who believe they may qualify should contact the financial aid office to ensure proper procedures are taken for the student to receive their benefit.

Criteria for Selecting Recipients from Group of Eligible Applicants

Student eligibility is determined by the Oklahoma State Regents of Higher Education (OSRHE). Students must maintain required standards set by the OSRHE for the scholarship. All students who meet the eligibility requirements receive scholarships.

Criteria for Determining Amount of Student's Aid

The amount of aid is determined annually by the OSRHE is dependent upon enrollment in a program that is offered through a cooperative agreement, co-enrollment at the degree granting institution with which NWTC has an alliance agreement.

Method and Frequency of Disbursement

Oklahoma's Promise funds are credited to a student's account each semester and if there is a credit balance a check is made and disbursed to the student.

Otha Grimes Memorial Scholarship

Purpose of Otha Grimes Memorial Scholarship

The Otha Grimes Memorial Scholarships are reserved for adult students who have initiated formal training to achieve technology career objectives.

Application Procedures

Applicants must use the authorized application form provided them by their Counselor; fill out as directed and return to the Counselor's Office by the stated deadline.

Criteria for Selecting Recipients from Group of Eligible Applicants

Scholarships are reserved for adult students who may not qualify for other scholarships or student assistance programs. Scholarships are awarded more on the basis of need and commitment, rather than on grades. Scholarships are determined by the Oklahoma State Department of Career and Technical Education Foundation. The scholarship stipulates that the award be used toward books, tuition, and other direct expenses incurred for technology training.

NWTC and expect to receive monthly educational stipends must present a court-certified copy of VA Form DD214 and a Military Transcript. Both half and full-time benefits are available. Contact the Financial Aid Director or the Veteran's Administration at 1-888-GI-BILL-1 for more information. Through the Oklahoma GI Bill (Senate Bill No. 530) tuition-free training may be awarded in addition to those educational allowances a veteran receives under Chapter 31 through 34. Veterans who have been determined by the Veteran's Administration to possess at least 20% service-related disability may be eligible for special benefits under the VA/VCR program. Tuition assistance and purchase of required supplies may be available to the qualified veteran. Contact the Financial Aid Office for more information.

Oklahoma HB 3350 Career Technology Tuition Waiver

HB 3350 waives tuition at career techs for children of peace officers, fire fighters, military personnel, and Oklahoma EMT's who died in the line of duty and children of members of Oklahoma Law Enforcement Retirement System who were catastrophically injured or killed in the line of duty. The law states "Such waiver of resident tuition and nonresident tuition shall be limited to a period of five (5) years."

Administration of Other Scholarships

Other scholarships at NWTC are administrated following the policies and regulations as stated by the agencies awarding said scholarships.

IN-SCHOOL LOAN DEFERMENT AND NSLDS

In-School Loan Deferment

NWTC does not offer loans or participate in any loan programs. Students may, however; defer payments on educational loans previously received at other institutions while attending school on at least a half-time basis at NWTC. Contact the Financial Aid Office for more information and in-school loan deferment forms.

National Student Loan Data System (NSLDS)

The National Student Loan Data System (NSLDS) is a database of information about loans and grants awarded to students under Title IV aid. Students may view their personal student loan or grant information on the website www.nsls.ed.gov by logging in with their FSA ID. Students must never share their FSA ID with any other entity. For more information, contact the Financial Aid Office.


NON DISCRIMINATION STATEMENT

Northwest Technology Center is in compliance with Title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, Title IX of the Education Amendments of 1972 and other federal laws and regulations.

It is the policy of Northwest Technology Center to provide equal opportunities without regard to sex/gender, age, race, marital status, religion, color, national origin, disability or veteran in the operation of its educational services, recruitment, admissions, financial aid or employment practices. Inquiries concerning application of this policy may be referred to

Daren Slater/Karen Koehn, Alva Campus
Title IX/Section 504 Compliance Coordinators
1801 South 11th Street
Alva, OK 73717
580.327.0344

Colt Shaw/Kay Koehn, Fairview Campus
Title IX/Section 504 Compliance Coordinators
801 Vo-Tech Drive
Fairview, OK 73737
580.227.3708

| <p><i>What to Disclose, When, and to Whom</i></p> | <p> Northwest Technology Center's Annual Notice of Required Disclosures of Student Consumer Information <i>Description of Information to be Disclosed</i></p> | <p>2015-2016 <i>Where to Find Information</i></p> |
|---|---|---|
| <p>What: Institutional Information</p> <p>To: Enrolled Students When: Annually the first day of class To: Enrolled Students Prospective Students When: Upon Request</p> | <ul style="list-style-type: none"> • Cost of attending school i.e.: Tuition and Fees • Institutional Refund Policy/Requirements for officially withdrawing from school • Information regarding the school's academic support and career tech career majors • Copyright infringement/peer to peer file sharing • Entities that accredit, license, or approve the school and It's career majors and procedures for reviewing the school's accreditation, licensing, or approval documentation • Description of any special services and facilities for disabled students • Titles and availability of employees responsible for dissemination of institutional and financial assistance disclosure information and how to contact them • Net Price Calculator • Constitution Day/Voter Registration/Vaccination Policies • Grievance Procedures | <ul style="list-style-type: none"> • Student Handbook • Consumer Information Handbook • NWTC Website www.nwtech.edu/information.htm |
| <p>What: Financial Assistance Information</p> <p>To: Enrolled Students When: Annually the first day of class To: Enrolled Students Prospective Students When: Upon Request</p> | <ul style="list-style-type: none"> • Description of all available federal, state, local, private and institutional financial assistance, and a description of: (1) application form and procedures; (2) student eligibility requirements; (3) selection criteria; and (4) criteria for determining the amount of a student's award • Rights and responsibilities of students receiving Title IV and other financial aid, including: (1) criteria for continued eligibility; (2) satisfactory academic progress (SAP) standards; (3) criteria to re-establish eligibility if student fails to maintain SAP; (4) method and frequency of financial aid disbursements; (5) books and supplies policy • Procedures for the Return of Title IV Aid and Repayments by withdrawn students | <ul style="list-style-type: none"> • Student Handbook • Consumer Information Handbook • Financial Aid Policy & Procedures Handbook • NWTC Website www.nwtech.edu/finaid.htm |
| <p>What: Family Education Rights and Privacy ACT (FERPA)</p> <p>To: Enrolled Students Parents of enrolled students under the age of 18 Prospective Students When: Annually the first day of class, Upon Request and Annually in Local Newspapers</p> | <ul style="list-style-type: none"> • Right to and procedures for inspecting and reviewing a student's education records • Right to and procedures for requesting amendment of a student's education records believed to be inaccurate, misleading, or in violation of a student's privacy rights • Right to file a complaint with the Department of Education for alleged school's or educational agency's failure to comply with FERPA requirements • Right of the school to disclose personally identifiable information contained in a student's education records without prior consent • Students right for directory information to not be disclosed | <ul style="list-style-type: none"> • Student Handbook • Consumer Information Handbook • Board of Education Policy and Procedure Manual • http://www2.ed.gov/policy/gen/guid/fpco/ferpa/index.html |
| <p>What: Completion/Graduation Rate, Retention Rate, and Transfer Out Rate</p> <p>To: Enrolled Students Prospective Students When: Upon Request</p> | <ul style="list-style-type: none"> • The institution's completion or graduation rates for full-time, first-time, certificate seeking students enrolled at the post-secondary level who graduated or completed their career major within 150% of the normal time (scheduled length of career major) for graduation or completion • Cohort for non-term schools (Technology Centers): Students who enter between 9/1 and 8/31 and are enrolled at least 15 days if their career major is less than or equal to 1050 clock hours, or 30 days if their career major is longer than 1050 clock hours • Transfer-out rate is not applicable to Technology Centers since it applies to schools whose mission includes providing substantial preparation for students to enroll in another eligible institution • Information on student body diversity in the categories of gender and ethnicity of enrolled, full-time students who receive Federal Pell Grants • Retention rates of certificate or degree-seeking first-time full-time undergraduate students | <ul style="list-style-type: none"> • NWTC Website www.nwtech.edu/finaid.htm • Paper copy available upon request from the Financial Aid Office • U.S. Dept of Ed's College Opportunities Online website: www.nces.ed.gov/collegenavigator |
| <p>What: Campus Security Report</p> <p>When: Annually by Oct. 1 To: Enrolled Students Current Employees When: Upon Request To: Prospective Students Prospective Employees When: With Job Application, Upon Request To: U.S. Dept of Education When: Annually by date specified</p> | <ul style="list-style-type: none"> • Crime statistics for 3 most recent school years concerning the occurrence on campus, in or on non-campus buildings or property and public property reported to campus security authority or local police. Policies concerning the security of and access to campus facilities and procedures to report campus crimes • Disciplinary actions imposed for the possession, use and sale of alcoholic beverages and illegal drugs and enforcement of state underage drinking laws and federal and state drug laws • Emergency Response and Evacuation Procedures • Campus Sexual Violence Elimination Act and Violence Against Women Reauthorization Act information, policies, and procedures | <ul style="list-style-type: none"> • Student Handbook • Consumer Information Handbook • Board of Education Policy Manual • Campus Security Annual Report to the Campus Community Brochure • NWTC Website www.nwtech.edu/security.htm • Paper copy available upon request from the Financial Aid Office • www.ope.ed.gov/security |
| <p>What: Drug and Alcohol Abuse Prevention</p> <p>To: Enrolled Students When: Annually the first day of class To: Current Employees When: Annually included with first paycheck of the school year</p> | <ul style="list-style-type: none"> • Information on preventing drug and alcohol abuse • Standards of conduct that clearly prohibit, at a minimum, the unlawful possession, use, or distribution of drugs and alcohol by students and employees on the school's property, or as part of the school's activities • A description of the sanctions under local, state and federal law for unlawful possession, use or distribution of illicit drugs and alcohol • A description of any drug and alcohol counseling, treatment, or rehabilitation programs available to students and employees • A description of the health risks associated with the use of illicit drugs and alcohol • A clear statement that the school will impose sanctions on students and employees for violations of the standards of conduct (consistent with local, state and federal law) and a description of these sanctions, up to and including expulsion, termination of employment, and referral for prosecution | <ul style="list-style-type: none"> • Student Handbook • Consumer Information Handbook • Drug Free School and Workplace Handbook • Drug Free Schools Policy Statement Brochure • Paper copy available upon request from the Financial Aid Office • NWTC Website www.nwtech.edu/drug-ed.htm |
| <p>What: Gainful Employment</p> <p>To: Prospective Students Enrolled Students When: Upon Request</p> | <ul style="list-style-type: none"> • Information on graduation rates, the median debt of students completing the program, program costs, job placement rates, types of employment, etc. | <ul style="list-style-type: none"> • Student Handbook • Consumer Information Handbook • Paper copy available upon request from the Financial Aid Office • NWTC Website www.nwtech.edu/gainful.htm |
| <p>This notice is distributed annually to all current and prospective students. It is also located on the NWTC website, in the Student Handbook, and in the Consumer Information Handbook. Additional paper copies of this notice and all handbooks are available in the Financial Aid Office, the Central Office, the Counselor's Office, and on the NWTC website at www.nwtech.edu.</p> | | |

Treatment Of Title IV Funds When A Student Withdraws From A Clock-Hour Program

| | |
|--|---|
| Student's Name <input style="width: 90%;" type="text"/> | Social Security Number <input style="width: 90%;" type="text"/> |
| Date form completed <input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/> | Date of school's determination that student withdrew <input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/> / <input style="width: 20%;" type="text"/> |
| Period used for calculation (check one) <input type="checkbox"/> Payment period | <input type="checkbox"/> Period of enrollment |

*Monetary amounts should be in dollars and cents (rounded to the nearest penny).
When calculating percentages, round to three decimal places. (For example, .4486 = .449, or 44.9%)*

STEP 1: Student's Title IV Aid Information

| Title IV Grant Programs | Amount Disbursed | Amount that Could Have Been Disbursed | |
|---|--|---|---|
| 1. Pell Grant | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | E. Total Title IV aid disbursed for the period. <div style="text-align: right;"> <input style="width: 100%;" type="text"/> A. + <input style="width: 100%;" type="text"/> B. = E. \$ <input style="width: 100%;" type="text"/> </div> |
| 2. Academic Competitiveness Grant | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | |
| 3. National SMART Grant | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | |
| 4. FSEOG | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | |
| 5. TEACH Grant | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | |
| 6. Iraq Afghanistan Service Grant | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | |
| A. <input style="width: 100%;" type="text"/> | | C. <input style="width: 100%;" type="text"/> | |
| Subtotal | | Subtotal | |
| | | | |
| Title IV Loan Programs | Net Amount Disbursed | Net Amount that Could Have Been Disbursed | |
| 7. Unsubsidized FFEL/Direct Stafford Loan | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | F. Total Title IV grant aid disbursed and that could have been disbursed for the period. <div style="text-align: right;"> <input style="width: 100%;" type="text"/> A. + <input style="width: 100%;" type="text"/> C. = F. \$ <input style="width: 100%;" type="text"/> </div> |
| 8. Subsidized FFEL/Direct Stafford Loan | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | |
| 9. Perkins Loan | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | |
| 10. FFEL/Direct PLUS (Graduate Student) | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | |
| 11. FFEL/Direct PLUS (Parent) | <input style="width: 90%;" type="text"/> | <input style="width: 90%;" type="text"/> | |
| B. <input style="width: 100%;" type="text"/> | | D. <input style="width: 100%;" type="text"/> | |
| Subtotal | | Subtotal | |
| | | | G. Total Title IV aid disbursed and that could have been disbursed for the period. <div style="text-align: right;"> <input style="width: 100%;" type="text"/> A. <input style="width: 100%;" type="text"/> B. <input style="width: 100%;" type="text"/> C. + <input style="width: 100%;" type="text"/> D. = G. \$ <input style="width: 100%;" type="text"/> </div> |

STEP 2: Percentage of Title IV Aid Earned

Withdrawal date / /

H. Determine the percentage of the period completed:
Divide the clock hours scheduled to have been completed as of the withdrawal date in the period by the total clock hours in the period.

÷ = %

Hours scheduled to complete
Total hours in period

▶ If this percentage is greater than 60%, enter 100% in Box H and proceed to Step 3.
 ▶ If this percentage is less than or equal to 60%, enter that percentage in Box H, and proceed to Step 3.

H. %

STEP 3: Amount of Title IV Aid Earned by the Student

Multiply the percentage of Title IV aid earned (Box H) by the Total Title IV aid disbursed and that could have been disbursed for the period (Box G).

% **x** **=** **I. \$**

Box H
Box G

STEP 4: Title IV Aid to be Disbursed or Returned

- ▶ If the amount in Box I is greater than the amount in Box E, go to Item J (Post-withdrawal disbursement).
- ▶ If the amount in Box I is less than the amount in Box E, go to Title IV aid to be returned (Item K).
- ▶ If the amounts in Box I and Box E are equal, **STOP**. No further action is necessary.

J. Post-withdrawal disbursement

From the Amount of Title IV aid earned by the student (Box I) subtract the Total Title IV aid disbursed for the period (Box E). This is the amount of the post-withdrawal disbursement.

- **=** **J. \$**

Box I

Box E

If there's an entry for "J," **Stop here**, and enter the amount in Box 1 on Page 3 (Post-withdrawal disbursement tracking sheet).

K. Title IV aid to be returned

From the Total Title IV aid disbursed for the period (Box E) subtract the Amount of Title IV aid earned by the student (Box I). This is the amount of Title IV aid that must be returned.

- **=** **K. \$**

Box E
Box I

POST-WITHDRAWAL DISBURSEMENT TRACKING SHEET

Student's Name

Social Security Number

Date of school's determination that student withdrew

/ /

I. Amount of Post-withdrawal Disbursement (PWD)

Amount from "Box J" of the Treatment of Title IV Funds When a Student Withdraws worksheet **Box 1** \$.

II. Outstanding Charges For Educationally Related Expenses Remaining On Student's Account

Total Outstanding Charges Scheduled to be Paid from PWD

Box 2 \$.

(Note: Prior-year charges cannot exceed \$200.)

III. Post-withdrawal Disbursement Offered Directly to Student and/or Parent

From the total Post-withdrawal Disbursement due (Box 1), subtract the Post-withdrawal Disbursement to be credited to the student's account (Box 2). This is the amount you must make to the student (grant) or offer to the student or parent (Loan) as a Direct Disbursement.

\$. — \$. = \$.

Box 1 Box 2

IV. Allocation of Post-withdrawal Disbursement

| Type of Aid | Loan Amount School Seeks to Credit to Account | Loan Amount Authorized to Credit to Account | Title IV Aid Credited to Account | Loan Amount Offered as Direct Disbursement | Loan Amount Accepted as Direct Disbursement | Title IV Aid Disbursed Directly to Student |
|-----------------------------|---|---|----------------------------------|--|---|--|
| Pell Grant | N/A | N/A | | N/A | N/A | |
| ACG | N/A | N/A | | N/A | N/A | |
| National SMART Grant | N/A | N/A | | N/A | N/A | |
| FSEOG | N/A | N/A | | N/A | N/A | |
| TEACH Grant | N/A | N/A | | N/A | N/A | |
| Iraq Afghanistan Svc. Grant | N/A | N/A | | N/A | N/A | |
| Perkins | | | | | | |
| Subsidized FFEL / Direct | | | | | | |
| Unsubsidized FFEL / Direct | | | | | | |
| FFEL / Direct Grad Plus | | | | | | |
| FFEL / Direct Parent Plus | | | | | | |
| Totals | | | | | | |

V. Authorizations and Notifications

Post-withdrawal disbursement loan notification sent to student and/or parent on

/ /

Deadline for student and/or parent to respond

/ /

Response received from student and/or parent on

/ /

Response not received

School does not accept late response

VI. Date Funds Sent

Date Direct Disbursement mailed or transferred

Grant

/ /

Loan

/ /