

GOVERNMENT OF THE DISTRICT OF COLUMBIA
DEPARTMENT ON DISABILITY SERVICES



DRAFT

PROCEDURE	
Subject: Postsecondary Education and Training Procedures	Procedure No.: 2015-RSA-PR
Responsible Program or Office:	Effective Date:
Rehabilitation Services Administration – Client Services	Number of Pages: 24
Cross References, Related Policies and Procedures, and Related Documents: Section VI Policy Manual (2010), Services relating to Post-secondary Education and Training Section V Policy Manual (2010), Economic Needs and Comparable Benefits Guidance Email from RSA Deputy Director dated February 19, 2013 Transportation Standard Operating Protocol Number 2013-RSA-Trans-001 Regulations for Postsecondary Education and Training 29 DCMR §122 Postsecondary Education and Training Policy (2015) Maintenance Policy (2015)	

1. PURPOSE

The purpose of this procedure is to outline steps and serve as a guide in authorizing Post-Secondary Education and Training and services related to it.

2. APPLICABILITY

This procedure applies to all vocational rehabilitation (“VR”) Specialists, supervisors, administrators, eligible people that DCRSA serve (hereinafter referred to as people/ person or student) and their families and advocates, and stakeholders of the DC Rehabilitation Services Administration.

3. PROCEDURES

A. Procedure for Authorizing Postsecondary Education and Training Service

Once a person is determined eligible for vocational rehabilitation services and s/he will require or request further training or education to make him or her employable:

1. Comprehensive Assessment

- a. ***Comprehensive Assessment.*** The VR Specialist shall conduct a comprehensive assessment to include a review of psychological evaluation/ medical records/ vocational assessment/ transcripts of prior training/ assistive technology assessment and labor market to determine the unique strengths, resources, priorities, concerns, abilities, capabilities, interests and informed choice in accordance with the requirements of the Rehabilitation Act of 1973. This shall be documented using the Comprehensive Rehabilitation Needs Assessment form.
- b. ***Determination of college-readiness.*** The VR Specialist shall determine college readiness of the person as part of the comprehensive assessment and in accordance with the criteria set in the Postsecondary Education and Training Policy. The VR Specialist shall document this using the Postsecondary Consultation Worksheet, which shall be presented to the VR supervisor during consultation.
- c. ***Student Loans Resolution.*** The VR Specialist shall establish that the person has resolved student loan/s or obtains a waiver from the Department of Education regarding any defaulted student loan pursuant to 29 DCMR § 122.2(c) once the person has been determined to be ready for postsecondary training. Otherwise, no paid training can be provided if there are any outstanding student defaulted loans.
- d. ***Employment goal identification.*** The person, with the assistance of the VR Specialist, shall identify an employment outcome consistent with his or her interests, aptitude, abilities and informed choice. The employment goal shall be agreed upon by the person and VR Specialist.
- e. ***Identification of required training.*** The person, with the assistance of the VR Specialist, shall identify a suitable training or education that will be consistent with the employment goal and informed choice. The approved training or education should be required to achieve entry-level position in the person's chosen field.
- f. ***Identification and selection of training institution.*** The person, with the assistance of the VR Specialist, shall identify a post-secondary institution which will provide the training or education in line with the employment goal and consistent with informed choice. Efforts shall be made to explore locally available public options within the Washington DC Metropolitan area first consistent with the Postsecondary Education and Training Policy. The VR Specialist shall provide information about locally available public training or educational options in the person's chosen field. Availability of the program in the local area is not limited by not applying or not getting accepted at a locally available option.

Refer to the Criteria for selecting an appropriate institution and for forming the basis for approval for DCRSA sponsorship in the Postsecondary Education and Training Policy.

- g. **Acceptable timeline for requesting postsecondary training.** The person shall provide the counselor with a letter of acceptance and proposed course of study at least **90 days prior to the beginning of the semester/ grading period** so that there is sufficient time to plan and determine **whether and to what extent** DCRSA can provide financial assistance. While agency staff will make every effort to assist individuals who request services less than 90 days prior to the beginning of the semester/ grading period, DCRSA financial assistance may be delayed until the next semester/ grading period for last minute requests.

COMPREHENSIVE ASSESSMENT: AT A GLANCE	
VR SPECIALIST RESPONSIBILITIES	ELIGIBLE PERSON'S RESPONSIBILITIES
<ul style="list-style-type: none"> ➤ Conduct comprehensive assessment; ➤ Gather information to determine if the person has the strengths, resources, abilities and capabilities to succeed in postsecondary education; ➤ Establish that there is no outstanding student loan or a waiver has been obtained for it; ➤ Provide counseling and guidance and assist the person in exercising informed choice through the identification and selection of: <ul style="list-style-type: none"> - Employment goal; - Required training for it; - Suitable training institution (with emphasis on those within the person's home area, at which the types of training needed to achieve the employment goals under consideration are available). 	<ul style="list-style-type: none"> ➤ Cooperate with the VR Specialist in following next steps, undergoing evaluation and submitting required documentation in a timely manner; ➤ Identify a realistic employment goal consistent with one's interest, aptitude, skills and abilities; ➤ Identify training and training institution that are required and consistent with the employment goal; ➤ Submit a letter of acceptance and proposed course of study at least 90 days prior to the beginning of the semester or grading period;
<p>Required Documentation</p> <ul style="list-style-type: none"> ➤ Comprehensive Rehabilitation Needs Assessment ➤ Postsecondary Consultation Worksheet <p>Useful Tools:</p>	

➤ Postsecondary Education/ Training Documentation Checklist

2. Determination of Supports (Financial Assistance and Accommodations)

- a. **Annual application for financial aid requirement.** The person shall apply for financial aid annually and submit a copy of Student Aid Report. (See Section C(1)). Federal VR funds cannot be used to pay training costs in institutions of higher education *unless every effort has been made to secure financial assistance, in whole or in part, from other funding sources*. Failure to apply annually for financial aid shall result to a delay in the determination of DCRSA financial assistance the following semester or academic year.
- b. **Financial aid verification.** The VR Specialist shall verify financial aid utilizing the Student Aid Report and/or a VR Exchange Form/ Statement of Account from the school indicating the grants available to the person. The VR Specialist shall determine financial assistance only after the results of the SAR and the financial aid award letter are known, and after the financial participation and any comparable benefits have been applied.
- c. **Request for Accommodations.** The VR Specialist and the person shall discuss any need for reasonable accommodations in the educational setting and will discuss the role of the disability services coordinator in facilitating any requests for accommodations. The VR Specialist will strongly encourage the person to register with the Disability Support Services.
- d. **Economic Needs Assessment Requirement.** The financial participation form shall be completed before the IPE development and updated annually during the annual review to determine the person's cost of participation or each time there is a change in the eligible person's financial status in accordance with 29 DCMR § 124.3.
- e. **Determination of current costs.** The VR Specialist shall refer to the institution's website for current costs and fees as well as current academic/ course catalogs. If the institution's website does not list current information, the person shall provide the VR Specialist with this information.
- f. **Identification of needed supports.** The VR Specialist shall identify the supports (e.g. assistive technology, transportation, personal care services etc.) required to assist the person to be successful in his/ her training pursuit and include this in plan development.

DETERMINATION OF SUPPORTS: AT A GLANCE

VR SPECIALIST RESPONSIBILITIES	ELIGIBLE PERSON'S RESPONSIBILITIES
<ul style="list-style-type: none"> ➤ Work cooperatively with the financial aid administrator, the coordinator of disability services, the individual student, and as appropriate, the person's family or authorized representative to assist the student in applying for financial aid or postsecondary education and to request for accommodations in the classroom; ➤ Conduct an economic needs assessment; ➤ Determine the agency financial assistance according to relevant policy and procedures. ➤ Identify the supports needed to help the student to be successful and develop a plan on how these supports will be provided. 	<ul style="list-style-type: none"> ➤ Apply for financial aid every year; ➤ Submit a copy of Student Aid Report to VR Specialist; ➤ Submit financial records as required by VR Specialist for economic needs assessment; ➤ Decide whether to request for services from disability support services and/or be responsible for accessing services identified previously in a vocational or psychological assessment that would help them in their academic pursuits; ➤ Help the VR Specialist gather information about current training costs; ➤ Participate in the cost of training and related services in institutions of postsecondary education, when required. ➤ Access the university's career services center.
<p>Useful Tool:</p> <ul style="list-style-type: none"> ➤ Postsecondary Financial Aid Verification <p>Required Form</p> <ul style="list-style-type: none"> ➤ Financial Participation Form 	<p>Required Documents:</p> <ul style="list-style-type: none"> ➤ Student Aid Report ➤ Financial records

3. IPE Development to Authorization

a. IPE Justification Documentation. The VR Specialist must document in the case record all decisions with regards to the services that will be provided in the IPE and the applicable regulation/s or policy that guided such decision/s:

SERVICE	APPLICABLE REGULATION/POLICY/
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	PROCEDURE
Training Program and Tuition Cost Limit	29 DCMR § 122.3 – 122.6
Graduate Education	29 DCMR § 122.23
Room and Board	29 DCMR § 122.9
Transportation	Section G of this procedure
Less than full-time student	29 DCMR § 122.16
Summer classes	Postsecondary Education and Training Policy
Maintenance	Maintenance Policy

- b. IPE Development and Approval.** The person and the VR Specialist shall jointly develop the Individualized Plan for Employment (IPE) to include approved training consistent with the employment goal at a postsecondary institution and other related services or amend accordingly.
- i. The IPE shall include all the necessary services and supports that will lead to the achievement of the employment goal; AND
 - ii. The IPE shall be developed to cover the full duration of the services until its completion. (i.e. coverage for two or four-year course in the plan)

The IPE shall be subject to the approval of the VR Specialist in instances when the person opts to develop the IPE without assistance from the VR Specialist consistent with 29 DCMR §§ 110.4 and 110.5 and 110.5 and 34 CFR 361.45 (c)-(d). When a person opts to develop the IPE without the assistance of a VR Specialist, Section 3(A)(3)(b) above applies.

- c. IPE Components.** The development of the IPE should be in accordance with the mandatory components of the Plan as outlined in 29 DCMR § 111:

COMPONENT	SYSTEM 7 FIELD
i. A description of the specific employment outcome that is chosen by the eligible individual consistent with the individual's unique strengths, resources, priorities, concerns, abilities, capabilities, career interests, and informed choice;	Employment Goal
a. A description of the specific rehabilitation services that are: (1) Needed to achieve the employment outcome, including, as appropriate, the provision of assistive technology devices, assistive technology services, and personal assistance services, including training in the management of those services; and (2) Provided in the most integrated setting that is appropriate for the services involved and is consistent with the informed choice of the eligible individual;	Objectives

<p>b. Timelines for the achievement of the employment outcome and for the initiation of services;</p>	<p>Plan begins on (date) and is estimated to end on (date)</p>
<p>c. A description of the entity or entities chosen by the eligible individual or, as appropriate, the individual's representative that will provide the vocational rehabilitation services and the methods used to procure those services</p>	<p>Services</p>
<p>d. A description of the criteria that shall be used to evaluate progress toward achievement of the employment outcome; and</p>	<p>Evaluation Criteria</p>
<p>e. The terms and conditions of the IPE, including, as appropriate, information describing:</p> <p>(1) The responsibilities of the Rehabilitation Services Administration;</p> <p>(2) The responsibilities of the eligible individual, including:</p> <p>(A) The responsibilities the individual will assume in relation to achieving the employment outcome;</p> <p>(B) If applicable, the extent of the individual's participation in paying for the cost of services; and</p> <p>(C) The responsibility of the individual with regard to applying for and securing comparable services and benefits as described in section 114; and</p> <p>(3) The responsibilities of other entities as the result of arrangements made pursuant to the comparable services or benefits requirements in Section 114.</p>	<p>Individual Understanding, Responsibilities, Rights, Remedies and Informed Choice</p>

d. Authorization Process. The VR Specialist shall process authorization only for the identified services in the approved and signed IPE - to the postsecondary institution and/or any provider of training-related services or materials. Authorization cannot be processed if the service or material good/s is/are not in the IPE. Services cannot be initiated or provided without a written authorization.

- i. Authorization for Training or Education shall be issued on an individual school term basis (per semester/ quarter/ grading period);
- ii. Authorization for books, tools, training-related materials, services or assistive technology (See Section F of this procedure) shall be issued to the school bookstore/ approved vendor or through purchase card as appropriate.

IPE DEVELOPMENT TO AUTHORIZATION: AT A GLANCE	
VR SPECIALIST RESPONSIBILITIES	ELIGIBLE PERSON'S RESPONSIBILITIES
<ul style="list-style-type: none"> ➤ Documentation of IPE Justification in the case record; ➤ Be sure that supports are in place and are included in the IPE (e.g. continuation of therapy and/or medications) to address disability issues and assist the person in maintaining stability so that s/he has the best chance for academic and employment success; ➤ Process authorization in a timely manner and coordinate provision of services. 	<ul style="list-style-type: none"> ➤ Apply any financial assistance received toward training and related expenses; ➤ Discuss with the VR Specialist any requested change in major or course of study, considering the impact on the employment goal, any required extension in the academic program and whether the IPE would need to be amended.
<p>Useful Tools:</p> <ul style="list-style-type: none"> ➤ Plan of Study ➤ Transportation Worksheet ➤ Maintenance Worksheet <p>Required Documentation</p> <ul style="list-style-type: none"> ➤ Postsecondary Justification Form <p>Required Forms:</p> <ul style="list-style-type: none"> ➤ IPE ➤ VR Authorization 	

4. Training Monitoring Requirements

- a. **Frequency of Contact.** The VR Specialist shall monitor the student's progress throughout the semester as appropriate and as frequently as possible either by email, phone or text and this shall be documented accordingly in the case record. Frequent contact for students in their first year of postsecondary training may be necessary and thus the VR Specialist shall make every effort to contact them monthly, with the first contact occurring within the first 30 days to determine their adjustment and identify needs the student may have. Face to face progress reviews shall also be conducted consistent with 4e and 4f of this section.

- b. **Grade requirement.** For those continuing training, the VR Specialist shall review the student's academic performance in the previous term and/ or complete annual review if applicable. The **cumulative grade point average** (acceptable is considered at least 2.0 in a scale of 4.0 or C or based on the school's standard) shall be reviewed at the end of each academic year pursuant to 29 DCMR § 122.12 (a) and shall be the basis of approval of continuous training support for the following academic year.

Due to the foregoing, processing of authorization shall not be delayed:

- i. If the grades are not yet available during in-between terms (before the Winter quarter or Spring semester); or
- ii. If the GPA is below 2.0 for only one term/ semester/ quarter/ grading period. Counseling and guidance shall be provided to make sure that the person seeks appropriate academic support.

c. ***Failure to meet requirements and reconsideration.***

Any postsecondary student who fails to maintain an annual minimum cumulative grade point average of “C” (2.0), or higher - if required by the academic institution or program, shall be placed on probation.

Funding for training the following term or semester after being placed on probation cannot be authorized pursuant to 29 DCMR §122.14 if the student:

- i. Gets dismissed by a postsecondary institution, OR
- ii. Fails to maintain satisfactory academic or other progress (defined as minimum cumulative grade point average of “C” or 2.0, or higher- if required by the academic institution or program) in accordance with the institution’s academic or performance requirements or financial aid eligibility criteria; OR
- iii. Fails to meet the institution’s requirements for progress toward earning a degree or to earn the requisite certificate for the course of study.

Reconsideration: This may be reconsidered only if the student provides documentation of successful completion of C or better while maintaining a full-time schedule at a post-secondary educational institution for one semester consistent with 29 DCMR § 122.15.

- d. ***Elective change in school or major.*** Any change in the training plan shall require pre-approval by the VR Specialist, and the VR Specialist’s supervisor where appropriate, and shall be effected by subsequent IPE amendment. The person must discuss any requested change and the reason for the change with the VR Specialist. Only one transfer from one post-secondary institution to another post-secondary institution and only one change in the vocational goal for the life of the case may be approved by the VR Specialist pursuant to 29 DCMR § 122.13. The person must inform the VR Specialist for the request in change at least 90 days before the beginning of the term or grading period.
- e. ***Progress review before each semester.*** The VR Specialist shall meet with the student prior to each semester to:
 - i. Review grades and progress toward the agreed upon certificate/ degree;
 - ii. Plan coursework;
 - iii. Address any required prerequisites, remedial courses, repeated courses, withdrawals and “incomplete”, and assure that the student completes related requirements so as not to delay completion of certificate / degree.

- iv. Discuss disability issues and facilitate provision of supports and reasonable accommodations needed and/or continuation of those which are in place;
 - v. Emphasize the employment outcome on the IPE;
 - vi. Offer support and encourage self-advocacy;
 - vii. Document the progress review accordingly.
- f. **Annual Review requirement.** The VR Specialist shall review the IPE annually and document accordingly, considering all relevant factors, including whether or not:
- i. The employment goal is still viable;
 - ii. Time frames on the IPE are being met;
 - iii. Disability related supports are in place and adequate;
 - iv. There is a need for an IPE amendment.
- g. **Annual Updates.** The following forms, process or documentation shall be updated annually:
- i. Financial Participation Form
 - ii. Release of Confidential Information Authorization
 - iii. Application for grants
 - iv. Documentation requirement for room and board
 - v. Documentation to justify less than full time load

TRAINING MONITORING REQUIREMENT: AT A GLANCE	
VR SPECIALIST RESPONSIBILITIES	ELIGIBLE PERSON'S RESPONSIBILITIES
<ul style="list-style-type: none"> ➤ Monitor student's training progress as appropriate and as frequently as possible either by email, phone or text ; ➤ Keep the student engaged for the duration of the educational or training program, monthly contact for those in the first year of postsecondary training, making the first contact within the first 30 days. ➤ Conduct progress review before start of each semester/ term; ➤ Remind student about timely submission of grades and reports; ➤ Conduct annual review; ➤ Update forms/ documentation requiring annual review. <ul style="list-style-type: none"> ➤ Financial Participation Form ➤ Release of Confidential Information Authorization ➤ Application for grants ➤ Documentation requirement for room 	<ul style="list-style-type: none"> ➤ Maintain satisfactory progress toward a degree or certificate program as stipulated in the IPE; ➤ Remain in good standing with the institution of postsecondary education; ➤ Provide the VR Specialist a copy of the grade report or transcript and proposed course of study upon completion of each semester/ grading period; ➤ Discuss the proposed course of study and its relationship to the employment goal and progress toward the certificate/ degree with the VR Specialist during progress review meetings; ➤ Update the VR Specialist with any information that may adversely affect training. ➤ Any request for change in school or major shall be discussed with the VR Specialist at least 90 days before the start

<p>and board</p> <ul style="list-style-type: none"> ➤ Documentation to justify less than full time load. 	<p>of the next semester or grading period.</p> <ul style="list-style-type: none"> ➤ Submit justification documentation for room and board (if determined medically necessary due to disability) and/or for taking less than full time load
<p>Required Documentation:</p> <ul style="list-style-type: none"> ➤ Training Progress Report ➤ Annual Review <p>Required Forms:</p> <ul style="list-style-type: none"> ➤ IPE or IPE Amendment ➤ Financial Participation Form ➤ Release of Confidential Information Authorization <p>Useful Tools</p> <ul style="list-style-type: none"> ➤ Letter – Student in training reminder letter ➤ Letter – Decision Letter 	<p>Required documents:</p> <ul style="list-style-type: none"> ➤ Grade reports ➤ Medical certification for room and board and/or taking less than full time load.

B. Guidelines in the application of the Postsecondary Education and Training regulations, effective August 29, 2014, 29 DCMR § 122

1. The Postsecondary Education and Training regulations effective as of August 29, 2014 shall apply to ***new IPEs developed*** on or after August 29, 2014. IPEs developed prior to this date shall be covered by the previous regulations and shall continue with the same level of support unless the person elects to change schools and amend the IPE.
2. Any IPE amendment after August 29, 2014 that will involve a change of school shall be guided by the Postsecondary Education and Training regulations, effective as of August 29, 2014.

C. Application Procedure for Financial Assistance

For those persons for whom it has been determined that postsecondary education or training is required to achieve an employment goal, the following procedures shall be followed in applying for financial assistance from Rehabilitation Services Administration (RSA) for postsecondary education expenses:

1. ***Annual application for financial aid requirement.*** The person shall submit a financial aid application annually in accordance with 29 DCMR § 122.2 (d) to the following:
 - a. The post-secondary institution the person is attending or to which the person has applied;
 - b. The D.C. Tuition Assistance Grant, if applicable;
 - c. All other District or state funded educational assistance programs and school grants or financial aid;

- d. The U.S. Department of Education (The Free Application for Federal Student Aid (FAFSA));
 - e. All federal grant programs, including the Pell Grant; and
 - f. The Leverage Educational Assistance Program (LEAP);
 - g. DC- College Access Program (DC-CAP); or
 - h. Any other financial assistance programs available.
2. The eligible person/ person's family shall complete DCRSA's Financial Participation Form to determine the individual/family annual contribution for services.

Exemptions from financial needs test. The following person(s) are exempt from the financial needs test and are not required to contribute to the cost of vocational rehabilitation per 29 DCMR § 124.5:

- a. A ward of the District of Columbia Government committed to the jurisdiction of the Child and Family Services Agency, or its successor agency;
- b. A recipient of Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI);
- c. A client of the Economic Security Administration (formerly known as Income Maintenance Administration) or its successor agency, who meets the requirements for Income Maintenance Administration-related rehabilitation programs or;
- d. An eligible person receiving another form of public assistance income as defined in the federal Social Security Act of 1935. (e.g. TANF, SNAP, WIC etc.)

Families are not required to contribute to the cost of vocational rehabilitation once a person has been determined exempt from financial participation.

However, if the person chooses an out-of-state institution, the person/ person's family will still be responsible for additional expenses beyond the limitations set by 29 DCMR §122.3 – 122.6 even if they are exempt from the financial needs test.

3. ***Financial information documentation.*** If the person's parents/family members are required to provide financial information on the FAFSA, i.e., the student is not considered "independent" for purposes of federal student financial aid, the parents/family members must provide financial information as supporting documentation to the Financial Participation form to determine the individual/family annual contribution for postsecondary education expenses.

This does not apply to persons identified above as exempt from the financial needs test.

The following may be used to calculate an eligible person's financial contribution toward the cost of vocational rehabilitation services in accordance with 29 DCMR § 124.10 (a) (1):

- a. The adjusted gross income listed on the Internal Revenue Service (IRS) Form 1040 (line 37), 1040A (line 21), or 1040EZ (line 4) of the eligible person, parent or guardian, and any relevant schedules, forms or supplemental documentation or supporting information listed on the IRS Form 1040, 1040A, or 1040EZ; or
 - b. Original copies of documents by verifying the annual gross income of the eligible person, parent, or guardian, if he or she is ineligible to file a federal tax return pursuant to IRS guidelines, or has otherwise not filed a federal tax return.
4. The person or, as appropriate, the person's representative, will sign a "Release of Confidential Information" and a Postsecondary Financial Aid Verification form, authorizing the exchange of information between the VR Specialist and financial aid administrator in accordance with 29 DCMR § 122.2 (f).
 5. The VR Specialist shall request a verification of Financial Aid (e.g. VR exchange form) from the financial aid administrator and/or review the Student Aid Report (SAR) and shall utilize this information to determine financial assistance.

D. Calculation of Amount of Financial Assistance

The amount of financial assistance to be provided by DC RSA shall be in accordance with the limitations set in 29 DCMR §§ 122.4, 122.5 and 122.6.

1. Necessary public institution within Metro DC / Gallaudet University (for Deaf students) / Necessary program with individualized supports in an institution that is not available within Metro DC.
 - a. The VR Specialist shall determine the amount of the tuition and required fees for the semester.
 - b. Subtract the total amount of grants and scholarships awarded (from Section C(5)) for the semester from the tuition and required fees.
 - c. Subtract the total of the individual participation for the semester as determined by Section C(3) from the remaining tuition and required fees.
 - d. The remainder is the amount of DCRSA financial assistance for the academic year that shall be in accordance with the limitations set in 29 DCMR § 122.4.

- e. The IPE shall reflect the estimated training cost for the whole duration of the training from the base year and the plan shall be amended accordingly with the anticipated annual increase in training costs.
 - f. The VR Specialist, the VR Supervisor and the person/ parent or guardian/ authorized representative shall sign and date the completed IPE.
2. Private institution within Metro DC when a necessary program with individualized supports at a public institution exists locally (except for Deaf students of Gallaudet University)
- a. The VR Specialist shall determine the amount of the tuition and required fees for the semester.
 - b. Subtract the total amount of grants and scholarships awarded (from Section C(5)) for the semester from the tuition and required fees.
 - c. Subtract the total of the individual participation for the semester as determined by Section C(3) from the remaining tuition and required fees.
 - d. Compare the amount from subsection (c) with the prevailing UDC tuition rate for residents. DCRSA may pay up to the prevailing UDC tuition rate for residents as the financial assistance for the semester/ grading period that shall be in accordance with the limitations set in 29 DCMR§ 122.5.
 - e. The remainder in the amount, if any, is added to the individual participation and shall be the financial responsibility of the student consistent with 29 DCMR§ 122.7.
 - f. The IPE shall reflect the estimated training cost for the whole duration of the training from the base year and the plan shall be amended accordingly with the anticipated annual increase in training costs.
 - g. The VR Specialist, the VR Supervisor and the person/ parent or guardian/ authorized representative shall sign and date the completed IPE.
3. Public or private institution outside of Metro DC when a necessary program with individualized supports at a public or private institution exists locally
- a. The VR Specialist shall determine the amount of the tuition and required fees for the semester.
 - b. Subtract the total amount of grants and scholarships awarded (from Section C(5)) for the semester from the tuition and required fees. It should be noted that the Pell Grant may be applied to room and board costs.
 - c. Subtract the total of the individual participation for the semester as determined by Section C(3) from the remaining tuition and required fees.

- d. Compare the amount from subsection (c) with the prevailing UDC tuition rate for residents. DCRSA may pay up to the prevailing UDC tuition rate for residents as the financial assistance for the semester/ grading period that shall be in accordance with the limitations set in 29 DCMR§ 122.6(a).
- e. The remainder in the amount, if any, is added to the individual participation and shall be the financial responsibility of the student consistent with 29 DCMR§ 122.7.
- f. The IPE shall reflect the estimated training cost for the whole duration of the training from the base year and the plan shall be amended accordingly with the anticipated annual increase in training costs.
- g. The VR Specialist, the VR Supervisor and the person/ parent or guardian/ authorized representative shall sign and date the completed IPE.

<i>CALCULATION OF FINANCIAL ASSISTANCE: AT A GLANCE</i>	
TRAINING INSTITUTION/ SCHOOL	BASE RATE
Necessary Public Institution within Metro DC / Gallaudet University (for Deaf students) / Necessary Program with individualized supports in an Institution that is not available within Metro DC.	Institution’s Published Tuition Rate and required fees
Private Institution within Metro DC when a necessary program with individualized supports at a public institution exists locally (except for Deaf students of Gallaudet University)	Not to exceed (NTE) prevailing UDC Tuition Rate and required fees for residents
Public or Private Institution Outside of Metro DC when a necessary program with individualized supports at a public or private institution exists locally	NTE prevailing UDC Tuition Rate and required fees for residents

E. Procedures in the use of Scholarships and Grants

For public, merit based scholarships or grants, or any private scholarships or grants, the determining factor for how the agency should calculate the effect of the grant on our support, is whether the scholarship or grant is restricted or unrestricted (i.e., is the money intended for only a particular purpose, such as tuition).

1. Restricted Scholarship or Grant

If the scholarship or grant is restricted, the amount awarded should be applied to the expense to which it was restricted. For example, if a student receives a grant

that is restricted to payment of tuition, the cost of tuition would be reduced by the amount of this grant. The agency’s level of support would then be based on this revised tuition amount, based on the federal requirement that restricts DCRSA in paying for expenditures that are “necessary and reasonable.”

2. Unrestricted Scholarship or Grant

In the case of an unrestricted grant or scholarship, the student is free to use these funds in any manner he or she wishes. However, the student must share with the VR Specialist how the funds are used. If the student’s use of these funds decreases an expense for which DCRSA is providing support, then DCRSA’s support is decreased by this amount. There may be circumstances, however, where the grant or scholarship would be used for other purposes and would have no effect on the support provided by RSA. For example, the student could use the grant to pay for expenses that RSA does not support (e.g., tuition to take a course which the student previously failed; expenses related to a school program involving study abroad; expenses for room and board in situations where RSA is not funding room and board).

Examples:

Public, Needs Based Scholarships or Grants

Example 1: The student attends the University of Maryland Eastern Shore (“UMES”), a public school. There was a similar public program available at a local college, however, the student chose to attend the out of state school. Therefore, the agency’s level of support is limited to the tuition rate of University of the District of Columbia (“UDC”) for residents (\$3710.56 at the time this procedure became effective); and the agency does not fund room and board (per 29 DCMR § 122.9), as the student had a locally available option that did not require room and board. The tuition and fees per semester for an out of state resident are \$7424.50. The cost for room and board per semester is \$4375. The student’s financial participation per semester is \$0.

The student receives a Pell Grant and Tuition Assistance Grant (“TAG”) from OSSE. The Pell Grant is in the amount of \$2500 per semester. The TAG is in the amount of \$4068 per semester (TAG pays the difference between in-state and out of state tuition at public four year colleges, up to \$5000 per semester; it also pays up to \$1250 per semester for Historically Black Colleges (“HBCU”); UMES is both a public state school and a HBCU, so TAG would pay the higher of the two ; i.e., up to \$5000 – the difference between in state and out of state for UMES is \$4068). Therefore, the calculation would be as follows:

Applicable Regulation: 29 DCMR§ 122.6(a)		Procedure Reference: Section 3, Subsection D3	
CALCULATION STEP	ITEM	COST COMPUTATION	COMMENTS
Step 1: Determine	Tuition and	\$ 7424.50	

Postsecondary Procedures 2.1

amount of tuition and required fees	required fees		
Step 2: Subtract the amount of grants from Step 1	TAG	(\$4068.00)	
Step 3: Subtract	Financial Participation	(\$0)	
Step 4: Agency Contribution	DCRSA contribution	\$3356 .50	The remaining balance becomes the agency's contribution as this is still within the limits of the UDC Tuition Rate for Residents (up to \$3710.56)
Other Fees	Room and Board <u>(less Pell Grant)</u> Student's responsibility	\$4375.00 <u>(\$2500.00)</u> \$1875.00	Pell Grant may be applied here to reduce the amount of the student's responsibility

The following computation model illustrates how Pell Grant can be applied to tuition thereby minimizing DCSRSA contribution and increasing the student's responsibility which can pose as a financial burden:

Alternative Computation:

Applicable Regulation: 29 DCMR§ 122.6(a)		Procedure Reference: Section 3, Subsection D3	
CALCULATION STEP	ITEM	COST COMPUTATION	COMMENTS
Step 1: Determine amount of tuition and required fees	Tuition and required fees	\$ 7424.50	
Step 2: Subtract the amount of grants from Step 1	TAG Pell Grant	(\$4068.00) (\$2500)	Pell Grant is applied here which will reduce DCSRSA's contribution and increase financial responsibility of the student.
Step 3: Subtract	Financial	(\$0)	

	Participation		
Step 4: Agency Contribution	DCRSA contribution	\$856 .50	The remaining balance becomes the agency's contribution as this is still within the limits of the UDC Tuition Rate for Residents (up to \$3710.56) but this makes it way lower than if the Pell Grant were applied to other fees which the student is expected to shoulder.
Other Fees	Room and Board Student's responsibility	\$4375.00	Pell Grant may be applied here to reduce the amount of the student's responsibility and increase DCRSA support that would still be within the limits

DCRSA shall also fund the cost of transportation to and from school as it would have been provided if the student attended the locally available option. The cost to travel to and from the out of state school, however, *shall not* be covered since it is the student's option to attend out of state. Refer to Section G of this procedure and the Transportation Standard Operating Protocol Number 2013-RSA-Trans-001 for guidance.

Private, Needs Based Grant

Example 2: The student attends Landmark College, a private school in Vermont. The student and her IEP team identified Landmark as the most appropriate post- secondary institution, in order to address the student's learning disabilities. The VR Specialist did not participate in the IEP meetings or engage with the student in counseling and guidance to make an informed choice regarding her options for studying computer science. The student applied for admission only to this one school, based on the IEP team's

plans. The agency initially refused to support Landmark, as the student intends to study computer science, and there are locally available options. However, the student filed an appeal at the DC Office of Administrative Hearings (“OAH”) and OAH found that there is no similar program available within the Metro DC area for that person and her required supports and ordered the agency to pay tuition, and room and board, consistent with the agency’s policies and procedures. Landmark College has awarded the student a \$15,000 grant per school year, to be applied to tuition. This is a “restricted, private grant.” The student also received a Pell Grant in the amount of \$5000, per year. The student applied for TAG, but this is only available to support public or historically black colleges, neither of which applies.

The Landmark tuition and required fees for the semester is \$24,500. The Landmark Grant is \$7,500 per semester. The Pell Grant is in the amount of \$2500 per semester. Room and Board amounts to \$4770 per semester. The student has \$0 financial contribution based on economic needs assessment.

Applicable Regulation: 29 DCMR §122.6(b)		Procedure Reference: Section 3, Subsection D1
CALCULATION STEP	ITEM	COST
Step 1: Determine tuition and required fees	Tuition and required fees	\$24,500
Step 2: Subtract grants/scholarships	Landmark Grant	(\$7,500)
	Pell Grant	(\$2,500)
Step 3: Subtract Financial Participation	Financial Participation	(\$0)
Step 4: Balance which will become the Agency Contribution	Agency Contribution for Tuition	\$14,500
Other fees	Room and Board	\$4770

Total agency support for this semester is \$19,270. Pell Grant could have alternatively applied to room and board but the total agency support would still have been the same at \$19,270 so in this case, it does not matter where it is applied.

Private Merit Based Grant

Example 3: The student is in his second year in Howard University’s Graduate School of Social Work, a private school, pursuing his MSW. There are locally available options for studying social work in graduate school. The tuition and fees are \$ 9,000 per semester. The student received a merit based scholarship in the amount of \$10,000 because he was the student with the highest GPA in his first year of study. The scholarship must be paid to the University, but it is otherwise unrestricted. The VR Specialist meets with the student to ask how he intends to use the scholarship. The student reports that Howard has a program in international social work practice over the Winter Break that

involves a five week course of international social work practice, studying and living in South Africa. The cost of the program is \$5000. The student would like to participate in this program, and plans to use the rest of the scholarship for tuition. The student’s financial participation is \$0.

Applicable Regulation: 29 DCMR§122.5		Procedure Reference: Section 3, Subsection D2	
CALCULATION STEP	ITEM	COST	COMMENTS
Step 1: Determine amount of tuition and required fees	Tuition and required fees for the semester	\$ 9,000.00	
Step 2: Subtract amount of Grants	Merit-based Scholarship	(\$5,000.00)	The balance from the unrestricted merit-based scholarship is subtracted from the tuition and shall be paid to the university per scholarship condition and because the student elected to use the other half for the study abroad program.
Step 3: Subtract	Financial Participation	(\$0)	
Step 4: Agency Contribution	DCRSA Contribution	\$3710.56	Limitation for Private school NTE UDC Tuition rate for residents. The \$4000 balance is not the agency’s contribution as it is over the limit of the prevailing UDC Tuition rate for residents, \$3710.56 .
Step 5: Balance to be added to Financial Participation as Individual Responsibility	Student Responsibility/ Contribution	\$289.44	This is the difference between the \$4000 balance and the maximum the agency will pay for the semester, \$3710.56
Step 6: Other fees	Room and Board	N/A	Is not covered

			because the school is within Metro DC.
	International Program using grant money	\$5,000	Half of the grant money was applied to the International program that the student elected to participate. DCRSA does not support study abroad programs consistent with 29 DCMR §122.17(b).

F. Purchase of Training-Related books, computer, tools, supplies, assistive technology, uniform and/ or service

1. Through the school bookstore or approved vendor

- a. The person approved for training shall submit a required list of books or tools/ equipment to the VR Specialist on official institution letterhead or as published in school website, catalog or syllabus and/or online student account.
- b. If it is a request for a computer and it is not available through other resources (e.g. Project Reboot) per 29 DCMR § 120.13, the request should be accompanied by documentation from the relevant University personnel (e.g. Chairman of the relevant Department or director of a training program) consistent with 29 DCMR § 120.11.
- c. Computer required as an assistive technology (AT) equipment shall be provided if supported and recommended by an AT assessment.
- c. The VR Specialist shall review the request, document the action taken and reflect this in the IPE. The VR Specialist and the person shall sign and date the completed or amended IPE.
- d. Authorization for purchase of requested books and/or training materials shall be issued to the school or approved vendor.

2. Through the agency purchase card

- a. If the requested books/ uniform/ training materials need to be obtained from vendors other than the school, the VR Specialist may need to consult with staff who handles purchasing for suggestions of vendors (i.e. Reiter’s for books, Modell’s for uniform) or may need to exercise due diligence in researching for vendors.

- b. Once a vendor is identified, a price quote may need to be requested from the vendor.
- c. Once a price quote is available, purchase of requested items shall be included in the IPE and shall be documented accordingly in case notes. The VR Specialist and the person shall sign and date the completed IPE.
- d. Authorization for purchase of items (not otherwise available in schools) shall then be issued to RSA staff with purchase card together with item or product description and a price quote.
- e. The RSA staff responsible for purchasing the requested items shall keep the VR Specialist apprised of the order status and once the item/s is/are delivered.
- f. Once the requested items are available for pickup, the VR Specialist shall notify the person accordingly.

3. Through reimbursement or payment of maintenance

- a. The person shall inform and secure prior approval from the VR Specialist before procuring required tools or materials related to training consistent with 29 DCMR § 122.11.
- b. If the books/ uniform/ training materials/ tools are purchased out-of-pocket by the person and a claim for reimbursement is submitted, documentation of the requirement must be submitted along with the receipts in accordance with 29 DCMR § 120.11.
- c. The VR Specialist shall review the request and claim for reimbursement, document the action taken in case notes and include this in the IPE as service for Maintenance. The VR Specialist and the person shall sign and date the completed or amended IPE.
- d. Authorization to Client for approved expenditures will be generated for the Business Unit to process the reimbursement or payment ***subject to supervisor’s review and approval***. The person may expect the check to be received within 10 days upon processing.

PURCHASE OF TRAINING-RELATED MATERIALS: AT A GLANCE			
Required Documents	THROUGH SCHOOL OR APPROVED VENDOR	THROUGH AGENCY PURCHASE CARD	THROUGH MAINTENANCE (REIMBURSEMENT OR PAYMENT)
1. Authorization	College Textbooks and Supplies	Other services	Maintenance/ Authorization to Client form
2. List of Required books/ tools/ supplies/ uniform	YES	YES	YES

in official letterhead or school catalog			
3. Case Notes Justification	YES	YES	YES
4. Price Quote	YES	YES	YES
5. Product Description	NO	YES	NO
6. Receipt/ proof of purchase (reimbursement request)	NO	NO	YES (for reimbursement)

G. Transportation

Procedure: The VR Specialist shall review the person’s need for transportation that will allow him or her to travel to and from school based on the following guidance. The VR Specialist shall document the action taken in case notes and reflect this in the IPE and authorization if considered. The VR Specialist and the person shall sign and date the completed IPE.

Guidance: Transportation costs for VR services may be paid at the usual rates not to exceed the federal allowed rate. Transportation costs can only be paid as an auxiliary service to core VR services. Transportation is not a stand-alone service. Once the main service for which it is supporting is suspended or terminated (e.g. student dropping out of school), transportation costs shall likewise be suspended or terminated and the business unit shall be notified accordingly to effect suspension or termination of transportation benefits.

1. Student Chooses Program Within the Washington Metro DC

Transportation may be paid if the student lives at home and transportation to and from school is required. Refer to Transportation Standard Operating Protocol Number 2013-RSA-Trans-001 for guidance.

2. Student Chooses Program Outside of the Washington Metro DC

a. **When a local training option is available:** If the training location is at a distance where the student cannot live at home, non-daily transportation costs shall not be paid at the beginning and end of the training session. However, the public transportation to and from school and off-campus housing can be covered as if the student were attending school within the district. The student shall be encouraged to apply for public transportation discounts, which include but are not limited to: student discounts and discounts for persons with disabilities.

b. **No local training option available:** Transportation shall not be provided to the student when he or she lives on campus. If he or she lives off-campus, transportation shall be provided when the student uses available public transportation to and from his or her residence and school/training site. The

student shall be encouraged to apply for public transportation discounts, which include but are not limited to: student discounts and discounts for persons with disabilities. Transportation costs shall be paid for a trip at the beginning and end of the training session and during any breaks during which the school or training program is closed.

3. Public Transportation not available or accessible

If public transportation is not available for the student because of disability or the student cannot travel by public transportation, the VR Specialist shall pay the prevailing federal gas mileage rates only if it is the least expensive travel cost. Refer to Transportation Standard Operating Protocol Number 2013-RSA-Trans-001 for gas computation process.