

# Winthrop University's Office of Financial Aid Policies and Procedures

**Policy and Procedure:** Palmetto Fellows Awarding      **Drafted By:** Michelle Hare  
**Date Revised:** May 2024 (Brook Keisler)

These procedures are meant as a guide for awarding Palmetto Fellows scholarship (PFS). When awarding, you should ALWAYS defer to the state regulations which can be found at [www.che.sc.gov](http://www.che.sc.gov).

## Procedure:

### General Guidelines

- A student has FOUR consecutive years of eligibility from initial college enrollment.
  - Review current state regulations on how a student can defer beginning college enrollment and still qualify for award.
- As of July 2014, a student can use their scholarship in the summer term, if they meet the eligibility, and it will count against their EIGHT terms of eligibility.
- A student can always appeal the loss of their scholarship to CHE during the CHE appeal period, but never guarantee it will be approved.
- Awards are made in **OFFER** status in RPAAWRD using the appropriate Palmetto Fellows fund code (SCPFS1, SCPFS2, SCPFS3, SCPFS4 or SCPFSX when renewal criteria is different than a typical student).
  - Year 1 awards = \$6,700
  - Year 2-4 awards = \$7,500
- Effective Fall 2019, students in their final term (with proof they have applied for graduation that term) can receive Palmetto Fellows (and enhancement if applicable) for less than full-time. If student is attending less than full-time award must be prorated (e.g. attending 1 hour they get 1/12 \* amount)
- For 24/25 – Under Proviso 117.183, grades earned via dual enrollment should be removed from LIFE GPA calculation if they are negatively affecting LIFE GPA and the GPA requirement is the only reason student is not renewing to LIFE (i.e. has hours but not GPA). As of now, this is only for the 23/24 cohort renewing into Year 2 for 24/25. The dual enrollment grades will be factored into the LIFE GPA for Year 3 and 4 renewals. This is applicable to any SCPFS1 student who did not meet renewal criteria for PFS, but may be eligible to receive SC LIFE in Year 2.

### Freshmen Awards/Initial Awards

- Guidance Counselors at SC high schools will use the criteria for junior and senior high school years and/or upon completion of high school to determine if they are eligible to receive fellows funding. CHE provides a list of eligible Palmetto Fellows via the CHE online portal.
  - Beginning in November, check the portal for a list of approved freshmen PFS students for the next academic year. Copy the Eligible/No Institution Selected list and the Winthrop University list into an Excel workbook and send to David Rollings in Admissions. Save the Excel file using the day's date in the shared drive: Scholarships\Palmetto Fellows\xxxx.
  - Once the first list of students has been posted, check the portal every two weeks for updates. Sort the portal lists by Date CHE Posted Early/Late Awards and only send the newly added students to Admissions. Remember to save the new Excel file in the shared drive.
- CHE will notify Winthrop about eligibility if a Palmetto Fellows is transferring to Winthrop.
- The Office of Admissions will determine ALL initial award eligibility for new freshmen students based on information from CHE. The Office of Admissions will notify the Office of Financial Aid (OFA) when awards need to be made by updating a student's code in SOATEST and notifying the OFA to make the award.

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## Refunds

- Winthrop University follows CHE's guidance for refunds for students who withdraw to apply the same institutional policy. PFS & PFS Enhancement will be adjusted by the same percentage that tuition is (e.g. 50%).
- Students who do not begin full-time hours will have their award cancelled (except those in final semester prior to graduation)

## Billing

Each semester, after the academic fee adjustment period (approximately 30 days after the state of the semester), a member of the Controller's office submits a reimbursement request to CHE for the total amount disbursed (credited on the students accounts) for the awards processed by OFA for the semester by the deadlines CHE publishes. If an additional award is made, or an award is reduced, after the initial semester's request is made to CHE, then those funds would be added or subtracted, whichever is appropriate, in the following semester's request, or at fiscal year-end.

## Returning Awards (SCPFS2-4 & SCPFSX)

- As soon as possible after Spring grades are official, begin reviewing students for renewal
- Student must earn at least 30 hours and have a cumulative Winthrop GPA of 3.000 to earn the PFS scholarship for the next year
- OFA notifies students who do not meet renewal eligibility via letter to their permanent address in Banner. A student cannot regain eligibility mid-year.

1. Go to Dashboard-Scholarships, State, *LS\_SCPFS\_Schp Recipients for Renewal by Year* report
  - Put in current aid year and current fall/spring term codes.
  - After report runs and populates, save copy to shared drive-Scholarships-PFS-appropriate aid year
    - i. Delete first three rows of report so that you can properly sort and filter
    - ii. Compare number of students listed on report with number of SCPFS1-4 & SCPFSX recipients shown on RFIBUDG. Number of students should match. If they don't, seek assistance from Director.
    - iii. Copy all data onto a second tab. Name this tab Review. This is the one you will work from. The first tab can be saved to what report looked like using it.
    - iv. Spot-check three student Cum WU GPA's with SHATERM to ensure that they match. If they don't stop and ask Director for assistance.
    - v. Sort list by fund. Cut all SCPFS4 into a new tab. Nothing further needs to be done with this group. Their PFS eligibility is all done.
    - vi. Back in Review tab, sort by **XX/XX Study Abroad**. If Y is in in this column, cute & paste them into a **Study Abroad** tab.
    - vii. Back in Review Tab, sort by Fund code and cut all SCPFS1 into a tab
    - viii. Then cut all SCPFS2 into a tab
    - ix. Then Cut all SCPFS3 into a tab
    - x. You will now be left with SCPFSX.
      1. Rename tab as SCPFSX. SAVE.
    - xi. Go to SCPFS1 tab, custom sort by **Cum WU GPA**
      1. Cut all students with less than 3.000 GPA and paste them in another tab named "PFS Non-renewals." Save for later.
      2. Back to SCPFS1
      3. Custom sort by **Fall Term + Spring Term Earn Hrs**

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4. Cut all students with fewer than 30 hours and paste them in PFS Non-renewals tab. Save for later.
  5. Back on SCPFS1 tab, you are now left with the students who have at least a 3.000 WUGPA and at least 30 hours who are eligible for renew to SCPFS2
    - a. Sort for students with *Fall/Sprg Incmpl Grd* column populated. **COPY** and paste these ID's in separate document or tab for incomplete grades for later review because you will have to do something special with these ID's later.
  6. Let Director spot check your list before completing step 7
  7. Copy ID's of all students that are left and eligible for renewal on SCPFS1 spreadsheet. Save a copy of ID's to desktop.
    - a. Email ID's to Mike and ask him to batch post PFS for upcoming academic year:
      - i. Please batch post SCPFS2 for these ID's in 22/23 \$7500 in offer status. Let me know if any don't work.
- xii. Go to SCPFS2 tab, custom sort by **Cum WU GPA**
1. Cut all students with less than 3.0 GPA and paste them in another spreadsheet named "LIFE Non-renewals." Save for later.
  2. Back in SCPFS2 tab
  3. Custom sort by **Fall Term + Spring Term Earn Hrs**
  4. Cut all students with fewer than 30 hours and paste them in PFS Non-renewals tab. Save for later.
  5. Back in SCPFS2 tab, you are now left with the students who have at least a 3.000 Cum WU GPA and at least 30 hours who are eligible for renew to SCPFS3
    - a. Sort for students with *Fall/Sprg Incmpl Grd* column populated. **COPY** and paste these ID's into the tab for incomplete grades for later review because you will have to do something special with these ID's later.
  6. Let Director spot check your list before completing step 7
  7. Copy ID's of all students that are left and eligible for renewal on main spreadsheet. Save a copy of ID's to desktop.
    - a. Email ID's to Mike and ask him to batch post PFS for upcoming academic year:
      - i. Please batch post SCPFS3 for these ID's in 22/23 \$7500 in offer status. Let me know if any don't work.
  8. Back in SCPFS2 tab, sort by XX/XX SCEPFSPaid Rcp column for Y
    - a. **COPY** and paste those with Y into a new tab called Enhancement and save for later. Save.
- xiii. Go to SCPFS3 tab, custom sort by **Cum WU GPA**
1. Cut all students with less than 3.0 GPA and paste them in tab named "PFS Non-renewals." Save for later.
  2. Back in SCPFS3 tab
  3. Custom sort by **Fall Term + Spring Term Earn Hrs**
  4. Cut all students with fewer than 30 hours and paste them in PFS non-renewals tab. Save for later.
  5. Back on SCPFS3 tab, you are now left with the students who have at least a 3.000 Cum Wu GPA and at least 30 hours who are eligible for renew to SCPFS3

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- a. Sort for students with *Fall/Sprg Incmpl Grd* column populated. **COPY** and paste these ID's into the tab for incomplete grades for later review because you will have to do something special with these ID's later.
  6. Sort by **Fall Grad**. If Y is populated cut & paste that student over to the SCPFS4 tab. These students have now graduated so no renewal needed.
  7. Sort by **Potential Sprg Grad**. If Y is populated check each of them in SHADGMQ to ensure they graduated. If so, cut & paste that student over to the SCPFS4 tab. These students have now graduated so no renewal needed.
  8. Let Director spot check your list before completing step 9
  9. Copy ID's of all students that are left and eligible for renewal on main spreadsheet. Save a copy of ID's to desktop.
    - a. Email ID's to Mike and ask him to batch post PFS for upcoming academic year:
      - i. Please batch post SCPFS4 for these ID's in 22/23 \$7500 in offer status. Let me know if any don't work.
  10. Back in SCPFS3 tab, sort by XX/XX SCEPFSPaid Rcp column for Y
    - a. **COPY** and paste those with Y into a new tab called Enhancement and save for later. Save.
- xiv. Go to Enhancement tab
  1. Sort by major. If student's major isn't still enhancement eligible, copy them to a new tab called ENXB. Add ENXB to ROAMESG for these students.
  2. Back on Enhancement tab, if student's major is still Enhancement eligible, send the ID's to mike in email
  3. *Please batch post SCEPFS for these ID's in xx/xx (put appropriate aid year). \$2500 in offer status. Let me know if any don't work.*
  4. Save.
- xv. Open PFS Study Abroad students
  1. Review their SHATERM/transcripts. Transfer credit from Study Abroad won't populate in Fall & Spring hours on report. You have to manually check for it in SHATERM.
    - a. Create a Notes column and document the total hours showing in SHATERM for the year.
    - b. Make note if student needs letter and possible email from Study Abroad counselor.
  2. Does student meet renewal criteria ie- 30 hours PLUS 3.000 WU CUM GPA?
    - a. Yes, make the appropriate awards, including WFS and Enhancement, if applicable
      - i. Check for incomplete grades
  3. Copy and paste the study abroad students to bottom of Non-Renewal tab
    - a. In non-renewal tab, delete the individual study abroad students who were able to be renewed.
    - b. Update **Fall term + Spring term Earn Hrs** column to match with the actual hours from your notes
    - c. If student's study abroad hours aren't in yet. Let the Study Abroad Counselor know who these are. They will send an email notifying students not to panic when they get the letter and to notify them as soon as study abroad transcript is received.

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## xvi. Open PFS Non-renewals tab

1. Sort by **Fall Grad**. If Y is populated look them up in SHADGMQ to ensure they actually graduated. If so cut & paste that student over to the SCPFS4 tab as they have no further eligibility because they graduated.
2. Sort by **Potential Sprg Grad**. If Y is populated, look them up in SHADGMQ to ensure they actually graduated. If so cut & paste that student over to the SCPFS4 tab as they have no further eligibility because they graduated.
3. We don't know if Potential Sumr Grad's will graduate so we treat them as renewals/non-renewals until we hear otherwise.
4. Create new tab "*no letter*"
  - a. Back in Non Renewal tab, sort all students with a XX/XX Paid Amount of \$3750 or \$3350
  - b. Review these students on ROAENRL to see if they were enrolled both fall and spring
  - c. If student wasn't awarded in spring you can cut and paste their names into the "*No letter*" tab because they did not attend Winthrop in spring.
  - d. Let Director review before you mail merge and send letter.
5. On Non-Renewal tab
  - a. Check SHATERM= GR to make sure student doesn't also have a GR record.
    - i. If yes, check report to see if non-renewal is due to pulling GR credits, thus potentially missing UG credits. Reassess if GR record was pulled.
6. Copy and paste Non- Renewal tab into new spreadsheet.
  - a. Sort by last name, add level and sort by first name.
  - b. Highlight only GPA's in CUM GPA column and reduce decimals to 3 places.
  - c. Save to shared, Scholarships, Palmetto Fellows, appropriate aid year as a CSV file. **Fix to only display 3 decimal points. Save.** Close this spreadsheet.
  - d. Mail merge students using the PFS with WFS non renewal letter. Use **Fall Term + Spring Term Earn Hrs** and **Cumm WU GPA** columns to populate hour and GPA fields in letter.
  - e. In a week or two, go back to this list and check these students in SWASGPA to see if they meet renewal criteria for LIFE
    - i. If yes, RHACOMM "Awarded XXXXX because PFS was cancelled. If student uses the summer to re-earn PFS, or gets a CHE appeal approved, we will cancel LIFE and reinstate PFS. After summer 18, it is not possible for stu to re-earn PFS ever unless CHE grants an appeal approved."
    - ii. For 24/25 – If reviewing any students who received SCPFS1 in 23/24 and did not renew for Year 2, you'll need to factor out any negatively impactful dual enrollment credits from LIFE GPA calculation. See *LIFE Procedures* for full process.
7. If applicable, copy and paste Non-Renewal tab into new spreadsheet
  - a. Sort by last name, add level and sort by first name.
  - b. Highlight only GPA's in CUM GPA column and reduce decimals to 3 places.
  - c. Save to shared, Scholarships, Palmetto Fellows, appropriate aid year as a CSV file. Close this spreadsheet.
  - d. Mail merge students using the PFS with NO WFS non renewal letter. Use **Fall Term + Spring Term Earn Hrs** and **Cumm WU GPA** columns to populate hour and GPA fields in letter.

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- e. In a week or two, go back to this list and check these students in SWASGPA to see if they meet renewal criteria for LIFE
  - i. If yes, RHACOMM "Awarded XXXXX because PFS was cancelled. If student uses the summer to re-earn PFS, or gets a CHE appeal approved, we will cancel LIFE and reinstate PFS. After summer 18, it is not possible for stu to re-earn PFS ever unless CHE grants an appeal approved."
8. Go back to list of SCPFSX students that you put aside earlier
  - a. Read RHACOMMs for each of these students
  - b. Review them individually to see if they met the outlined criteria listed on RHACOMM. Award SCPFSX if they meet criteria or the appropriate code if you can move them back into regular code. Make sure to RHACOMM what student will need to earn to get PFS next year, if you use SCPFSX.
  - c. If any are receiving their final term of PFS during the aid year you are renewing for, let Michelle know who they are so she can send them a special ROAMESG
  - d. If they didn't meet renewal criteria then you'll need to craft a special non-renewal letter for them and send and add a RHACOMM.
- xvii. Go back to the list of ID's that you saved for students who renewed to PFS, but have incomplete grades.
  1. Add a ROAMESG = PIFF for these ID's
  2. Add a ROAHOLD for PFS (& if needed WFS) for upcoming aid year
  3. In a week or two when you have time, calculate each student's Cumm WU GPA if they got a F in their incomplete classes.
    - a. If Cumm WU GPA would remain above 3.000 even with F's
    - b. ROAMESG = PFS
    - c. Expire ROAHOLD
    - d. Make a RHACOMM "Expire PIFF ROAMESG. Even if student get's F grades WU GPA will still be above 3.000 so ok for SCPFS2."
    - e. Save calculation for our proof of what it was at the time.
- xviii. Go back to the list of ID's that could not renew.
  1. Check them in SWASGPA to determine if they qualify for LIFE
  2. If so, award them SCLIF% (and if applicable, SCELIF)
  3. RHACOMM ""Awarded XXXXX because PFS was cancelled. If student uses the summer to re-earn PFS, or gets a CHE appeal approved, we will cancel LIFE and reinstate PFS. After summer xx, it is not possible for stu to re-earn PFS ever unless CHE grants an appeal approved."
  4. Add ROAMESG= LPPF
  5. Ignore Study Abroad students and copy/paste their ID's to another spreadsheet and print to check later (as in after their SA transcript is received/processed)

## Enhancement (\$2,500 per year)

- Dashboard Report, JEA\_Non-new freshmen SCPFS Schp Recipients without SCEPFS Schp by Term provides everyone with SCPFS% awarded, in a possible Enhancement Major, who doesn't have SCEPFS awarded
  - Filter list and exclude anyone with a "N" in the **14 Hrs M/S FR Yr** column. These students have previously been reviewed for enhancement and didn't get 14 hours of math/science by end of their freshman year.

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- A student that is majoring in an eligible major as determined by CHE may receive the PFS Enhancement in their sophomore, junior or senior year as long as they are eligible for the PFS scholarship. CHE has determined the following majors eligible at Winthrop University.

|         |  |
|---------|--|
| 11.0101 | Computer Science   |
| 13.1203 | Middle Level Education, Mathematics or Science ONLY  |
| 19.0504 | Human Nutrition  |
| 26.0101 | Biology  |
| 27.0101 | Mathematics, General   |
| 40.0501 | Chemistry  |
| 51.0201 | General Communication Disorders  |
| 03.0104 | Environmental Science (incoming fall 2018 & beyond students only) <b>ENSC only! (Not ENST, which is environmental studies)</b> |
| 31.0505 | Exercise Science (incoming fall 2018 & beyond students only) EXSC  |
|         | Data Science (incoming fall 2020 & beyond students only) DSCI  |
|         | Applied Software Development (incoming fall 2020 & beyond students only) ASWD  |
|         | Cybersecurity (incoming fall 2021 & beyond students only) CYBR   |

- Review the students major on SGASTDN
- If the student is no longer in an eligible major, RHACOMM and add ROAMESG = ENXB.
- If the student's current major before the first day of classes is listed above, the student might be eligible for the enhancement in their sophomore, junior or senior year.
  - A student cannot qualify if only their minor/concentration is one of the categories above.
- Review the student's award package on RPAAWRD.
  - If the student has SCPFS1 awarded for the current academic year, they are not eligible to receive this scholarship this year.
- Review the student's credits for the initial year in college on SHATERM (fall and spring or could be a spring and fall if the student was a mid-year start). AP credits and institutional credits earned prior to the initial start of college DO count towards the Enhancement requirements.
- Count the number of earned hours that would classify under Math/Science using the following course indicators: BIOL, CHEM, CSCI, CYBR, DSCI, ENVS, ENSC, EXSC, GEOL, NUTR, MATH, PHYS for incoming fall 2020 and beyond, **CYBR for incoming fall 2021 students and beyond.**
- If the student has 14 hours or more earned hours by the end of their initial year in college, the student is eligible for the enhancement.

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- i) Note : If student's initial semester in college is a spring, they will be reviewed mid-year for Enhancement
- ii) If eligible, go to RPAAWRD, award \$2500 – SCEPFS
- If a student did not earn 14 hours of math/science, go to ROANYUD and add N to field 28. Add RHACOMM 'student ineligible for LIFE enhancement, \_\_ hours of math/science earned in freshmen year.
- If you have time and student is within 4 credit hours of qualifying for enhancement, reach out to them via letter/email so they know they can use the summer to gain those hours if they want.

## Fall Enhancement Check

You will need to check the students' majors again for the new academic year at the time of disbursement **and** day after last day of 100% add/drop

- If a student has changed their major before disbursement or last day of 100% add/drop, cancel SCELIF and add ROAMESG ENXB. Make RHACOMM and email the student.
- If a student changes their major after 100% add/drop, we do not remove the scholarship for the academic year. Make a note on RHACOMM and notify the student they will have the scholarship for the current year but will not be eligible for renewal. Add ROAMESG ENXA. Do not add ROAMESG if student is SCLIF4, because student has no eligibility left anyway.

## Important Notes

- Once a student has lost eligibility the PFS, they cannot earn it back unless the CHE grants their appeal. They may however be eligible to receive the LIFE scholarship if they meet the LIFE renewal requirements.
- Students may use the summer to re-earn their PFS scholarship. Use the State Reinstatement/Renewal Form processing procedures to review and process.

## SCPFSX

- If a student has been awarded the PFS scholarship using this code, there is an extenuating circumstance that makes them outside of the normal procedures for renewing state scholarships. PROCEED WITH CAUTION!!
- Situations where this code might be used will include the following:
  - (1) Military deployment
  - (2) Disability reduced course load
  - (3) Mid-year start
  - (4) Delayed initial college enrollment
  - (5) Term/Year of Remediation
  - (6) CHE approved Appeals
  - (7) Early Graduation expected and received summer disbursement of scholarship

### 1) Military deployment

1. If a student mentions they will be completing basic training or received orders for military deployment, the regulations allow them a break in enrollment without the need to appeal to receive their scholarship upon return.
2. A student must have completed 15 hours in that academic year if they sit out for a term in order to receive the scholarship upon their return.
3. A student must return to enrollment within 12 months of their release date.
4. Awarding
  - i) Counsel the student by reading with them the regulations for military deployment
  - ii) Request a copy of their military orders when they plan to re-enroll at Winthrop.
  - iii) Review the military orders to make sure the dates cover the term that the student was not enrolled.



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- iv) Make a RHACOMM about the terms missed
  - i) Send a copy of the military orders to scan and it is recommended you keep a copy in your state scholarship files
- 2) Disability - reduced course load
1. If a student mentions that they are approved for a reduced course load with the Disabilities office, the regulations allow a student to continue receiving the scholarship – use the CHE guidelines as your guide on how to proceed
  2. Make sure the student provides a letter from the Office of Accessibility for the term and/or aid year – it depends on the student on whether they write the letter by term or aid year.
  3. Make a note in RHACOMM regarding the reduced hours and calculate how many hours the student will need to renew.
    - (1) Example:   Fall 2013           Enrolled - 15 hours  
                  Spring 2014           Enrolled - 15 hours  
                  Fall 2014    Enrolled – 6 hours, approved with Disabilities Office  
                  Spring 2015 Enrolled – 6 hours, approved with Disabilities Office  
                  Student must have 42 hours and 3.000 GPA to be eligible for 15/16
  4. Send a copy of the ADA letter to scan and it is recommended you keep a copy in your state scholarship files
4. CHE approved appeals
- (1) The Commission on Higher Education will send a letter to the school and the student detailing the requirements for their appeal and renewal of their scholarship.
  - (2) Make a detailed note on RHACOMM regarding the terms of renewal for the next year from the CHE letter.
  - (3) Send a copy of the appeal letter to scan and it is suggested you keep a copy with your state scholarship files

## Transfer students

- 1.) Director will send approval email from CHE that a student is eligible for a PFS transfer
- 2.) Find student in Banner.
- 3.) Make sure student is a resident in SGASTDN. If not, stop and seek assistance from director.
- 4.) Make sure student has a date populated in **Transcript Received Date** in SOAHSCH. If not, stop and ask Admissions if they have a high school transcript for student. If not, reach out to student and ask them to submit it or a copy of their high school diploma to our office. “We cannot proceed until we have proof of high school diploma in system.”
- 5.) Determine what year of PFS student is, should the email not say.
- 6.) If mid-year transfer, make the award using SCPFSX in OFFER status or else student will not be reviewed correctly after spring.
  1. If student was already awarded HOPE or LIFE, be sure to cancel it and make sure it un-disburses.
- 7.) If student is (technically) a SCPFS2-4, check for Enhancement eligibility using SGASTDN.
  1. If not, nothing further.
  2. If yes, use PFS Enhancement procedures to determine if student should receive enhancement.
- 8.) Make RHACOMM with any information sent by CHE- E.g. 202310 Award SCPFSX and cancel LIFE. Notified by CHE eligible for transfer. Student is in x year of scholarship. Per transcripts, student earned x hours in x term at prior school.
- 9.) Save email from CHE in shared drive, Scholarships, Palmetto Fellows, appropriate aid year- usually “Palmetto Fellows Scholarship Transfer- student name”

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## October Enhancement Email

1. Identifying PFS recipients – Log into WEBFocus:
  - Click on Financial Aid.
  - Click on Scholarship/State tab.
  - Click on JEA\_SCPFS Schp Recipients By Term
  - Enter term code for FALL and correct aid year.
2. Save report to shared drive, Scholarships, Palmetto Fellows, Current Aid Year, PFS Recipients to review for Enhancement Email xxxxxxxx (date)
  - a. Name sheet Master List
  - b. Filter for Fund = SCPFS1 and Enhancement Eligible Majors
  - c. Copy student information and paste into another sheet
  - d. Name sheet PFS1 & Eligible Major
  - e. Confirm Middle Level Education Majors are Math or Science concentrations only
  - f. On the Master List, filter for SCPFSX and confirm if any of the students are first-year students who should be included in the email and if so, copy info into PFS1 & Eligible Major
  - g. Add a new column after Fund and name Scholarship. Fill in all rows with Palmetto Fellows Scholarship
3. Open a new Excel spreadsheet and save in the shared drive as Enhancement Fall Reminder Email Source xxxxxxxx (date)\*
  - a. Name four sheets: Master, HOPE, LIFE, PFS
  - b. Copy the PFS1 & Eligible Major list into the PFS tab
  - c. Repeat steps for HOPE and LIFE, adding them to the same Email Source spreadsheet (see procedures for each for detailed instructions)
  - d. Copy all scholarship types and paste in the Master tab
4. Open the Word document Enhancement Fall Reminder Email Fall for the previous year and update to the current aid year. Save in current year's folder.
5. Complete a mail merge to email the reminder to all students in the Master tab.

\*If you began with HOPE or LIFE, do not create a new Email Source spreadsheet.

## Yearly CHE Renewal Report

Each fall CHE requests data on Palmetto Fellows recipients. The purpose is to justify why we renewed a student from previous aid year into this aid year.

1. Webfocus, Scholarships, State, run *LS\_SCPFS\_Schp Recipients for Renewal by Year (for October 2023 report you would be pulling the 22/23 list)*
  - a. Save excel spreadsheet to shared drive, Scholarships, Palmetto Fellows, aid year, and call it *Paid PFS for XXXX for CHE renewal report*
  - b. Copy the **ID** column to a new spreadsheet. Remove the **ID** row so all you are left with are ID's. It should match number of ID's in other report. Save report to your desktop and call it XXXX Paid PFS (Mike likes the aid year to be the current year so in October 2023, use 2324 Paid PFS).
    - i. Email this list of ID's to Mike and say "I need FA\_JEA092\_SCPFS Schp Disbursement History Report By Term run for the attached ID's. I think you need the terms aid year and they are xxxxxx, xxxxx, xxxxx & xx/xx"
    - ii. You will be requesting data from the previous aid year. Use previous aid year terms and aid year code. (for example if you are in the 23/24 school year, you need to pull 22/23 data. So you would give him 202280, 202310, 202350 & 22/23)
  - c. Once Mike sends you back the FA\_JEA092 report save it to the shared drive, Palmetto Fellows, current aid year as PFS Report FAJEA092 XXXX.

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- d. If the report is good to use, let Mike know that “the report is acceptable” (per his request, this lets him know he can now update fields for next year)
  2. Open PFS Report FAJEA092 XXXX and sort by **Last Name (A to Z)**
    - a. The report should now be in similar order to the CHE website. Rename tab to Master
    - b. Copy all the data into another sheet/tab
      - i. Choose View, Freeze Panes, Freeze Top Row. **Save.**
    - c. Insert a column after **Prev Aid Yr Study Abrd** column. Name it **Notes**. Save.
  3. Go to <https://etl.che.sc.gov/SSO5/Login.aspx?ClientID=Connect> and login
    - a. Choose Palmetto Fellows Renewals
    - b. Click **Refresh Students**
    - c. If not already in Alpha Order, click **Last Name** column so they will be sorted via last name
    - d. The report auto saves as you enter data.
    - e. Use *PFS Report FAJEA092 XXXX XXXXXX* to fill in each column for student.
      1. Terms Awarded = Tot TrmsPFS
        - a. This is the number of terms awarded PFS at Winthrop and that’s what we report.
      2. Fall Credit Hours = PrevFalleHrs
      3. Spring Credit Hours = Prev Sprg EHrs
      4. Summer Credit Hours = PrevSumrEHrs
      5. Total Hours = Prev Aid YrEHrs
        - a. If the student is a mid-year transfer, we do not include hours earned at previous school – leave that term blank. Example, student transferred to WU for Spring 2023, Fall 2022 hours would be blank and you would make a note in the Comments field (example below)
      6. GPA = WU CumGPA
      7. Renewed = If XXXXFund column has a fund code here put a Y – if it doesn’t put a N
      8. Graduated = Put a Y in this column **ONLY IF** Grad Column on spreadsheet has a Y
      9. Comments = Note about non-renewal, if a first-year freshman, etc.
        - a. A note is **required** if Renewed = N and the student did not graduate. Examples of notes:
          - i. GPA below 3.000
          - ii. Did not earn 30 hours
          - iii. Hours & GPA
          - iv. Has received 8 terms
          - v. Withdrew Fall 20xx, did not earn GPA or hours
          - vi. Note, student did not return to Winthrop for 23/24
          - vii. New transfer Spring 2023. Student earned 13 hours at previous school Fall 2022 = 31 total hours
        - b. If DID earn renewal, but didn’t return to Winthrop (so SCPFS is cancelled in RPAAWRD), change **Renewed** column back to Y. Add a **Comment** = Note, student did not return to Winthrop for 23/24.
    - f. Repeat for every student. After entering a student’s information into the portal, put an X in the Notes column on the *PFS Report FAJEA092* so you know you are finished with that student.
    - g. Save the *PFS Report FAJEA092* often. The portal auto saves (look for the green check mark on each line).
  4. Once finished with initial review of students on *PFS Report FAJEA092*:
    - a. If CHE list DOES not include incoming fall cohort (e.g. in October 2023 they list 2023 cohort then move on to next step).
    - b. If they DO include incoming class....

# Winthrop University's Office of Financial Aid Policies and Procedures

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1. Run Dashboard, Webfocus, Scholarships, State, run *LS\_SCPFS\_Schp Recipients for Renewal by Year* using current aid year (e.g. if we are in 23/24 use 23/24 information with 202380 as next fall term)
  - a. Save excel spreadsheet to shared drive, Scholarships, Palmetto Fellows, current aid year, and call it *Paid PFS for XXXX so far xxxxxx(date)*.
  - b. Filter **Fund** column for **SCPFS1**. Copy those records on to another tab. Name tab **SCPFS1**
  - c. Add a notes column
  - d. Compare those names with CHE list.
    - i. If on CHE list AND our list, add a comment in **Comments** column = New for Fall XXXX. You are done with this student and should put **X** in **Notes** column on spreadsheet so you know you're done.
    - ii. For those who aren't on CHE report, but ARE on OUR list. Just make a note on OUR spreadsheet – not listed on CHE report so didn't add. They probably didn't notate their system they are attending Winthrop. It will get caught during the CHEMIS file submission through AAAS.
    - iii. For those who are on CHE report and NOT on OUR report, make sure we didn't miss awarding them. Add a **Comments** on CHE report about why not awarded (e.g. not attending Winthrop in 19/20).
- ii. When completed sort the CHE website report by **Terms Awarded**. Copy & paste all the students with blank **Terms Awarded** into a spreadsheet on the *Not On PFS Spreadsheet Tab*. Ask Michelle to review each student. Once the data is updated on spreadsheet you will be able to enter it on CHE website.
5. When completed, sort the CHE website report by Terms Awarded. Copy & paste all the students with blank Terms Awarded into a spreadsheet on the Not On PFS Spreadsheet Tab. Ask Michelle to review each student.
6. Once CHE portal is completed, ask Michelle to review.

# Winthrop University's Office of Financial Aid Policies and Procedures

**Policy and Procedure:** LIFE Awarding

**Drafted By:** Michelle Hare

**Date Revised:** Summer 2024

These procedures are meant as a guide for awarding LIFE scholarship. When awarding, you should ALWAYS defer to the state regulations which can be found at [www.che.sc.gov](http://www.che.sc.gov).

## Procedure:

### General Guidelines

- L.I.F.E. - Legislative Incentives for Future Excellence is \$5,000 per year
- A student has FOUR consecutive years of eligibility from initial college enrollment.
- As of July 2014, a student who is eligible can use their scholarship in the summer term and it will count against their EIGHT terms of eligibility.
- Due to updated regulations, students in their final term prior to graduation can receive a prorated scholarship amount based on their number of hours (e.g. 1 credit / 12 credits \* scholarship amount = prorated award amount for 1 credit hour)
- A student can always appeal the loss of their scholarship to CHE during the appeal period, but never guarantee it will be approved.
- The Office of Admissions will determine ALL initial award eligibility for new students (transfers and freshmen). The Office of Admissions will notify the Office of Financial Aid (OFA) when awards need to be made by updating a student's code in SOATEST and notifying the OFA to make the award.
  - Awards are made in **OFFER** status in RPAAWRD using the appropriate LIFE fund code (SCLIF1, SCLIF2, SCLIF3, SCLIF4 or SCLIFX when renewal criteria is different than a typical student).
- For 24/25 – Under Proviso 117.183, grades earned via dual enrollment should be removed from LIFE GPA calculation if they are negatively affecting LIFE GPA and the GPA requirement is the only reason student is not renewing to LIFE (i.e. has hours but not GPA). As of now, this is only for the 23/24 cohort renewing into Year 2 for 24/25. The dual enrollment grades will be factored into the LIFE GPA for Year 3 and 4 renewals.

### Important Notes

- Residency - If the student does not have SCLIF1-3 or SCHOPE for any previous years after high school graduation, you must work with the Office of Admissions and/or Office of Records & Registration to determine if the student was a state resident at the time of high school graduation AND at the time of initial college enrollment. If they were awarded in prior years skip to step 3.
- For each academic year enrolled from initial college enrollment, the student will an average of 30 hours
  - i) For example: Graduation date is June 2012. You are reviewing the student eligibility in the 2014/2015 academic year. 12/13 – 30hours, 13/14 – 30 hours. 30+30 = The student will need at least 60 hours if they are renewing the scholarship for 14/15
- If the student was awarded SCLIF1-3 or SCHOPE in prior years, make a note of what 'year' they were awarded in the current award year so that you can determine how many hours they need for renewal.
- GPA - renewal requires a cumulative LIFE GPA of at least a 3.000 (to the third decimal, DO NOT ROUND UP)
  - i) Must have a cumulative LIFE GPA of 3.000 (to the third decimal, DO NOT ROUND UP)
  - ii) SWASGPA displays a student's LIFE GPA, but the data programmer (Michael Coyle) can also pull this data for you on reports to assist with renewal)

# Winthrop University's Office of Financial Aid Policies and Procedures

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- Summer 2023 - Proviso 117.183 – when reviewing for second year, dual enrollment grades less than 3.0 should not be used when calculating LIFE GPA (credit hours still count). After year 2, all dual enrollment grades count.

## **SCLIFX - \$5000**

- If a student has been awarded the LIFE scholarship using this code, there is an extenuating circumstance that makes them outside of the normal procedures for awarding state scholarships. **PROCEED WITH CAUTION!!**
- Situations where this code might be used will include the following:
  - i) Military deployment
  - ii) Disability reduced courseload
  - iii) Mid-year start
  - iv) Delayed initial college enrollment
  - v) Term/Year of Remediation
  - vi) CHE approved Appeals
  - vii) Early Graduation expected and received summer disbursement of scholarship
- Military deployment
  - If a student mentions they will be completing basic training or received orders for military deployment, the regulations allow them a break in enrollment without the need to appeal to receive their scholarship upon return.
  - A student must have completed 15 hours in that academic year if they sit out for a term in order to receive the scholarship upon their return.
  - A student must return to enrollment within 12 months of their release date.
  - Awarding
    - i) Counsel the student by reading with them the regulations for military deployment
    - ii) Request a copy of their military orders when they plan to re-enroll at Winthrop. (DD214)
    - iii) Review the military orders to make sure the dates cover the term that the student was not enrolled. (on DD214—look for #12 “Record of Service” 12a and 12b are the dates needed.)
    - iv) Make a RHACOMM about the terms missed
      - (1) Example:

|             |                 |
|-------------|-----------------|
| Fall 2013   | Enrolled        |
| Spring 2014 | Military orders |
| Fall 2014   | Enrolled        |
| Spring 2015 | Enrolled        |

Student must have 45 hours and 3.000 GPA to be eligible for LIFE 15/16
- **Disability Services - Reduced Course Load**
  - i) If a student mentions that they are approved for a reduced course load with the Disabilities office, the regulations allow a student to continue receiving the scholarship – use the CHE guidelines as your guide on how to proceed
  - ii) Make a note in RHACOMM regarding the reduced hours and calculate how many hours the student will need to renew.
    - (2) Example:

|             |                     |
|-------------|---------------------|
| Fall 2013   | Enrolled - 15 hours |
| Spring 2014 | Enrolled - 15 hours |

Fall 2014          Enrolled – 6 hours, approved with Disabilities Office  
Spring 2015      Enrolled – 6 hours, approved with Disabilities Office  
Student must have 42 hours and 3.000 GPA to be eligible for LIFE 15/16

- Send a copy of the ADA letter to scan and it is recommended you keep a copy in your state scholarship files
- **Mid-year start**
  - If a student did not attend college right out of high school and they began their college enrollment in the spring semester, the student will have different requirements for renewal than the typical student.
  - Awarding
    - i) Make a note in RHACOMM regarding the initial college enrollment
      - (1) Example:  
  
SCLIFX:  
Spring 2022 = Term 1 - Needs 15 hours and 3.000 to renew to LIFE for  
Fall 2022 = Term 2  
Spring 2023 = Term 3 (needs 45 hours and 3.000 to renew)  
Fall 2023 = Term 4  
Spring 2024 = Term 5 (needs 75 hours and 3.000 to renew)  
Fall 2024 = Term 6  
Spring 2025 = Term 7 (needs 105 hours and 3.000 to renew)  
Fall 2025 = Term 8 - final term
      - (2) This student will need to be manually reviewed each year for renewal
    - ii) You can check documents on BDMS, high school transcripts to verify the graduation date.
      - (1) They will need to earn 15 hours after their first semester, 45 after their third semester, 75 after their fifth semester, and 105 after their seventh semester for their last term of eligibility in the fall.
      - (2) Add ROAMESG: HOPS
    - iii) Award SCLIFX \$5000 if the student has met the criteria for renewal.
- **Term/Year of Remediation**
  - A student that was required to take remedial courses at a technical school will be granted a term or year of remediation ONLY IF they are taking less than 12 hours of non-remedial classes in the appropriate terms.
  - If the student IS eligible for a term/year of remediation, the credits earned during remediation CANNOT be included in their earned hours for continued eligibility, even if they are non-remedial courses.
  - Make notes on RHACOMM about the students initial college enrollment.
- **CHE approved appeals**
  - A student that has appealed to receive their state scholarship may need to be manually reviewed each year.

- CHE will send a letter to the school and the student detailing the requirements for their appeal and renewal of their scholarship.
- Make a detailed note on RHACOMM regarding the terms of renewal for the next year from the CHE letter.
- Send a copy of the appeal letter to scan and it is recommended you keep a copy with your state scholarship files.
- If necessary because of renewal requirements, award SCLIFX - \$5000 if the appeal was approved by CHE. Otherwise use appropriate award code.
- **GED student**
  - A student that received their GED can receive the LIFE scholarship in their sophomore year and beyond if they meet the renewal requirements for LIFE. They cannot receive it in their initial year since they do not have the qualifications to meet the high school criteria.
    - i) The student must have 30 hours and a 3.000 to earn the LIFE scholarship for their sophomore year or second year enrolled in college.
  - If a student is a mid-year start as a GED, then they have a semester and a year that they will not be eligible to receive the scholarship. However they would still need to meet the cumulative hour requirements.
    - i) Example: Student receives GED June 2012

|                          |             |  |          |
|--------------------------|-------------|--|----------|
| (1) Enrolls January 2013 | Spring 2013 | not eligible                                 | 15 hours |
|                          | Fall 2013   | not eligible                                 | 15 hours |
|                          | Spring 2014 | not eligible                                 | 15 hours |
|                          | Fall 2014   | Eligible - needs 45 hours and 3.000 LIFE GPA |          |
- No scholarship as a new freshman
  - All state residents have eligibility for the LIFE scholarship even if they did not earn it in their first year of college (e.g. low GPA) if they meet the CHE criteria

## Refunds

- Winthrop University follows CHE's guidance for refunds for students who withdraw to apply the same institutional policy. LIFE & LIFE Enhancement will be adjusted by the same percentage that tuition is (e.g. 50%).
- Students who do not begin full-time hours will have their entire term award cancelled

## Billing

Each semester, after the academic fee adjustment period (approximately 30 days after the state of the semester), a member of the Controller's office submits a reimbursement request to CHE for the total amount disbursed (credited on the students accounts) for the awards processed by OFA for the semester by the deadlines published by CHE. If an additional award is made, or an award is reduced, after the initial semester's request is made to CHE, then those funds would be added or subtracted, whichever is appropriate, in the following semester's request, or at fiscal year-end.

## Renewing Awards

- As soon as possible after Spring grades are official, begin reviewing students for renewal
- Student must have an average of 30 hours and a cumulative LIFE GPA of 3.000 to earn the LIFE scholarship for the next year



# Winthrop University's Office of Financial Aid Policies and Procedures

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- E.g. 30 hours for year 2, 60 hours for year 3, 90 hours for year 4
  - OFA notifies students who do not meet renewal eligibility via letter to their permanent address in Banner. A student cannot regain eligibility mid-year.
1. Go to Dashboard-*Scholarships, State, LS\_SCLIFE Schp Recipients for Renewal by Year*—Make sure Michelle has had Mike batch post Y's for study abroad before you run!!!
    - Put in current aid year and current fall/spring term codes. And next fall term code.
    - After report runs and populates, save copy to shared drive-*Scholarships-HOPE & LIFE-appropriate aid year*
      - i. Delete first three rows of report so that you can properly sort and filter
      - ii. Copy all data onto a second tab and name it Review. This is the one you will work from. The first tab can be called Master.
      - iii. Spot-check three student GPA's with SWASGPA to ensure that they match. If they don't stop and ask Director for assistance.
      - iv. Sort by Fund code (Z to A) and cut all SCLIF1 into a tab
      - v. Then cut all SCLIF2 into a tab
      - vi. Then Cut all SCLIF3 into a tab
      - vii. Then Cut all SCLIF4 into a tab. Nothing further needs to be done with this group. Their LIFE eligibility is all done.
      - viii. You will now be left with SCLIFX.
        1. Rename Review tab to SCLIFX
      - ix. Go to SCLIF1 tab, custom sort by **LIFE GPA** (largest to smallest)
        1. Cut all students with less than 3.0 GPA and paste them in another tab named "LIFE Non-renewals." Save for later.
        2. Back to SCLIF1 tab
        3. Custom sort by **LIFE ALL Coll Total UG Earn Hrs**
        4. Cut all students with fewer than 30 hours and paste them in LIFE Non-renewals spreadsheet. Save for later.
        5. On SCLIF1 tab, you are now left with the students who have at least a 3.000 LIFE GPA and at least 30 hours who are eligible for renew to SCLIF2
          - a. Sort for students with *Fall/Sprg Incmpl Grd* column populated. **COPY** and paste these ID's in separate tab for incomplete grades for later review because you will have to do something special with these ID's later.
        6. Let Director spot check your list before completing step 7
        7. On SCLIF1 tab, copy ID's of all students that are left and eligible for renewal. Save a copy of ID's to desktop.
          - a. Email ID's to Mike and ask him to batch post LIFE for upcoming academic year: "Please batch post SCLIF2 for these ID's in 24/25 \$5000 in offer status. Let me know if any don't work."
      - x. Go to LIFE Non-Renewals tab
        1. Sort by **LIFE ALL Coll Total UG Earn Hrs**

2. Cut all students with at least 30 earned hours and paste into a new tab call Special Proviso
  3. Review each student for potential dual enrollment credits using SWASGPA for transfer credits and have Michelle or Mike run the STU\_DUAL\_ENROLLMENT popsel so you can VLOOKUP those who had WU dual enrollment
    - a. If the student did not have dual enrollment credits, make a note "No dual enrollment" – these students are not eligible
      - i. Copy students from spreadsheet and paste into Non-Renewal tab
    - b. If the student does have dual enrollment credits:
      - i. Review the transfer transcript(s) in BDMS or WU credit in SHATERM
      - ii. Use the GPA Calculation spreadsheet to calculate LIFE GPA with only A and B dual enrollment grades plus Quality Hours & Quality Points from current academic year
      - iii. If LIFE GPA is at least a 3.0 with harmful credits removed, note hours and GPA on spreadsheet. If LIFE GPA is still not at least a 3.0 with harmful credits removed, note hours and GPA on spreadsheet and copy and paste student information into a new tab called Special Proviso Non Renewal.
      - iv. Save GPA Calculation spreadsheet and PDF of SWASGPA in Shared Drive - Scholarships > HOPE & LIFE > yyyy > Proviso Review
- xi. In Special Proviso tab
1. Award SCLIF2 to eligible students
  2. Add RHACOMM with calculated LIFE GPA. Example:

Student falls under Proviso 117.183 for 24/25 so dual enrollment coursework that negatively impacts LIFE GPA is removed from calculation. This is only for renewal into year 2. For 25/26, all credits will be counted in LIFE GPA. Without dual enrollment courses < B in GPA - student has 42 hrs/3.070 LIFE GPA so awarded SCLIF2
- xii. Go to SCLIF2 tab, custom sort by **LIFE GPA**
1. Cut all students with less than 3.0 GPA and paste them in another spreadsheet named "LIFE Non-renewals." Save for later.
  2. Back in SCLIF2 tab
  3. Custom sort by **LIFE ALL Coll Total UG Earn Hrs**
  4. Cut all students with fewer than 60 hours and paste them in LIFE Non-renewals spreadsheet. Save for later.
  5. You are now left with the students who have at least a 3.000 LIFE GPA and at least 60 hours who are eligible for renew to SCLIF3
    - a. Sort for students with *Fall/Sprg Incmpl Grd* column populated. **COPY** and paste these ID's into the tab for incomplete grades for later review because you will have to do something special with these ID's later.
  6. Let Director spot check your list before completing step 7
  7. Go back to SCLIF2 tab, copy ID's of all students that are left and eligible for renewal on main spreadsheet. Save a copy of ID's to desktop.

- a. Email ID's to Mike and ask him to batch post LIFE for upcoming academic year:
  - b. Please batch post SCLIF3 for these ID's in 22/23 \$5000 in offer status. Let me know if any don't work.
- xiii. Go to SCLIF3 tab, custom sort by **LIFE GPA**
  1. Cut all students with less than 3.0 GPA and paste them in "LIFE Non-renewals" tab. Save for later. Save.
  2. Back in LIFE3 tab.
  3. Custom sort by **LIFE ALL Coll Total UG Earn Hrs**
  4. Cut all students with fewer than 90 hours and paste them in LIFE Non-renewals spreadsheet. Save for later.
  5. Sort by **Fall Grad**. If Y is populated cut & paste that student over to the SCLIF4 tab. These students have now graduated so no renewal needed.
  6. Sort by **Potential Sprg Grad**. If Y is populated look each up in SHADGMQ.
    - a. IF actually graduated, cut & paste that student over to the SCLIF4 tab. These students have now graduated so no renewal needed.
    - b. If did not graduate, leave student on SCLIF3 tab
  7. On SCLIF3, you are now left with the students who have at least a 3.000 LIFE GPA and at least 90 hours who are eligible for renewal to SCLIF3
    - a. Sort for students with *Fall/Sprg Incmpl Grd* column populated. **COPY** and paste these ID's into the tab for incomplete grades for later review because you will have to do something special with these ID's later.
  8. Let Director spot check your list before completing step 9
  9. Copy ID's of all students that are left and eligible for renewal on on SCLIF3 tab. Save a copy of ID's to desktop.
    - a. Email ID's to Mike and ask him to batch post LIFE for upcoming academic year:
    - b. Please batch post SCLIF4 for these ID's in 22/23 \$5000 in offer status. Let me know if any don't work.
- xiv. Go back into SCLIF2 tab because these are the students you renewed. Sort by column **XXXX SCELIF Paid Rcp**.
  1. Copy all Y's and paste into new tab called Enhancement
- xv. Go back into SCLIF3 tab because these are the students you renewed. Sort by column **XXXX SCELIF Paid Rcp**.
  1. Copy all Y's and paste into new tab called Enhancement
  2. Save.
- xvi. In Enhancement tab, sort by major.
  1. Create a notes column.
    - a. If student's major is still Enhancement eligible- write Elig
    - b. If major is not longer eligible, write Ineligible. Save

- i. Sort by notes column. Look each up in SGASTDN to find a possible double major
          1. If you find a possible double major, send email to Gina Jones and confirm.
            - a. If Gina writes back not a double major, be sure to canx Enhancement in RPAAWRD and send ENXB ROAMESG.
          2. Change note on spreadsheet from Ineligible to Elig.
        - c. Re-sort by Notes column
2. Copy ID's of all students that are left and eligible for renewal of SCALIF. Save a copy of ID's to desktop.
  - a. Email ID's to Mike and ask him to batch post SCALIF for upcoming academic year:
  - b. Please batch post SCALIF for these ID's in xx/xx (put appropriate aid year). \$2500 in offer status
3. If student's major isn't still enhancement eligible, see below in enhancement section on how to proceed.
- xvii. Open LIFE Non-renewals tab – Recommend you move these to a different tab and customize letter at end.
  - a. Sort by **XX/XX Study Abroad** column. For those with a Y in column
    - i. Review these students. If their Study Abroad coursework isn't in yet, but when it is in, it appears they will be eligible, they will need a special letter explaining not to panic.
    - ii. If the study abroad coursework doesn't appear like it will help students, customize a non-renewal to student with what is needed.
    - iii. If coursework in SHATERM doesn't seem to match spreadsheet, check SWASGPA to see if transcript shows up. If not, email Thea to have her add it to SWASGPA and cut and paste student over to correct tab and award in RPAAWRD.
  2. Sort by **Fall Grad**. If Y is populated cut & paste that student over to the no letter needed tab.
  3. Sort by **Potential Sprg Grad**. If Y is populate cut & paste that student over to the no letter needed tab.
  4. We don't know if Potential Sumr Grad's will graduate so we treat them as renewals/non-renewals until we hear otherwise.
  5. Sort by spring term code earned hours (ie- 201910) and then add a level to sort by XX/XX Study Abroad
    - a. For students with **blanks** in this column and no Y in study abroad column, cut and paste into new tab called "no letter- non renew"
      - i. Add a notes column and write "did not attend spring" for each one. Save.
      - ii. Do not get .00 earned spring hours confused with **blank** hours

- b. For students with blanks in this column AND a Y in study abroad, pull them up in ROAENRL and make sure they were here. If so, move them to study abroad non renewal tab and design letter as appropriate.
  - c. Go back to LIFE- Non Renewal tab and let Director review before you mail merge and send letter.
  - d. Copy and paste LIFE Non-Renewal tab into new spreadsheet to prepare for merge. Be sure to save it as a CSV file to shared drive, Scholarships, Life/Hope, appropriate aid year.
  - e. Mail merge students that require a letter. Sort by alphabet first. Use **LIFE ALL Coll Total UG Earn Hrs** and **LIFE GPA** columns to populate hour and GPA fields in letter.
  - f. Print one copy and make sure address appears properly in window.
  - g. Once merged, save merged Word document to shared, Scholarships, Life/Hope, appropriate aid year.
  - h. Print on letterhead.
- xviii. Go to Special Proviso Non Renewal tab. Sort by last name A-Z then add level and sort by first name A-Z.
1. Add a column titled Special LIFE GPA and add calculated LIFE GPA with harmful dual enrollment credits removed.
  2. Filter and make sure no one is missing an address you need to fill in
  3. Save to shared drive as CSV file type named "LIFE Non-renewal letter - Special Proviso". Then close spreadsheet.
  4. Open Word document "LIFE Non-Renewal Letter - Special Proviso" from shared drive. Make sure it's updated to xx/xx and approved by director.
  5. Mail merge students that require a letter. Use **LIFE ALL Coll Total UG Earn Hrs** and **Special LIFE GPA** columns to populate hour and GPA fields in letter.
    - a. Spot check one letter against data in non-renewal tab
    - b. Print sample to make sure it lines up in window envelope
    - c. Print on letterhead
    - d. Save to shared drive as MERGED LIFE non-renewal letter - Special Proviso.
- xix. Go back to list of SCLIFX students that you put aside earlier
- a. Add notes column
  - b. Read RHACOMMs for each of these students
  - c. Review them individually to see if they met the outlined criteria listed on RHACOMM.
    - i. Award SCLIFX or SCLIF4 if appropriate if they meet criteria.
    - ii. If Y in XX/XX SCELIPaid Rcp column, go ahead and award SCELIF as if still in eligible major.
    - iii. Make sure to RHACOMM what student will need to earn to get LIFE next year.
    - iv. Students using their first semester of LIFE in Spring should be reviewed for eligibility under proviso following steps outlined above.

- d. If they didn't meet renewal criteria then you'll need to us LIFEX Non Renewal Letter and tweak it according to their circumstances.
  - e. Award any you can using SCLIFX (or SCLIF4 for fall only, if final term)
    - i. Be sure to check Fall/Sprg Incmpl Grd column for any incompletes
  - f. If any are receiving their final term of LIFE during the aid year you are renewing for, let Michelle know who they are so she can send them a special ROAMESG
- xx. Go back to the list of ID's that you saved for students who renewed to LIFE, but have incomplete grades.
1. Add a ROAMESG = LIFF for these ID's
  2. Add a ROAHOLD for LIFE for upcoming aid year
  3. In a week or two when you have time (or student worker can assist), calculate each student's LIFE GPA if they got a F in their incomplete classes.
    - a. If LIFE GPA would remain above 3.000 even with F's, print that calculation for student's file.
    - b. Expire ROAMESG = LIFF
    - c. Expire ROAHOLD
    - d. Make a RHACOMM "Expire LIFF ROAMESG and ROAHOLD. Even if student gets F's for incomplete courses, LIFE GPA will still be above 3.000 so ok for SCLIF2." Or "Expire LIFF ROAMESG and ROAHOLD. Student no longer has incomplete courses and is eligible for SCLIF2."
    - e. Remember to take note of any students with dual enrollment credits that could impact LIFE GPA and review using Proviso review steps outlined previously.
  4. Get with Michelle on those where you cannot expire LIFF. It may be best to cancel the award and send email to student about taking summer classes or CHE appeal depending on likelihood of incomplete becoming a passing grade.
2. Students may use the summer to re-earn their LIFE scholarship. Use the *State Reinstatement/Renewal Form processing* procedures to review and process.

## **Enhancement (\$2,500 per year)**

- New summer 2023 – if continuing students already met requirement to receive Enhancement, they can switch majors to a newly approved STEM major and still receive Enhancement (in prior years only those students beginning their first year a new STEM major was approved were eligible).
- Once renewals are posted (wait until ODS refreshes again after Mike batch posts awards to ensure report is accurate), Dashboard Report, JEA\_Non-new freshmen SCLIFE Schp Recipients without SCELIF Schp by Term provides everyone with SCLIFE awarded, in a possible Enhancement Major, who doesn't have SCELIF awarded
  - Save to shared drive, Scholarships, Life, current aid year
  - Filter list and exclude anyone with a "N" in the **14 Hrs M/S FR Yr** column. These students have previously been reviewed for enhancement and didn't get 14 hours of math/science by end of their freshman year.
  - Other codes listed in the RONYUD field:
    - i) X- this means the student is in an eligible major, but the major wasn't approved until AFTER the student was in it. The X means the student is NOT grandfathered into eligibility for THAT major. Eg.

# Winthrop University's Office of Financial Aid Policies and Procedures

AWSD began for those entering college fall 2020. If a student entered college fall 2019 and *changes their major* to AWSD, they cannot get enhancement, even if they meet the 14 hours. The X signifies your ability to skip them for AWSD major... but if they change to CSCI, they can be reviewed since there is no "start" date on that major.

- ii) M- this means the student is in a Middle Level Education major and (as of most recent enhancement check) was in a non-eligible program/concentration. Eg. Student is Middle Level-Social Studies. The M indicates that they've never been reviewed for hours, and if their program/concentration remain the same, will never be reviewed for hours. These still need to be checked on SGASTDN on every enhancement run to see if their program/concentration has changed to Science or Math. Then they'd be reviewed and either a Y or N will be populated instead.
- A student that is majoring in an eligible major as determined by CHE may receive the LIFE Enhancement in their sophomore, junior or senior year as long as they are eligible for the BASE LIFE scholarship. CHE has determined the following majors eligible at Winthrop University.

|         |   |             |
|---------|---|-------------|
| 11.0101 | Computer Science  | <b>CSCI</b> |
| 13.1203 | Middle Level Education, Mathematics or Science ONLY   |             |
| 19.0504 | Human Nutrition   | <b>NUTR</b> |
| 26.0101 | Biology   | <b>BIOL</b> |
| 27.0101 | Mathematics, General  | <b>MATH</b> |
| 40.0501 | Chemistry   | <b>CHEM</b> |
| 51.0201 | General Communication Disorders   |             |
| 03.0104 | Environmental Science (incoming fall 2018 & beyond students only) <b>ENSC only!</b><br>(Not ENST, which is environmental studies) |             |
| 31.0505 | Exercise Science (incoming fall 2018 & beyond students only) <b>EXSC</b>  |             |
|         | Data Science (incoming fall 2020 & beyond students only)  |             |
|         | Applied Software Development (incoming fall 2020 & beyond students only)  |             |
| 11.1003 | Cybersecurity (BS-CYBR) for incoming fall 2021 & beyond students.   | <b>CYBR</b> |

- Review the students major on SGASTDN
- If the student has received LIFE Enhancement before, but is no longer in an eligible major, add RHACOMM and ROAMESG ENXB.

- If the student's current major before the first day of classes (August 19, 2018 is eligible, August 20, 2018 is not eligible) is listed above, the student might be eligible for the enhancement in their sophomore, junior or senior year.
  - A student cannot qualify if only their minor is one of the categories above.
- Review the student's award package on RPAAWRD.
  - If the student has SCLIF1 awarded for the current academic year, they are not eligible to receive this scholarship this year.
  - If the student has SCLIF2-4 or SCLIFX, the student might be eligible.
- Review the student's credits for the initial year in college on SHATERM (fall and spring or could be a spring and fall if the student was a mid-year start). AP credits and institutional credits earned prior to the initial start of college DO count towards the LIFE Enhancement requirements. You can also check SWASGPA & transcripts too.
- Count the number of earned hours that would classify under Math/Science using the following course indicators: BIOL, CHEM, CSCI, CYBR, DSCI, ENVS, ENSC, EXSC, GEOL, NUTR, MATH, PHYS for incoming fall 2020 and beyond, **CYBR for incoming fall 2021 students and beyond.**
- If the student has 14 hours or more earned hours in their initial year in college, the student is eligible for the enhancement.
  - i) Note : If student's initial semester in college is a spring, they will be reviewed mid-year for Enhancement
- If eligible, go to RPAAWRD, award \$2500 – SCELIF. Add RHACOMM.
- If a student did not earn 14 hours of math/science, go to ROANYUD and add N to field 28. Add RHACOMM: Student is ineligible for LIFE enhancement - did not earn at least 14 hours of math/science in freshman year
  - i) If you have time and student is within 4 credit hours of qualifying for enhancement, reach out to them via letter/email so they know they can use the summer to gain those hours if they want.

## Fall Enhancement Check

You will need to check the students' majors again for the new academic year at the time of disbursement **and** day after last day of 100% add/drop

- If a student has changed their major before disbursement or last day of 100% add/drop, cancel SCELIF and add ROAMESG ENXB. Make RHACOMM and email the student.
- If a student changes their major after 100% add/drop, we do not remove the scholarship for the academic year. Make a note on RHACOMM and notify the student they will have the scholarship for the current year but will not be eligible for renewal. Add ROAMESG ENXA. Do not add ROAMESG if student is SCLIF4, because student has no eligibility left anyway.

## October Enhancement Email

1. Identifying LIFE recipients – Log into WEBFocus:
  - Click on Financial Aid.
  - Click on Scholarship/State tab.
  - Click on JEA\_SCLIFE Schp Recipients By Term
  - Enter term code for FALL and correct aid year.
2. Save report to shared drive, Scholarships, Hope & Life, Current Aid Year, LIFE Recipients to review for Enhancement Email xxxxxxxx (date)
  - a. Name sheet Master List
  - b. Filter for Fund = SCLIF1 and Enhancement Eligible Majors



- c. Copy student information and paste into another sheet
- d. Name sheet LIF1 & Eligible Major
- e. Confirm Middle Level Education Majors are Math or Science concentrations only
- f. On the Master List, filter for SCLIFX and confirm if any of the students are first-year students who should be included in the email and if so, copy info into LIF1 & Eligible Major
- g. Add a new column after Fund and name Scholarship. Fill in all rows with SC LIFE Scholarship
3. Open a new Excel spreadsheet and save in the shared drive as Enhancement Fall Reminder Email Source xxxxxxxx (date)\*
  - a. Name four sheets: Master, HOPE, LIFE, PFS
  - b. Copy the LIF1 & Eligible Major list into the LIFE tab
  - c. Repeat steps for HOPE and Palmetto Fellows, adding them to the same Email Source spreadsheet (see procedures for each for detailed instructions)
  - d. Copy all scholarship types and paste in the Master tab
4. Open the Word document Enhancement Fall Reminder Email Fall for the previous year and update to the current aid year. Save in current year's folder.
5. Complete a mail merge to email the reminder to all students in the Master tab.
6. Subject : **\$2500 State Scholarship Enhancement Opportunity**

\*If you began with HOPE or Palmetto Fellows, do not create a new Email Source spreadsheet.

## **Christmas-time LIFE warning letter**

To generate warning letters to SCLIFE1 scholarship recipients with GPA's below a 3.0 at the end of the fall semester.

### Procedure:

1. Identifying LIFE recipients – Log into WEBFocus:
  - Click on Scholarship, State tab.
  - Click on JEA\_SCLIFE Schp Recipients by Term.
  - Enter term code for FALL and correct aid year.
2. Once report has opened in Excel:
  - a. Make sure every student has a permanent address listed. If a student is missing a permanent address, notify Mike and ask him to fix the report.
  - b. Save a copy of the report to shared drive under Scholarship folder→HOPE/LIFE→appropriate aid year.
  - c. Make sure the file type is saved as Excelworkbook.
3. In the report:
  - a. In LIFE GPA:
  - b. Spot check about five students from the report just to ensure that things look accurate. Also note that by going to RFIBUDG you can view how many students specifically have accepted the SCLIF1 scholarship.
  - Delete first 3 rows in spreadsheet so header with column names becomes first row.
  - Highlight top row

- Click on Filter/Sort
  - Filter by Fund
  - Uncheck all but SCLIF1, SCLIF2, SCLIF3
  - Then filter for LIFA GPA less than 3.000
  - Highlight those showing and copy/paste them onto second tab
  - Remove rows for anyone with **Dcsd**
  - Ask Director for list of who is not returning (based on SGASTDN comment) and who is a fall R2T4
    - Review those indicated as fall R2T4. Remove them from list IF they aren't registered for spring in ROAENRL
    - Review list from Michelle of students who have indicated they are not returning for Spring and remove them from list
  - Filter **Pref First Name** and make sure none are blank. If they are, default the **First Name**.
  - Save a separate copy of the report and label it "mailmerge" at the end.
  - Sort list again by name by clicking on "Custom sort" under sort/filter and then clicking on 'sort by name.'
4. Go back to copy of spreadsheet saved as mailmerge:
- Close the report
5. Go to Word
- Open Word document of LIFE scholarship warning letter.
  - Click on Page Layout→Margins→Custom Margins
  - Adjust top to 2 inches, bottom to 1 inch, left to 1.25 inches and right to 1 inch.
  - Click on 'Mailings'
  - Click on "Start Mailmerge"
  - Select 'Letters'
  - Select 'Recipients' and use existing list
6. Open copy of spreadsheet saved as mailmerge again
- Insert merge fields
  - Insert appropriate field in each section of letter.
  - Click on 'Preview Results'
  - If everything looks corrected click on 'Finish and Merge'
  - Edit individual documents
  - Save mailmerge to shared drive
7. Review list for any SCLIFX who don't have 3.000 and need a letter. Use the LIFX letter as a guide. Seek assistance from Director as needed.
8. Also send the mail merge as individual emails when we return in January. If you don't know how to do this seek assistance from Director.

# Winthrop University's Office of Financial Aid Policies and Procedures

**Policy and Procedure:** HOPE Awarding

**Drafted By:** Jeanie Faris/Michelle Hare

**Date Revised:** May 2024

These procedures are meant as a guide for awarding HOPE scholarship. When awarding, you should ALWAYS defer to the state regulations which can be found at [www.che.sc.gov](http://www.che.sc.gov).

## General Guidelines

- The HOPE scholarship (\$2800) is intended to provide scholarship funding for those student that do not meet the LIFE scholarship requirements out of high school.
- A student has ONE year of eligibility for HOPE and then THREE consecutive years of LIFE scholarship eligibility from initial college enrollment.
- The Office of Admissions will determine ALL initial award eligibility for new students (transfers and freshmen). The Office of Admissions will notify the Office of Financial Aid (OFA) when awards need to be made by updating a student's code in SOATEST and notifying the OFA to make the award.
  - Awards are made in **OFFER** status in RPAAWRD using the fund code SCHOPE (students who begin college in fall) or SCHOPX (students who begin college in Spring).
- For 24/25 – Under Proviso 117.183, grades earned via dual enrollment should be removed from LIFE GPA calculation if they are negatively affecting LIFE GPA and the GPA requirement is the only reason student is not renewing to LIFE (i.e. has hours but not GPA). As of now, this is only for the 23/24 cohort renewing into Year 2 for 24/25. The dual enrollment grades will be factored into the LIFE GPA for Year 3 and 4 renewals.

## Important Notes

- This award is for the FRESHMAN/First YEAR only
- If you are notified by Admissions to remove a state scholarship after the student's final high school transcript was received, cancel the scholarship and make RHACOMM.
- Mid-Year Start - Students can begin their initial eligibility in the spring term which means they are on a different time frame for required hours for the renewal of their scholarships. They should be awarded using SCHOPX.
  - a) For example: 15 hours after their first semester to renew for the next year and an average of 30 years for subsequent years. (15 after their first semester, 45 after their third semester, 75 after their fifth semester, and 105 after their seventh semester for their last term of eligibility in the fall)
  - b) If a student is a mid-year start and begins receiving the HOPE scholarship in the spring semester, they have two options for scholarships in the next academic year.
    - i) They can earn 15 hours at the end of spring/summer and a 3.000 LIFE GPA to earn the LIFE scholarship for the next fall/spring
    - ii) If they do not have 15 hours and a 3.000 LIFE GPA at the end of the spring semester, they have ONE more term of HOPE for the fall semester. There for they will NOT be eligible for scholarship funding in the next spring term OR their third term of enrollment.
    - iii) These students will need to be manually reviewed each year for renewal to make sure meeting renewal requirement
    - iv) Admissions determines initial eligibility and their paperwork should show mid-year start. A student that receives their GED is not eligible for the HOPE scholarship because that student's eligibility does not begin until after the first year in college and then they can get LIFE for 3 years if they qualify (see state regulations).
- Summer 2023 - Proviso 117.183 – when reviewing for second year, dual enrollment grades less than 3.0 should not be used when calculating LIFE GPA (credit hours still count). After year 2, all dual enrollment grades count.

# Winthrop University's Office of Financial Aid Policies and Procedures

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- Disability - reduced course load
  - If a student mentions that they are approved for a reduced course load with the Disabilities office, the regulations allow a student to continue receiving the scholarship – use the CHE guidelines as your guide on how to proceed.
  - Make a note in RHACOMM regarding the reduced hours and calculate how many hours the student will need to renew.  
  
(1) Example:

|             |   |
|-------------|---|
| Fall 2013   | Enrolled - 15 hours                                   |
| Spring 2014 | Enrolled - 15 hours                                   |
| Fall 2014   | Enrolled – 6 hours, approved with Disabilities Office |
| Spring 2015 | Enrolled – 6 hours, approved with Disabilities Office |

Student must have 42 hours and 3.000 GPA to be eligible for LIFE 15/16
  - Send a copy of the ADA letter to scan and it is recommended you keep a copy in your state scholarship files
- **Mid-year start**
  - If a student did not attend college right out of high school and they began their college enrollment in the spring semester, the student will have different requirements for renewal than the typical student.
  - Awarding
    - Make a note in RHACOMM regarding the initial college enrollment  
Example:  
  
SCHOPX:  
Spring 2022 = Term 1 - Needs 15 hours and 3.000 to renew to LIFE for  
Fall 2022 = Term 2 (if doesn't earn LIFE will get \$1400 HOPE for fall)  
Spring 2023 = Term 3 (needs 45 hours and 3.000 to renew)  
Fall 2023 = Term 4  
Spring 2024 = Term 5 (needs 75 hours and 3.000 to renew)  
Fall 2024 = Term 6  
Spring 2025 = Term 7 (needs 105 hours and 3.000 to renew)  
Fall 2025 = Term 8 - final term
    - Add ROAMESG = HOPS
    - This student will need to be manually reviewed each year for renewal
    - You can check documents on BDMS, high school transcripts to verify the graduation date.
      - They will need to earn 15 hours after their first semester, 45 after their third semester, 75 after their fifth semester, and 105 after their seventh semester for their last term of eligibility in the fall.
      - Add ROAMESG: Example: As a Spring admit, you will need to earn at least 15 hours and have a LIFE GPA of 3.000 by end of summer 2020 to earn the LIFE scholarship for 20/21. If you do not earn LIFE, you will receive a second semester of HOPE for fall 2020 and then can be reviewed for 21/22 LIFE after summer 2021 if you earn at least 45 credit hours and have a LIFE GPA of 3.000. Please contact the financial aid office with any questions. Thank you!
    - Award SCLIFX \$5000 if the student has met the criteria for renewal.

# Winthrop University's Office of Financial Aid Policies and Procedures

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- Term/Year of Remediation
  - A student that was required to take remedial courses at a technical school will be granted a term or year of remediation ONLY IF they are taking less than 12 hours of non-remedial classes in the appropriate terms.
  - If the student IS eligible for a term/year of remediation, the credits earned during remediation CANNOT be included in their earned hours for continued eligibility, even if they are non-remedial courses. SWASGPA/LIFE GPA should correctly reflect this.
  - Make notes on RHACOMM about the students initial college enrollment.

## Refunds

- Winthrop University follows CHE's guidance for refunds for students who withdraw to apply the same institutional policy. HOPE will be adjusted by the same percentage that tuition is (e.g. 50%).
- Students who do not begin full-time hours will have their entire term award cancelled

## Billing

- Each semester, after the academic fee adjustment period (approximately 30 days after the start of the semester), a member of the Controller's office submits a reimbursement request to CHE for the total amount disbursed (credited on the students accounts) for the awards processed by Financial Aid for the semester by the deadlines CHE publishes each year. If an additional award is made, or an award is reduced, after the initial semester's request is made to CHE, then those funds would be added or subtracted, whichever is appropriate, in the following semester's request, or at fiscal year end.

## Renewing Awards - Earning the LIFE scholarship

- As soon as possible after Spring grades are official, begin reviewing students for renewal
- Student must have an average of 30 hours and a cumulative LIFE GPA of 3.000 at the end of their initial year in college to earn the LIFE scholarship for the next year
- All students are reviewed at the end of the Spring semester for continued eligibility. OFA notifies students who do not meet renewal eligibility via letter to their permanent address in Banner. A student cannot regain eligibility mid-year.

### 1. Go to Dashboard-Scholarships, State, *LS\_SCHOPE Schp Recipients for Renewal by Year*

- Put in current aid year and current fall/spring term codes.
- After report runs and populates, save copy to shared drive-*Scholarships-HOPE & LIFE-appropriate aid year* (if running after 21/22 you would save it to 22/23)
  - i. Delete first three rows of report so that you can properly sort and filter
  - ii. Copy all data onto a second tab- call it Review. This is the one you will work from. The first tab can be saved to what report looked like using it.
  - iii. Freeze top row
  - iv. Go to Review Tab
    - 1. Spot-check three student GPA's with SWASGPA to ensure that they match. If they don't stop and ask Director for assistance.
    - 2. **Sort (don't filter)** for all SCHOPX students and cut them from spreadsheet. Paste these students into a new tab and save for later- call HOPEX- paste on second row and add header row. SAVE.
    - 3. Back in Review Tab, custom sort by **LIFE GPA**

# Winthrop University's Office of Financial Aid Policies and Procedures

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4. Cut all students with less than 3.0 GPA and paste them in another tab named "HOPE Non-renewals." Leave top row blank and copy/paste header row. Save for later. SAVE.
5. Back in Review Tab Custom sort by **LIFE ALL Coll Total UG Earn Hrs**
6. Cut all students with fewer than 30 hours and paste them in HOPE Non-renewals spreadsheet. Save for later. Save.
7. The Review tab is now left with the students who have at least a 3.000 LIFE GPA and at least 30 hours who are eligible for renew.
  - a. Sort for students with *Fall/Sprg Incmpl Grd* column populated. **COPY** and paste these ID's in separate tab for later review because you will have to do something special with these ID's later. Name tab Incompletes
- v. Let Director spot check your list.
- vi. Copy ID's of all students that are left and eligible for renewal on Review Tab and save into a new spreadsheet on your desktop without header row. Name spreadsheet "Need SCLIF2 as of xxxxxx today's date"
  1. Email ID's to Mike and ask him to batch post LIFE for upcoming academic year:  
"Please batch post SCLIF2 for these ID's in 22/23 \$5000 in offer status. Let me know if any don't work."
  2. Rename Review tab- RENEWED

## vii. Click on HOPE Non-renewals tab

1. Sort by **LIFE ALL Coll Total UG Earn Hrs**
2. Cut all students with at least 30 earned hours and paste into a new tab call Special Proviso
3. Review each student for potential dual enrollment credits using SWASGPA for transfer credits and have Michelle or Mike run the STU\_DUAL\_ENROLLMENT popsel so you can VLOOKUP those who had WU dual enrollment
  - a. If the student did not have dual enrollment credits, make a note "No dual enrollment" – these students are not eligible
    - i. Copy students from spreadsheet and paste into Non-Renewal tab
  - b. If the student does have dual enrollment credits:
    - i. Review the transfer transcript(s) in BDMS.
    - ii. Use the GPA Calculation spreadsheet to calculate LIFE GPA with only A and B dual enrollment grades plus Quality Hours & Quality Points from current academic year.
    - iii. If LIFE GPA is at least a 3.0 with harmful credits removed, note hours and GPA on spreadsheet. If LIFE GPA is still not at least a 3.0 with harmful credits removed, note hours and GPA on spreadsheet and copy and paste student information into a new tab called Special Proviso Non Renewal.
    - iv. Save GPA Calculation spreadsheet and PDF of SWASGPA in Shared Drive - Scholarships > HOPE & LIFE > yyyy > Proviso Review

## viii. In Special Proviso tab

1. Award SCLIF2 to eligible students
2. Add RHACOMM with calculated LIFE GPA. Example:  
Student falls under Proviso 117.183 for 24/25 so dual enrollment coursework that negatively impacts LIFE GPA is removed from calculation. This is only for

# Winthrop University's Office of Financial Aid Policies and Procedures

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renewal into year 2. For 25/26, all credits will be counted in LIFE GPA. Without dual enrollment courses < B in GPA - student has 42 hrs/3.070 LIFE GPA so awarded SCLIF2

- ix. Click on HOPE Non-renewals tab
- x. Create new tab called *"no letter"*
  1. Sort all students with a SCHOPE 2324 Paid Amt amount of \$1400 or less. Cut and paste them into "no letter" tab.
  2. Review these students on ROAENRL to see if they were enrolled both fall and spring- or Spring only. If so, cut/paste these back to HOPE Non-renewal tab.
  3. Let director spot check your list before merging to letters.
- xi. Copy Non-Renewal tab into a new SPREADSHEET- this is what you will use as your merge source. Sort by last name A-Z then add level and sort by first name A-Z.
  1. Filter and make sure no one is missing an address you need to fill in
  2. Save to shared drive as CSV file type named "Hope Non-renewal letters". Then Close spreadsheet.
  3. Open Word document "Hope Non-Renewal Letter" from shared drive. Make sure it's updated to xx/xx and approved by director.
  4. Mail merge students that require a letter. Use **LIFE ALL Coll Total UG Earn Hrs** and **LIFE GPA** columns to populate hour and GPA fields in letter.
    - a. Spot check one letter against data in HOPE non-renewal tab
    - b. Print sample to make sure it lines up in window envelope
    - c. Print on letterhead
    - d. Saved to shared drive as MERGED HOPE non-renewal letter.
- xii. Go to Special Proviso Non Renewal tab. Sort by last name A-Z then add level and sort by first name A-Z.
  1. Add a column titled Special LIFE GPA and add calculated LIFE GPA with harmful dual enrollment credits removed.
  2. Filter and make sure no one is missing an address you need to fill in
  3. Save to shared drive as CSV file type named "Hope Non-renewal letter - Special Proviso". Then close spreadsheet.
  4. Open Word document "Hope Non-Renewal Letter - Special Proviso" from shared drive. Make sure it's updated to xx/xx and approved by director.
  5. Mail merge students that require a letter. Use **LIFE ALL Coll Total UG Earn Hrs** and **Special LIFE GPA** columns to populate hour and GPA fields in letter.
    - a. Spot check one letter against data in HOPE non-renewal tab
    - b. Print sample to make sure it lines up in window envelope
    - c. Print on letterhead
    - d. Save to shared drive as MERGED HOPE non-renewal letter - Special Proviso.
- xiii. Go back to tab of SCHOPX students
  1. Read RHACOMMs for each of these students
  2. Review them individually to see if they met the outlined criteria listed on RHACOMM to determine what they needed to renew.
  3. Award SCLIFX if they meet criteria. Make sure to RHACOMM what student will need to earn to get LIFE next year.

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4. If they didn't meet renewal criteria then you'll review to see if you should send standard HOPX non-renewal letter or create something different as applicable. Students using their first semester of HOPE in Spring should be reviewed for eligibility under proviso following steps outlined above.

xiv. Go back to Incomplete tab

1. Add a ROAMESG = LIFF for these ID's. (Make sure director has turned off viewing of ROAMESG's for this). Be sure to be in the new aid year
2. Add a ROAHOLD for SCLIF2 for upcoming aid year

|                  |   |                |   |                          |  |
|------------------|---|----------------|---|--------------------------|--|
| <b>Hold:</b>     | DH <input type="button" value="v"/> Disbursement Hold | <b>Fund:</b>   | SCLIF2 <input type="button" value="v"/> | <b>User:</b>             | W10224528                                    |
| <b>Reason:</b>   | incomplete grade                                      |                |   | <input type="checkbox"/> | Lock   |
| <b>Aid Year:</b> | 1819 <input type="button" value="v"/>                 | <b>Period:</b> | <input type="button" value="v"/>        | <b>Hold From Date:</b>   | 08-MAY-2018 <input type="button" value="c"/> |
|                  |   |                |   | <b>Hold To Date:</b>     | 31-DEC-2099 <input type="button" value="c"/> |

Repeat for each student.

3. In a week or two when you have time, calculate each student's LIFE GPA if they got an F in their incomplete classes.
  - a. If LIFE GPA would remain above 3.000 even with F's
  - b. Delete ROAMESG = LIFF
  - c. Expire ROAHOLD
  - d. Make a RHACOMM "Expire LIFF ROAMESG. Even if student get's F grades LIFE GPA will still be above 3.000 so ok for SCLIF2."
  - e. Save GPA calculation for scan as our proof of what it was.
  - f. Remember to take note of any students with dual enrollment credits that could impact LIFE GPA and review using Proviso review steps outlined previously.

xv. When all State Scholarships are renewed and letters for non-renewals are sent, Run Enhancement report to check for potential enhancement awards.

xvi. See *LIFE Procedures* for how to check for students who may qualify for enhancement.

## October Enhancement Email

1. Identifying HOPE recipients – Log into WEBFocus:
  - Click on Financial Aid.
  - Click on Scholarship/State tab.
  - Click on JEA\_SCHOPE Schp Recipients By Term
  - Enter term code for FALL and correct aid year.
2. Save report to shared drive, Scholarships, Hope & Life, Current Aid Year, HOPE Recipients to review for Enhancement Email xxxxxxxx (date)
  - a. Name sheet Master List
  - b. Filter for Fund = SCHOPE and Enhancement Eligible Majors
  - c. Copy student information and paste into another sheet
  - d. Name sheet Eligible Major
  - e. Confirm Middle Level Education Majors are Math or Science concentrations only
  - f. On the Master List, filter for SCHOPX and confirm if any of the students are first-year students who should be included in the email and if so, copy info into Eligible Major
  - g. Add a new column after Fund and name Scholarship. Fill in all rows with SC HOPE Scholarship



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3. Open a new Excel spreadsheet and save in the shared drive as Enhancement Fall Reminder Email Source xxxxxxxx (date)\*
  - a. Name four sheets: Master, HOPE, LIFE, PFS
  - b. Copy the Eligible Major list into the HOPE tab
  - c. Repeat steps for LIFE and Palmetto Fellows, adding them to the same Email Source spreadsheet (see procedures for each for detailed instructions)
  - d. Copy all scholarship types and paste in the Master tab
4. Open the Word document Enhancement Fall Reminder Email Fall for the previous year and update to the current aid year. Save in current year's folder.
5. Complete a mail merge to email the reminder to all students in the Master tab.

\*If you began with LIFE or Palmetto Fellows, do not create a new Email Source spreadsheet.

## Christmas-time HOPE warning letter

To generate warning letters to HOPE scholarship recipients with GPA's below a 3.0 at the end of the fall semester.

Procedure:

1. Identifying LIFE recipients – Log into WEBFocus:
  - Click on Scholarship, State tab.
  - Click on JEA\_SCHOPE Schp Recipients by Term.
  - Enter term code for FALL and correct aid year.
2. Once report has opened in Excel:
  - a. Make sure every student has a permanent address listed. If a student is missing a permanent address, notify Mike and ask him to fix the report.
  - b. Save a copy of the report to shared drive under Scholarship folder→HOPE/LIFE→appropriate aid year.
  - c. Make sure the file type is saved as Excelworkbook.
3. In the report:
  - a. In LIFE GPA: Spot check about five students from the report just to ensure that things look accurate. Also note that by going to RFIBUDG you can view how many students specifically have accepted the SCHOP% scholarship.
  - Delete first 3 rows in spreadsheet so header with column names becomes first row.
  - Highlight top row
    - o Ask Director to indicate who is not returning (based on SGASTDN comment) and who is a fall R2T4
  - Highlight everyone and copy/paste them onto second tab
  - Click on top left of spreadsheet in order to highlight the **ENTIRE** spreadsheet.
    - o Click on 'Custom Sort' under Sort/Filter.
    - o Click on 'sort by LIFE GPA.' Choose order **Largest to Smallest**.
    - o Remove rows for those with a LIFE GPA of 3.0 or higher
    - o Record Remove those indicated as not returning
    - o Remove rows for anyone with **Dcsd**
    - o Review those indicated as fall R2T4. Remove them from list IF they aren't registered for spring in ROAENRL
    - o Review list from Michelle of students who have indicated they are not returning for Spring and remove them from list
  - Filter **Prof First Name** and make sure none are blank. If they are, default the **First Name**.

# Winthrop University's Office of Financial Aid Policies and Procedures

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- Highlight everyone and then Sort by **Last Name**, then **First Name**
  - Save a separate copy of the report and label it "mailmerge" at the end.
  - Sort list again by name by clicking on "Custom sort" under sort/filter and then clicking on 'sort by name.'
4. Go back to copy of spreadsheet saved as mailmerge:
    - Close the report
  5. Go to Word
    - Open Word document of LIFE scholarship warning letter.
    - Click on Page Layout→Margins→Custom Margins
    - Adjust top to 2 inches, bottom to 1 inch, left to 1.25 inches and right to 1 inch.
    - Click on 'Mailings'
    - Click on "Start Mailmerge"
    - Select 'Letters'
    - Select 'Recipients' and use existing list
  6. Open copy of spreadsheet saved as mailmerge again
    - Insert merge fields
    - Insert appropriate field in each section of letter.
    - Click on 'Preview Results'
    - If everything looks corrected click on 'Finish and Merge'
    - Edit individual documents
    - Save mailmerge to shared drive
  7. If time allows, also send the mail merge as individual emails when we return in January. If you don't know how to do this seek assistance from Director.

# Winthrop University's Office of Financial Aid Policies and Procedures

**Policy and Procedure:** South Carolina National Guard College Assistance Program (SC CAP) **Drafted By:** Michelle Hare

**Date Drafted:** 2015

**Date Revised:** Summer 2024 (Brook Keisler)

The Office of Financial Aid (OFA) adheres to the federal, state, and Winthrop regulations while awarding financial aid. These procedures are meant as a guide for awarding South Carolina CAP. When awarding, you should ALWAYS defer to the state regulations which can be found at [www.che.sc.gov](http://www.che.sc.gov).

CHE contact – Alfie Mincy; [amincy@che.sc.gov](mailto:amincy@che.sc.gov)

Guard contact – SFC Paul J. Mead, State Incentive Manager, [paul.j.mead2.mil@mail.mil](mailto:paul.j.mead2.mil@mail.mil) ; 803-299-2734

Air Force contact – SSgt Steve David (but using email [leamber.s.gregg.mil@mail.mil](mailto:leamber.s.gregg.mil@mail.mil))

## How students apply

- The application process is normally open on June 1 and end on August 1. You should email CAP recipients from the previous year on the day that application is available and notify them to apply. Do **NOT** email CAP students that have graduated or met their lifetime award amount.
- It is our understanding that soldiers that do not apply during this window will not be eligible. However, you can refer soldiers to appropriate CHE or military contact if needed to be the final word as Winthrop does not control the application process.

## Determining who is eligible

- The CHE database is now available so you will look there for who is eligible.
- Under “Institution Users”, click the link “Search for National Guard Students”
  - Two blanks will appear: “Last Name” & “SSN”. Leave them blank.
  - Click Search. This will display a current and historical list all CAP eligible Winthrop students
  - Sort List by “Eligibility Status” for “Y”. The Y’s are your current eligible students.
  - Use Snipping Tool to clip the full grid of student’s down where Eligibility status changes from Y’s to N’s.
  - Click Save icon and save as JPG file. Name file “Roster Pulled from CHE database (today’s date)”.
  - Convert to PDF:
    - Click the print icon.
    - Printer= “Microsoft Print to PDF”
    - Fit= Shrink to fit
    - Save to shared drive, Scholarships, SC CAP, aid year. Name file “Roster Pulled from CHE database (today’s date)”.
  - This is your Master List for the year. (if you pull this list before August 1, you will have to check again after August 1 to catch any students CHE approved up until the application deadline.)
- Make notes on your Master list using Adobe
  - Click the three dots on the Toolbar
  - Select “Sign Yourself”
  - When an editing toolbar appears, select the text icon that looks like this: ][Ab.
  - Place insertion point where you want to make your note.
- For each student who is potentially eligible (If necessary, you can check eligibility with CHE):
  - Ensure that student is admitted per SGASTDN.
  - Make sure student is meeting Satisfactory Academic Progress in ROASTAT for the upcoming term. Notate Master.

# Winthrop University's Office of Financial Aid Policies and Procedures

- If not, make a note in RHACOMM "Student is eligible for \$xxx CAP funds; however, must be meeting SAP to receive the award" and make sure SAP = Q is in RRAAREQ (or SAP = P/I if SAP appeal is in progress)
- If SAP status is SAP0. Go to SGASTDN and make sure it will be a new student, not a readmitted student.
  - If new student – go to ROASTAT
  - Change New SAP Status from SAP0 to SAP1
  - Check Lock Indicator. Save.
  - If readmitted student – get with Jordan or Director to see what SAP status should be
- Make sure student has not already received a bachelor's degree. Recipient must be seeking first bachelor degree. Notate Master.
- Go to RHIAFSH, pull up fund SCNGCP and make sure student has not already received \$22,000 in CAP funds. Notate Master.
  - If they have, put a RHACOMM that student already received \$22,000 in CAP funds and exhausted eligibility and make sure to email or ROAMESG that information to student
- Check **Life Amount** column on Master to make sure student has not already received \$22,000 in CAP funds or maybe have limited funding for this year. Notate Master.
  - If they have, put a RHACOMM that student already received \$22,000 in CAP funds and exhausted eligibility and make sure to email or ROAMESG that information to student
- Check previous disbursement report you sent to CHE and SHATERM/transcripts to ensure that student has not **attempted** at least 130 hours since they began receiving CAP funds. Notate Master **\*\*currently not required under proviso (22/23, 23/24, 24/25 academic years)**

## Awarding

- Once you have determined who is eligible, make the award in RPAAWRD using SCNGCP fund code
  - Amounts:
    - SCANG = Air National Guard  
Eligible for up to \$5500 per year – total \$22,000 lifetime
    - SCARNG = Army National Guard  
Eligible for up to \$5500 per year – total \$22,000 lifetime
  - If student is attending less than full-time award must be prorated (Reg: 62-252 G (2) states "The prorated method (based on semester calculation) will be ¾ time; ½ time; less than ½ time to include ¼ and less than ¼ time of the recipient's full time award value." Exact dollar amounts per CHE:

| 4-year Institutions        |                         |                                       |             |       |
|----------------------------|-------------------------|---------------------------------------|-------------|-------|
| Lifetime Max               |                         | \$ 22,000.00                          |             |       |
| Max per Academic Year (AY) |                         | \$ 5,500 per year - \$ 2,750 per term |             |       |
| <u>Enrollment Per Term</u> |                         | <u>Award</u>                          |             |       |
| Full time                  | 12 or more Credit Hours |                                       | \$ 2,750.00 | 100%  |
| Three Quarters             | 9-11 Credit Hours (3/4) | (\$ 2,063.00)                         | \$ 2,062.50 | 0.75% |
| Part-time                  | 6-8 Credit Hours (1/2)  |                                       | \$ 1,375.00 | 0.50% |
| Less than Part-time        | 3-5 Credit Hours (1/4)  | (\$ 688.00)                           | \$ 687.50   | 0.25% |

# Winthrop University's Office of Financial Aid Policies and Procedures

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- NOTE – effective summer 2017, students can no longer receive a full year award in their final term if they are graduating.

## Reporting

- Make sure you know the deadline dates for invoicing the Commission on Higher Education – CHE should contact you each term with the actual deadline date
  - Fall Term      November
  - Spring Term    May
  - Summer Term   July
- Log into CHE portal.
  - Under “Institution Users” click “Update National Guard Student Data” to provide the eligibility verification information to CHE.
  - The Student Update page will appear. Note- The first time you go to this page for a new report period the student data will be blank. You must click the **Refresh Students** button at the top of the page. This will cause the system to transfer current eligible student data for the current report period by copying the name, branch, eligible date, ineligible date, eligibility status, and total amount reported from the CHE data system.
  - Once the data is displayed, the Corrected Total Amount, Enrollment Status, Cumulative Credit Hours Attempted, Attempted Credit Hours, SAP Progress, and Award Amount fields will be open for each student.
  - Complete these fields using information found in Banner.
  - Once the data is entered by the institution, CHE can retrieve the report.
  - Note, the invoice sent by Controller’s office (next step) cannot be processed by CHE until the eligibility verification information has been updated.
- Create invoice for finance (see Billing section below) \*CHE refers to this as the “Request for Funds”
  - Use information from CHE report to create a new spreadsheet (open previous term’s report from shared drive to view format)
  - Enter, Last 4 SSN, Last Name, First Name, MI, Award Amount, Term, Term Year Credit Hours
  - AutoSum the Award Amount column- make sure it totals the amount listed on CHE report AND dashboard report (Banner must match CHE must match this invoice)
  - Make sure spreadsheet has cents
  - Save to shared drive- Scholarships, SC CAP, aid year
  - Send as attachment to Ken Tough

## Refunds

Winthrop University follows CHE’s guidance for refunds for students who withdraw to apply the same institutional policy. CAP funds will be adjusted by the same percentage that tuition is reduced (e.g. 50%).

Initial awards are made assuming a student will be attending full-time. Students attending less than full-time will have their Cost of Attendance and awards adjusted according to institutional and state policy before disbursement.

## Billing

Each semester, prepare invoice with student’s name, last four of the SSN, term, hours enrolled, amount awarded.

- From WebFocus, go to Scholarships, State; JEA\_SCNGCP Grant Recipients
  - Save called “ [term] CAP Disbursements from Banner [today’s date] ”
  - Remove column “Preferred First name”
  - Rename Amount Paid column to “Award Amount”

# Winthrop University's Office of Financial Aid Policies and Procedures

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- Modify SSN column to only last 4. Rename column to "Last 4 SSN"
  - If any last 4 SSN starts with a 0, excel will remove the zero and leave only 3 digits. Use an apostrophe to capture the zero. Then right click on that cell and choose "ignore error". Then use the right justify to line it up with the other numbers in that column.
- Add column on end called "Term" and populate the written out version of the term "Fall 2023"
- Total the Award Amount. Check RFIBUDG to make sure term amount= paid amount.
- Send to Controller's Office (Ken Tough) so that Winthrop can bill CHE. Follow up with them to make sure it is sent by the deadline and funds were received.

After the academic fee adjustment period (approximately 30 days after the start of the semester), a member of the Controller's office submits a reimbursement request to CHE for the total amount disbursed (credited on the students accounts) for the awards processed by OFA for the semester by the deadlines published by CHE [meghan.mccraw@admin.sc.gov](mailto:meghan.mccraw@admin.sc.gov). If an additional award is made, or an award is reduced, after the initial semester's request is made to CHE, then those funds would be added or subtracted, whichever is appropriate, in the following semester's request, or at fiscal year-end.

# Winthrop University's Office of Financial Aid Policies and Procedures

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| <b>Policy and Procedure:</b> South Carolina Grant Awarding | <b>Drafted By:</b> Michelle Hare       |
| <b>Date Drafted:</b> April 2015                            | <b>Date Revised/Reviewed:</b> May 2024 |

The Office of Financial Aid (OFA) adheres to the federal, state, and Winthrop regulations while awarding financial aid. These procedures are meant as a guide for awarding South Carolina Grant. When awarding, you should ALWAYS defer to the state regulations which can be found at [www.che.sc.gov](http://www.che.sc.gov).

## Procedure – Traditional Student

Students are required to complete a Free Application for Federal Student Aid (FAFSA) before they can be considered for title IV aid and any state or Winthrop need-based aid. In special circumstances, additional documentation may be required before a financial aid package can be provided (e.g. dependency override paperwork). Students must complete all required documentation before financial aid can be disbursed. Most required documentation is available for view to students via Wingspan and to staff via RRAAREQ or ROASMRY.

Prior to awarding, a report is run by the OFA Data Programmer to determine who received SC Grant in the prior academic year and met the criteria to be potentially eligible for renewal (e.g. a full-time student had to earn at least 24 credit hours in prior academic year and have at least a 2.000 cumulative Winthrop GPA). A Y is batch posted into ROAUSDF for the new aid year for all those students to ensure returning students met the renewal criteria before being awarded SC Grant funds. Funding cannot be guaranteed from year-to-year. That ROAUSDF field is used in Banner's awarding rules.

Initial awards are packaged automatically using Banner's auto package system and the system prevents students from being awarded over the Cost of Attendance to ensure compliance with federal and state regulations. The programming required to award aid (RORRULE & RPRGFND) will serve as the initial awarding criteria. The Director of Financial Aid uses historical funding data to project how much SC Grant is available to award. Subsequent awards will be made as funding is available, especially after Winthrop receives its SC Grant allocation in late July from the state. Subsequent awards will follow the same criteria as initial awards, but may further narrow the applicant pool using specific criteria to find the number of applicants that matches the funding available. The Director of Financial Aid (or her designee) will maintain the additional awarding criteria used each time additional awards are made.

If subsequent awards are added to a student's award package, each student's award package is reviewed to ensure student's financial aid awards are not over Cost of Attendance for the aid year and/or Cost of Attendance by Term (if applicable) and to ensure student's awards are not over a student's financial need by aid year and/or by term. If necessary, OFA will adjust a student's award package to eliminate the overaward following Winthrop's *Overaward and Overneed* policy.

*Effective August 2021 (and now into law)* state regulations were updated to allow maximum awards up to \$3,500 per year for a full-time student. It also limits students to \$14,000 total lifetime funding. There is no longer a requirement of only eight terms of an award. Also allows a summer award.

OFA adheres to all deadlines outlined by federal, state and Winthrop regulations.

## Refunds – Traditional Student

Winthrop University follows CHE's guidance for refunds for students who withdraw to apply the same institutional policy. SC Grants will be adjusted by the same percentage that tuition is reduced (e.g. 50%).

Initial awards are made assuming a student will be attending full-time. Students who begin at least half-time hours, but less than full-time hours will have their Cost of Attendance and awards adjusted according to institutional policy before

# Winthrop University's Office of Financial Aid Policies and Procedures

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disbursement. At the present time, students  $\frac{1}{2}$  award for half-time enrollment (no more than \$1600 per year).  $\frac{3}{4}$  time is \$1875 per year. Exceptions can be made at the discretion of the director (e.g. student with reduced course load).

Students who do not begin at last half-time hours will have their entire term SC Grant award cancelled.

## **Billing – Traditional Student**

Each semester, after the academic fee adjustment period (approximately 30-60 days after the state of the semester), a member of the Controller's office submits a reimbursement request to CHE for the total amount disbursed (credited on the students accounts) for the awards processed by OFA for the semester by the deadlines published by CHE. If an additional award is made, or an award is reduced, after the initial semester's request is made to CHE, then those funds would be added or subtracted, whichever is appropriate, in the following semester's request, or at fiscal year-end.

## **Procedure – CTP Student**

CTP students are required to complete a Free Application for Federal Student Aid (FAFSA) before they can be considered for title IV aid and any state or Winthrop need-based aid. In special circumstances, additional documentation may be required before a financial aid package can be provided (e.g. dependency override paperwork). Students must complete all required documentation before financial aid can be disbursed. Most required documentation is available for view to students via Wingspan and to staff via RRAAREQ or ROASMRY.

Winthrop is told how much a CTP student can receive in SC Grant funds each year from CHE (amount depends on allocation and potential number of eligible recipients in all 5 SC CTP programs). For 21/22 that amount is \$7,500 per student and for 22/23, 23/24, and 24/25 it is \$10,000 per student as long as they have gross need (awards are smaller depending on a student's gross need).

Awards are made manually into the Banner system by Director (or her designee). Need and eligibility (e.g. SAP, Residency) is reviewed at that time. Awards are not made if student does not meet eligibility criteria (e.g. residency).

## **Refunds – CTP Student**

Winthrop University follows CHE's guidance for refunds for students who withdraw to apply the same institutional policy. SC Grants will be adjusted by the same percentage that tuition is reduced (e.g. 50%).

CTP students must be full-time per Winthrop policies so there is no need to pro-rate awards.

## **Billing – CTP Student**

Each semester, after the academic fee adjustment period (approximately 30 days after the state of the semester), a member of the Office of Financial Aid completes CHE's invoice for CTP students. He/she sends it to the Controller's office who submits a reimbursement request to CHE for the total amount disbursed (credited on the students accounts) for the awards processed by OFA for the semester by the deadlines published by CHE. If an additional award is made, or an award is reduced, after the initial semester's request is made to CHE, then those funds would be added or subtracted, whichever is appropriate, in the following semester's request, or at fiscal year-end.



# Winthrop University's Office of Financial Aid Policies and Procedures

**Policy and Procedure:** Foster Care Youth Funding Awarding

**Drafted By:** Michelle Hare

**Date Revised:** Summer 2023

These procedures are meant as a guide for awarding Foster Care youth funding. When awarding, you should ALWAYS defer to the state regulations which can be found at [www.che.sc.gov](http://www.che.sc.gov).

## General Guidelines

- Institutions must give first priority and award the maximum allowable Need-based Grant (\$3,500 if full-time or \$1,750 if part-time) to students who are in the custody of the South Carolina Department of Social Services (DSS). However, institutions should not award the maximum amount if, by doing so, this causes the student to exceed the unmet need according to Title IV Regulations. Students who may be eligible under this provision are responsible for contacting the institution and providing official verification to the institution that he/she is in custody of DSS. Acceptable verification shall include a letter from DSS.
- In addition, these students are eligible for additional funding of up to \$2,000 of "Foster Care" funding.
- To be eligible to receive the maximum award and additional funding, foster youth must self-identify their foster care status to either the institution's Financial Aid Office, the Commission on Higher Education, or the Department of Social Services and must complete a Foster Care Waiver Form. The form can be downloaded from the Commission on Higher Education's website

## Initial Awarding

- Students may submit the Foster Care Waiver Form to the Office of Financial Aid. If so, forward the form to Kathryn Harris ([kharris@che.sc.gov](mailto:kharris@che.sc.gov)) at CHE before moving forward.
- Most often, Kathryn Harris will send notice of eligible students each year. Once you receive notice from CHE:
  1. Ensure student is awarded maximum amount of SC Need-based Grant they are eligible to receive
  2. Award SC Foster Care Youth funding (SCFCY) – up to \$2000 dependent upon need
  3. Make a note in RHACOMM regarding eligibility confirmation per CHE
  4. Save email from CHE in shared drive

## Refunds

- Winthrop University follows CHE's guidance for refunds for students who withdraw to apply the same institutional policy. SCFCY will be adjusted by the same percentage that tuition is (e.g. 50%).

## Billing

- Each semester, after the academic fee adjustment period (approximately 30 days after the start of the semester), a member of the Controller's office submits a reimbursement request to CHE for the total amount disbursed (credited on the students accounts) for the awards processed by Financial Aid for the semester by the deadlines published by CHE. If an additional award is made, or an award is reduced, after the initial semester's request is made to CHE, then those funds would be added or subtracted, whichever is appropriate, in the following semester's request, or at fiscal year end.

## Renewing Awards

- As soon as possible after Spring grades are official, begin reviewing students for renewal of SC Need-based Grant and Foster Care Youth funding