

**The Division of Vocational Rehabilitation Services
And
The N.C. Division of Services for the Blind
And
The N.C. Association of Student Financial Aid Administrators**

This Memorandum of Understanding (the Memorandum) made and entered into this fifteenth day of March 2003 is by and between the Division of Vocational Rehabilitation Services (DVRS) of the North Carolina Department of Health and Human Services, the Division of Services for the Blind (DSB) of North Carolina Department of Health and Human Services and the North Carolina Association of Student Financial Aid Administrators (NCASFAA) regarding joint support of students who are disabled.

Definitions:

DVRS means the Division of Vocational Rehabilitation Services of the North Carolina Department of Health and Human Services.

DSB means the Division of Services for the Blind of the North Carolina Department of Health and Human Services.

NCASFAA means the North Carolina Association of Student Financial Aid Administrators, a voluntary association composed of persons associated with colleges, universities, community colleges, technical colleges and institutes, proprietary institutions, government agencies, and private and community organizations concerned with the support and administration of student financial aid programs.

The designation of DVRS/DSB or "Division" used in this Memorandum means either of the governmental units defined above or both as is appropriate to serve the individual client/students.

I. PURPOSE:

In recognition of the need for a close working relationship between DVRS/DSB counselors and financial aid officers at postsecondary schools in North Carolina, this Memorandum sets forth mutually agreeable procedures and responsibilities for the joint financial support of students attending postsecondary institutions within the State. The Memorandum reflects the collective concerns of DVRS/DSB and the NCASFAA membership that individuals with disabilities receive fair and equitable treatment in obtaining financial assistance for a postsecondary education. By nature and by law, some differences in philosophy and methodology in providing financial assistance to students who are disabled may exist between DVRS/DSB and respective financial aid officers. By insisting upon meaningful and responsible communication between DVRS/DSB counselors and financial aid officers, the Memorandum attempts to insure equitable treatment for individuals with disabilities and reduce for them, when possible, the financial barriers to a postsecondary education.

NCASFSA is a voluntary association. Adoption of the Memorandum by the membership is not individually binding on any institution, agency or organization that may have individuals in their employ who hold NCASFSA membership. However, NCASFSA encourages North Carolina postsecondary educational institutions to follow the principles, procedures and responsibilities set forth by the Memorandum regarding the awarding of financial aid to persons with disabilities.

II. AREAS OF COOPERATION

The core of this Memorandum contains five basic components:

- A. DVRS/DSB client, attending a postsecondary institution in North Carolina be required to apply for financial aid by using the Free Application for Federal Student Aid (FAFSA), which measures family ability to contribute to the cost of a postsecondary education and serves as the application for all federal student aid programs. Other forms may be required by DVRS/DSB or an educational institution in order for the student to be considered for state and institutional aid programs.
- B. DVRS/DSB clients may receive DVRS/DSB assistance to complement aid offered by institution.
- C. DVRS/DSB and NCASFSA will establish policies and procedures for cooperation in the payment of costs of students who are residents, off campus residents or commuters at postsecondary schools within the State.
- D. The Federal Work Study Program may be utilized, where appropriate, in a number of ways to provide assistance to eligible students with disabilities:
 1. Provision of jobs for students with disabilities both within the institutions and under contract with public and private nonprofit agencies;
 2. Employment of students within the institutions who will provide necessary support services to students with disabilities;
 3. Contract arrangements between institutions and DVRS/DSB for off-campus employment of students.
- E. DVRS/DSB clients who are eligible to receive Federal and State funded (either in whole or in part) financial aid should have financial need based upon an educational budget met first with those funds. DVRS/DSB will endeavor to supplement and complement such Federal or State funds to meet the unmet educational financial need and the special financial needs created by the client's disability.

III. RESPONSIBILITIES OF DVRS/DSB

- A. Determine the appropriateness of a client's educational and vocational choice insofar as qualification for DVRS/DSB financial support is concerned. Financial support from DVRS/DSB shall be directed toward meeting those student educationally related costs after the Expected Family Contribution (EFC) and financial aid resources (grants, work study funds and loans) have been packaged by the financial aid officer. The difference between the Cost of Education minus EFC and other financial aid resources and educational and special services costs may be assumed by DVRS/DSB, consistent with Division guidelines by DVRS/DSB. DVRS/DSB may exercise the option, after consultation with the financial aid officer, to replace all or part of the loan component within the student financial aid package with financial assistance from DVRS/DSB resources. DVRS/DSB reserves the right to terminate financial support for clients who cannot adjust to the educational situation or who fail to make normal academic progress as established by DVRS/DSB. DVRS/DSB will determine the amount of assistance it will provide and notify the financial aid officer prior to the actual awarding of the assistance to the client.
- B. In the event a person is put on probation by the Division, this information is shared with the financial aid office.
- C. Recognize the need of a financial aid officer to know when a client receives DVRS/DSB financial assistance. DVRS/DSB shall communicate this information via form DVR-0223 developed to provide the essential information that will enable the financial aid office and DVRS/DSB to carry out the financial aid support, decisions and arrangements of the Memorandum.
- D. Notify the financial aid office in writing prior to the beginning of any term if the agreed upon DVRS/DSB financial support will not be forthcoming.
- E. DVRS/DSB may meet costs directly related to the client's disability. Such assistance will not be included in determining eligibility for financial aid.
- F. Determine if special support services are needed and inform the financial aid office of their nature and costs of services and the amount DVRS/DSB is going to contribute toward their costs via the Financial Aid Information Exchange Form, DVR-0223.

IV. RESPONSIBILITIES OF FINANCIAL AID OFFICERS

- A. Determine the financial need of DVRS/DSB clients who submit a completed FAFSA. After packaging the student according to the institutional packaging policy, the financial aid officer should:
 - 1. Add any expenses identified by DVRS/DSB and related to the student's disability to the cost of attendance.
 - 2. Adjust award, if necessary, after information exchange with DVRS/DSB regarding monetary support for student. If DVRS/DSB assistance creates an overaward situation, institution should:
 - a) Be sure additional expenses incurred by the student due to his/her disability have been included in student's cost of attendance;
 - b) Allow DVRS/DSB assistance to replace self-help if possible;
 - c) Reduce other aid to prevent overaward.
- B. Notify DVRS/DSB of any change in the student's financial aid package, which may affect the level of DVRS/DSB support.
- C. Try, in packaging financial aid, to be sensitive to any unique characteristics of the DVRS/DSB client. Unless advised to the contrary by a qualified DVRS/DSB counselor, the Financial Aid Office will encourage the employment of disabled students in the FWS program and, where appropriate, use the Federal Work Study Program to provide special services whenever possible for disabled students who may require these services.
- D. Refer to DVRS/DSB any applicant for financial aid who also may meet DVRS/DSB criteria.

V. JOINT RESPONSIBILITIES OF THE PARTIES

- A. Attempt to keep the client actively involved in all negotiations that occur.
- B. Keep each other well informed by any changes in programs, policies and/or procedures so as to honor in good faith the provisions of the Memorandum.
- C. Periodically, sponsor training programs and develop technical assistance materials designed to educate all parties as to current DVRS/DSB and NCASFAA policies and practices.
- D. Recognize the importance of full professional communication when dealing with mutual client/students.
- E. Agree to review the Memorandum as needed.

VI. PROCEDURES FOR COMPLETION OF FINANCIAL AID INFORMATION EXCHANGE FORM DVR-0223

- A. DVRS/DSB will provide to the financial aid officer the Financial Aid Information Exchange Form No. DVR-0223 with information on the student who has signed the consent for exchange of information.
- B. The financial aid officer will complete Part B of the DVR-0223 and forward it to the designated DVRS/DSB counselor. Whenever possible, this will be done within a 14 day period after receipt of the form.
- C. DVRS/DSB will complete section C of the DVR-0223 and return it to the financial aid officer. This action will be followed by an authorization for services within 14 days, whenever possible.

VII. EVALUATION

This Memorandum, which is effective May 1, 2003 may be modified as necessary upon written request of any of the parties. This Memorandum supersedes all other Memorandum prior to the date of execution of this document.

Rose Mary Stelma
President, NCASFAA

Date

John Deluca, Director
Division of Services for the Blind

Date

George McCoy, Director
Division of Vocational Rehabilitation Services

Date