



NORTH CAROLINA COMMUNITY COLLEGE SYSTEM

Dr. William S. Carver, II

Interim President

October 7, 2020

MEMORANDUM

TO: Business Officers
Chief Academic Officers
Financial Aid Directors
Senior Continuing Education Administrators

FROM: Kimberly Gold, Senior Vice President/Chief Academic Officer

RE: **GEER Scholarship Funds – Frequently Asked Questions and Required Workflows**

There have been numerous questions on how best to operate the GEER Scholarship Program. This memo serves as guidance to colleges on the operation, documentation, and reporting of the program and contains a Frequently Asked Questions (FAQ) Resource and the required Business Office and Financial Aid Workflows/Job Aids to guide colleges through the processing requirements of the program. The success of the program depends on strong collaboration on campuses between Workforce Continuing Education program staff, the Business Office, and the Financial Aid Office.

Frequently Asked Questions

The GEER Scholarship Program provides a unique opportunity to reduce barriers faced by Workforce Continuing Education students pursuing short-term workforce training pathways. Because this represents the largest ever state-wide investment in WCE students, this has raised many questions on how best to implement the program across the three primary involved offices on campus. Attached, please find a frequently asked questions document organized by three primary question types – policy, financial aid, and business office. Further questions not covered in the document should be directed to the individuals below.

- Brandy Andrews, Associate Vice President for College Finance & Operations
 - andrewsb@nccommunitycolleges.edu
- Monty Hickman, Associate Director for Enrollment Management
 - hickmanm@nccommunitycolleges.edu
- Nate Humphrey, Associate Vice President for Workforce & Continuing Education
 - humphreyn@nccommunitycolleges.edu

Business Office and Financial Aid Workflows (Mandatory Process)

Due to the complexities of administering these funds and associated state and federal reporting requirements, this program must follow the provided workflows utilizing the Colleague Financial Aid module. These required processes will facilitate data matching at the state-level for required outcomes reporting. In collaboration with test colleges, System Office Business Systems Analysts (BSAs) developed the provided Business Office and Financial Aid Workflows, which are mandatory for this program. Colleges experiencing implementation issues should open a ServiceNow ticket to request any needed troubleshooting assistance. Provided workflows are posted in the ServiceNow Knowledge Base and can be accessed at <https://ncccs.service-now.com/sp>. Questions regarding the workflows should be directed to the appropriate BSA at the contact information provided below.

- Holly Martin, BSA - Financials & Accounts Receivable/Cash Receipts
 - martinh@ncccommunitycolleges.edu
- Brandi Massey, BSA – Financial Aid
 - masseyb@ncccommunitycolleges.edu

Attachments:

Frequently Asked Questions (FAQ) Resource

cc: Brandy Andrews, Associate Vice President for College Finance & Operations
James “J.W.” Kelley, Associate Vice President for Student Services
Nate Humphrey, Associate Vice President for Workforce & Continuing Education
Monty Hickman, Associate Director for Enrollment Management
CC Continuing Education Registrars

GEER Scholarship Program - Frequently Asked Questions

Policy Related Questions:

#	Question	Answer
1	Does the scholarship have to be awarded at the beginning or after the student completes the course? Is the scholarship contingent upon the student completing the course, or is that a local decision?	This program intends to remove access barriers to high-quality short-term workforce training. Scholarship funds should be awarded as early as practicable to students and are not contingent upon completing the program. Completion incentivization, while admirable, is not in the intent of this program.
2	If a class does not cost \$750, does the student receive the balance?	Colleges have the flexibility to determine the funding level a student is awarded locally, up to \$750 per course in a pathway, or up to the cost of the course fee(s) if they exceed \$750. Funds awarded above the charges on the student account should be refunded to the student to assist with other costs of attendance such as books, supplies, credentialing tests, transportation, childcare and other components of the total cost of attendance.
3	Does the allocation have to be spread out over two years, or can Colleges use it until all funds are exhausted?	This is a local college decision. Colleges are encouraged to assess the needs of their communities and local economic conditions in deciding.
4	Are underage or CCP students eligible for this award?	This program intends to remove barriers for individuals seeking short-term workforce training to reenter the workforce. Students meeting all State and local enrollment eligibility requirements and policies and pursuing an approved WCE Pathway are eligible.
5	Are CCR students working towards their HSE diploma eligible?	Students pursuing an approved WCE Pathway are eligible. If a CCR student is co-enrolled in an approved WCE Pathway, they would be eligible.
6	Is this based on need, and if so, is it based on the poverty guidelines, or is that a local decision?	As outlined in Numbered Memo CC20-057, the scholarship awards are determined by each college based on student need, local industry needs, number of eligible students, and cost of course, up to a maximum award of either \$750 per course or the cost of the course fee(s) if the fee(s) exceed \$750. The scholarships help cover the cost of tuition, fees, books, supplies, credentialing tests, transportation, childcare, and other components of the total cost of attendance.
7	Are fully online programs eligible?	Yes - there is no restriction on instructional modality.
8	Is there a maximum of how many times a student can receive GEER funds? For example, a student receives funds in one approved CE program that has already started, then drops and starts another CE approved program.	Students can receive funds for each course within a pathway. Colleges may determine if students are eligible to complete more than one pathway locally.
9	Are waived students eligible for funding? What if the cost of the course is less than \$750?	Yes. Per Numbered Memo CC20-057, costs other than tuition are included in the total cost of attendance for students, including, for example, transportation, housing, childcare, or healthcare. Therefore, Colleges may include these factors in their local determination of need.
10	What are the approved pathways?	As noted in the Numbered Memo CC20-057, automotive, aircraft maintenance, construction, criminal justice, emergency medical services, healthcare, industrial/manufacturing, information technology,

	transportation, and fire and rescue service are all approved pathways. Note: Colleges have local flexibility to add additional Pathways to meet local workforce needs. Approved pathways are Workforce Continuing Education (WCE) pathways/courses offered for 96 hours or more and leading to a State or industry-recognized credential on the state's managed credential list in Colleague. Pathways should prepare North Carolinians for living-wage careers or provide career paths that lead to one.
11	Can we add local Pathways to the application? Yes. As stated on Numbered Memo CC20-057, colleges have local flexibility to add additional Pathways to meet local workforce needs and add them to the application.
12	The application has a question about being affected by COVID-19 and how. Does this need to be verified with documentation? No. The purpose of this question is for statistical purposes. This is not an eligibility requirement, and it does not require documentation.
13	If we award this upfront, what happens if the student drops? Are they responsible for returning the funds? Colleges are encouraged to adopt sound local fiscal policies balanced with removing access barriers. One example might be releasing funds in excess of the charges on the student account on or after the first day of class once entry is confirmed. Colleges are reminded that while these are federal funds, this is not a Title IV award and not subject to specific Title IV regulations. Colleges are not responsible for returning funds for students who drop or fail to complete.
14	Can students who are currently enrolled in a class now apply for the scholarship to use the funds to assist with the balance of their course fees, transportation, and childcare? Yes. Any student with need who enrolled on or after August 24th, 2020 or enrolling prior to September 30, 2022 is eligible.
15	Are we required to use the application provided, or can we adapt it to our local needs? Colleges are encouraged to use the provided application and amend as needed locally.
16	Do we need to find out from students what their needs are? While not a data collection requirement, Colleges should follow their local processes for screening and accessing student needs.
17	If classes started after 8/24, can we go back and award these scholarships? Yes. Any student with need who enrolled on or after August 24th, 2020 or enrolling prior to September 30, 2022 is eligible.
18	If the class is canceled or the student does not come to class, we should notify the financial aid? Yes. This program intends to remove access barriers to high-quality short-term workforce training. Colleges are encouraged to adopt sound local fiscal policies balanced with removing access barriers. To achieve the objectives of the GEER Scholarship, the WCE program, financial aid, and business office staff must all work together.
19	Can we apply scholarship funds directly to the cost of the class? No. For reporting and accounting purposes, Colleges are required to utilize the Financial Aid process in Colleague to administer this program. While this is different from the typical handling of other WCE scholarships, it is a mandatory requirement of these funds. Colleges will be monitored monthly to ensure the provided Financial Aid and Business Office processes are being followed to ensure accurate program reporting.
20	Do we need to run SECU Continuing Education through financial aid also? No. At this time, only GEER, Golden LEAF, and BCBS - Firefighter Scholarship are the only three CE programs operated through the Financial Aid module. Local colleges can operate other programs this way; however, only these three require this method.

21	What is the total communication funding money available?	As noted in the State Board Item FC02 (8/21/20), which allocated these funds, "to assist college communication efforts regarding these new scholarship funds to improve student access to education meeting local industry needs, \$450,004 is designated for Communication/Program Success. These funds will be divided into eight economic development regions with one college from each region selected as the lead college as determined by the System President." System Office staff will be convening colleges for regional meetings to assist with leading colleges across the State to serve as fiscal agents for their regions.
22	How will lead colleges for the regional marketing campaign be selected?	To assist college communication efforts, \$450,004 was designated for Communication/Program Success. These funds will be divided into eight economic development regions with one college from each region selected as the lead college as determined by the System President. Colleges will be convened by Economic Prosperity Zones to help determine a lead college to serve as the fiscal agent for each region.

Business Office Related Questions:

#	Question	Answer
1	Do these students need to report SSN for 1098T reporting?	The instructions for Form 1098-T state that reporting is not required for anyone who is not seeking academic credit (CE students). However, the IRS is implying that you do not have to report when net QTRE is zero. If a CE grant/scholarship exceeds QTRE then it is potentially taxable gain and should be reported. Consistent with prior 1098T communications, colleges must decide the level of risk of interest and penalties you are willing to take. Otherwise, the safest option is to collect SSN and report. Colleges should apply this decision consistent with decisions made for CE students in the past.
2	Will this need to be reported to NCPRO every month?	Yes, GEER will be reported monthly to NCPRO on new attachments G-1 and G-2. A new upload link will be provided to colleges, when available.
3	Why are there three reporting processes associated with this program?	All three require different reporting details. The System Office data pull will collect detailed student data. State Aid will require a high-level summary month-end verification of FA and GL to ensure colleges are "paying themselves back" for all award transmissions. NCPRO reporting requirements are outside of the System Office, and we do not see or have access to anything submitted by colleges.
4	Will this process result in double-counting revenues and expenses? Will colleges need to make elimination entries during Financial Statements?	Correct. Similar to GoldenLeaf (when it was put on the 112), colleges should include GEER on your year-end list of needed elimination entries for financial statements.
5	For NCPRO reporting, what detailed documentation will be needed for this? Checks copies are typically required to be sent, and this could violate FERPA.	Colleges should upload the state funds check (cut from purpose 551) and include a clear FA reference number that will allow the student awards to be found quickly if selected for audit. For example: include the FGLR/FGLP reference number for each FA batch being paid on each state funds check (that is visible on the printed check copy). This is the same number that is reflected in the TFAR - FA Transmittal GL Posting report.
6	For the GoldenLeaf funds awarded, do we cut checks to institutional at the time of award?	Financial Aid budget allocations on the 112 should cut checks monthly based on the awards transmitted that month to cover the negative institutional fund cash balance. The entire allocation

	We cut one check to institutional and then at year-end cut it back to State.	should not be moved to institutional funds at the beginning of the year. Monthly 112 reports are monitored for program status. If a college cuts check for all allocation at the beginning of the year and then moves some back to State at year-end, it does not allow accurate System office grant monitoring and drawdowns.
7	With GoldenLeaf, we were provided with an object code; what object code do we need to use for GEER?	A state funds general ledger object code will not be assigned for GEER - the only code assigned is purpose code 551 with vocational code 80 for State budget and expense. Note: Never use state fund code 11 in the Financial Aid setup.
8	Can we move all funds at once into Institutional from State, or do we have to wait until they are awarded?	No. Colleges should only move funds once the awards have been transmitted and hit student accounts. Funds should not be moved to create a positive fund balance in institutional funds, only to pay for a negative fund balance created by the transmission of awards.
9	Will colleges have to process the FATR with a Continuing Education term to allocate to course fees appropriately?	This is correct. At present, the FA transmittal process cannot be award to CE terms due to overlapping term dates. A Business Office workflow document has been created to assist in this process.
10	How are payments applied to the class given term issues?	See Business Office Workflow: Continuing Education Scholarship Award by Financial Aid

Financial Aid Related Questions:

#	Question	Answer
1	Is this process something colleges will be doing for all CE scholarships from now on? (Running through FA?)	No. Only three programs require this approach due to their complexities - GEER Scholarships, Golden Leaf, and the BCBS - Firefighter Scholarship program. However, nothing prevents a local college from determining using this approach for other scholarship programs.
2	Do we need students to sign a release?	Yes. Colleges are encouraged to utilize the sample release provided in the Scholarship Guide.
3	Are we expected to go back and create all the new award codes referenced in the scholarship guide and transmit ALL CE funds for 2020-21?	No. Only three programs require this approach to their complexities - GEER Scholarships, Golden Leaf, and the BCBS - Firefighter Scholarship program. However, nothing prevents a local college from determining to use this approach for other scholarship programs.
4	How do colleges "transmit" CE awards?	Colleges should follow the outlined processes as outlined in the Colleague Scholarship Guide.

Please reference Numbered Memo CC20-060 for additional information, including workflows/job aids. Further questions not covered in these documents should be directed to the individuals below.

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