



Financial Aid and Student Accounts: Policy and Procedures Manual
2022-2023 and 2023-2024

Last updated by Judy Cuellar on 03/27/2023

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Schreiner University Financial Services Office

Policy Development

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Financial Aid Mission Statement

The Schreiner University Financial Aid Office strives to provide its students with excellent individualized customer service that assist them with finding the appropriate financial aid for their situation.

SECTION 1: MANUAL INTRODUCTION

Financial Aid Policies and Procedures

The Schreiner University Director of Financial Aid and Student Accounts is responsible for developing policies and procedures related to financial aid and accounts for the school. These policies and procedures as related to undergraduate, graduate, and certifications are made in conjunction with the administration of the University.

The Schreiner University Director of Financial Aid and Student Accounts works with the AVP of Admissions in administrating policies related to merit scholarships awarded in the Letter of Admission. Merit scholarship inquiries should be made to the Director of Admissions.

Updated policies and procedures for all programs are communicated through the Financial Aid sections of that programs website. New policies or changes will also be communicated through emails made directly to students, faculty, and/or staff.

Federal Financial Aid Updates

The SU Director of Financial Aid and Student Accounts keeps abreast of federal regulations through a variety of resources. This includes the Federal Student Financial Aid Handbook, Dear Colleague Letters, NASFAA newsletters, the IFAP website, webinars, and conferences through varying resources.

The following operating policies are designed to assure that the Financial Services Office is effective in carrying out its responsibilities:

1. All students seeking federal student loans must submit the FAFSA to SU annually (School Code 003610).
2. All students seeking federal student loans must accept the student loans through the Schreiner One portal and complete any online paperwork.
3. The selection of students to receive certain designated scholarships shall be submitted by the responsible staff member to the Financial Aid Office for processing. Outside student resources must be reported to the Financial Aid Office via email or in person.

4. The Financial Aid Office shall maintain adequate records to ensure proper administration of aid funds. This includes ensuring that aid given is not in excess of need and/or the cost of attendance and that aggregate awards do not exceed total expenditures of funds under each program.
5. Selection of students to receive financial aid will be made without regard to age, sex, race, color, religion, sexual orientation, national origin, disability or marital status.

SECTION 2: ADMINISTRATIVE ORGANIZATION OF THE FINANCIAL AID OFFICE

Division of Responsibility between Financial Aid and Fiscal Offices

There exists a clear and separate division of responsibility for the administration of financial aid programs which are divided between the FAO, student accounts, and the Business Office. In order to maintain this division, each office is accountable for the following responsibilities.

The SU Financial Aid Office is responsible for the following:

- Collect supporting documentation for the determination of aid eligibility
- Determine student eligibility for financial assistance
- Award federal aid in compliance with laws, regulations, and policies
- Notify students of aid eligibility (loans and scholarships/grants)
- Assist students with creating personal student budgets, administration of Schreiner Scholarships, federal checklist completion, FAFSA verification
- Assist students with sponsored/external scholarship payments, private loan certification, bursar disbursements
- Compile and complete financial aid institutional, state and federal reports
- Prepare a master list of scholarships awarded for the current year and update as appropriate
- Fund Management (Scholarships and Endowments) The Student Accounts Office is responsible for the following:
 - Maintain and disburse accurate bills
 - Collect payments for student accounts
 - Disburse funds to students
 - Report outside scholarships received to the Financial Aid Office
 - Process school loan certification
 - Process Electronic Funds Transfers to the student accounts
 - Administer the Direct Loan Program

Financial Aid Office Operations

The Schreiner University Financial Aid Office is open and available to service students from 8:00am-5:00 pm Monday through Friday or via email at any time. General financial aid forms are set up through the Net Partner portal within Schreiner One. Emails are responded to within 24 hours. Every attempt is made to return calls the same business day, and no later than the next business day.

Students are not required to make appointments to meet with Financial Aid Staff. However, students wishing to make an appointment can contact the Financial Aid Office directly by phone: 830-792-7303 or email: financialservices@schreiner.edu, or by booking an appointment at this link: [Financial Services Appointment Request](#).

The personnel policies of staff members are outlined in the Schreiner University Human Resources link on Schreiner One. Performance evaluations are conducted on an annual basis. Forms must be completed by immediate supervisors.

Records Management and FERPA

All records and conversations between an aid applicant, their family and the staff of the Financial Services Office are confidential and entitled to the protection ordinarily given a counseling relationship. The University assures the confidentiality of student educational records in accordance with institutional, state, and federal laws including the Family Educational Rights and Privacy Act (FERPA) of 1974. For more information regarding FERPA, including what is and is not considered directory information, please visit the student handbook link: [Microsoft Word - STUDENT PRIVACY RIGHTS FERPA \(schreiner.edu\)](https://www.schreiner.edu/microsoft-word-student-privacy-rights-ferpa)

SECTION 3: FINANCIAL AID PROGRAMS

Financial aid programs which are available to students attending the Schreiner University are listed on the Financial Aid sections of the website [Types of Aid - Schreiner University](https://www.schreiner.edu/types-of-aid). The SU Financial Aid Office awards federal and institutional resources listed below based on the eligibility criteria outlined.

Federal Resources

Pell Grant
FSEOG Grant
TEACH Grant
Federal Subsidized and Unsubsidized Loan
Federal Workstudy
Federal Parent and Graduate PLUS Loan
Veterans Administration (VA) GI Bill/Yellow Ribbon Program

Institutional Resources

SU Merit Scholarships – based on GRIT
SU Endowment Awards
Schreiner Grant – based on financial need
Yellow Ribbon Match Award
Departmental, performance, or program based awards

Federal Resource Requirements

To be eligible to receive Federal assistance, a student must:

1. Be enrolled at least half-time (6 credit hours Fall, 6 credit hours Spring, 6 credit hours summer)
2. Be a U.S. citizen, U.S. national, or U.S. permanent resident or reside in the United States for other than a temporary purpose (supportive documentation may be required to verify residency or citizenship status).
3. Maintain satisfactory academic progress (2.0 GPA UG, 3.0 Graduate) in their course of study.
4. Not be in default of any loan or owe a repayment on a Federal Pell Grant, FSEOG, or State Grant.
5. Demonstrate financial need.

Federal aid is awarded in accordance with the Department of Education guidelines. Federal loans are awarded after any grants or scholarships (including outside scholarships which must be reported on the Financial Aid Application), and are applied toward any unmet cost of attendance.

Institutional Resource Requirements

All institutional scholarships are awarded prior to the student's first semester and carried throughout the student's SU career. These scholarships must be applied toward tuition.

A student will not be allowed to receive a refund of institutional aid. If the sum of their institutional aid exceeds the cost of tuition causing a credit on the student's account, the institutional aid will be reduced to actual tuition costs. For students who may receive a full cost of attendance award (e.g. Sumner's Scholars, Young Scholars, PASA...), if the sum of their institutional aid exceeds the cost of attendance causing a credit on the student's account, the institutional aid will be reduced to actual costs.

Awards:

The Merit Scholarship program is based on a student's application and resume provided to SU. The University knows there's more to you than your grades. Yes, GPA, test scores, and grades are important, but Schreiner University awards scholarships of up to \$100,000 over four years based on your GRIT!

We care more about how you were the Student Body Secretary, clubs you were in, volunteer hours, after-school jobs, the time your debate team won the state championship, founded your school's gaming club, and other ways you've been involved outside of the classroom. Tell us about your:

- Generosity – Where you volunteered or have been generous with your time
- Resilience – What challenges you have overcome and where you strived to succeed
- Involvement – What clubs, activities, or programs you participate in
- Tenacity – In what ways you have been a leader or persisted

Plus, there's no extra step – your application to Schreiner is also your scholarship application! Be sure to add all of your involvement to get up to \$100,000 in scholarships over four years.

Endowment funds are assigned to SU students based on data applicants included on their Schreiner Admission Application. Students are matched to endowment awards based on their interests and areas of previous study. Students are selected for awarding from endowments by the Director of Financial Aid and Student Accounts unless the endowment is assigned to a particular person or committee within a program of study. Some Endowment Funds are used as replacement for institutional gift aid and some Endowment Funds are added as stackable scholarships. Endowment funds cannot produce a refund to the student. They are intended to cover tuition only. Applications for stackable endowment funds will be provided to students when scholarship funds are made available.

Schreiner University offers spaces to veterans who qualify for the VA's Yellow Ribbon Program. This program requires a match of funds from the participating institution. SU has pledged to match VA awards up to \$5,000 per year per space. For more information on veteran's programs please see the Schreiner University VA information website: [Veteran Resource Center - Schreiner University](#)

A student's financial need is taken into account when determining a financial aid offer. SU wants to meet a certain percentage of a student's financial need. Once calculated, if all other financial aid does not meet the percentage, the student is given a Schreiner Grant or Hill Country College Fund Scholarship to fill that financial need.

SECTION 4: STUDENT LOAN POLICIES AND PROCEDURES

Student loan policies and procedures are created and maintained by the Financial Services Office. For more information, please visit their website: <http://schreiner.edu/loans>.

SECTION 5: STUDENT CONSUMER INFORMATION

The staff in the Financial Aid Office recognizes that in order to understand the complications of Financial Aid, accurate and timely dissemination of information to consumers is vital. Several policies have been implemented to ensure appropriate dissemination is achieved. The consumer information policies are developed and maintained by Schreiner University. For more information, please contact the Undergraduate Financial Aid office: [Financial Services - Financial aid - Schreiner University](#).

Rights and Responsibilities of Students on Aid

As a recipient of financial aid, there are certain rights and responsibilities of which students should be aware. These rights and responsibilities of students on financial aid are listed in the following documents:

1. Student Handbook
2. The Financial Aid Award Notification
3. The Master Promissory Note
4. The SU Course Catalog

Students have the right to know the:

1. Financial aid programs available at Schreiner University
2. Application process which must be followed to be considered for aid
3. Criteria used to select recipients and calculate need
4. SU refund and repayment policy
5. Policies surrounding Satisfactory Academic Progress
6. Policies regarding maintaining Merit Scholarships
7. Special facilities and services available for the handicapped

Students are responsible for:

1. Completing all forms accurately and by published deadlines
2. Submitting information requested by FAO staff in a timely manner
3. Keeping the Registrar's Office informed of any changes in address & name
4. Keeping the Financial Aid Office informed of any changes in marital status, financial situation, or any change in student status
5. Reporting to the FAO any additional assistance from non-University sources such as scholarships, loans, fellowships, and educational benefits
6. Notifying the FAO of a change in enrollment status (adding a dual degree program)
7. Maintaining satisfactory academic progress (2.0 for undergraduate, 3.0 for graduate)
8. Re-applying for aid each year (complete a new FAFSA)

Schreiner University has a limited number of fees associated with courses with a laboratory component. These fees are nominal with the exception of lab fees for the Aviation Program.

REFUND POLICY

Schreiner University Institutional Refund Policy states:

Although financial aid must be returned to federal programs as prescribed by federal regulations, the Schreiner University Tuition Refund Policy does not refund tuition at the same percentages. Students will be required to pay Schreiner University for any balances owed after the tuition refund and financial aid refunds have been calculated.

Refund of room charges and meal plans will be pro-rated to the 12th class day for students withdrawing from the university.

Tuition and fees (excluding commitment fee) are refunded to students who are withdrawing from the University according to the following schedule:

Before classes through second day of classes	100 percent
Third through fifth days	75 percent
Through Second week of classes	50 percent
After the second week of classes.	0 percent

Students who withdraw from the Learning Support Services (LSS) program will be refunded a portion of the LSS fee based on the percent indicated above for Fall/Spring. There will be no refunds of LSS fees after the second week.

All Students: Students who change their enrollment status from full to part-time or from a higher to lower level of part-time will receive a refund consistent with the percentages listed above.

In order to OFFICIALLY withdraw from Schreiner University you must notify the Registrar's Office IN WRITING before classes begin. Please use your SU email account when sending written requests.

(See published calendar for dates of each term).

Students who fail to officially withdraw and who do not attend classes or who do not arrange for payment with the Financial Services Office will be administratively withdrawn as of the last day to add a course. Students in this category will fall under the regular refund policy.

Students who attend any classes will be responsible for payment unless they officially withdraw under University policy. In addition, students who are suspended, expelled, or administratively withdrawn will fall under the regular refund policy.

Immediate refunds are not issued at the time of official withdrawal, change in status, or at the end of a semester or session. Payment covering all refunds due to account credit will be mailed to the address left with the Financial Services Office within 90 days after official withdrawal or completion of a semester session. Addresses not properly updated with the Registrar's Office could delay refunds. You may also sign up for e-Refund on CASHNet.

SECTION 6: APPLICATIONS AND FORMS

Application Process

Once additional information is received and reviewed, the Director of Financial Aid finalizes the award(s) and includes the information in the student's folder. If the information is incomplete, the student is notified by the Assistant Director of Financial Aid via phone or email. Once federal verification is completed, the flag indicating verification status is flipped accordingly in PowerFAIDS. The Database Manager in Financial Aid runs queries periodically for any students with Verification status at Required or Pending. The Assistant Director reviews the information and follows-up with the students. When all required documents are received, the student is considered complete and ready to be packaged. The Director of Financial Aid reviews all documentation and creates a financial aid offer and sends a letter via email to the student (and parent if approved by the student).

Pre-Award Appeals

We have limited scholarship funds available at the school. Appeals of the scholarship award decisions made for first time freshmen are made through the Admissions Office. The student provides a resume if their application did not include all high school activities. If you feel you would not be able to join our program due to financial constraints, you may send a letter explaining the situation to the Assistant Vice President of Admissions for consideration of an increase.

Special Circumstances and Unusual Circumstances

Triggers for appeals typically involve involuntary loss of employment by the student, student spouse, or parent, high medical expenses, or child or elder care. Students are instructed to provide documentation of the change in income or out-of-pocket expenses for a particular time period (typically a calendar year for

income and academic year for expenses). Students would be notified of appeal decision by email or appointment. Any change to a financial aid award would be available for view on Schreiner One as well.

Unusual Circumstances involve homelessness or other situations where a dependency override is warranted based on Federal Student Aid regulations.

SECTION 7: FILE REVIEW

Verification

Verification is the process of confirming the accuracy of student reported data on financial aid applications. Only a portion of the student population is selected for verification. Students are notified that they are selected for verification on the FAFSA Student Aid Report (SAR). In addition, the student is notified via email that he/she has been selected for verification.

The SU Financial Aid Office verifies only those applicants identified by the Department of Education (DOE) or if there is conflicting information or a condition which is unusual and warrants investigation. SU systematically verifies only those data elements required by the federal government. However, the Director of Financial Aid may request additional information if further investigation is needed to resolve a discrepancy.

The SU Financial Aid Office is required to resolve any discrepancies discovered in a student's file, regardless of whether the student is selected for verification. The Director of Financial Aid will request additional information from the student to resolve the discrepancy.

For students selected for verification, an automated process assigns a PowerFAIDS checklist (on Net Partner) and email communication to the student. The student may receive an email as well as a reminder of the specific items needed and to let the student know the information may be mailed, faxed, or scanned and uploaded electronically. **All verification requirements must be satisfied by the next to last week of classes of the final term of enrollment for the academic year.**

Verification Exclusions

In the circumstances below, student verification is not required. The Director, Assistant Director of Financial Aid or Financial Aid Counselor documents the specific reason within PowerFAIDS if any of the following applies:

1. An applicant who died during the award year
2. A student who does not receive Title IV funds
3. A student who is eligible to receive only unsubsidized loans
4. Student was selected for verification after ceasing to be enrolled at the school and after all Title IV aid has disbursed.

Data Elements to be Verified and Required Documentation

Adjusted Gross Income and Taxed Paid

The adjusted gross income, federal taxes paid, and most untaxed income is verified through IRS Data Retrieval, which imports tax information from the IRS directly to the FAFSA. This may be completed during the initial FAFSA filing or as a FAFSA correction. If a student cannot or will not use IRS Data Retrieval, s/he must provide an IRS tax transcript for the student and/or spouses, if applicable.

If a student did not file a tax return, s/he must submit all W-2s as well as a signed verification worksheet listing any income for which a W-2 was not received.

Household Size

Household size is verified by comparing the Verification Worksheet to federal data. Discrepancies must be corrected before further processing. Household size does not need to be verified if family size is:

- For independent, single students
- For independent, married students

Number in Postsecondary Institutions

Number of family members enrolled at least half-time in postsecondary institutions is verified by comparing the Verification Worksheet to federal data. Discrepancies must be corrected before further processing. If the student is the only family member enrolled at least half-time in postsecondary institutions, number in college does not need to be verified.

Notification to Students

Students are notified of the results of verification by email, either through a financial aid award notification or revision communication generated through PowerFAIDS or as a personal email sent from the Assistant Director of Financial Aid.

Update and Correction Procedures

There are three situations whereby a Director of Financial Aid may update student information. When students notify the aid office of an allowable update, the Officer may recalculate the student's Expected Family Contribution and the new figure may be used to award financial aid. Updates may occur for: Dependency status (Dependency status may not be changed for previously certified Stafford Loans, and may not be changed due to marital status)

Family size

Number of family members enrolled in a postsecondary institution. If corrections are needed after verification is completed, the verifying counselor updates the incorrect FAFSA information. This will result in an additional FAFSA being received. Once received, verification will be completed on the updated FAFSA information.

Database Matches, Reject Codes, & C-Codes Clearance

For database match and c-codes on the FAFSA, an automated process assigns PowerFAIDS checklists for any missing documentation and sends an email to the student notifying them of this requirement. The Director of Financial Aid would also follow up with an email to the student, providing additional explanation. Financial aid awards are not final until the appropriate documentation is received and verified. Common FAFSA messages and required documentation to clear the message and proceed with a final financial aid award are listed below.

Social Security Administration (SSA)

The student is required to submit a copy of the social security card, confirming the name and SSN, or to correct the FAFSA if errors were made during the initial FAFSA filing.

Department of Homeland Security (DHS)

If the Department of Homeland Security could not verify the student's citizenship, the student must submit additional information. US citizens or permanent residents must submit a copy of a US passport, birth certificate, or naturalization certificate confirming citizenship status. The checklist item is completed by the Officer and a copy of the documentation is stored in the student file. Eligible noncitizens whose A-number did not pass secondary confirmation by Homeland Security must bring unexpired immigration status verification documentation in person to the Financial Aid Office. The Director of Financial Aid completes form G-845 and makes a copy of the front and back of student documentation. This information is sent to the Department of Homeland Security for review. No financial aid is awarded until we have received

confirmation from the Department of Homeland Security regarding student's eligibility for federal financial aid or until **15 business days** after the date the documentation was sent, whichever occurs first.

Selective Service System – Texas Requirement Only

Males aged 18-25 are required to complete selective service registration. The Director of Financial Aid will verify registration status at <http://www.sss.gov>. If the registration is not complete, the student is instructed to go to the website to complete registration. If the student is female, the FAFSA information is corrected and the checklist for additional documentation is waived.

Male students are exempt from selective service registration if any of the following are true:

- Current active duty military
- Not yet 18 as of the date the FAFSA is completed
- Born before 1960
- Noncitizens who first entered the US after age 26 or who entered the US as lawful nonimmigrants on a valid visa and remained in the US on that visa until after they turned 26 If the Director of Financial Aid has adequate information to determine that the student is not required to register, the Financial Aid Office would note this in PowerFAIDS and/or in the student file and proceed accordingly. Otherwise, the student will be asked to register or provide appropriate documentation regarding the selective service registration exemption. If a student has not registered and cannot provide documentation of an exemption, he must contact the Selective Service to get a status information letter addressing his failure to register. This letter will be used to determine if the student is exempt from registration or if he knowingly and willfully failed to register. If the student knowingly and willfully failed to register, he is not eligible for federal student aid.

National Student Loan Data System (NSLDS)

If the student's FAFSA indicates that they are at or near the federal aggregate loan limit or may be in default or owes an overpayment, the Director of Financial Aid pulls the student's NSLDS record and retains this in the student's file. If the student is at or near a federal aggregate limit, the financial award is completed accordingly, to either omit any funding from the pertinent federal program or with a reduction from the standard award amount. If the student is in default or owes an overpayment, the Officer contacts the student to request additional information before completing the financial aid award. Questions regarding the student's eligibility for federal loans are reviewed by the Student Loan office.

Drug Conviction – Texas Requirement Only

If a student has a federal or state drug conviction during a period of enrollment for which the student was receiving federal aid, the student is disqualified from federal financial aid funding. Students selfreport this information on the FAFSA. However, in situations of conflicting information, the School is required to confirm this information.

Review of Subsequent ISIR Transactions

Queries are utilized to identify students with additional federal subsidized Stafford eligibility due to subsequent ISIR transactions. Audit queries are used to identify students who are in a federal overaward situation.

SECTION 8: STUDENT BUDGETS

Student budgets are an important component in the financial aid process. Standard student budgets reflecting the SU average student population cost of attendance at a modest, but adequate standard of living are used to award financial aid. Special budget considerations are approved through the Professional Judgment process by the Director of Financial Aid on a case-by-case basis.

Budget Components

The Director of Financial Aid collects information on an annual basis to prepare standard budgets by academic program and cohort/admit term. The budget components are as follows:

Tuition and Fees

Tuition rates are approved by the Board of Trustees Executive Committee on an annual basis at the February BOT meeting. SU-specific fees are also approved at this time. All other University fees are approved by June. Tuition and fees information is available on the SU Financial Aid website under the Cost of Attendance link. Loan fees are reviewed on an annual basis using the most recent data available.

Books and Supplies

Books are provided as part of the tuition and fees for SU. Students may purchase their supplies separately.

Room and Board

Room and board is based on a survey of average utilities and rent in the area using College Board standards. This amount is used for all Schreiner University student budgets.

Transportation

Transportation costs are based on a student living on campus or commuting to class five days a week. It also includes a component of funds for students who drive back and forth to work each day. This amount is used for all Schreiner University undergraduate student budgets. Graduate student budgets are calculated as commuter budgets for tuition and fees unless the student resides on campus.

Miscellaneous Expenses

Miscellaneous expenses include costs for clothing, toiletries, recreational, and other personal expenses. This amount is used for all SU undergraduate, graduate, and professional student budgets.

Budget Amounts

The Schreiner University tuition and fees for 2023-2024:

Flat-rate tuition 12-18 credit hours: MPP \$37,396

All student budgets include a standard allowance for housing, food, transportation, books, loan fees and miscellaneous expenses.

Special Budget Considerations

Upon request, the Director or Assistant Director of Financial Aid may review, and if appropriate, adjust a student's budget.

Students must submit supporting documentation.

Examples of changes to standard budgets include, but are not limited to:

1. Childcare - the cost of day care with dependent children may be added to a standard budget with appropriate dollar specific documentation. Maximum allowance is \$5000 per child per year. Allowance is for costs incurred by the student during the months of enrollment in the aid year ONLY.
2. Large out-of-pocket medical expenses – medical expenses incurred by the student during the months of enrollment that exceed the normal allowance provided by the Department of Education (generally about 2% of income) may be added to the student budget with appropriate dollar-specific documentation.
3. Additional educational expenses – educational expenses required for the degree and that are not included in our budget or exceed our allocation may be considered with dollar-specific documentation. This may include one-time purchase of a computer, books and supplies that exceed

the allowance, participation in study abroad programs where credits count towards the degree being sought.

SECTION 9: AWARDING AND PACKAGING FINANCIAL AID

Packaging Philosophies

Schreiner University offers admitted students (without full tuition/fee paying sponsors) a program scholarship. This scholarship is merit-based (made without regard to financial need) and no financial documentation is needed to be considered for a program scholarship.

U.S. Citizens and permanent residents are offered financial aid to help cover the full cost of the program upon request (via the FAFSA), this includes a Grad PLUS loan offered for graduate students enrolled at least half-time to meet any gap between institutional/federal resources and total cost of attendance. The student may seek an outside alternative loan, which the Assistant Director of Financial Aid will certify and post in PowerFAIDS. International students without the full support of a sponsor may be awarded a scholarship but will be required to find outside resources to cover the remainder of tuition and fees on their own.

The Financial Aid office works in conjunction with the Business Office and the Admissions Office to develop policies and procedures related to institutional scholarship awarding. The Director of Financial Aid and Student Accounts has oversight of all financial aid policies and procedures to ensure they are aligned with the school's mission.

Packaging guidelines and philosophies are evaluated by the Director of Financial Aid and the Assistant Vice President of Admissions, in conjunction with the Vice President for Planning and Finance and the approval of the President of the University on an annual basis. Merit-based scholarship awarding procedures are reviewed at least annually, and often prior to the beginning of each application cycle.

Package Construction

Student files are reviewed upon admission to the University and upon receipt of a. Standard budgets are built undergraduate and graduate programs. Students selected for verification are contacted regarding supplemental information needed before a financial aid award may be finalized.

Students may receive a financial aid offer up to the cost of attendance; however, SU does not package PLUS or alternative loans.

Outside resources are considered first, then institutional scholarships/grants, guaranteed workstudy, followed by federal loans (Subsidized, Unsubsidized Direct Loans then Grad/Parent PLUS). If scholarship, grants, assistantships and federal loans do not cover the total cost of attendance or if the student is not eligible for federal aid, the remaining gap may be covered by a alternative loan. The student is responsible for seeking any outside loan opportunities.

The Assistant Director of Financial Aid pulls student records and verifies receipt of the Financial Aid Application and any other documentation that the student may have submitted. If the student is selected for verification or if additional information is needed, the Officer emails or calls the student. If the file is complete, the officer reviews the FAFSA and application.

FAFSA information is used to verify eligibility for federal aid, and federal loan annual fiscal limits are monitored automatically. Outside scholarships or tuition benefits are manually awarded, as are merit-based scholarships, guaranteed workstudy/assistantship positions.

The Director of Financial Aid and Student Accounts will package financial aid to students once all documentation has been provided, any verification is completed, and the student is ready for packaging (RP) in PowerFAIDS

Once packaged, a student will receive an email notification of financial aid offers and any revised aid offers. The student may review their aid offers on the Schreiner One portal in the Net Partner space.

Packaging Other Educational Resources

Outside scholarships and grants are considered as a resource against federal need and cost of attendance. Students are asked to report other resources via email or in person to Financial Services. Chapter 31 & 33/VA benefits are applied toward the cost of attendance, but are not considered against federal need. External award and overaward queries help us monitor and ensure compliance against overawards and overpayments.

Summer Awards

Schreiner University does not offer Summer financial aid with the exception of eligibility for Pell Grants for those student enrolled at least half-time. Summer courses are available at a discounted per credit hour rate. Students are responsible for any cost for living on campus over the summer. Students are encouraged to seek assistance from the Office of Meaningful Work if funding is needed for support to complete a required internship.

Award Package Notification

All students receive an email created by PowerFAIDS when an award or change is made to the student's financial aid package.

Each student receives an award letter annually that includes: their program cost of attendance, breakdown of individual scholarships, and financial aid office contact information (phone number, email address, website). Information is included regarding the process for receiving loans, namely that they must be accepted through Net Partner and the required paperwork for approval and disbursement.

All active, matriculated students can view their full financial aid panel on Net Partner. This lists the aid by individual source, specific cost of attendance, and award amount broken down by term. This includes any issued loans—federal and/or private. Award messages are included, describing federal sources and links to federal loan requirements.

Packaging Appeals

Students may submit documentation for appeals based on change to financial income, such as involuntary loss of employment by the student or spouse or based on additional cost of attendance, such as child care or computer expenses. Appeals are reviewed by the Director of Financial Aid.

Professional Judgement for special or unusual circumstances are appeals regarding income or other FAFSA data elements. An appeal may not change aid eligibility. The outcome of the appeal and additional aid eligibility (if applicable) is communicated to the student by email and through an adjustment to the financial aid award, if applicable. A revision email would be sent to the student with instructions to view the information on Net Partner. The appeal process is as follows:

1. Request for appeal is communicated to the Director of Financial Aid.
2. Additional information and documentation required is communicated to the student.
3. Completed appeal is reviewed by the Director of Financial Aid.
4. Any applicable changes to FAFSA, cost of attendance, and/or financial aid award are made by the Officer.

Student is emailed regarding the result of the appeal. Professional Judgment is documented in PowerFAIDS.

Award Package Revisions

The Director of Financial Aid updates student budgets and revises financial aid awards as needed. The Director of Financial Aid runs overaward queries periodically to determine overawards and overpayments. The awards are then reviewed and any necessary adjustments are made. If loan reductions are needed they will be made in the following order: private, Grad/Parent PLUS, Subsidized and Unsubsidized Direct Loans.

Queries are run at least weekly from the start of the semester until the week after drop/add. Queries are also run at the end of the fiscal year as a final clean up. Revisions are made as quickly as possible after the query is run (typically the same day). The student is emailed notification of any change and referred to Net Partner for specific award details.

Overawards & Overpayments

The Financial Aid office runs queries on a monthly basis to check for students who are currently overawarded. Overawards are rare and can be due to a change in the student's FAFSA, due to new external funding/scholarships or to receipt of a subsequent FAFSA after the initial award is made.

An adjustment is made to the student's financial aid award, reducing Federal Work Study or private loans first, then Grad/Parent PLUS, then Subsidized and Unsubsidized Direct Loans. If possible, the overaward is resolved by reducing future loan disbursements. If the additional resources must be applied toward tuition only, other funds that are specific to tuition may need to be reduced first—this includes the merit scholarship. Before returning funds already disbursed and creating a balance on the student account, we will review the budget to determine if there are additional expenses that warrant an increase to the Cost of Attendance. If loan disbursements have already been made and funds must be returned, the Financial Services Office will notify the student of the funds that need to be returned. The student is emailed regarding the change to the award and the reason.

SECTION 10: PROFESSIONAL JUDGMENT

Students may submit documentation for professional judgment based on change to financial income, such as involuntary loss of employment by the student or a spouse or based on additional cost of attendance, such as childcare, study abroad or computer expenses. Professional judgments are reviewed by the Director of Financial Aid. Professional judgment requests to budget items would increase maximum Grad/Parent PLUS or private loan eligibility. Professional judgment requests may result in no change in aid eligibility. Professional judgment decisions are noted in PowerFAIDS and emailed to the student. Documentation for PJ decisions are placed in the student's financial aid student file. A revision email would be sent to the student if applicable, directing the student to view the information on Net Partner.

The professional judgment process is as follows:

1. Request for professional judgment is communicated to the Financial Aid office.
2. Professional judgment form is provided to the student requesting additional information and documentation required. The form is provided through the Net Partner portal.
3. Professional judgment request is reviewed by student's Director of Financial Aid.
4. Any applicable changes to FAFSA, cost of attendance, and/or financial aid award are made by the Officer.

The student is emailed within 60 days regarding the result of the appeal. Professional Judgment is documented in PowerFAIDS.

SECTION 11: DISBURSEMENTS

Financial aid disburses to the student's account no sooner than one week after the start of classes.

Awards made during the semester disburse through a manual process through PowerFAIDS and Jenzabar by the Financial Services Database Manager.

SECTION 12: STANDARDS OF SATISFACTORY ACADEMIC PROGRESS

Federal regulations require that all student financial aid recipients make satisfactory academic progress toward achieving a certificate or degree. Progress is measured by the student's cumulative grade point average, credits earned in relation to those attempted and the length of the academic program. This standard applies to ALL terms regardless of whether or not the student received financial aid.

NOTE: This policy should be read in conjunction with the university's policy on Academic Good Standing and Academic Probation/Suspension in the Schreiner University Catalog. A student's academic eligibility and financial aid eligibility are closely related. Progress will be measured at the end of each semester for all degree seeking students.

Progress Standards

Students must, at a minimum, satisfactorily complete 67% of all courses attempted and maintain a minimum cumulative grade point average (GPA) as shown in the minimum GPA requirement table below. Satisfactory grades consist of A, B, C and D.

Unsatisfactory grades are F, W, I, PR or any other grade that does not result in credits completed. (Individual programs and awards may have additional or more rigorous requirements.)

Cumulative Progress:

Undergraduate Students:

Students are expected to complete their degrees within 8 semesters when attending college full-time. Students are also expected to maintain a minimum cumulative 2.00 grade point average (GPA). A higher GPA may be required for a specific program. Failure to meet program standards will result in removal from the program. A student may still be eligible to receive financial aid for other eligible programs at the university.

Students seeking a baccalaureate degree who reach 150 hours attempted will be required to submit a recent signed degree plan and letter of intent outlining their plans to complete their degree. No student will receive aid after they have attempted 150% of their program length or 180 hours depending upon the program.

Withdrawals (W grades) which are recorded on the student's permanent academic transcript will be included as credit hours attempted and will have an adverse effect on the student's eligibility to meet the requirements of the credit progression schedule for financial aid.

Incomplete and Progress grades – Courses that are assigned an incomplete or progress grade are included in the cumulative credits attempted. These cannot be used as credits earned in the progress standard until a successful grade is assigned.

Repeated Courses – Repeated courses enable the student to achieve a higher cumulative GPA. However, repeating courses adversely affects the student's ability to meet the requirements of the credit progression schedule, and may affect overall financial aid eligibility for state aid programs.

Vocational Nursing Students: Students enrolled in certificate programs have specific, set requirements to maintain financial aid eligibility. Vocational Nursing Students are required to maintain 2.0 gpa while receiving financial aid in the program, and are required to complete 100% of the classes they are enrolled in.

Maximum attempted hours is 70.

Appealing Status (FA): Students who are placed on Financial Aid Suspension may direct their appeals to the Director of Financial Services.

Transfer Students: Only credits officially accepted in transfer will be counted toward the maximum credits allowed. If the student is required to take hours above the maximum number allowable as a result of transfer from another institution, the student may submit a written appeal to the Office of Financial Services requesting an extension, if it exceeds the number of hours allowed by federal regulations.

Second Degree Students: Only officially accepted credits will be included in the maximum number allowed.

Graduate Students: Graduate students must have a GPA of 3.0 or better and must take the required full-time course load per term. However, graduate students will only be eligible to receive aid for one semester beyond the number of semesters it should be required to complete the program. For example, students in the Master of Education program who have a 36 credit hours requirement are expected to complete a minimum of 12 credit hours per semester and will not be eligible for aid beyond a 4th semester.

Part-time Students: These standards will be adjusted according to the hours enrolled. Cumulative GPA requirements are the same as for full-time students.

Financial Aid Warning

Students will be placed on financial aid warning if they fail to meet either standard as outlined. Students will be placed on warning for one semester during which they must come into compliance with the standard. (See Financial Aid Disqualification for exceptions to this rule.) Students not meeting the Standard at the end of the first semester of warning will be placed on suspension. At the warning stage, a letter will be sent to the student stating the student's financial aid status based on most recent grade submission for the prior academic term. The letter to the student will clarify the situation and potential consequences. Students are asked to complete and return a form with their email address and commitment to improving their academic progress. This form is mandatory and future aid disbursements will be held up until this form is signed and returned. In addition, students may be required to attend success workshops presented by the Student Success division as part of their progress plan.

Financial Aid Suspension (Disqualification)

Students on financial aid warning who fail to meet the standards as outlined above will be ineligible for financial aid beginning with the next semester of attendance. *Students will be automatically ineligible for financial aid, regardless of whether they have previously been placed on financial aid probation, beginning with the next semester of attendance when one of the following occurs:*

- a) student receives grades of "F" in all courses attempted in any semester. In evaluating satisfactory progress, a grade of "I" will be considered an "F".
- b) a student completely withdraws from all courses attempted in two consecutive semesters.

Students who pre-register for a subsequent semester before grades are evaluated and who use financial aid to pay tuition and fees may owe a financial aid repayment if they do not maintain satisfactory academic progress and have been disqualified from financial aid once grades are posted and reviewed.

A student who is disqualified from financial aid more than one time for failure to meet these standards must meet with a financial aid counselor to discuss plans for reestablishing financial aid eligibility. Unless there are extenuating circumstances, a student in this category should expect to enroll for at least 12 semester credits without financial aid and successfully pass all courses with a minimum of a 2.00 GPA to be reconsidered for financial aid.

Disqualification from financial aid does not prevent a student from enrolling without financial aid if he or she is otherwise eligible to continue their enrollment. However, the student should be aware that the university's policies for academic eligibility and financial aid eligibility closely mirror one another, since both are measures of satisfactory academic progress intended to encourage behavior which leads to academic success.

Appeals to Regain Eligibility

Students who fail to meet these standards and have lost eligibility for financial aid may appeal this decision. Appeals must be in writing and must be accompanied by appropriate supporting documents. Appeals should be submitted to the Office of Enrollment Services within 30 days of the student receiving notice of disqualification. Reasons that may be acceptable for the appeal are:

- (1) serious illness or accident on the part of the student;
- (2) death, accident or serious illness in the immediate family;
- (3) change in academic program;
- (4) other extenuating circumstances.

The reasonableness of the student's ability for improvement to meet the appropriate standards for the certificate or degree program in which the student is enrolled will be taken into consideration.

Appeals will be reviewed by the Financial Aid Committee and will be approved, denied or approved for a probationary period not to exceed one academic semester.

Regaining Eligibility

Students who failed to meet these standards and who choose to enroll without the benefit of financial aid may request a review of their academic record after any term in which they are enrolled without the receipt of financial aid. If the standards are met, eligibility is regained for subsequent terms of enrollment.

Students should consult with a financial aid counselor to determine what must be done to regain eligibility.

SECTION 13: RETURN OF TITLE IV FUNDS

Return of Title IV Funds calculations are approved by and policy is maintained by Undergraduate Financial Aid Office. *Changes to federal law may affect this policy.*

Process Overview & Applicability

Steps in Federally Mandated Process

1. Determine the withdrawal date. If the student officially withdraws, the withdrawal date is the date SU determines the student either began the withdrawal process, or the date the student provided official notification to SU *Registrar's Office*, in writing, of his or her intent to withdraw. If the student does not provide official notification of his or her intent to withdraw, the withdrawal date will be determined as the date SU became aware the student was not attending class.
2. Calculate the percentage of enrollment period completed. The percentage of enrollment period completed is determined by dividing the total number of calendar days in the enrollment period into the number of calendar days completed in that period as of the withdrawal date. The total number of calendar days in a payment period includes all days (including weekends) within the period. Scheduled breaks of at least five consecutive days are excluded from the total number of calendar days in the enrollment period and the number of calendar days completed in that period.
3. Calculate the amount of Title IV aid earned. If the withdrawal date is equal to or greater than 60 percent of the enrollment period (semester), the student has earned 100 percent of the Title IV funding disbursed for that semester. If the withdrawal date is less than 60 percent of the semester, the amount of Title IV funding the student has earned is calculated by using the federally mandated

calculation to determine the percentage of Title IV funds that have been earned by the student for that semester. This percentage is then applied to the total amount of Title IV funding that was disbursable for the semester as of the withdrawal date.

4. For student enrolled in *module terms only*, who withdrawal between terms and do not begin the second term, and receive passing grades in the first term, that student is considered to have earned their aid at the 50% date of the semester.
5. Determine the amount of Title IV aid unearned. The amount of Title IV funding the student has not earned is calculated by subtracting the amount of Title IV funding the student earned from the total Title IV funding disbursed/or was disbursable.
6. Allocate unearned aid. SU is required to return the lesser of the total amount of Title IV funds the student has not earned or an amount equal to the charges if the total amount to be returned exceeds the charges incurred by the student. Charges include tuition and fees and can include other education-related expenses assessed by SU.
7. Unearned Title IV funds must be returned within 45 days of the student's withdrawal. SU will return the student's unearned Title IV funding on his or her behalf and consider the returned funds as the student's debt to US. Students must make arrangements with the Bursar's office for repayment of the debt. Consequences of non-payment include blocks on re-enrollment, transcript and diploma holds, and student account placement with Collections. Title IV loan amounts to be returned by SU will be credited to the appropriate programs in the following order: Unsubsidized Federal Stafford loans, Federal Grad PLUS loans received on behalf of the student. If amounts to be returned remain after repayment of all outstanding loan amounts, the remaining excess must be credited to any amount awarded for the semester for which a return of funds is required. Federal Work Study is excluded from this policy.
8. Communication of return of funds. Students for which a portion of Title IV aid must be returned will receive a communication from the Financial Aid Office sent to their Duke email address indicating an adjustment has been made and funds have been returned on the student's behalf. This communication further instructs any resulting balances on the student account must be paid by the student and arrangements for payment must be made directly with Duke's Bursar.

Withdrawal Date

Policies

The withdrawal date is determined by the student's program director and is the date the student began the withdrawal process, or the date the student provided official notification to their director, in writing of his or her intent to withdraw. If the student does not provide official notification of his or her intent to withdraw, the withdrawal date will be determined as the date the program director became aware the student was not attending class.

Formula Calculation

Policies

Upon receipt of an attrition notice from the Registrar, the Financial Aid Office performs a return of Title IV funds calculation using the PowerFAIDS Financial Aid Management System.

The school calendar is determined by:

1. Calculating the days in the particular term/semester, from the first day of classes to the last day of finals.
 2. Weekend days are included in the total number of days.
 3. Breaks of five or more days are excluded.
 4. When counting the number of days attended, the date of withdrawal is counted as a day attended.
- Institutional costs are used to determine the amount of refund due from the school versus the student

but do not change the amount of aid earned by the student. These costs refer to the original amounts charged to the student for educational expenses for the term of withdrawal and not pro-rated amounts used by the University based on the date of withdrawal. Required fees are included. Deposits, parking violation fees, and similar non-academic expenses are not included. Aid disbursed or aid that could have been disbursed is determined by:

1. Counting the aid accepted for the term/semester in question only.
2. Aid that could have been disbursed refers to aid accepted by the student and for which all paperwork/application materials and federal verification have been completed by the student.
3. If loan fees are taken out, the net amount disbursed or that could have been disbursed is used.

Procedures

The attrition notice is received by the Assistant Director of Financial Aid from the Registrar's Office. The FA Officer performs the Return to Title IV calculation in PowerFAIDS. Once the calculation has been approved, the Officer adjusts the student's aid according to the calculation and notifies the Database Manager to return any loan funding within 45 days of the date of student withdrawal. An email is also sent to the Counselor Supervisor to notify them of the adjustments made to student aid. Once the calculation has been completed, a pdf copy of the calculation and attrition notice are placed in the student's electronic financial aid file.

Post-Withdrawal Disbursements

Policies

If an amount of Title IV aid a student has earned is greater than the amount of Title IV aid that has been disbursed, the difference is treated as a post-withdrawal disbursement to the student. Any post withdrawal disbursement must be made within 180 days of the date the institution determines that the student withdrew. Aid for which all requirements (paperwork/application materials and federal verification) have been satisfied is disbursed to the student account 10 days prior to the start of classes. Refunds of applicable aid are provided to the student immediately after the drop/add date for each semester.

Procedures

If a student has *undisbursed aid for which all requirements have been satisfied*, a Return to Title IV calculation must be performed to ensure that funds for which a student was eligible and had earned at the time of withdrawal but had not been disbursed are offered as a post-withdrawal disbursement. The institution must disburse any amount of a post withdrawal disbursement of grant funds that is not credited to the student's account as soon as possible but no later than 180 days after the date it is determined the student withdrew. A post-withdrawal disbursement of Title IV funds does not require permission from the student. Written notification will be sent to the student within thirty (30) days of the date it is determined that the student withdrew and confirmation received before making any post withdrawal disbursement of loan funds. The notification will include:

1. A request for confirmation.
2. A confirmation deadline of fourteen (14) days or more.
3. The type and amount of the loan funds it wishes to credit to the student's account or disburse directly.
4. An option to accept or decline the post-withdrawal disbursement.
5. A notice of obligation to repay loan funds.
6. A notice the student may not receive, as a direct disbursement, loan funds that the institution wishes to credit to the student's account unless the institution agrees to do so.
7. A post-withdrawal disbursement must be made from available grant funds before available loan funds.

Returning Unearned Funds

Policies

The amount of Title IV funds the student has not earned is calculated by subtracting the amount of Title IV funds the student earned from the total Title IV funding disbursed/or was disbursable. Unearned Title IV funds must be returned to the applicable Title IV program within 45 days of the date of the students' withdrawal. If the amount earned is greater than the amount that has been disbursed, the difference is treated as a post-withdrawal disbursement to the student. Unearned funds are returned to the Title IV programs within 45 days of the student's withdrawal by SU's Financial Aid Office and the Student Account Office on behalf of the student and consider the returned funds as the student's debt to Schreiner University.

Procedures

Students are notified via their Schreiner.edu e-mail account that, as a result of withdrawal and pursuant to the Return to Title IV calculation, adjustments have been made to their aid package which may create a balance on the student account. Students must make arrangements with the Student Account's office for repayment of the debt if returned funds create an account balance. Unearned Title IV funds are returned to the Title IV programs in the following order:

1. Federal Grad PLUS/Parent PLUS loans
2. Unsubsidized Federal Stafford Loans
3. Subsidized Loans
4. TEACH Grant
5. FSEOG
6. Pell Grant

SECTION 14: INSTITUTIONAL REFUNDS

Schreiner University Institutional Refund Policy Although financial aid must be returned to federal programs as prescribed by federal regulations, the Schreiner University Tuition Refund Policy does not refund tuition at the same percentages. Students will be required to pay Schreiner University for any balances owed after the tuition refund and financial aid refunds have been calculated. Tuition and fees (excluding commitment fee) are refunded to students who are withdrawing from the University according to the following schedule:

Before classes/through second day of classes.....	100%
Third through fifth day of classes	75%
Sixth through tenth day of classes	50%
After tenth day of classes.....	0%

For terms shorter than seven (7) weeks, the following schedule will apply:

Before classes and first day.....	100%
Second day.....	50%
Third day and after.....	0%

Students who withdraw from the LSS program will be refunded a portion of the LSS fee based on the percent indicated above for Fall/Spring. All Students: Students who change their enrollment status from full to part-time or from a higher to lower level of part-time will receive a refund consistent with the percentages listed above. Financial Aid is adjusted based on full-time or part-time enrollment as well. In order to OFFICIALLY withdraw from Schreiner University you must notify the Registrar's Office IN WRITING before classes begin. (See published calendar for dates of each term). Students who fail to officially withdraw and who do not attend classes or who do not arrange for payment with the Financial Services Office will be administratively withdrawn as of the last day to add a course. Students in this category will fall under the regular refund policy. Students who attend any classes will be responsible for payment unless

they officially withdraw under University policy. In addition, students who are suspended, expelled or administratively withdrawn will fall under the regular refund policy. Immediate refunds are not issued at the time of official withdrawal, change in status, or at the end of a semester or session. Payment covering all refunds due will be mailed to the address left with the Financial Services Office within 90 days after official withdrawal or completion of a semester session.

SECTION 15: TITLE IV FRAUD

Student Fraud

In reviewing reports, appeals, or in other secondary review of files (see SECTION 7: FILE REVIEW for more Information), discrepancies may arise. Discrepancies in student application materials (i.e. income, citizenship, name, SSN, signatures) must be investigated and resolved. To do so, the Financial Aid Office will contact the student to request additional information and documentation. If, in the Financial Aid Officer's judgment, there has been intentional misrepresentation, false statements, or alteration of documents which have resulted or could result in the awarding or disbursement of funds for which the student is not eligible, the case shall be referred to the Dean of Academic Programs and Student Affairs and the program director, for possible disciplinary action.

The dean and the program director will review the student's aid file with the Director of Financial Aid and if the decision is made by the committee to pursue the possibility of denying or canceling financial aid, the Officer will contact the student to set up an appointment. If the student does not make an appointment, the Director may:

1. Not process a financial aid application until the situation is resolved satisfactorily
2. Not award financial aid
3. Cancel financial aid
4. Determine that financial aid will not be processed for future years.

Students who willfully submit fraudulent information will be investigated to the furthest extent possible. All cases of fraud and abuse will be reported to the proper authorities. After investigating the situation, if the Officer believes there is a fraudulent situation, he/she will refer all information to the Department of Education's (ED's) Office of Inspector General (OIG). The student may also be referred to the SU judicial process.

SECTION 16: AUDITS

All audit policies and procedures are maintained by the University Controller.

SECTION 17: POLICY FOR EMPLOYEES WORKING IN FINANCIAL AID AND ADMISSIONS

Schreiner University does not issue incentive pay of any kind to admissions or financial aid personnel. Staff are paid on a salaried or hourly basis based on time-card submissions for time worked based on the FLSA standards and University Pay Structures and Processes.