



StudentAidBC

# **StudentAid BC Administration Manual 2021-22**

MINISTRY OF ADVANCED EDUCATION AND SKILLS TRAINING

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### COVID-19

In response to COVID-19 SABC may temporarily adjust policies and the procedures described in this document. Please visit the SABC website for up-to-date information on SABC COVID-19 response:

<https://studentaidbc.ca/news/general/covid-19-response-information>

## Introduction to StudentAid BC

StudentAid BC (SABC) is a joint program between the Government of Canada and the Province of British Columbia administered under the *Canada Student Financial Assistance Act* and a B.C. Order-in-Council. StudentAid BC assists eligible students with the cost of their post-secondary education through loans, grants, scholarships, bursaries and debt reduction measures.

Most StudentAid BC programs are based on need, providing financial assistance where students and their immediate families need help with the cost of post-secondary education and basic living expenses. Students enrolled in high-tuition programs or with significant financial commitments in addition to educational expenses may need to seek additional sources of funding to support their education choices.

### StudentAid BC Administration Manual

The purpose of this manual is to provide institution officials with information on the tasks you will need to complete for students at every stage of a student's SABC funding process. The manual will assist you in administering SABC student financial assistance and fulfilling your responsibilities outlined in the StudentAid BC Policy Manual.

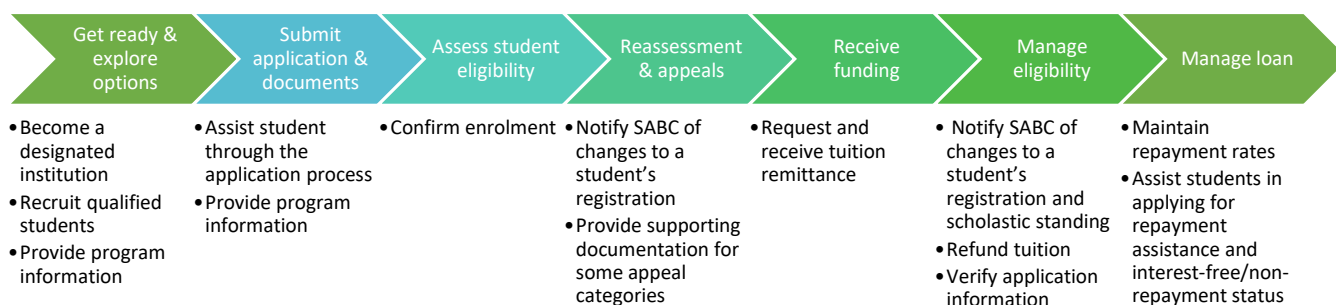
Any institution official administering SABC student financial assistance must read and understand this manual and the StudentAid BC Policy Manual and administer student financial assistance in compliance with these documents.

Students applying for funding from SABC need institution officials' support throughout the student loan process. Institution officials advise students as they explore their options and guide students on submitting SABC funding applications. Institution officials also advise students on repayment strategies and programs.

For questions related to SABC policies, procedures, and instructions, please email the Institution and Program Designation Team at [designat@gov.bc.ca](mailto:designat@gov.bc.ca)

As an institution official you are responsible for providing program information, confirming that a student is enrolled in the program identified in their application, and informing SABC if this information changes. Institution officials are also responsible for their institution's repayment rate.

## Stages of a student's SABC funding process and the role of the Institution Official



## Institution Official resources

The following resources support the administration of StudentAid BC programs. You are expected to be familiar with and use these resources.

### StudentAid BC Policy Manual

The StudentAid BC Policy Manual is the authoritative source of information on SABC programs. The StudentAid BC Policy Manual can be found on the Institution Officials web page of the SABC website.

In the case of conflicting information involving guidelines from the StudentAid BC Policy Manual and any SABC application form, administration manual, or any other source of information on the SABC program, the language and meaning found in the current year's StudentAid BC Policy Manual is to be considered accurate and comprehensive. The StudentAid BC Policy Manual is updated as required.

### StudentAid BC systems

#### *Student Financial Assistance Partner Portal*

The Student Financial Assistance Partner Portal allows all institutions with active Partner Portal accounts to:

- update and maintain their institution account information
- update and maintain institution contact
- review and submit some Institution and Program information online
- complete and submit Designation Agreements (B.C. Private institutions only)



A Business BCeID account is used to access the Partner Portal. For more information about how to get your Business BCeID, please visit the [BCeID website](#). In the Partner Portal, each institution can select roles for their users, based on the desired level of access.

For more information about the [Student Financial Assistance Partner Portal](#) and on how to access and use the portal, visit the Partner Portal Info tab on the Institution Officials page of the SABC website to see videos and review Frequently Asked Questions.

The Ministry provides updates and important information to institution officials. Institution users in the Partner Portal are automatically added to the list. If you would like to be added to the distribution list, please work with your institution administrator to add you as an institution user in the Partner Portal. Videos on adding users are included in the link above.

### *Student Financial Assistance System*

The Student Financial Assistance System (SFAS) processes full time applications for SABC student financial aid. You can access SFAS to confirm enrolment electronically and report student withdrawals.

To apply for access to SFAS, complete the [System Access Request](#) form, found on the Institution Officials section of the SABC website.

### *SAIL*

The part-time Student Aid Internet Loan (SAIL) system can be accessed by B.C. public institutions to administer part time student aid. Access to SAIL is via the internet link at: <https://www.sail.aved.gov.bc.ca/sail/search/applicationSearch.action>

To apply for access to SAIL, complete the [System Access Request](#) form, found on the Institution Officials section of the SABC website.

## **StudentAid BC website**

<https://studentaidbc.ca/>

The SABC website offers information for both institution officials and students. You are advised to check the SABC website for information before calling the Ministry and should counsel students to do the same.

Institution officials can:

- Access the StudentAid BC Policy Manual, StudentAid BC Administration Manual, and the pan-Canadian Designation Policy Framework
- Look up program codes
- Access information to minimize default and help students succeed, including the Repayment Resource Guide and the Repayment Rate Frequently Asked Questions document
- Download StudentAid BC forms

Students can:

- Find information on career planning
- Find information on funding options
- Look up institution designation information
- Apply for student financial assistance
- Find information pertaining to loan maintenance and repayment
- Download SABC forms
- Access the Student Dashboard to:
  - Check online application status
  - Review correspondence received by StudentAid BC
  - Update personal information

To update your institution's information on the SABC website please see [Appendix 11](#): How to Update information.

## **Students with Disabilities**

SABC offers a suite of provincial and federal disability related support programs to help students with disabilities achieve success in their post-secondary education. For more information on these programs please contact the Accessibility Office at your institution. If your school does not have an Accessibility Office, visit the Directed Programs section of the Institution Officials page on the SABC website and review the [StudentAid BC Disability Program User Guide](#).

## Contact Information

WHO TO CONTACT			
Contact Information	StudentAid BC – General and student inquiries	StudentAid BC – Institution and Program Designation	National Student Loans Service Centre (NSLSC)
	<p>studentaidbc@gov.bc.ca</p> <p>Canada/USA: 1-800-561-1818 Outside North America: 1-778-309-4621</p> <p>Mailing address: StudentAid BC Branch Ministry of Advanced Education and Skills Training PO Box 9157 Prov Govt Victoria, BC V8W 9H2</p> <p>Courier address: StudentAid BC Branch Ministry of Advanced Education and Skills Training 1st Floor, 835 Humboldt St Victoria, BC V8W 4W8</p>	<p>designat@gov.bc.ca</p>	<p>Canada/USA: 1-888-815-4514 Outside North America: 800-2225-2501</p> <p>National Student Loans Service Centre PO Box 4030 Mississauga ON L5A 4M4</p>
Get Ready and Explore	<ul style="list-style-type: none"> <li>• SABC Application Process</li> <li>• Supporting Documentation</li> </ul>	<ul style="list-style-type: none"> <li>• Designation</li> <li>• Program Information</li> </ul>	

## WHO TO CONTACT

	StudentAid BC – General and student inquiries	StudentAid BC – Institution and Program Designation	National Student Loans Service Centre (NSLSC)
<b>Submit Applications and Documents</b>	<ul style="list-style-type: none"> <li>• Notice of Assessment (NOA)</li> <li>• Student restrictions</li> </ul>	<ul style="list-style-type: none"> <li>• Program Eligibility Declaration (PED)</li> <li>• Institutional Appendix (IA)</li> <li>• Confirmation of Distance Education Eligibility (CODEE)</li> </ul>	
<b>Assess Student Eligibility</b>	<ul style="list-style-type: none"> <li>• Appeals</li> <li>• Appendix 7 (Reassessment)</li> </ul>		<ul style="list-style-type: none"> <li>• Master Student Financial Aid Agreement (MSFAA)</li> </ul>
<b>Reassessment and Appeals</b>	<ul style="list-style-type: none"> <li>• Confirmation of Enrolment (COE/ECE)</li> </ul>		
<b>Receive Funding</b>	<ul style="list-style-type: none"> <li>• Withdrawals, unsuccessful and early completions</li> <li>• Appendix 5 (Transfer)</li> </ul>		<ul style="list-style-type: none"> <li>• Disbursement of Funding</li> <li>• Rejected Electronic certificates (E-certs)</li> </ul>
<b>Manage Eligibility</b>			<ul style="list-style-type: none"> <li>• Tuition Refunds</li> <li>• Non-Repayment Status and Interest-Free Status</li> </ul>
<b>Manage Loan</b>		<ul style="list-style-type: none"> <li>• Institutional Repayment Risk Rates</li> </ul>	<ul style="list-style-type: none"> <li>• Repayment Assistance Program (RAP)</li> <li>• Federal restrictions</li> </ul>
<b>Access Inquiries</b>		<ul style="list-style-type: none"> <li>• PUTTY and SFAS access</li> <li>• Partner Portal Issues</li> </ul>	

## Additional Contact Information

### **Private Training Institutions Branch (PTIB)**

PTIB is responsible for the registration and accreditation of private career training institutions in B.C. and management of the Student Training Completion Fund. Private post-secondary institutions in B.C. seeking StudentAid BC designation must first achieve accreditation through PTIB.

[www.privatetraininginstitutions.gov.bc.ca](http://www.privatetraininginstitutions.gov.bc.ca)

Mailing address:

Private Training Institutions Branch  
203–1155 West Pender St  
Vancouver, BC V6E 2P4

Email: [PTI@gov.bc.ca](mailto:PTI@gov.bc.ca)

Phone: 604-569-0033

Fax: 778-945-0606

Toll free: 1-800-661-7441

# Chapter 1: Get Ready and Explore Options

The first stage of a student's SABC journey is exploring their education and funding options. At this stage your role as an institution official is to ensure your institution is eligible for student funding by becoming a SABC-designated institution. Institutions in British Columbia must also have their program information assessed at this stage. Through your recruitment efforts you are also expected to recruit qualified students who will be successful in their studies and repay their loans.



## 1.1 Designation

Institution Designation is the process by which post-secondary institutions are deemed eligible to administer federal and provincial student financial assistance.

### 1.1.1 Designation Policy Framework

SABC institution designation is guided by the Pan-Canadian Designation Policy Framework. In 2001, provincial/territorial and federal governments developed the framework to guide institution designation policy. The policy framework is based on the principles of taxpayer protection, accountability, informed choice and consumer protection.

The framework outlines the following elements for designated institutions:

- The institution's programs meet the eligibility criteria as defined by federal, provincial and territorial legislation with respect to post-secondary education.
- The institution is capable of appropriate administration of the student loan program and is accountable for this administration.
- The institution provides students with adequate consumer protection and information upon which to make informed choices about their post-secondary options. Designated educational institutions are expected to focus on student success, improve ways to retain students and ensure students improve their overall employability so they can repay their loans.
- The level of financial risk of designated institutions is monitored and addressed.

For more information, the Designation Policy Framework document can be found on the StudentAid BC website under the Institution Officials page.

### 1.1.2 Become a designated institution

Meet the criteria:

- Institutions wishing to enroll SABC-funded students must meet the designation eligibility criteria and responsibilities specified in the Institution Designation for Student Financial Assistance chapter of the StudentAid BC Policy Manual.
- As part of the criteria for designation, the institution must offer and deliver at least one program that meets the SABC program eligibility requirements. These requirements are found in the Program Eligibility for Student Financial Assistance chapter of the StudentAid BC Policy Manual and the Program Information section of this manual.

Apply for designation:

- **B.C. Public post-secondary institutions** are designated through a Memoranda of Understanding with the Province. These institutions are not required to complete an application.
- **B.C. Private post-secondary institutions** apply to the Ministry using the Institution Designation Application form on the institution officials page of the SABC website. B.C. Private institutions must also enter into a Designation Agreement with the Ministry on an annual basis and submit a Program Eligibility Declaration (PED) for each eligible program for which SABC funding is desired. PED forms for the current program year can be found on the Institution Officials page of the SABC website.
- **All other post-secondary institutions** apply using the Institution Designation Application form on the Institution Officials page of the SABC website.
- See [Appendix 1](#): Designation Application Job Aid for directions on how to complete the online application.
- StudentAid BC reviews the Institution Designation Application. Decisions on eligibility, reasons for denial, and/or requests for further information are communicated by email. If the institution is found eligible for designation, SABC:
  - Emails an invitation to join the Student Financial Assistance Partner Portal (the Portal) and provides instructions on how to obtain a Business BCeID account. The Portal allows for online processing of institution information and for submission of the Appendix 3 - Institution and Program Information portion of the student loan application.
  - Requires a **B.C. Private institution** to submit their Designation Agreement through the Portal. The institution will be asked to submit PEDs by email to the Institution and Program Designation Team.
  - Issues an institution code that must be used on all StudentAid BC forms and correspondence.
  - Directs the institution to the resources needed to administer SABC financial assistance, such as the StudentAid BC website where the StudentAid BC Policy Manual, StudentAid BC Administration Manual, Repayment Resource Guide, tutorial videos demonstrating how to use the Portal, and Form Library may be found.

Start the process early:

- The institution must be designated, and its program(s) must be approved by SABC prior to a funded student's study start date. You should initiate this process well in advance as the application process may take several months to complete.

Maintain designation:

- All institutions must continue to meet the designation eligibility criteria and adhere to institution responsibilities specified in the Institution Designation for Student Financial Assistance chapter of the StudentAid BC Policy Manual. SABC conducts performance monitoring and enforcement activities to ensure these conditions are met.
- B.C. Private institutions will receive an annual reminder in May to renew their Designation Agreement. The agreement renewal must be completed prior to the new SABC program year starting August 1st to ensure funding is available to students starting after this date.



## 1.2 Program Information

For programs to be eligible for student financial aid they must meet the Program Eligibility criteria for Student Financial Assistance included in the StudentAid BC Policy Manual. Program eligibility criteria also helps to determine the amount of funding a student will receive.

### 1.2.1 Collection of program information

Program information is collected and reviewed by SABC through three methods:

Appendix 3s can be completed online through the Student Financial Aid Partner Portal. By signing up you will receive automatic notification to complete Appendix 3s.

Method of collecting program information	What institutions can use this method	How is information provided?	For more information see:
<b>1. Student application- Appendix 3 – Institution and Program Information</b>	All institutions	Via the digital Appendix 3 accessed through the <a href="#">Partner Portal</a> . Schools that do not have access to the Partner Portal use the paper Appendix 3 form.	<a href="#">Appendix 2: Appendix 3 – Institution and Program information Job Aid</a>
<b>2. Institutional Appendix</b>	B.C. Public Institutions	The Institutional Appendix (IA) is accessed through the Student Financial Aid System.  Once information is entered in the IA, students can select the program when they complete their application.	<a href="#">Appendix 3: Institutional Appendix Job Aid</a>
<b>3. Program Eligibility Declaration</b>	B.C. Private Institutions	Institution completes Program Eligibility Declaration (PED) form and emails it to SABC.  Once the PED form is approved by SABC, students can select the program when they complete their application.	<a href="#">Appendix 4: Program Eligibility Declaration Job Aid</a>

### 1.2.2 Program governance authority

Programs must be approved by the appropriate governance authority.

B.C. Public institutions:

Programs of study must be approved by the institution's Senate, Academic Council, Education Council and/or Program Council and Board of Governors.

B.C. Private institutions:

Programs offered at B.C. Private institutions must be approved under one of the following Ministry of Advanced Education and Skills Training recognized regulatory bodies:

- Private Training Institutions Branch (PTIB)
- Degree Quality Assessment Board/Degree Authorization Act (DQAB/DAA)
- Insurance Corporation of British Columbia (ICBC) for driving institutions only, or
- Industry Training Authority (ITA)

Degree programs must be authorized under the *Degree Authorization Act*. A list of the private post-secondary institutions authorized to offer degree programs is available on the Ministry of Advanced Education and Skills Training website.

All other institution programs are considered on an individual basis by the Ministry of Advanced Education and Skills Training and must meet SABC eligibility criteria.

### 1.2.3 Program codes

Institutions are responsible for assigning a distinct and accurate program code to each eligible program they offer. These specific program codes will identify the program of study on the Appendix 3 – Institution and Program Information attached to the student's SABC application. If you are unable to determine which code reflects your program or if you require further assistance, please contact the Institution and Program Designation Team.

The program codes can be found using the Program Code [Search Tool](#) on the SABC website.

Instructions for assigning new program codes:

- Click on Program Codes then go to Program Code Search
- Choose Field of Study
- Review program list to find a name of a program that best describes your new program

- Assign the code (e.g., Early Childhood Education is WAP)
- Add the level of study at the end of the code (e.g., Early Childhood Education Diploma is WAP7)

**Levels of Study Codes:**

8 for Certificate  
7 for Diploma  
6 for PhD  
5 for Masters  
4 for Co-op Undergraduate\*  
3 for Undergraduate  
2 for Co-op Non-Degree\*  
1 for Non-Degree\*

\*These levels of study are used by  
B.C. Public Institutions

If you cannot find a code that best suits your program or require further assistance, contact the Institution and Program Designation Team.

### 1.2.4 Program length

All programs must be at least 12 weeks in length to be eligible for SABC funding.

For programs that are longer than 52 weeks, break down the program into years for the purposes of an SABC application. Each program year should report study period start and end dates to align to the student's student financial assistance application.

For example, students enrolled in a program that is 60 weeks in length will be required to submit two applications for SABC.

Students can apply for study periods as short as 6 weeks in length, provided the overall program is at least 12 weeks in length.

### 1.2.5 Breaks in study

An institution break is a period of time during the delivery of a program when instruction is not offered. Breaks in full-time study are permitted if the combined break time does not exceed 10 per cent of the total study period for the program. No break can be longer than two consecutive weeks, except for the calendar year-end break, which can be up to three weeks in length.

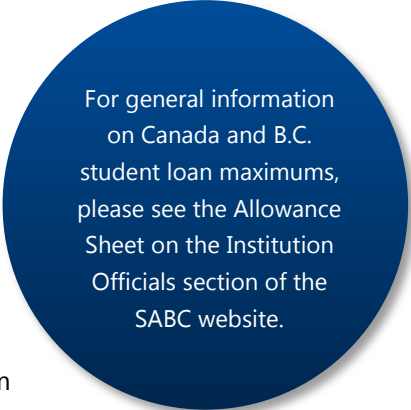
### 1.2.6 Program costs

Program costs must be provided to SABC when program information is submitted. Costs are divided into three categories:

- Actual Tuition
- Mandatory Fees
- Program-related Costs

Each category has specific reporting requirements as described in the section below.

Students attending institutions outside Canada will be allowed foreign exchange rates for tuition and program costs. These costs must be converted to Canadian currency and entered on the Appendix 3 (Institution and Program Information).



For general information on Canada and B.C. student loan maximums, please see the Allowance Sheet on the Institution Officials section of the SABC website.

#### *1.2.6.1 Actual tuition:*

Actual tuition is the amount the student pays for tuition for the current study period (after any discounts or reductions for Prior Learning Assessment (PLA) credit have been granted) and must match the amount indicated on the student enrolment contract.

Do not deduct any sponsored tuition and/or fees paid by a third party such as Employment and Social Development Canada or First Nation Band funding, even if they are paid directly to the school. The student must report any sponsored tuition in their SABC application.

If the student qualifies for sponsorship after the SABC application has been submitted, immediately advise the student to submit an Appendix 7 - Request for Reassessment to report the amount of sponsorship assistance they will receive. You may not act to confirm enrolment until the reassessment has been processed, as the amount of assistance the student is eligible for may change.

### 1.2.6.2 Mandatory fees:

Mandatory fees are costs associated with attending an institution and enrolment in programs that must be paid by all students at the institution or in the program. The mandatory fee amount should be consistent with the amount on the student enrolment contract.

Examples of mandatory fees are:	What mandatory fees are not:
<ul style="list-style-type: none"> <li>• Registration fee</li> <li>• Archiving fee</li> <li>• Student license fee</li> <li>• Student Association or Alma Mater Society fees</li> <li>• Membership fees for overseeing bodies</li> </ul>	<ul style="list-style-type: none"> <li>• Optional fees (e.g., insurance)</li> <li>• Fees that do not apply to all students (e.g. assessment fees)</li> <li>• Fees already included in standard of living allowance (e.g., local transit, medical premiums)</li> <li>• Additional fees/interest charges on tuition</li> <li>• Any fees/costs included in program costs of exceptional expenses.</li> </ul>

### 1.2.6.3 Program-related costs:

These costs are relating directly to the program of study.

These costs may include:

- Book costs;
- Expendable supplies used in achieving the learning objectives of the program (pens, pencils, paper, eraser, notebooks, art supplies, typing costs, photocopying charges, paints, film, etc.);
- Personal instruments/tools required for study/practice (e.g., calculator, scissors, hair trimmers); and,
- Computer costs (for hardware, software, repairs, ink cartridges, internet fees, etc.).

### 1.2.6.4 Exceptional expenses:

Exceptional expenses are costs not normally associated with attending school but required for the program. The actual cost of field trips, practical education, and clinical experiences are allowed, provided they are essential elements of the program.

Do not include items/equipment (capital investments) that would reasonably be expected to be in the student's possession prior to commencing post-secondary level studies. Do not include items that would be used in the field of study after graduation, and items that are used for a hobby as well as part of post-secondary studies.

Excluded costs include, but are not limited to:

- Diving equipment
- Musical instruments
- Cameras, lenses and related photography equipment
- Camping, hiking, all-weather gear, etc.
- Equipment for golfing, skiing or other sports

- Electronic devices such as cell phones, voicemail/email, pagers, tablets, smart phones etc.
- Any costs relating to meals and accommodation (already included in the need assessment)
- Any program travel costs that are not mandatory for the program of study
- Any costs of exams or tests that are optional and unrelated to the program completion
- Passport or luggage
- Medical/vaccine expense
- Costs relating to the operation of a motor vehicle
- Items required for the workplace

### **1.2.7 Changes to existing programs**

Changes to programs with students receiving SABC funding must be provided to SABC in advance of the changes being implemented. All revisions must comply with the StudentAid BC Policy Manual and be approved by your governing body prior to submitting the change for approval.

What changes should be reported?

- Program costs
- Start/End Dates
- Duration of Breaks in Study
- Any other program information that was originally submitted as part of the IA or the PED

How should changes be reported?

- Programs with SABC funded students in attendance: work with students to complete an Appendix 7 – Reassessment, and submit along with a revised Appendix 3. The Partner Portal cannot be used to report Appendix 3 revisions.
- B.C. institutions must also update the information SABC has on file for the program by updating the associated IA or PED record.

### **1.2.8 Online/Blended learning program eligibility**

The Ministry of Advanced Education and Skills Training will provide SABC funding to eligible residents of B.C. enrolled in approved online/blended programs or other programs of study with non-traditional forms of delivery if the required conditions are met.

Programs delivered by B.C. institutions must be approved by the institution's regulatory authority.

Institutions outside B.C. must download and complete the Confirmation of Distance Education Eligibility (CODEE) form found on the Institution Officials page of the SABC website, attach the appropriate documentation outlined on the form and return all to the SABC office for approval.

For program eligibility requirements, please see the Program Eligibility for Student Financial Assistance section of the StudentAid BC Policy Manual.

### **1.2.9 Unclassified/Qualifying Studies**

Students may be eligible for up to 1 year of unclassified/qualifying studies in their lifetime.

Unclassified/qualifying studies refers to a study period where courses are taken in preparation for entry into a specific program or faculty (for example, students required to take additional courses before being accepted into graduate studies). Students and institutions should not select this program type for other situations. Students who are not pursuing a credential are not eligible for SABC financial assistance.

### **1.2.10 Condensed courses**

SABC does not review specific courses, however courses must be part of an eligible program. Academic credit-based programs may contain condensed courses that are offered during intersessions, summer sessions or other periods. These courses must be part of a program that meets the program eligibility criteria in the StudentAid BC Policy Manual.

### 1.2.11 Work Integrated Learning

For the policy on Work Integrated Learning (WIL), see the StudentAid BC Policy Manual. Any WIL must be approved by your regulating body. If your regulating body does not consider the program component to be WIL, it would not be considered WIL for the purposes of student financial aid.

Students must complete their WIL component before the study period end date. For more information on WIL contact your regulator and visit: <https://www.cewilcanada.ca>

	Unpaid Work-Integrated Learning			Paid Work-Integrated Learning	
	Practicum	Preceptorship	Clinical Placement	Co-op	Paid work Term outside of Co-op Education model
<b>Required for graduation</b>	✓	✓	✓	✓ or results in credential with co-op designation.	✓
<b>Practical experience is linked to curriculum</b>	✓	✓	✓	✓	✓
<b>Percentage of program</b>	20%	10%	50%	50%	50%

## 1.3 Recruitment and Financial Advice for Students

A student's success in completing their program of studies and their success at obtaining employment after leaving studies are key factors in defining institution success and limiting defaults on government student loans.

As an institution official, your role is to ensure that only qualified students who are sufficiently prepared are enrolled at your institution. If you are authorized to sign student financial assistance documents, you must not use titles such as "counsellor" or "admissions advisor" if your compensation is directly affected by students' enrolment decisions.



Ensure you collect contact information during the student enrolment process to enable immediate contact of students who have attendance and/or progress issues. This contact information includes alternate contact information for a parent or sponsor.

For more information on student entry, please refer to the Repayment and Resource Guide on the StudentAid BC website.

### **1.3.1 Advertising**

In recruiting tools and advertising media, institutions must not make statements that students are guaranteed to receive SABC funding or make statements that are otherwise untrue or misleading. In publications such as program calendars, brochures, and websites, designated institutions are authorized to quote directly from SABC publications and the SABC website, and provide summaries of SABC funding, if the institution indicates that there are eligibility requirements to access and maintain SABC funding and that students should contact SABC for further information. Reference to SABC funding may only appear accompanied by the wording: "Financial assistance may be available to eligible students."

### **1.3.2 Entrance counselling**

Making the decision to enrol in post-secondary education is an important commitment for a student. Entrance counselling plays an important role in student success and in the prevention of loan defaults.

Students need to understand their financial requirements for education costs and living expenses for the duration of their program of study. Preparatory counselling by institution officials, prior to the signing of an enrollment contract, can assist students with understanding the responsibilities involved in financing a post-secondary education and help them plan for success.

If the borrower is a dependent student, a parent/guardian should be included in the entrance counselling process.

As an institution official you need to ensure that, prior to the student enrolling at your institution, there has been adequate dialogue between a school counsellor and the prospective student to ensure the following:

- The program of interest meets the student's objectives.
- The program prerequisites and entrance requirements have been met, and the student is a suitable candidate for the program.
- The student is aware of the types of jobs and salary to be expected in the field of study.
- The program meets current employer and industry standards.
- The student has planned well in advance of the prospective start date to ensure that adequate finances, daycare, transportation, etc. are in place (see the following section Institution Financial Counselling and Student Budgeting).
- The student understands SABC attendance and participation requirements.
- The student understands refund and withdrawal policies.

- The student understands their legal obligation to repay their student loans and understands the repercussions of defaulting.
- The student's enrolment is based on the student's interest and the value of the program of studies, not the amount of financial assistance that could become available to the student.
- A Student Responsibilities form is developed as part of their entrance counselling process to be read and signed by the student and counsellor to acknowledge that the student understands their responsibilities, and then kept in the student's file.

### 1.3.3 Institution financial counselling

Financial difficulties can put students at risk of withdrawal and student loan default. As a needs-based program, SABC does not cover all costs associated with a student's studies, especially for those enrolled in high tuition programs. Pre-enrolment financial counselling assesses a prospective student's financial preparedness for full-time studies.

To support the student in making sound financial choices about their education, you can:

- Support the student in developing a budget worksheet to determine all costs and available resources for the study period (see [Appendix 6: Budget Worksheet example](#)).
- Ensure that prospective students apply for SABC funding well in advance of the program start date and receive a Notification of Assessment (loan approval) before financial counselling and enrolment. Students in need should have accurate confirmation of the amount of financial assistance they are eligible to receive from SABC before making the decision to enrol in the program.
- Ensure that a payment schedule (amounts owing to the institution and when) is established before enrolment to support student decision-making.
- Encourage students who do not have a sound financial plan in place to postpone studies until they have acquired enough resources.
- Provide additional financial counselling to students with high unmet need (as calculated on the StudentAid BC Notice of Assessment), as there is a high correlation between high unmet need and student withdrawal.
- Make students aware that there are maximum funding limits and inform them that not all students receive the maximum funding.

## Chapter 2: Submit Application and Supporting Documentation

The second stage of a student's SABC journey is to submit an application and supporting documentation. At this stage your role as an institution official is to support the student in understanding their responsibilities under the SABC application, and to provide supporting information, such as program information.



### 2.1 StudentAid BC Application Process

For the policy on the SABC application process, please see the Application Process section of the StudentAid BC Policy Manual.

Institution staff are limited to assisting students in understanding application forms and process, as well as referring students to SABC resources. As an institution official, you may not complete or provide a response to any portion of the SABC application for a student, their parent, sponsor, or spouse.

To ensure that students receive their financial assistance for the start of classes, provide enough time for the processing of SABC applications. SABC applications received by SABC with errors or missing information can take up to six weeks to process. Reassessments to change the Appendix 3 – Institution and Program Information may also require six weeks to process.

All SABC policies and procedures apply to students who are receiving SABC funding or have received federal and/or provincial funding previously and are applying for and/or receiving interest-free status.

#### 2.1.1 Register for a SABC Dashboard Account

Students applying for financial assistance must register for a SABC account through the StudentAid BC website. On their account dashboard a student can apply for new student loans, check an application's status, change contact information, and apply for interest-free status.

#### 2.1.2 Identity verification

Identity verification for new applicants to the full-time student loan program is required in advance of the application submission process. Please see the [StudentAid BC website](#) for further information.

### 2.1.3 Complete and submit an application

Students are responsible for completing and submitting the SABC application. To support students through this stage of the SABC process, you should ensure:

- Students understand that by submitting the application, they are assuming full responsibility and accountability for the information in it.
- Students are aware of the terms and conditions for receiving student assistance detailed in the Declaration section of the SABC application.
- Students understand that they are legally required to repay their loans and that their student loans will become a part of their financial history and may affect their future financial credit rating.
- Students know of their responsibility to keep SABC informed of any changes to their initial application information, including changes of address, email or telephone number.
- Students are reminded that they should not share their SABC IDs and passwords with anyone, including parents, spouses, or institution officials.

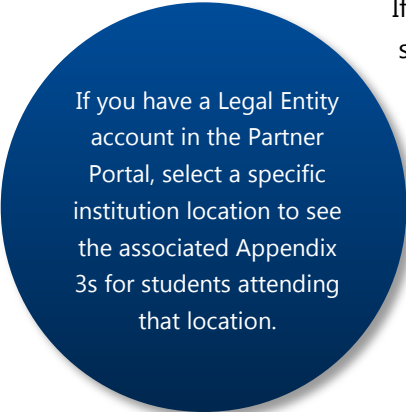
## 2.2 Supporting documentation

Additional information may be required from third parties for the student's application to be processed. This information is outlined below. The student's application will not be processed until this information is completed by the third party and submitted.

- Institution and Program Information – it is the student and the institution's responsibility to provide this information.
- Parent/Stepparent/Sponsor/Legal Guardian Information – a dependent student is required to have their parent(s) complete an Appendix 1 - Parent/Stepparent/Sponsor/Legal Guardian Information form. It is the student's responsibility to provide this information.
- Spouse/Common Law/Partner Information – students with a partner are required to have their partner complete and submit an Appendix 2 -Spouse/Common Law/Partner Information form. It is the student's responsibility to provide this information.
- Permanent Resident / Protected Person status

### 2.2.1 Appendix 3 – Institution and Program Information

Institution and Program Information – if the student’s program or study period is not listed as an option on the SABC application, you will need to complete an Appendix 3 - Institution and Program Information. See Appendix 2 of this manual for how to complete and submit this appendix.



If you have a Legal Entity account in the Partner Portal, select a specific institution location to see the associated Appendix 3s for students attending that location.

If the program and dates the student wishes to attend are not available to select when the student completes their Student Financial Aid application, an Appendix 3 – Institution and Program Information will be required.

The Appendix 3 – Institution and Program Information can be completed online in the Student Financial Aid [Partner Portal](#).

Institutions not registered for the Partner Portal must submit the [Appendix 3 Institution and Program Information](#) form.

### 2.2.2 Parent/Stepparent/Sponsor/Legal Guardian Information

A dependent student is required to have their parent(s) complete an Appendix 1 - Parent/Stepparent/Sponsor/Legal Guardian Information form. It is the student’s responsibility to provide this information. For privacy protection, SABC applications and Appendix 1s and 2s should not be kept in institution files.

### 2.2.3 Spouse/Common Law/Partner Information

Students with a partner are required to have their partner complete and submit an Appendix 2 - Spouse/Common Law/Partner Information form. It is the student’s responsibility to provide this information. For privacy protection, SABC applications and Appendix 1s and 2s should not be kept in institution files.

### 2.2.4 Protected Person status

Students with protected person status will be required to provide a Protected Person Status Document valid for the entire study period.

### 2.2.5 Permanent Resident

Permanent Residents with a 900 Social Insurance Number (SIN) will be required to provide documentation that their SIN is valid for the entire study period.

## 2.3 Verification

SABC is a needs-based program. To identify and prevent abuse, all student assistance files are subject to review by SABC Verification Officers. Serious concerns may be referred to the RCMP. A formal RCMP investigation could result in charges under the Criminal Code of Canada.

Students whose applications have been identified for verification by SABC will be requested to provide documentation to verify information that the student, their spouse or parents submitted on any SABC application or appendices. Students should be advised to keep all receipts and supporting documentation which may be needed for verification purposes, such as tenancy agreement/cancelled rent cheques, child support or alimony payment receipts, income statements, bank statements, etc.

Institution officials should ensure that their students read and are familiar with the terms and conditions of assistance as stated in the SABC application declaration and appendices.

Processing of applications and disbursement of funds can be delayed until verifications are completed. To avoid delays in their funding, students should promptly reply to verification requests. Students must reply to the verification request directly. Institution officials are only involved in student verification issues if information is required from the institution.

### Income Verification

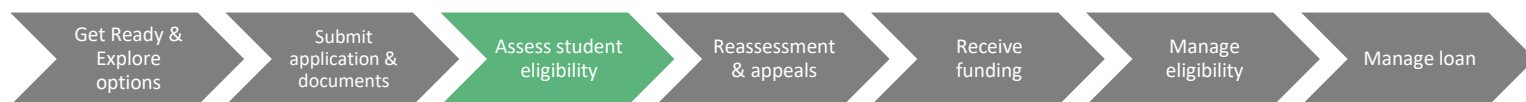
Institution officials are encouraged to advise students that the income reported on their application and appendices is verified with the Canada Revenue Agency (CRA). Income reported on the application and appendices that cannot be verified through the CRA is flagged for verification. Students who appeal to use their current year's income in their application are also flagged for verification.

### Residency Verification

Students are only eligible to receive funding from their province of residence. Institution officials should advise students that if they apply for Student Financial Aid from more than one province their funding will be delayed. Residency will be verified by the provinces involved and the National Student Loan Service Centre. If the student is unsure if they are a BC resident, please direct them to contact the Student Support Team. If you are aware of a student applying to more than one province, please notify the SABC Verification Unit at [sabcverificationunit@gov.bc.ca](mailto:sabcverificationunit@gov.bc.ca), and provide a brief explanation of your concerns.

## Chapter 3: Assess Student Eligibility

The third stage of a student's SABC journey is having their eligibility assessed. At this stage your role as an institution official is to support students in understanding their Notice of Assessment, if required, and to make students aware they need to complete their Master Student Financial Assistance Agreement (MSFAA).



### 3.1 Notification of Assessment (NOA)

Once SABC has processed the student's application for financial assistance, the student will receive a Notification of Assessment (NOA). The NOA describes:

- The type of funding the student is eligible to receive (loan and/or grant);
- The amount of funding the student has been approved for;
- When the student will receive the funding; and,
- Where the funding will be sent.

Please see [Appendix 7: Notification of Assessment Job Aid](#) for more information on the components of the NOA.

B.C. Public institution officials can find information on the B.C. Access Grant in [Appendix 8: B.C. Access Grant Scenarios](#).

### 3.2 Master Student Financial Assistance Agreement (MSFAA)

The NOA also includes a ten-digit MSFAA number.

After the student receives their NOA, they will receive an email from the National Student Loan Service Centre (NSLSC) with a link to create a NSLSC account online. The student will verify their identity with NSLSC online and submit their MSFAA electronically from their NSLSC account.

The MSFAA is a formal legal contract between the student and the provincial and federal governments. The MSFAA explains what the student's responsibilities are, from application to repayment. The MSFAA does not state the amount of funding the student will receive. Instead, each time the student is approved for funding by StudentAid BC, the student receives an NOA that describes their loan and/or grant amount and disbursement details.

In most cases, the MSFAA will remain active throughout the student's post-secondary studies. However, in the following two situations, the student must sign a new MSFAA through their NSLSC account before receiving new funding from B.C.:

- If the student takes a two-year break in studies; or,

- If the student has signed a MSFAA in another province.

### 3.3 Student Restrictions

A student may not receive an NOA or may receive no disbursement of the award on their NOA if their file is restricted. Students' files may be restricted if further information is required to assess their eligibility, they do not meet the SABC eligibility criteria and/or federal eligibility criteria, or if information in their file is being verified. Students with restricted files should contact SABC for guidance on how to resolve their restriction.



## Chapter 4: Reassessment and Appeals

Once assessed for a student loan, a student may wish to change the information they provided on their application, or appeal their assessment based on a change in circumstances. At this stage of the SABC process your role as an institution official is to provide supporting information and documentation as required and support students through these processes.



### 4.1 Request for Reassessment

For the policy on reassessment, see the Changes to Student Circumstances chapter of the StudentAid BC Policy Manual.

Students must complete their own Appendix 7 - Request for Reassessment. If you are supporting a student in completing a request for reassessment, please note:

- Requests for reassessment must be received at the SABC office at least six weeks before the student's study end date.
- A student changing program information will need to complete an Appendix 7 – Reassessment, and you will be required to complete an Appendix 3 – Institution and Program information form to support this reassessment.
- Where a reassessment has been submitted, institution officials should not confirm enrolment until after the reassessment has been processed by StudentAid BC.

Reassessments and appeals can result in overawarded funding if the reassessment changes the student's eligibility and funding has been disbursed. To avoid overawards, work with students to submit appeals and reassessments prior to confirming enrolment.

### 4.2 Appeals

Students experiencing exceptional circumstances impacting the application study period can appeal an assessment made by StudentAid BC. Appeal categories and definitions of exceptional circumstance can be found in the appeals chapter of the SABC Policy Manual, and forms for each appeal category are on the [SABC website](#).

Students are advised to talk with their institution official or financial aid officer prior to completing an appeal. A student must complete their own appeal form unless supporting information is required from a third party such as the student's doctor or an institution official. You may be asked by the student to provide a letter confirming the student's scholastic progress and expected date of graduation, or evidence of administrative procedures like Confirmation of Enrolment or Withdrawals to support the student's appeal.

For Repeat Course Appeals, you may assist the student with a letter verifying their need to repeat a course to either:

- progress in their program of studies, or
- attain a higher GPA to gain admission to a specific program – please provide the typical GPA cut-off point

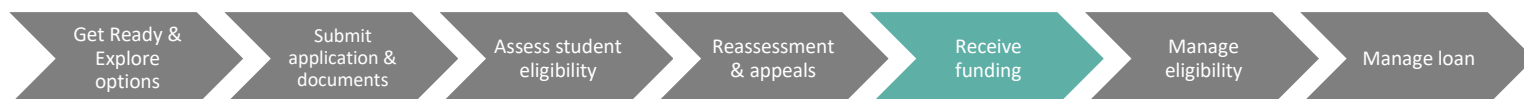
If the student decides to complete an appeal, SABC will review the student's Appeal Request Form and all supporting documentation and apply policy found in StudentAid BC's Policy Manual to determine if the student's circumstances meet the criteria.

- If approved, the student will receive a Final Decision Letter on their StudentAid BC Dashboard.
- If not approved, the student will receive a Notification of Findings Letter on their StudentAid BC Dashboard. The Notification of Findings Letter includes the preliminary decision and a list of any missing documentation that is required to support their appeal request. The student has 15 calendar days to submit further documentation to their StudentAid BC Dashboard.
- Once all additional documentation is received, or the deadline has passed, the student will receive a Final Decision Letter on their StudentAid BC Dashboard.
- If an unsatisfactory response is received to the Notification of Findings Letter where the student does not meet the criteria, or provide sufficient and/or appropriate documentation, the appeal will be denied and the student will have the option to request a review by the Appeal Committee.

Appeal requests, including supporting documentation, must be received at the SABC office at least six weeks before the student's study period end date.

## Chapter 5: Receive Funding

The fourth stage of a student's SABC journey is receiving funding. At this stage your role as an institution official is to confirm students are enrolled in the program on their SABC application, and to receive eligible funds.



### 5.1 Confirmation of Enrolment process

Before a student's loan and/or grant funding can be released, you must confirm that the student is enrolled in an eligible, full-time post-secondary program for the entire study period for which the student has been awarded funding. Where applicable, you must also confirm that the student has met SABC attendance requirements before confirming enrolment to release funds.

If a student is scheduled to receive more than one student loan disbursement during their study period (disbursements are listed on the NOA), the institution must confirm the student's enrolment each time before funds can be issued to the student.

When confirming enrollment, you must ensure that the following information is correct:

- Student name
- Institution code
- Program of studies title and program code
- Number of weeks of study
- Program year and study period dates
- Disbursement date

In the following circumstances enrolment should not be confirmed:

- If the student's start date has been delayed by more than two weeks. An Appendix 7 – Request for Reassessment and an Appendix 3 – Institution and Program Information must be submitted with updated program information. The student enrolment contract with the school should reflect the corrected start and end dates.
- A student has failed to meet SABC attendance criteria, even if outstanding tuition is owed to the institution under the enrolment contract. The student is no longer eligible for the funding disbursement and therefore the institution may not access the funding.

The Confirmation of Enrolment is completed through either an Electronic Confirmation of Enrolment process or by a Paper Confirmation of Enrolment process.

### 5.1.1 Electronic Confirmation of Enrolment process

StudentAid BC will accept Electronic Confirmation of Enrolment up to 26 days prior to disbursement date. Institution officials will access the SABC Confirmation of Enrolment page using PuTTY (see [Appendix 3: A3.3.1 Install PuTTY and A3.3.2 Configure PuTTY](#)). The post-secondary institution confirms that the student is enrolled full-time and provides instructions on the amount of StudentAid BC funding to be sent to the post-secondary institution, if any.

### 5.1.2 Paper Confirmation of Enrolment process

Post-secondary institutions that do not confirm enrolment electronically can confirm a student's enrolment on or after the disbursement date listed on the student's Paper Confirmation of Enrolment form. StudentAid BC will post the Paper Confirmation of Enrolment form to the student's StudentAid BC dashboard. Completed forms can be emailed to StudentAid BC.

Further guidance on how to confirm enrolment online or by paper can be found on the [Institution Officials](#) page of the SABC website.

### 5.1.3 Information on funds collected through the Confirmation of Enrolment process

- The post-secondary institution can ask that some or all the funds be paid to the post-secondary institution to cover the student's academic fees. The cumulative total of all funds directed to the post-secondary institution must not exceed the cost of tuition, books and fees as reported to SABC and declared on the student enrolment contract.
- The post-secondary institution must ensure that the student agrees with any request to release all or a portion of the loan funding directly to the post-secondary institution.
- If a student's tuition is paid by a sponsor, parent or other individual, no SABC funding should be directed to the institution.

For B.C. Private institutions, only the eligibility signing officer whose name has been identified and provided to SABC in the Schedule C of the Designation Agreement may sign a hard copy or submit the electronic confirmation of enrolment.

At this time, institution officials should remind the student of their responsibility to repay their loans and ensure that the student understands that funds being directed to the institution are also repayable.

Institutions who deposit SABC funds from ineligible students will be requested to repay the funds to the National Student Loan Service Centre.

## 5.2 Disbursement of Funds

### 5.2.1 StudentAid BC Funding Disbursement Model

Institutions may choose to have their students' financial assistance disbursed under one of three disbursement models, depending on their study period length, funding eligibility and award configuration:

- Most commonly students can receive up to 60% of their total funding at the beginning of their study period and 40% at the midpoint.
- Alternatively, students can receive equal monthly disbursements throughout the study period on the first day of each month.
- A combination of these two models allows students to receive up to 60% of their total funding up front and then receive monthly disbursements from the midpoint of their study period or at the beginning of the second term of their study period.

Institution officials who are interested in switching their disbursement model must make their request in writing (on institution letterhead) to the SABC Institution and Program Designation Team.

### 5.2.2 Funds deposited into a student's bank account

Student financial assistance is issued via Electronic Funds Transfer for most students.

After the post-secondary institution has confirmed that the student is enrolled in an eligible, full-time post-secondary education program for the entire study period for which the student has been awarded funding, the funds will be deposited into the specified bank account within seven business days.

If the bank account information is invalid, a cheque will be issued and sent to the address provided by the student within approximately 10 business days.

The banking information provided by the student will also be used to withdraw loan payments when the student starts repaying the loan.

Third-party bank accounts, such as those of the student's parents, are not accepted.

**Note:** The NSLSC will only release funds if it receives a valid MSFAA and confirmation of enrolment before the student's study period end date.

### 5.2.3 Funds disbursed to the post-secondary institution

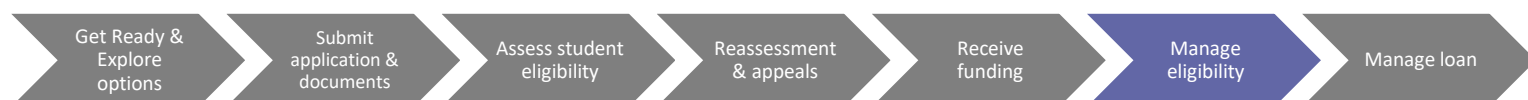
Financial assistance funding is initiated three days before the study start date for post-secondary institutions that confirm enrolment electronically, or on or after the study start date for post-secondary institutions that do not.

International post-secondary institutions requesting funding will receive a cheque in Canadian dollars.

For questions related to disbursements please contact National Student Loan Services Centre (NSLSC).

## Chapter 6: Manage Eligibility

Once a student is successful in their student loan application, they must maintain their eligibility during their study period. In this stage of the SABC process, you are responsible for supporting the student by providing financial counselling, maintaining student files, including attendance records, and informing SABC of any changes in the student's registration. While in studies students may also need assistance in applying for non-repayment and in-study interest-free status.



### 6.1 Institution Responsibilities for SABC-funded students while in studies

For the policy on institution responsibilities, see the Institution Designation for Student Financial Assistance chapter of the StudentAid BC Policy Manual.

#### 6.1.1 Student file documentation

The Ministry provides SABC funding and support to eligible students and expects those students to participate fully in their post-secondary studies. It is the institution's responsibility to monitor this participation and to keep records of each student including classroom attendance, course work, self-paced study, practicum, clinical placement, etc.

All institutions must maintain a separate student file for each SABC-funded student. These files can be electronic and/or digital.

For privacy protection, student files must be kept in a secure location that can only be accessed by authorized persons. The institution must use student information in the SABC records solely for the purposes of administering StudentAid BC funding. Institution officials should advise students to keep copies of their SABC applications and appendices in their own personal files at home.

Institution owners should ensure that their staff are familiar with the *Personal Information Protection Act* ([PIPA](#)) confidentiality laws and regulations when managing student files and records and when accessing student personal information.

The Act protects individuals' privacy by requiring private sector organizations to obtain consent for the collection, use and disclosure of personal information and provides individuals with a right of access to their own personal information.

To fulfill SABC expectations, institutions must keep the following documentation in the student files:

- A copy of valid photo identification issued by a Canadian government such as a driver's license, passport or other document showing date of birth.
- If admission was based on high school graduation, a copy of the student's high school graduation certificate or equivalent. Certificates of High School Completion do not qualify as proof of graduation.
- The student's enrolment contract (or revised contract, if applicable) detailing the program name, cost, duration, study start and end dates and other program details.
- The student's payment schedule detailing dates and amounts of payments made to the institution.
- If a student is accepted for enrolment based on having advanced standing (PLA), the following documentation must be on file:
  - Copies of transcripts if the student has been granted advanced standing based upon previous post-secondary studies;
  - Documentation showing the assessment results if advanced standing was granted due to an assessment of their prior learning;
  - Documentation of the student's schedule when a PLA has been granted.
- Copies of the Appendix 3 and other related SABC appendices (where applicable).
- Copies of all student loan documentation relating to funding, including the Confirmation of Enrolment form, Schedule 2s and Certificate 2s, if your institution is not completing these forms online or through systems operated by SABC or NSLSC.
- Detailed attendance records (hourly for technical/vocational programs and daily for academic, credit-based programs).
- Demonstration of satisfactory progress including copies of examination results, interim and final transcripts, graduation certificates where applicable, etc.
- Copies of the practicum or placement student evaluations, letter of understanding between school and practicum host and any other applicable documentation.
- Copies of withdrawal notifications or cancelation forms.
- Documentation verifying withdrawals, dismissal or voluntary leaving.
- Copy of any refund calculations and refund cheques.
- Alternate contact information.
- Any other appropriate documentation concerning the student while involved with the school.
- A copy of any credential earned by a student for successfully completing their program (e.g., degree, diploma, certificate).

Student files must be accessible on-site for two years from the student's start date and must be maintained for five additional years in storage (off-site is optional).

In addition, it is recommended that institutions keep the following documentation in the student files:

- Documentary proof that the student meets the institution's published program entrance requirements.
- Counselling notes for entrance, in-study and exit counselling.

### 6.1.2 Study period student financial management counselling

Due to the interaction between students and institution staff, you are in a unique position to observe and advise SABC recipients of program requirements and to implement default management best practices.

During the study period, institution officials must ensure administrative compliance to student financial assistance policies and procedures by actively monitoring all students receiving assistance. Institution officials are expected to act at the earliest opportunity to prevent over-assessments and fraud. For example, when a change in a student's financial circumstances comes to the attention of institution officials, officials are expected to remind the student of their obligations to notify SABC and to provide the student with the required forms.

Student financial management counselling during the study period should aim to:

- Establish a strong relationship between students and institution staff.
- Take advantage of personal contact with students to emphasize the student's obligation of loan repayment and the consequences of default.
- Assist at-risk students to stay in school and actively participate in their studies in order to reach their goals and to avoid defaulting. Please see the Repayment Resource Guide for additional study period strategies.

Institution officials are expected to keep notes detailing any meetings with students.

### 6.1.3 Attendance procedures for non-credit (hours-based) programs

A student's continued eligibility for student financial assistance depends on maintaining regular attendance and participation in their studies.

For non-credit programs, institutions are required to keep accurate hourly attendance records for all students for the duration of their study period. This requirement includes records of attendance and progress reports from placement hosts and facilities.

Institutions can establish their own attendance record format, but all records must meet the following basic expectations:

- All attendance data for the funded study period, including attendance in practicums or other practice education components, must be present on a single, formal record kept in the individual student file (or be present in the file at the time of a SABC inspection). Only the individual student's data should be on the attendance record (i.e., no class records).



- The exact approved program title must be present on the attendance record, as the institution must demonstrate that the attendance occurred in the same approved program for which the student was funded.
- The record must demonstrate the actual number of hours per day the student physically attended the funded program, and the daily date. Absences should clearly indicate with either an "A" for absent or "0" for zero hours attended that day.
- The record must also demonstrate the program's required hours of attendance each day, and the daily date. The total required program hours must match those identified on the PED and may not include non-instructional time such as extra homework time, lunch breaks, etc. The total weekly required program hours on the record must match the full-time weekly standard for the program as reported on the PED (or be consistent with a reduced course load, if applicable).
- SABC attendance criteria are measured weekly. At the end of each week, the attendance record must demonstrate the weekly attendance percentage (required program hours/actual student attendance hours). This recording will identify whether the student has maintained at least 60% of a full course load for a given week.
- All statutory holidays, breaks, and institution closures must be clearly identified on the attendance record to differentiate between instructional days and closure days, and to demonstrate that actual institution breaks follow SABC policy.
- Hourly attendance in the practicum or other work-integrated learning components must be clearly distinguished as work-integrated learning and be present on the same record as regular class attendance. For example, four hours of practicum attendance could be denoted as "4P."
- The attendance record must be kept current. Designated institutions are required to identify and report students who fail to meet SABC attendance criteria in a timely fashion. Before confirming enrolment to release a funding disbursement, it is essential that institution officials check the attendance record to confirm that the student has met the SABC attendance requirements for continued funding eligibility.

[Appendix 9](#): Hourly Attendance Record Example shows the type of information to capture for an appropriate hourly attendance record.

Monitoring attendance records may also assist with default management. Accurate and up-to-date attendance information enables institution officials to identify those SABC students who are not attending regularly or who are at risk of failing courses, so that timely corrective action can be taken.

Institutions are recommended to:

- Have a dedicated staff member to review attendance at least once per week; and,
- Develop a system for informing students of the consequences of continued absence and the support services available, for example through one-to-one interviews with at-risk students or warning letters. All meetings and follow-up communications should be documented and included on the student's record.

Retention efforts made by the institution, such as the provision of extra academic assistance, will result in a greater chance of students completing their program, which in turn will increase the institution's repayment rates. Student success and subsequent employment are key factors in loan repayment behaviour.

## 6.2 Notifying SABC of Changes to a Student's Registration and Scholastic Standing

As an institution official you are responsible for notifying SABC of changes in a SABC-funded student's registration including:

- Withdrawals or dismissals
- Transfer of school
- Unsuccessful completion
- Early completion

For the policy on changes to registration, see the Maintaining Eligibility chapter of the SABC Policy Manual.

### 6.2.1 Withdrawals and dismissals

Institution officials must immediately report to SABC as withdrawn any student who meets one or more of the following criteria:

1. Voluntarily leaves the institution
2. Is dismissed by the institution
3. Fails to maintain regular attendance as required by StudentAid BC

The withdrawal or dismissal date is the last date that the student was in full-time attendance.

Institution officials report withdrawals and dismissals to SABC using a [Full-Time Withdrawal Notification form](#).

B.C. public institutions can enter a withdrawal in the Student Financial Assistance System indicating the date the student ceased to maintain full-time studies. This entry must be completed within six weeks of the withdrawal date. For more information on how to enter a withdrawal into SFAS please see [Appendix 10: Withdrawals/Unsuccessful Completions for B.C. Public Institutions Job Aid](#).

If a student does not start studies and no funding has been disbursed to the student or to the institution, an application cancellation request via a Cancel Document form should be submitted to StudentAid BC.

Copies of all documentation relating to a student's withdrawal or dismissal, including attendance records, must be placed in the student's file to verify the withdrawal or reason for dismissal.

Students who meet withdrawal criteria must be reported to SABC for the purposes of reassessing their funding eligibility only. SABC does not require that the institution dismiss or withdraw the student from the program. For the purposes of default management, designated institutions are expected to continue under the terms of their enrolment contract with the student, especially where some or all funds have been paid. Students who continue to graduation are more likely to be successful at repaying their loans.

If the student can return to studies and maintain SABC attendance requirements, the student and the institution should complete and submit the required documents to maintain in-study interest-free status for the duration of the study period.

### **6.2.2 Unsuccessful Completion**

Students must attain a satisfactory scholastic standard to be eligible for student financial assistance. Satisfactory scholastic standard is successful completion (i.e., student receives credit towards a degree, diploma or certificate from the educational institution) of at least 60 percent of a full course load of study (40 percent for students with a permanent disability) at the post-secondary level. Institution officials must notify StudentAid BC when a student does not meet these standards by submitting an [Unsuccessful Completion](#) form.

B.C. public institutions can enter an unsuccessful completion in the Student Financial Assistance System. For more information on how to enter an unsuccessful completion into SFAS please see [Appendix 10: Withdrawals/Unsuccessful Completions for B.C. Public Institutions Job Aid](#).

### **6.2.3 Transfer of school**

Students can only transfer SABC assistance between institutions if:

- The new institution is designated for StudentAid BC funding;
- The break in study is not greater than two weeks (between the last day of attendance at the original institution and the start date at the new institution); and,
- The combined study periods do not exceed 52 weeks.

If the break in studies is more than two weeks, the student will be withdrawn from the original institution and will be required to complete and submit a new application for the new institution.

Institution officials must fill out and submit an [Appendix 5](#) - Transfer of Schools form for students who are transferring from/to their institution. If SABC funding has not been disbursed an Appendix 5 may not be required. In this case, the student can complete an Appendix 7 - Request for Reassessment and the new institution completes an Appendix 3 – Institution and Program Information.

If a student is transferring to another branch of the same institution for four weeks or less, an Appendix 5 – Transfer of Schools is not required. If a student transfers between branches of the same institution for more than four weeks, remaining in the same program, a new Appendix 3 must be submitted. The date classes

end stated on the new Appendix 3 cannot exceed the date classes end stated on the original Appendix 3 by more than two weeks.

The Appendix 5 contains five sections. The transferring student must complete sections 1, 4 and 5. The original institution must complete section 2 and the new institution must complete section 3. The completed Appendix 5 must be received at the SABC office at least six weeks prior to the student's "Date Classes End" entered by the new school on the Appendix 5.

### 6.2.4 Early completion

When a student successfully completes all the requirements of their program before the study end date reported on the Appendix 3, as an institution official you must complete the [Early Completion of Studies Notification](#) form and send it to the SABC office.

You should counsel students that the loan application will be reassessed and pro-rated, and that the student may incur an overaward.

A copy of the early completion documentation must be placed in the student's file for verification and compliance purposes.

## 6.3 Non-repayment and in-study interest-free status

Students do not have to make payments on any outstanding student loans or pay interest while they are enrolled at a designated post-secondary institution in an approved full-time study program (at least 12 weeks long) leading to a formal post secondary credential. Effective October 1, 2020 students may also apply for non-repayment status for medical or parental leave.

Students with previous student loans who are in full-time studies and are not receiving SABC funding for their current study period must apply for in-study interest-free and non-repayment status by:

- applying through the NSLSC online portal, or
- submitting a [Schedule 2](#) form to the NSLSC Centre, or
- applying via the StudentAid BC website

Important note: the maximum lifetime weeks of allowable student financial assistance include weeks of in-study interest-free status.

Please see the Maintain Your Loan page of the SABC website for information on how to apply and for further details.

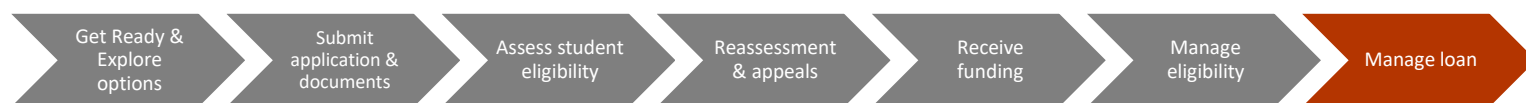
## 6.4 Tuition Refunds

Calculation of the institution's non-refundable fees must be done in accordance with the institution's refund policy. The institution must forward any applicable tuition fee refund to the National Student Loan Service

Centre within 30 days of the date of a student's withdrawal or dismissal, so that the refund can be applied to the student's outstanding debt.

If there is a loan outstanding with SABC, a refund is only paid to a student by the institution when a student transfers from one institution to another. The institution will make any tuition refund payable to the student to use to pay the new institution's tuition.

## Chapter 7: Manage Loan



Students are required to start repaying their loans following the completion of their studies. The cost of defaulted student loans is high, not only to the student but also to government and taxpayers. Under the pan-Canadian Designation Policy Framework (the Framework), you share responsibility for your students' success and are critical to government efforts to manage the financial risk of student loan programs. In accordance with the Framework, SABC uses the Canada Student Financial Assistance Program Repayment Rate to assign institutions to one of three institutional risk zones:

- Green for institutions with a repayment rate above the national average;
- Yellow for institutions with a repayment rate within one standard deviation below the national average; or,
- Red for institutions with a repayment rate below one standard deviation from the national average.

Repayment Rates are defined as the sum of principal loan paid and the principal in good standing divided by the principal (and capitalized non-repayment period interest) consolidated in any given loan year. Red Zone post-secondary institutions are required to submit repayment rate improvement plans to SABC. Institutions in the Yellow zone are encouraged to submit repayment rate improvement plans if the institution's repayment rate is not increasing year over year. SABC informs those institutions that require the submission of a formal improvement plan.

For more information on improvement plans, see the [Repayment Resource Guide](#) on the SABC website.

As an institution official, you play an important role in helping students prepare for repayment while maintaining high repayment rates. The following chapter outlines approaches to take when helping students plan for repayment.

### 7.1 Default management and budget counselling

To prevent default on student loans and maintain repayment rates, develop student retention strategies at your institution to support students in successfully completing their programs of study. Students who complete their programs are much more likely to find employment and repay their student loans.

Retention strategies could include:

- Providing information about SABC loan and grant options, as well as repayment responsibilities, to prospective students prior to enrolment. Ensure that students have all the information possible when deciding to apply for SABC funding.

- Providing counselling to students throughout the entire study period and after studies end, to educate students about their loan repayment obligations and debt relief options. Once students are close to the end of their program, meet with students either individually or in groups to discuss student loan repayment obligations.

For more information on student loan repayment strategies, see the Repayment Resource Guide.

## 7.2 Exit meeting with students

At the conclusion of a student's studies, conduct an exit meeting with each student. The exit meeting, at a minimum, will remind the student of:

- Their repayment responsibilities
- The repercussions of non-repayment or avoidance of payment
- The options available to students who may find themselves in financial difficulties after leaving school
- Their responsibility to keep up-to-date contact information with the National Student Loan Service Centre (NSLSC) and SABC

Encourage students to keep their contact information up to date and inform you if they find employment, to help determine the success of your students in gaining employment in their field of study.

Studies show that students who do not receive adequate exit counselling, including an introduction to debt management tools, are more likely to default.

## 7.3 Repayment

Below is an outline of what a student can expect when they complete their studies and loan repayment begins. Communicate this information to students when they are nearing the completion of their programs. Applications and preparations for repayment require time to process and set up. Notifying students of these requirements and coaching them through the preparation activities will help students avoid default.

- Borrowers are required to start making payments on the first day of the seventh month after the end of their study period (or from their withdrawal date, if applicable).
- Borrowers must repay their Canada-B.C. integrated loans through the service provider, the NSLSC. Borrowers will receive details of their personalized repayment terms approximately 45 days before they must begin repaying their loan.
- The six months following the end of a student's study period is called their non-repayment period.
- Interest begins accumulating on the federal portion of a borrower's loan after the six-month non-repayment period unless they qualify for interest-free status. For more information on how to qualify or apply for interest-free status, see the Maintain Your Loan page of the SABC website.
- If the borrower had arranged for the direct deposit of their loan disbursements, the same bank account number will be used to withdraw monthly loan payments. However, if a borrower does not have money in the account or if their bank account information has changed and NSLSC has not

been updated, this will result in a returned payment. If there are two returned payments, the loan will become delinquent and may go into default.

- Payments will be prorated to the borrower's Canada and B.C. student loan debt, based on each loan's outstanding balance.
- Borrowers can make advance payments on their loan any time during their study period and during their six-month non-repayment period.

All repayment terms and conditions are described in the Master Student Financial Assistance Agreement for those borrowers who received funding after August 1, 2011.

#### Repayment Resources

##### SABC website

[Maintain your Loan](#)

[Repay your Loan](#)

##### NSLSC website

[Stages of a Loan](#)

[Confirmation of Enrolment](#)

[Repay your Canada student loan](#)

[Loan Repayment Options](#)

## 7.4 Financial Difficulties

Repayment assistance is available to eligible students who may have difficulties repaying their loans. For more information on the programs please see the StudentAid BC Policy Manual chapter on Repayment, Default and Rehabilitation, and the SABC website under Repay Your Loans.

The B.C. and Canada Repayment Assistance Plans (RAP), for example, allows borrowers to repay what they can reasonably afford. Borrowers can apply for RAP using one online application form. For more information, visit: [Government of Canada – Student Financial Assistance](#).

## 7.5 Default prevention approaches

You play an important role in student loan default management. Implementing the strategies below can help students understand their student loan repayment obligations and avoid default:

- Contact students immediately after they enter the non-repayment period and several times during the non-repayment period, to ensure that students know about consolidation, repayment options and the deadline for starting repayment.
- Encourage students to use the non-repayment period to set up an electronic payment agreement (automatic debit) with the service provider or to confirm that the service provider has the most up-



to-date banking information.

- Encourage students to make payments during the non-repayment period to help them become aware of the impact of loan payments on their budgets after leaving school and to reduce the total interest to be paid.
- Develop a regular email or letter sending strategy for reminding students of deadlines and other issues regarding their loan.
- Maintain up-to-date contact information including email addresses and alternate contact information in the event a student moves.
- Inform students who have become delinquent borrowers that there is assistance available to them. Refer students to the Repay your Loan section of the SABC website.
- When having difficulty reaching a student, call at different times of the day.
- When interacting with students, remember the goal is assistance, not collection.

## 7.6 Graduate surveys

Conduct graduate surveys four to six months after graduation. Include questions about the general financial conditions the student is experiencing, their expectations for future employment, and their satisfaction level with their program of study.

Surveys help you determine how useful students found the tools and processes your institution provided to inform students of their loan responsibilities. In addition, surveys addressed to employers of graduates evaluate applicability of your programs and whether graduates were trained well enough to fulfill industry needs.

The information gathered in graduate surveys helps inform your default management strategies and practices throughout the process of recruiting, counselling, educating, and graduating students.

## Appendix 1: Designation Application Job Aid

### A1.1 Purpose

The purpose of this appendix is to guide post-secondary institution officials through the process of completing an Institution Designation Application.

### A1.2 Institution Designation Application

The online Institution Designation Application must be completed by B.C. private, out-of-province and international institutions wishing to become designated to administer federal and provincial student financial assistance. The application collects information about institution ownership, addresses, and contacts, as well as regulatory body and program information. SABC uses this data to assess whether an institution meets the criteria for designation as specified in the StudentAid BC Policy Manual chapter Institution Designation for Student Financial Assistance.

### A1.3 Guidelines for completing the Institution Designation Application

- The Institution Designation Application must be completed by an institution official.
- The application is an online form found on the SABC website on the Institution Officials page. The following entries correspond to areas on the form.

#### ***Institution Information***

##### *Legal Name*

Name that identifies the institution for legal, administrative, taxation, or other official purposes. If your institution is a company or corporation that owns multiple educational institutions, please provide the company/corporate legal name.

##### *Operating Name*

Name (if different than the legal name) that the institution uses when offering programming and services to students.

##### *In continuous operation since*

Enter MM/YYYY. To be eligible for designation, the institution must have been in continuous operation for the required amount of time immediately prior to designation. Note: Institutions operating in B.C. with Ministerial consent under the Degree Authorization Act or that have a valid Designation Certificate issued under the Private Training Act are exempt from the requirement.

*Institution Address*

Institutions offering programs at multiple campuses or companies/corporations that own multiple educational institutions are required to submit a Designation Application for each campus or institution. Contact [designat@gov.bc.ca](mailto:designat@gov.bc.ca) for more information.

*SABC Institution Code (if known)*

SABC Institution Code is the same as the Federal Location Code and can be found on the Master Designation List (MDL) at [www.canlearn.ca](http://www.canlearn.ca).

**Regulatory Information**

Under the federal government's Designation Policy Framework, designated institutions must provide independent assurance of institutional integrity by being in good standing with the appropriate educational accrediting, regulatory or government body in the jurisdiction where located. This section of the application displays the appropriate authority for the institution type selected at the top of the application form.

If your institution is not approved or regulated by the listed authorities it is not eligible to be designated.

**Institution Contacts***Legal Authority*

The Legal Authority is the individual who is legally authorized to sign a designation agreement and/or commit the institution to the terms and conditions of designation for all institution locations.

*Legal Authority Business BCeID*

This is required to grant the legal authority access to the Partner Portal. Partner portal access is used to complete the designation process, update location and program information, and submit Appendix 3 information.

*Primary Contact*

The Primary Institution Contact will be the main contact for SABC communication.

*Primary Contact Business BCeID*

The Primary Contact requires access to the Partner Portal to complete the designation process, manage institution users, update location and program information, and submit Appendix 3 information. Please provide the Primary Contact's BCeID to grant them access.

***Program Information***

Institutions must have at least one eligible program in order to qualify for designation with StudentAid BC. Eligible programs must meet the criteria in the Program Eligibility for Student Financial Assistance chapter of the StudentAid BC Policy Manual.

B.C. Private institutions are also be required to complete a Program Eligibility Declaration for the program reported in this section, as well as for all other eligible programs for which StudentAid BC funding is desired. Refer to [Appendix 4](#) – Program Eligibility Declaration Job Aid.

## Appendix 2: Completing Appendix 3 – Institution and Program Information

### A2.1 Purpose

An overview of how institutions can complete the Appendix 3 – Institution and Program Information online and via paper-based forms.

### A2.2 Background/context

If the information for the program delivered by a SABC designated institution is not in the SABC database an Appendix 3 will be generated. This can occur if the program is not listed, or if the program is listed but the programs dates are not. All programs delivered by institutions outside of B.C. will require an Appendix 3.

Institutions can complete an Appendix 3 – Institution and Program Information through the Partner Portal or by completing a paper-based form.

A student begins an application for SABC funding and selects their school.

If the student cannot find their program or study period in the available program options, they select "Other".

The student is notified on their SABC Dashboard that their application will require an Appendix 3 to be completed by their institution.

### A2.3 Appendix 3 – Institution and Program Information Partner Portal Process

#### Institution Information

This information is auto populated.

#### Student Information & Student Supplied Program Information

This information is auto populated based on the student's application.

#### Institution Supplied Program Information

Program Code:

Please see the instructions in the *Program Codes* section of the administrative manual if a new code is

required for a new program.

Major Department:

Enter the major/department of the program.

Total Weeks:

Students must be enrolled in a minimum of 6-week study period.

Student's intended course load:

Enter the student's course load percentage. To be eligible for full time student financial assistance students must maintain 60 percent course load (40 percent for students with permanent disabilities) for academic programs or 12 instructional hours per week (8 hours a week for students with permanent disabilities) for non-academic programs. Student enrolled in less than these minimums are considered part time and should apply to the Part Time Student Loan program, do not approve their Appendix 3.

Prior Learning Assessment:

Is a Prior Learning Assessment part of the program, if yes, please ensure the costs of the PLA are not included in the tuition, fees, or program related costs. PLAs can not be counted towards program credits or hours. PLAs are ineligible for StudentAid BC funding as they are an assessment process, not a formal course or program of study.

What year will the student be in:

Enter the year of the program the student is studying. For example, if the student is in the third year of a four-year program, enter three.

How long is the program (in years):

Enter the total number of years of the program. This may impact student's eligibility for grants, where program lengths may vary, ensure you provide the option the student has selected. Programs must be a minimum of 12 weeks in length.

Online, Blended or Distance Learning:

If the program is delivered online or in a blended format, select yes. For institutions outside of B.C., a CODEE will be required if the program has not already been approved by SABC for online or blended learning delivery.

### Tuition, Mandatory Fees, Program related costs, and Exceptional Expenses:

Please see section [1.2.6 Program costs](#) of the Administration Manual for information on what costs included in each category. These costs must be entered in Canadian currency.

### Program/Faculty:

Select the program/faculty from the drop-down list.

### Program Type (level of study):

Select the program type from the drop-down list.

### Scholarships and merit-based awards:

Provide the amount for any scholarship and merit-based awards awarded to the student.

### Bursaries and other need-based awards:

Provide the amount for any need-based bursaries awarded to the student, where the eligibility criteria are based on need, but the funding is not targeted for a specific element of the costs of living or education.

### Change data reason:

If you have changed information from the student's response, select a reason from the drop list. The reason will be provided to the student.

### Denial reason & Denial Reason other description:

If you are denying the Appendix 3, select a reason from the drop-down list. The reason will be provided to the student. If the reason is not listed, enter your reason in the Denial Reason other section.

### Comments:

This section is free text, included information not captured elsewhere that is important to the processing or record of the Appendix 3.

## **A2.4 Appendix 3 – Institution and Program Information Paper-based Process**

Institutions registered for the [Partner Portal](#) are required to use the Portal to complete Appendix 3's, unless the Appendix 3 is the result of a reassessment. If your school is not registered for the Partner Portal, or you are assisting a student with a Reassessment, please use the [Appendix 3 - Institution and Program Information Form](#) found on the Institution Officials page of the SABC website. Please follow the instructions on the form. Forms can be submitted by email.

## Appendix 3: Institutional Appendix Job Aid (for B.C. Public Institutions)

### A3.1 Purpose

This document is a reference guide for B.C. Public institutions when completing the institutional appendix. In this guide you will find information on how to:

- Install PuTTY (SFAS) on your computer
- Configure PuTTY
- Review and update institution program codes (Rule\_14\_P table)
- Load the institutional appendix
- View IA data for a given program year

### A3.2 Background/context

B.C. Public institutions record information for SABC eligible programs in the Institutional Appendix (IA) of the Student Financial Aid System (SFAS).

B.C. Public institutions must ensure the programs in their IA meet all program eligibility criteria identified in the StudentAid BC Policy Manual to be eligible for SABC funding.

Programs must be entered in the IA every program year for the program to be eligible for SABC funding.

### A3.3 Instructions for completing the institutional appendix

When completing the IA:

- Ensure all sections of the Rule\_14\_P table are accurate before completing the IA.
- Ensure that you complete the IA for the upcoming program year. Program year runs from August 1 to July 31.
- Do not make modifications to the current program year Rule\_14\_P table or IA as this will impact students currently funded.
- Note that SFAS only accepts whole numbers. Round all numeric values containing decimals to the nearest whole number (hours, costs, number of weeks, academic credits, etc.). For example, 25.5 hours must be entered as 26 hours.
- Ensure that all programs adhere to the *Breaks in Study* policy as outlined in the StudentAid BC Policy Manual. Align the tuition amounts reported on each line of the IA with what would be charged to a student enrolled in that study period.

#### What is the Institutional Appendix?

The IA is a part of the Student Financial Assistance System (SFAS) where B.C. Public Institutions can enter their program information.



- Report programs longer than 52 weeks on multiple lines in the IA broken down into years (each year must be at least 12 weeks in length). Each line must have a study period start and end date that aligns with how a student will apply for student financial assistance.
- Retain a copy of the IA at your institution for verification purposes.

### A3.3.1 Install PuTTY (SFAS) on your computer

*Step 1:*

Visit <http://www.putty.org/>

*Step 2:*

Locate the putty.exe file and save it anywhere on your computer.

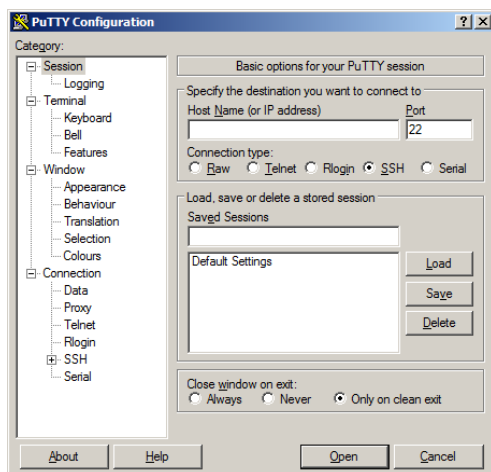


*Step 3:*

Open the .exe file and you are ready to configure the PuTTY.

### A3.3.2 Configure PuTTY

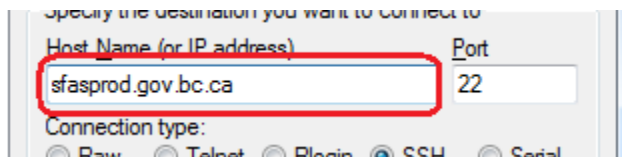
Configuration is a one-time setup and is the initial screen that appears when you launch PuTTY for the first time.



This is the initial screen at first launch of the PuTTY system.

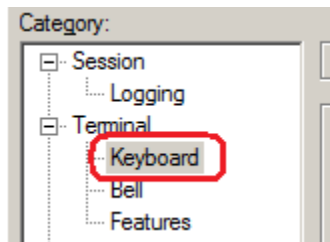
*Step 4:*

Type *sfasprod.gov.bc.ca* in the Host Name field.

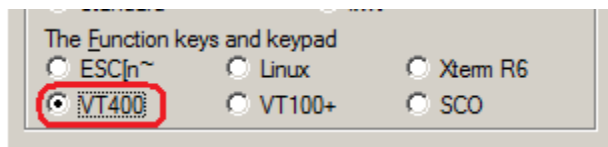


*Step 5:*

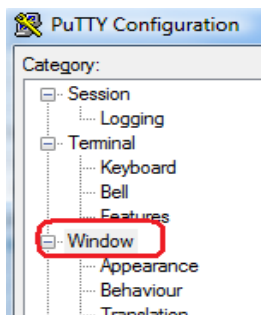
Select *Keyboard* from the left-hand menu labelled *Category*.

*Step 6:*

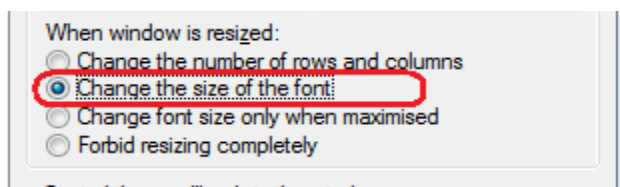
Select the radio button labelled *VT400*.

*Step 7:*

Select *Window* from the left-hand menu *Category*.

*Step 8:*

Select the radio button *change the size of the font*.

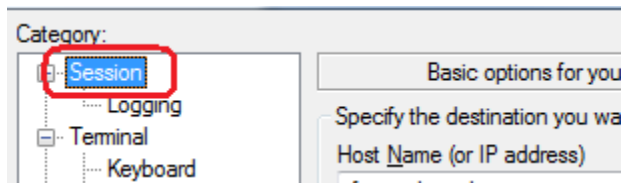


**Step 9:**

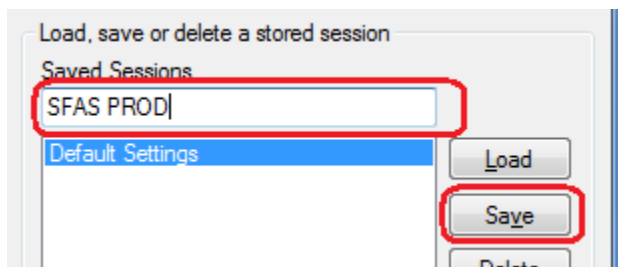
Set the *Lines of scroll back* to 2000.

**Step 10:**

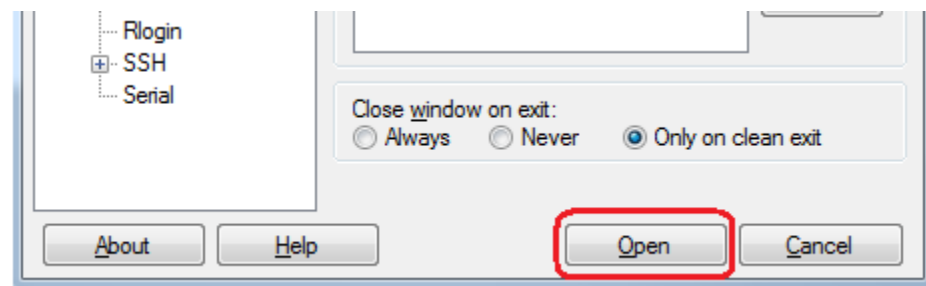
Select *Session* from the left-hand menu *Category*.

**Step 11:**

Type a name for this collection of settings (*Saved Session*) then click *Save*. This example uses the name *SFAS PROD*.

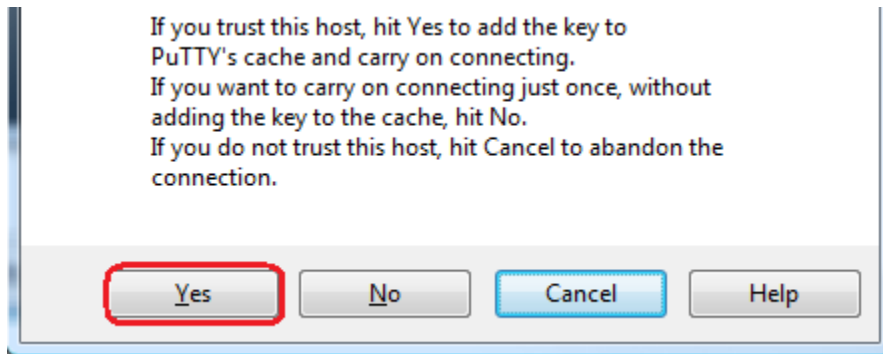
**Step 12:**

Select the *Open* button to log into SFAS.

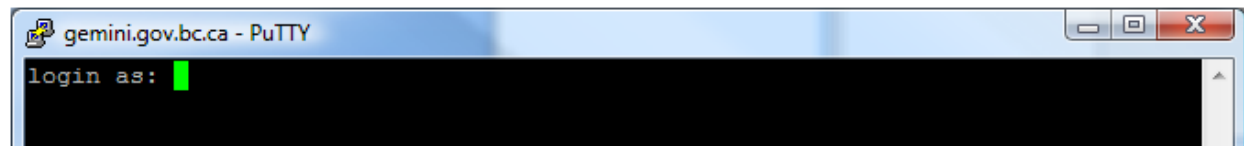


*Step 13:*

Select *YES* when the PuTTY security alert appears.

*Step 14:*

You are now ready to log in to SFAS.



### A3.3.3 Review and update institution program codes (Rule\_14\_P table)

You will be given annual write access to the Rule\_14\_P screen to make edits to the program codes already prepopulated from the previous program year. Only those who have access to the IA will have access to make any changes in the Rule\_14\_P table.

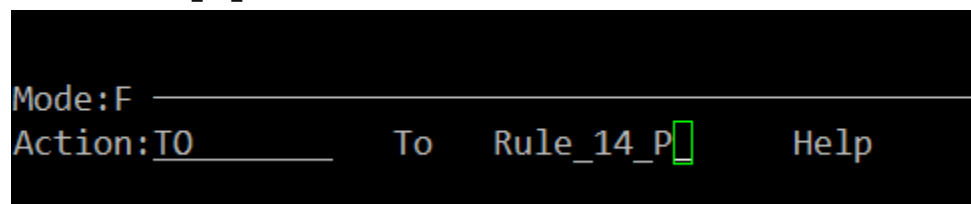
Ensure that you do not make any adjustments to the previous year's record as this could affect current student applications.

After completing your updates for the current program year, review your information and email a signed copy to IPDT.

Begin entering your IA for the current program year once all programs have been populated in the Rule\_14\_P.

#### Step 1:

Locate the Rule\_14\_P screen.



#### Step 2:

Enter *F* or *S* in the *action* field at the bottom of the screen.

F = *Find* all your institution's program descriptions

S = *Select* a certain program description

#### Step 3:

Enter your institution's 4-digit code, as well as the upcoming program year.

The following information will appear for each program displayed alphabetically by program description:

- Program code
- Requirement of an Appendix 3 – Institution and Program Information (you can decide if you wish to have an Appendix 3 – Institution and Program Information generate automatically for each student that applies to this program)
- Length of the program (in years). The length of the program should reflect the entire length of the program, not just the portion completed at your institution.

- Program description (program descriptions can not exceed 100 characters)

**Length of Program and Level of Study Tips for laddering programs:**

Where a certificate can lead into a degree or diploma, the program will need to be entered to reflect the different credentials and program lengths and levels of study available to the student.

Where years of a program are delivered at two institutions, each institution should include the entire length of the program and final level of study.

*Step 4:*

Verify that the information for each program is correct.

Screen Commands:

*D-# (line number)* = Will delete the row selected

*D* = Will delete the full page of displayed records

*A* = Will add a new record

*#* = Will allow your cursor into an existing line to edit

- *Ctrl B* = Will display the current description
- *Ctrl A* = Will allow character insertion

Page & *Full* = Print commands

Things to remember:

- SFAS will not allow you to revise the program code when editing a program description
- Editable fields are: Appendix 3 required, total length of study, and program description
- You can decide to have an Appendix 3 – Institution and Program Information generate automatically for each student that applies to this program. Simply indicate *Y* in the *apdx 3 req* field.
- Program descriptions you use on the Rule\_14\_P table will be displayed on the SABC online application for students to select. If you have a program that has the same description but offers two different credentials, incorporate the name of the credential in the description (i.e., Bachelor of Business Administration, Diploma in Business Administration, etc.).

*Step 5:*

Print a list of all programs.

*Page* = Will print the first page only

*Full* = Will print all programs for the current program year

Each print command will display a screen with four options. Select 1 *Print report on local, attached printer* to start the print job.

#### Shortcut to finding a single program

- Type *S* in the *action* field and press enter
- Type in your institution code and press enter
- Type in the upcoming program year and press enter (Press enter again to remove the pop message)
- Type 1 in the *action* field and press enter
- Type the specific program code and press enter
- Continue to hit enter until the program description appears
- Select the line number to edit the program description

Follow the previous instructions to select a group of programs that start with the same program code. Type the first two letters of the program code followed by the @ symbol. This will bring up all programs with the prefix of what you entered (i.e., *ZI@* will bring up all programs that start with *ZI*).



### A3.3.4 Load the institutional appendix

Prior to loading the institutional appendix for the upcoming year, you must first access an existing IA record on the *INAPPEN – Maintain Institution Appendix* screen in SFAS.

```

PROD          Student Financial Assistance System
2020-JAN-30   [INAPPEN] Maintain Institution Appendix

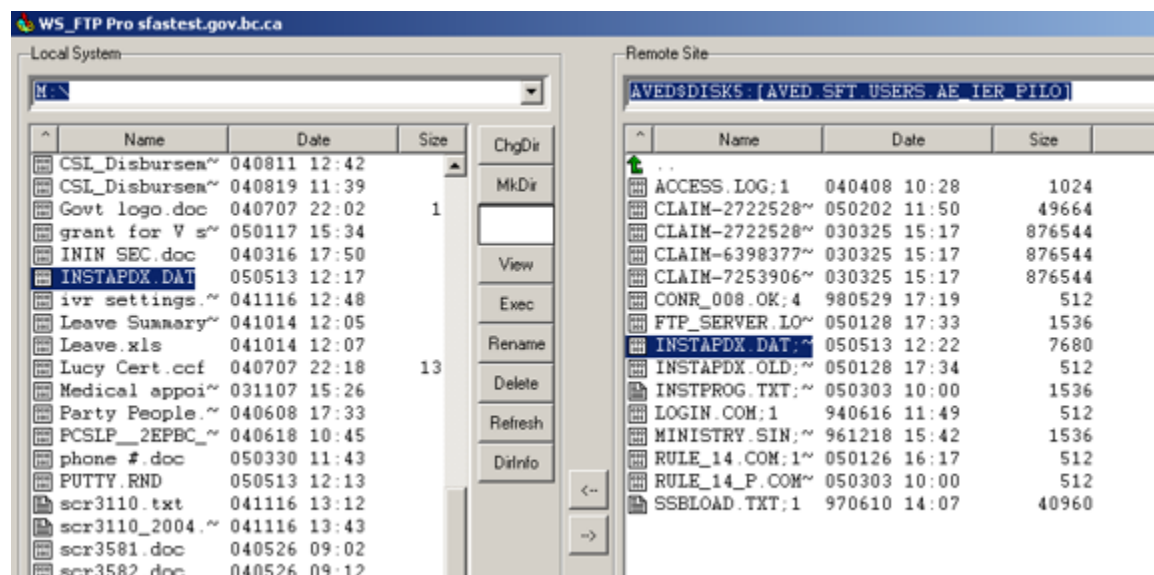
01 Program Year:  Start:          End:
02 Institution>
03 Field>          Area>          Level>
  
```

- Enter *F* in the *action* field
- Enter the previous program year, institution code and an existing program code

For your IA load to be successful, all program codes must be present on the Rule\_14\_P table (instructions on completing the Rule\_14\_P table are in section 3.3.3 of this job aid).

#### Step 1:

Using the WS\_FTP Pro software system, move your IA file from your computer to your SFAS directory.

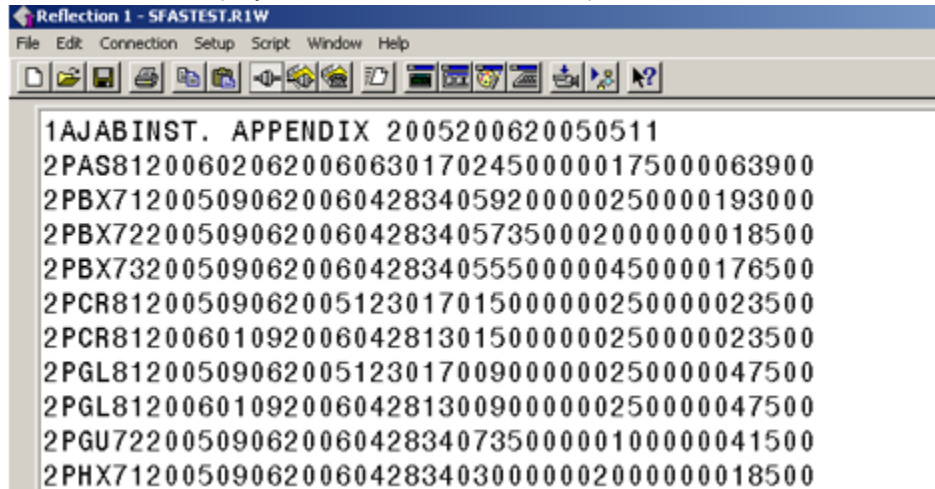


*Step 2:*

Verify that you have moved the file successfully to SFAS by typing the *View* command in the *Action* field of the INAPPEN screen.



The file should display as shown below. Use the up and down arrows to view the file and *Ctrl Z* to exit.

*Step 3:*

Upload your file by typing *Load* in the *action* field and press enter

*Step 4:*

Press *enter* to continue.

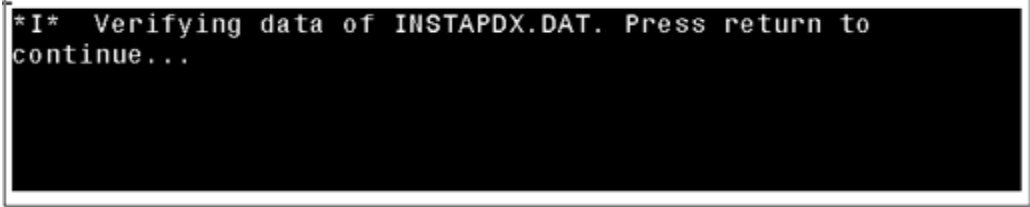
*Step 5:*

Press *enter* to continue.



*Step 6:*

Press *enter* to continue.



```
*I* Verifying data of INSTAPDX.DAT. Press return to
continue...
```

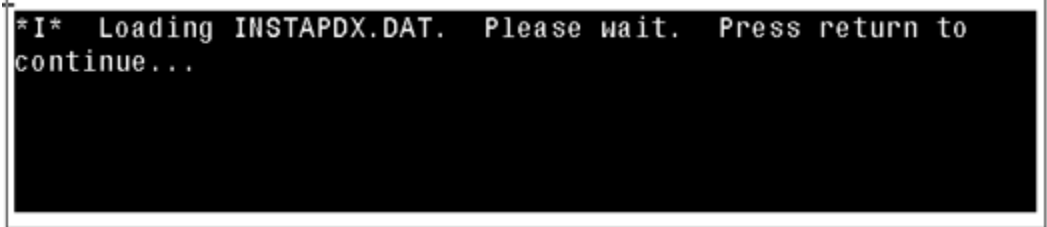
If you receive an error message regarding field of study, number of weeks, or that a program code in the IA has not been approved and entered in the Rule\_14\_P table, please review, correct the error and upload the file again.

All information on the IA must match the information on the Rule\_14\_P table.

*Step 7:*

When the upload is error-free, you will receive the message shown below.

Press *enter* to continue.

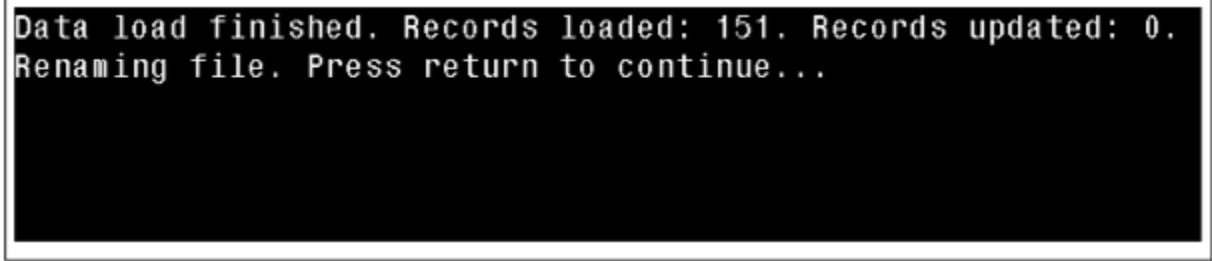


```
*I* Loading INSTAPDX.DAT. Please wait. Press return to
continue...
```

*Step 8:*

The system will report when the data load is complete and will indicate how many records were loaded.

Press *enter* to continue.



```
Data load finished. Records loaded: 151. Records updated: 0.
Renaming file. Press return to continue...
```

*Step 9:*

Find the newly loaded data in the *INAPPEN* screen.

Enter *F* in the *action* field and enter your program year, institution code and any program code that was in the new load.

*Step 10:*

Enter *Full* in the *action* field and press enter to print a full list of all programs.

*Step 11:*

Select option 1, *Print report on local, attached printer* and press enter.

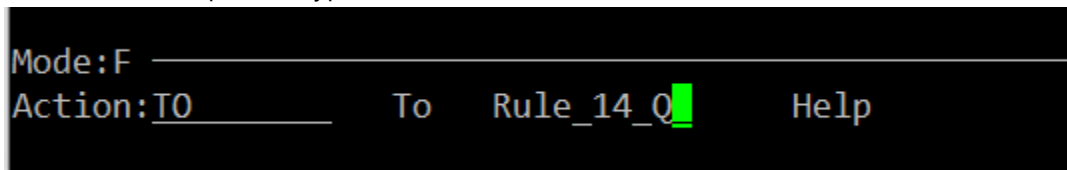
*Step 12:*

Review documents to ensure all programs have been loaded. Then sign off and email a copy to IPDT and keep a copy at your institution for verification purposes.

### A3.3.5 View IA data for a given program year

#### Step 1:

From the SFAS top menu type *TO* and *Rule\_14\_Q* in the *action* field.



Mode:F \_\_\_\_\_  
Action:TO\_\_\_\_\_ To Rule\_14\_Q\_\_\_\_\_ Help

You will have *Read Only* access to this.

#### Step 2:

Enter *F* in the *action* field, then enter your institution code and program year.

This will bring up all records on the IA for that program year. You can navigate through the pages using either the *Page down* key or the down arrow. To search a specific code or group of codes, proceed to the next step from this screen.

#### Step 3:

You must first search the full data set of the IA in order to search for a specific code or group of codes.

Enter *S* in the *action* field, then input the institution code and the program year.

Once your cursor is under the *F>A>L>* section, enter the first letter or first three letters that you wish to search, and press *enter*.

```
F>A> L>Study Area Desc      YR WK Start
P AS 8 COOK LEVEL1 HOTEL/RE 1 22 05-FEE
P CR 8 ELECTRICAL TRADE ENT 1 17 04-SEP
P CR 8 ELECTRICAL TRADE ENT 1 17 05-JAN
```

## Appendix 4: Program Eligibility Declaration (PED) Job Aid (B.C. Private Institutions)

### A4.1 Purpose

This is a reference guide for B.C. private institutions completing the PED form. It provides guidance for each question on the PED form to assist you as you complete the PED.

### A4.2 Program Eligibility Declaration

B.C. Private institutions submit program information to StudentAid BC (SABC) via the PED form every program year (August 1 to July 31). Institutions must retain a copy of the PED forms for verification purposes.

#### Where can I find the PED form?

You will find the PED form on the Institution Officials page of the [StudentAid BC website](#) under the Designation forms section.

B.C. Private institution programs must meet all the program eligibility criteria in the StudentAid BC Policy Manual to be eligible for SABC funding.

Students will be able to select the program on their application after SABC reviews and deems the program eligible.

### A4.3 Instructions for completing the Program Eligibility Declaration

When completing the form:

- Ensure all PED forms use the following the naming convention:
    - Program Code
    - Year of Program
    - Program year
    - Name of institution or legal entity
- For example, "*PDL8 1 of 2 20202021 Anywhere College*"
- Ensure all program changes have been reported to your regulator and approved. Unprocessed adjustments can delay the PED completion process.
  - Complete all sections of the form.
  - Use complete dates in the YY/MM/DD format.

- Use the PED form for the appropriate program year, program years begin on August 1 and end on July 31.
- Do not make modifications to the form. Modified or altered forms will not be processed.
- Use whole numbers for all numeric values (hours, costs, number of weeks, academic credits, etc.) e.g., 25.5 hours must be entered as 26 hours.
- Specify dates for all holidays or breaks. The December to January break must be reported as a *Calendar Year-End* break in the *Scheduled Institution Breaks* of the *Information Regarding Program Year* section.
- Align the tuition amounts reported on each PED with what would be charged to a student enrolled in the study periods listed on the PED.
- Report programs longer than 52 weeks on multiple PEDs broken down into years (each year must be at least 12 weeks in length). Each PED form must have study period start and end dates (see the *Continuous entry* question in the *Information regarding program year* section) that align with how a student will apply for student financial assistance.

### A4.3.1 Section 1 - Institution Information

#### *Question 1 Institution Code and Name*

- Institution Code**  
If your program is located at **only one location**, enter its Institution Code here  
If your program is located at **multiple locations**, enter "xxxx" here, and list all Institution Codes in S3 Q41 the program is offered at
- Institution Name**  
If your program is located at **only one location**, enter its name here  
If your program is located at **multiple locations**, enter its Legal Entity name here

#### *Question 2-7 Institution Address and Contact Information*

If your program is located at **only one location**, enter the address, phone number, and fax number  
If your program is located at **multiple locations**, do not enter address, phone number, or fax number

### A4.3.2 Section 2 – Program Details

#### *Question 8 Program*

- Code**  
This code should remain constant from year to year. Please see the instructions in the *Program Codes* section of this administration manual if a new code is required for a new program.
- Program name**  
The name provided on the form must match the program name approved by PTIB, ICBC, ITA or DQAB/DAA. If the program name indicated on the form does not match the regulating authority

program name, the program will not be eligible for SABC funding until the issue is resolved.

### *Question 9 Year*

If the program is greater than 52 weeks, submit one PED for each year of the program. Ensure that each PED is a minimum of 12 weeks in length and does not exceed 52 weeks.

### *Question 10 Regulating Authority*

Provide the name of the Regulating Authority which accredited or designated the program:

- Degree Quality Assessment Board/Degree Authorization Act (DQAB/DAA)
- Private Training Institutions Branch (PTIB)
- Insurance Corporation of British Columbia (ICBC) for driving institutions only
- Industry Training Authority (ITA) or
- Your own enabling Act

If your institution has received certification from other external bodies do not include those.

### *Question 11 NOC Code*

Provide the National Occupational Code for the program, which is available from the regulating authority, if applicable.

### *Question 12 Credential*

Provide the credential that the student will earn upon completion of the program.

If *Other* is selected enter the type of credential in the space provided.

### *Question 13 Program length*

Provide the total length of the program including all years in the program both in

- a) weeks, and
- b) hours.



Programs that are 52 weeks in length or less should be submitted in one PED.

For programs that are longer than 52 weeks, submit a PED for each SABC program year (August 1 to July 31), with a length no longer than 52 weeks.

Include all types of WIL (for example, practicum, clinical placement, preceptorships, and paid work terms).

Do not include institution breaks that occur between intakes.

For example, if your program has 40 weeks of in-institution instruction (20 hours per week) followed by 25 weeks of clinical placement (30 hours per week), then the total number of weeks is 65 weeks, and the total number of hours is 1550. Two forms are required for completion - one for each year of the program.

### *Question 14 Delivery method*

Identify the delivery method of the program that is being reported on the PED form.

**If the program is being offered at a 100% course load on-site**, please answer *On-site* to this question. If the program is also offered online or blended (partially on-site and partially online), you can indicate as such in Question 11 in the *Declaration* Section of this form. Online programs may require a Confirmation of Distance Education Eligibility (CODEE).

If the program is **only** being offered online or blended (partially on-site and partially online), please answer *Online or Blended*. Online or blended programs may require a Confirmation of Distance Education Eligibility (CODEE).

### *Question 15 Practice Education in this Year of the Program*

Identify the number of hours in each type of WIL for this year of the program. Enter zero hours for a type of WIL that is not included in this year of the program. Each type of WIL must not exceed the maximum percentage of the total program allowed as described in the StudentAid BC Policy Manual. If your WIL exceed the limits as described in the StudentAid BC Policy Manual and are approved by your regulator, please provide additional details in *Question 41 – Additional Information*.

#### **New Terminology**

Practice education is also known as work-integrated learning (WIL). It is used interchangeably in this job aid.

Calculate the percentage by dividing the WIL hours by the total number of hours in the program (*Total Program Length*).

For example, if the year of the program includes 25 weeks of clinical placement with 30 hours per week for a total of 750 hours, divide this by 1550 hours. The result is 48 percent, which is less than the 50 percent maximum allowed.

### *Question 16 Length of this year of the program*

Identify the length of this year of the program (in weeks);

- a) Total length of the program without breaks, and
- b) Total length of the program with breaks (include only those breaks that occur within the intake).

The maximum length for any year of a program is 52 weeks including breaks. For programs with multiple start and end dates, choose the longest scheduled break when counting the weeks including breaks.

Example for counting weeks:

Start Date: September 1, 2019

End Date: December 20, 2019

Scheduled Institution Breaks: October 7, 2019 to October 11, 2019

Weeks (excluding breaks) = 15 weeks

Weeks (including breaks) = 16 weeks

### *Question 17 Hours of study for this program year (including practice education)*

Identify the number of hours of study for this year of the program. Include all hours for all types of WIL terms. Do not include time for institution breaks.

### *Question 18 Hours program offered*

Identify the hours during which this year of the program is offered by the institution (hours when the doors are open to students), for both:

- a) weekdays (Monday through Friday) extending into the evening (if offered) and,
- b) weekends (Saturday and Sunday)

### *Question 19 Scheduled institution breaks*

Identify each of the scheduled breaks that occur during all intakes for that program year (August 1 to July 31). If there will be more than five breaks, include this information in the *Additional Information* text box on the last page of this form.

Remember that each institution break cannot be more than two weeks, except for the calendar year-end break (December to January) which can be three weeks long. Do not include break dates that are prior to or after the study period.

For example, if the program dates are September 7, 2020 – April 23, 2021 and the institution has the following breaks:

December 23, 2020 – January 6, 2021 (calendar year end)

February 22 – 26, 2021 (spring break)

You would enter:

	Start Date (YY/MM/DD)							End Date (YY/MM/DD)					
a) Calendar year-end	2	0	1	2	2	3	To	2	1	0	1	0	6
b)	2	1	0	2	2	2	To	2	1	0	2	2	6
c)							To						
..							-						

### Question 20 Continuous entry

#### IS MY PROGRAM CONTINUOUS ENTRY?

Continuous entry is a flexible option for students to enter a program at multiple points during a program year. All continuous entry programs must have a set duration of weeks in which the program must be completed.

If you select *NO* to *Continuous Entry*, no Appendix 3 – Institution and Program Information will be required for students who select their study period start and end dates listed on the PED.

If you want your students to apply semester-by-semester or apply for a single quarter/term that is a minimum of 12 weeks in duration, select 'YES' for continuous entry and document this in the *Additional Information* section at the end of the PED form. You must report your full program year intakes on the PED form; the PED form does not support partial program declarations.

Identify if there will be continuous entry into the program or not.

- If selecting *YES* to continuous entry, do not submit any dates in Section 2 question 20. Students will be asked to submit their study start and end dates. Your institution will then confirm those

dates by completing an Appendix 3 – Institution and Program Information form.

- If selecting *NO* to continuous entry and the program is offered at **only one location** provide start and end dates of each intake for the program in Section 2 question 20.
- If selecting *NO* to continuous entry and the program is offered at **multiple locations**, provide the start and end dates of each intake of the program at each location in Section 3, Question 41 *Additional Information*.

For multi-year programs, start and end dates must fall in the current program year in the same format as the year one PED form. If you have no intake planned for the current program year, please leave this field blank and make a note in *Additional Information* section at the end of the PED form.

(20) Continuous Entry: ☐ YES ☒ NO (Provide dates below)

	Start Date (YYMMDD)							End Date (YYMMDD)					
a)	1	7	0	9	0	3	To	1	8	0	4	2	5
b)							To						
c)							To						
d)							To						
e)							To						
f)							To						

Selecting *NO* will allow students to select from the dates listed here while completing their application. These dates must reflect the full program length.

### Question 21 Education cost

Identify the education costs for this year of the program. Report the costs that have been approved by the appropriate regulating authority. Refer to the StudentAid BC Policy Manual and StudentAid BC Administration Manual for more details on Education Costs.

(21) Education Costs (approved by Regulating Authority)

a) Actual tuition						.00
b) Mandatory fees						.00
c) Program related costs:						.00
d) Exceptional expenses:						.00

The costs listed here will be used on the SABC application for students if Continuous Entry is *NO*, and their start and end dates are listed.

### Question 22 Description of program

Provide a brief description of the program, **do not** exceed 250 characters. You are required to provide a simple but detailed explanation of the program or course content and subject matter.

## A4.3.3 Section 3 - Declaration

For this section mark the appropriate box for each question.

### Question 1 The program is offered onsite at a full-time (100 percent) course load

Refer to the program eligibility chapter of the StudentAid BC Policy Manual for a full definition of 100 percent onsite full-time.

*Question 2 The program is at the post-secondary level*

Requires that all students must be graduates from a secondary institution (or equivalent) and/or must be minimum age 19 prior to the start of classes. These entrance requirements must be applicable to all students, not just those applying for SABC assistance.

*Question 3 A formal post-secondary credential will be issued by the institution*

Graduated students must receive certification in their field of study. Certificates of Completion are not acceptable as credentials.

*Question 4 The program, in its current format, is approved by the appropriate regulating authority*

Approval from the recognized accrediting body must be obtained prior to applying for SABC designation. Information on this form must match what has already been approved by the appropriate regulatory authority.

*Question 5 The program is at least 12 weeks in length*

The program must provide a minimum of 240 instructional hours (except for aviation programs). The program must be at least 12 weeks when taken full-time (100 percent course load). Statutory holidays or institution breaks must not be included when responding to this statement.

*Question 8 Is this a vocational/technical program?*

Include only hours of instructor led classes and lab hours where an instructor is present.

*Question 9 If this is a program for academic credit*

Only institutions with credits recognized by the [BC Council on Admissions and Transfer](#) can consider themselves academic in this context.

*Question 10 The published minimum entrance requirements are 19 years of age prior to the start of the study period and/or graduation from grade 12 (or equivalent)*

This refers to an admissions policy published in the institution's calendar, brochures, on its website or in the media. Accepting students into a program without having established this minimum may result in the program being declared ineligible for SABC funding.

*Question 11 Will this program be offered via distance education, online, blended or other non-traditional forms of delivery?*

This is the opportunity to declare that the program that you wish to be eligible is also offered via online or blended. A CODEE may be required after a student makes an application to this specific type of program if the program has not already been approved for online or blended learning delivery.

Students in academic programs delivered through online or blended learning must complete a minimum of nine credits in four months (60 percent of a full course load) to qualify for SABC funding, as outlined in their current contract with the institution. You may contact the Institution and Program Designation Team for further clarification.

*Question 13 If a partnership, the second institution is designated/accredited for StudentAid BC purposes*

The second institution must be accredited by PTIB, DQAB, or another recognized accrediting body, and be designated by SABC. You must enter the name of the other institution on the form in the space provided.

**Practicum (unpaid)**

If the program does not have a practicum, select *N/A* and do not answer the questions in this section.

*Question 14 The practicum component is a mandatory requirement to obtain the credential*

Practicum activities must be part of the program that leads to the credential and must be related to the student's field of study. If the practicum is not required to receive the credential, it is not eligible for SABC funding.

*Question 17 The students are supervised and evaluated by the practicum host*

All monitoring done by the practicum host, including attendance and evaluations, must be documented and submitted to the you and forms part of the student's final grade. The student must be supervised and evaluated by a qualified practitioner.

*Question 18 The students will be monitored by the instructor/institution*

You are responsible for monitoring the student regularly, preferably once per week but not less than once every two weeks.

Students are required to follow SABC attendance/course load policy while on their practicum. All monitoring done by the institution, including attendance and evaluations, must be documented and kept in the student administration file at the institution.

**Clinical placement (unpaid)**

If the program does not have a clinical placement, select *N/A* and do not answer the questions in this section.

*Question 19 The clinical placement component is a mandatory requirement to obtain the credential*

Clinical placement activity must be part of the program that leads to the credential. The placement experience must be related to the student's field of study. If the placement is not required to receive the credential, it is not eligible for SABC funding.

*Question 22 The instructor/student ratio is 1:12 or less*

This question is for information purposes only and is determined by your regulator.

*Question 23 The clinical placement is in a real-life setting under the immediate supervision of a fully qualified individual*

This question is for information purposes only and is determined by your regulator.

*Question 24 The students will be monitored by the instructor/institution*

This question is for information purposes only and is determined by your regulator.

### **Preceptorship (Unpaid)**

If the program does not have a preceptorship, select *N/A* and do not answer the questions in this section.

*Question 25 The preceptorship component is a mandatory requirement to obtain the credential*

The preceptorship activity must be part of the program that leads to the credential. The preceptorship experience must be related to the student's field of study. If the preceptorship is not required to receive the credential, it is not eligible for SABC funding.

*Question 28 The preceptorship is in a 'real-life' setting under the immediate supervision of a fully qualified individual*

This question is for information purposes only and is determined by your regulator.

*Question 29 The students will be monitored by the instructor/institution*

This question is for information purposes only and is determined by your regulator.

### **Pre-accreditation Internship (Unpaid)**

If the program does not have a pre-accreditation internship/externship, select *N/A* and do not answer the questions for this section.

*Question 30 The internship/externship component is a mandatory requirement to obtain the credential*

The pre-accreditation internship or externship activity must be part of the program that leads to the credential. The experience must be related to the student's field of study. If the internship or externship is not required to receive the credential, it is not eligible for SABC funding.

*Question 33 The internship or externship is in a 'real-life' setting under the immediate supervision of a fully qualified individual*

This question is for information purposes only and is determined by your regulator.

*Question 34 The students will be monitored by the instructor/institution*

This question is for information purposes only.

### **Paid work term (co-op education)**

If the program does not have a paid work term, select *N/A* and do not answer the questions for this section.

*Question 35 Students will be paid at competitive rates for work performed*

This question is for information purposes only and is determined by your regulator.

*Question 37 Work assignments are related to the field of study and employer evaluations will be part of the institution records*

This question is for information purposes only and is determined by your regulator.

*Question 38 Students' progress and performance will be monitored by the institution in the form of onsite visits*

This question is for information purposes only and is determined by your regulator.

### **Practice Education**

*Question 39 Total Combined Practice Education*

The total combined practice education must not exceed 50 percent of the total program hours. You can request special dispensation from this restriction on an individual program basis and where governing bodies have different requirements. This request must be submitted to SABC for evaluation.

For SABC funding purposes, practice education components can be combined during the duration of a course of study.



If you have answered *NO* to any of the questions in the practicum, clinical placement, preceptorship, internship/externship, or paid work term sections, the program does NOT qualify SABC funding.

### **Declaration signature**

To ensure the PED can be processed by the Ministry it must include:

- The name and signature of an institution official, and
- The date of completion

Please note that electronic signatures are acceptable if it aligns with an authorized institution official (such as a manager/director, a financial aid officer, or an eligibility/enrolment officer as defined on your designation agreement).

### **Additional Information Provided by Institution**

If you have any other information about the program to help the Ministry determine or confirm that it is eligible for SABC funding purposes, then note it in the space provided.

Please use this space to provide the full address of any learning site locations where this program (or this year of a multi-year program) will be delivered other than the main campus of the institution, as well as any program information that may vary by location (for example, Program Dates, Education Costs)

## Appendix 5: How to Submit Program Eligibility Declarations (PEDs) (B.C. Private Institutions)

### A5.1 Purpose

This job aid provides instructions on how to batch and submit PED forms. It will cover three processes:

- Submitting PEDs for new program year (creating the PED batch)
- Submitting additional PEDs / submitting less than four PEDs
- Submitting changes to existing PEDs

### A5.2 Background/context

Each year institutions must submit PEDs for all programs for the upcoming program year (programs starting August 1<sup>st</sup> to July 31<sup>st</sup>). Institutions batch their PEDs by combining the individual PEDs into one using the computer software Adobe Acrobat.

Please review the processes and steps below before submitting your PEDs to ensure the timely processing of your submission. If you have any questions please contact us at [designat@gov.bc.ca](mailto:designat@gov.bc.ca).

- Institutions must use a single PED for each year of each program.
- Institutions can submit PEDs in a single batch, regardless of the number of PEDs.
- Use Adobe Acrobat (free or paid version) and either Windows or Mac OS to create a file in the "Portfolio" format for the batching process.
- Ensure that you retain each PED individually before batching. This will allow you to locate any PED should you need to make changes to individual programs in the future.

### A5.3 PED submission procedures

Select the appropriate PED submission process based on the number of PEDs your institution is submitting and whether this is a new submission, an additional submission, or an edit to an existing submission.

#### **New Submissions:**

Institutions with four or more PEDs are to use the process *Submitting PEDs for new program year*.  
Institutions with less than four PEDs are to use the process *Submitting additional PEDs/submitting less than four PEDs*.

### Changes and additions:

For additional PEDs, use the process *Submitting additional PEDs/submitting less than four PEDs*.

To submit changes to PEDs after your initial submission, use the process *Submitting changes to existing PEDs*.

### A5.3.1 Submitting PEDs for new program year (creating the PED batch)

Note: When naming your PED batch, ensure that you use either your location name (if you are a single location institution) or your legal entity's name (if you are an institution with multiple locations).

1. Select all the PEDs to be batched
2. Right-Click and select "Combine Files in Acrobat"
3. If the bottom of the screen indicates "Acrobat does not support the conversion of one or more of your files to PDF", you will need to change your settings
  - a. Click "Options"
  - b. Ensure that "Save as PDF Portfolio" is **checked off**.
  - c. Ensure that "Convert all files to PDF when creating a portfolio" is **not checked off**.
  - d. Click "OK"
4. With your mouse, select all the PEDs
5. Click the blue "Combine" button at the top right of the screen
6. Click "Save As" and name the PED Batch using the following format:  
 PED Batch 2020 2021 [Institution Name] or [Legal Entity Name]  
 For example, "PED Batch 2020 2021 Davidson College" or "PED Batch 2020 2021 Vancouver Career College Ltd."
7. Right click, and choose "send to"
8. Select "Compressed ZIP folder", this will generate a .zip folder containing your PEDs
9. Open Windows File Explorer (any folder on your desktop)
10. Click the "View" tab
11. Ensure "File Name Extensions" is checked off
12. Right click the .zip folder
13. Click "Rename"
14. Change the .zip at the end of the file's name to .txt
15. Email the batched PDFs to [designat@gov.bc.ca](mailto:designat@gov.bc.ca) with the following subject:  
 New PED Batch 2020 2021 [Institution Name] or [Legal Entity Name]  
 For example, "PED Batch 2020 2021 Davidson College" or "PED Batch 2020 2021 Vancouver Career College Ltd."
16. Retain the PED Batch for your own files. You will need it to submit any new programs or program changes.

### A5.3.2 Submitting additional PEDs / submitting less than four PEDs

If you have less than four programs offered at your institution locations or you need to submit an additional PED for the upcoming program year, use the following process.

1. Once PED(s) are completed, save and name all PEDs individually, using the following format:  
[program code] [year of program] 2020 2021 [Institution Name] or [Legal Entity Name]  
For example,  
"PHB7 1 of 2 2020 2021 Davidson College" or "PHB7 1 of 2 2020 2021 Vancouver Career College Ltd."
2. Email the new PED(s) to [designat@gov.bc.ca](mailto:designat@gov.bc.ca) with the following **subject**:  
Updated PED(s) 2020 2021 [Institution Name] or [Legal Entity Name]  
For example,  
"Updated PED(s) 2020 2021 Davidson College" or "Updated PED(s) 2020 2021 Vancouver Career College Ltd."  
and the following in the **text** of the email:  
[new program codes] added  
For example, "PHY8, JHR8, XIW7 added"
3. Retain the new PED(s) files for your own records. You will need them to submit any program changes.

### A5.3.3 Submitting changes to existing PEDs

Use this process when you wish to make a change to a program for which you have already submitted a PED.

1. Locate the individual PED(s) file you wish to update and change each as necessary
2. Email the updated PED(s) to [designat@gov.bc.ca](mailto:designat@gov.bc.ca) with the following **subject**:  
Updated PED(s) 2020 2021 [Institution Name] or [Legal Entity Name]  
For example,  
"Updated PED(s) 2020 2021 Davidson College" or "Updated PED(s) 2020 2021 Vancouver Career College Ltd."  
and the following in the **text** of the email:  
[program codes affected]: [changed field] changed  
For example, "PHY7, UAN8, GUR7: intake dates changed" or "PHY7, UAN8: tuition changed"
3. Retain the updated PED(s) for your own files. You will need it to submit any program changes.

## Appendix 6: Example Budget Worksheet

### A6.1 Purpose

Institutions are encouraged to develop template budget worksheets to assist students in creating their own budgets. Below is an example of a budget worksheet.

<b>BUDGET WORKSHEET</b>					
<b>STUDY PERIOD COSTS</b>			<b>STUDY PERIOD INCOME</b>		
<b>MONTHLY COSTS</b>	<b>STUDENT</b>	<b>SPOUSE/COMMON-LAW PARTNER (IF APPLICABLE)</b>	<b>MONTHLY INCOME</b>	<b>STUDENT</b>	<b>SPOUSE/COMMON-LAW PARTNER (IF APPLICABLE)</b>
RENT/MORTGAGE			NET INCOME FROM WORK (TAKE HOME)		
FOOD			MONEY FROM PARENTS		
UTILITIES			CHILD ARE SUBSIDY		
TRANSPORTATION (BUS/GAS)			CHILD/SPOUSAL SUPPORT		
MEDICAL & DENTAL			CANADA EMPLOYMENT & IMMIGRATION		
CREDIT CARD PAYMENTS			EI, WORKSAFE BC, EPPD BENEFITS		
DAY-CARE COSTS (Including child care subsidy)			SPONSORED TUITION/ BOOKS		
CHILD SUPPORT/ SPOUSAL SUPPORT YOU PAY			INCOME ASSISTANCE (WELFARE)		
LOAN PAYMENTS			NATIVE BAND ALLOWANCE		
MISC. EXPENSES			PENSION INCOME (CPP, CHILD BENEFITS, ETC.)		
OTHER			B.C. FAMILY BONUS		
			OTHER		
<b>TOTAL MONTHLY COSTS</b>	<b>= \$</b>		<b>TOTAL MONTHLY INCOME</b>	<b>= \$</b>	
<b>MULTIPLY BY STUDY MONTHS</b>	<b>X</b>		<b>MULTIPLY BY STUDY MONTHS</b>	<b>X</b>	
STUDY MONTHS = THE NUMBER OF MONTHS BETWEEN YOUR CLASS START AND END DATES					
<b>ONE TIME COSTS</b>	<b>STUDENT</b>	<b>SPOUSE (IF APPLICABLE)</b>	<b>ONE TIME INCOME</b>	<b>STUDENT</b>	<b>SPOUSE (IF APPLICABLE)</b>
TUITION & FEES			BANK BALANCES AT START OF CLASSES		
BOOKS/SUPPLIES			SALE OF ASSETS		
INSURANCE (CAR, HOUSE, RENTER'S)			BURSARIES (Institution/ PRIVATE)		
PROPERTY TAXES			SCHOLARSHIPS		
OTHER			OTHER		
<b>ADD ONE TIME COSTS</b>	<b>= \$</b>		<b>ADD ONE TIME INCOME</b>	<b>= \$</b>	
<b>TOTAL STUDY PERIOD COSTS</b>	<b>X</b>		<b>TOTAL STUDY PERIOD INCOME</b>	<b>X</b>	
STUDY MONTHS = THE NUMBER OF MONTHS BETWEEN YOUR CLASS START AND END DATES					
<b>COSTS - INCOME = THE AMOUNT YOU NEED TO GO TO Institution</b>					

## Appendix 7: Notification of Assessment Job Aid

### A7.1 Purpose

This Job Aid provides an overview of the information provided on the Notification of Assessment (NOA).

### A7.2 Background

The NOA contains all information a student will need about their current student aid application:

- The type of funding the student is eligible to receive;
- The amount of funding approved;
- When the student will receive the funding; and
- Where the funding will be sent.

### A7.3 Overview of the NOA

#### Section 1



#### Notification of Assessment Date: 2018-AUG-03



School: KWANTLEN POLYTECHNIC UNIVERSITY  
Program: ARTS

Application No:  
Start date:  
End date:  
MSFAA No:

2018-SEP-04  
2018-DEC-31

Study dates

MSFAA Number must be given to the National Student Loans Service Centre (NSLSC) when prompted by their welcome email.

**YOU ARE ELIGIBLE TO RECEIVE \$5,464**  
**See reverse for assessment details.**  
*The funding you receive may differ from the eligible amount. Refer to Conditions/Exceptions on Page 2.*

POTENTIAL amount of award.  
**Check Page 2 for exceptions**

Your funding has been and/or will be made available on or after the following date(s):

Date	Type of Funding	Amount	Sent Date
------	-----------------	--------	-----------

## Section 2

Your funding has been and/or will be made available on or after the following date(s):

Date	Type of Funding	Amount	Sent Date
2018-SEP-04	British Columbia Student Loan	1,870	
2018-SEP-04	Canada Student Grant - Full-Time	1,066	
2018-SEP-04	Canada Student Loan	2,528	

Disbursement types and dates

FEDERAL/PROVINCIAL FINANCIAL NEED ASSESSMENT			
	Federal	Provincial	
Assessed Education Costs	\$ 6,854	\$ 6,854	
Assessed Financial Resources	\$ 1,374	\$ 1,374	
Assessed Financial Need	\$ 5,480	\$ 5,480	
Funding through StudentAid BC	(\$ 5,464)		
Unmet Need	\$ 16	\$ 16	

Unmet need is the difference between your assessed financial need and the amount of funding being provided by StudentAid BC. If your unmet need is greater than \$0, you may need to seek additional sources of funding outside StudentAid BC.

Assessment details showing eligible award

If the amount of funding through StudentAid BC is zero, and you are a full-time student who would like to maintain interest-free status for your outstanding Canada-B.C. integrated loan, contact your institution's financial assistance office to submit a Schedule 2 (Confirmation of Enrolment). You can apply for interest-free status on the National Student Loans Service Centre website to the National Student Loans Service Centre on, or before, the date you return to studies.

Your application was subject to the federal and provincial financial need assessment calculations, based on Canada Student Loan Program and StudentAid BC's respective policies.

Important notice on maintaining Interest-Free Status

For both calculations, the following information was used to determine your available financial resources:

- ◆ Total family income as reflected on the previous year's tax returns (including spouse/common-law, or parent(s), step-parent, sponsor, or legal guardian, if applicable), or as reported on your application if no tax return was available.
- ◆ Scholarships and bursaries as reported on your application.
- ◆ Voluntary or targeted contributions specified on the application form.
- ◆ Assets reported by parent(s), step-parent, sponsor, or legal guardian (for dependent students only).

Financial resources that

## Section 3

LOANS AUTHORIZED TO DATE	
According to our records, the total amount of loans issued to date is:	<b>\$ 4,278</b>
This is a total of your combined Canada and B.C. loans authorized by StudentAid BC and does not reflect any loans not cashed or payments you may have made. For information on the amount you owe on your Canada – B.C. integrated student loan account, contact the National Student Loans Service Centre, at 1-888-815-4514, or online at <a href="http://Canlearn.ca">Canlearn.ca</a> and/or the bank(s) where you cashed your student loan (if cashed before August 1, 2000).	
<b>CONDITIONS/EXCEPTIONS</b> <ul style="list-style-type: none"> <li>◆ You are eligible to receive \$5,464 for your study period of 17 weeks based on standard federal and provincial policies.</li> <li>◆ Your Canada – BC integrated student financial assistance will be deposited into your bank account by electronic funds transfer (EFT). Before we can issue your Canada – BC integrated student financial assistance, you must first submit your master student financial assistance agreement (MSFAA) unless you have already submitted your MSFAA for a previous application. You will receive a 'Welcome Email' from the National Student Loans Service Centre (NSLSC) that includes a URL to register for an online account with the NSLSC where you will complete and submit your MSFAA using the 10 digit MSFAA number provided on this NOA. The disbursement amount indicated on this NOA is the total amount of your Canada – BC integrated student financial assistance disbursement. <b>If your school is to receive all or part of your funding, the amount you will receive may be less than the amount shown on this NOA. Check with your institution if you received less than the amount indicated on your NOA.</b></li> <li>◆ If your previous loans were in default prior to/after this notification was printed, or any funding restrictions added, this assistance may not be awarded to you.</li> </ul>	

Total amount of loans issued to date

### **EXCEPTIONS THAT MAY IMPACT FUNDING**

Possible restrictions will be listed here

Instructions to ensure funding is received



## Section 4

CALCULATION OF FEDERAL AND PROVINCIAL NEED ASSESSMENT					
ASSESSED COSTS	Federal	Provincial	ASSESSED FINANCIAL RESOURCES	Federal	Provincial
Tuition / Fees	\$2,685	\$2,685	Assessed Student Contribution	\$1,374	\$1,374
Books / Supplies	\$1,500	\$1,500	Assessed Spouse Contribution	\$0	\$0
Living Allowance	\$2,669	\$2,669	Assessed Parental Contribution	\$0	\$0
Exceptional Educational Costs	\$0	\$0	Note: Assessed contribution values are used as inputs for the need assessment, and may exceed costs. For information on how contributions are calculated, please visit <a href="https://studentaidbc.ca/">https://studentaidbc.ca/</a> .		
Transfer Costs	\$0	\$0			
Return Transportation Costs	\$0	\$0			
Child Care Costs	\$0	\$0			
Additional Transport	\$0	\$0			
Alimony/Child Support	\$0	\$0			
Separate Residence Allowance	\$0	\$0			
Spouse Student Loan Payments	\$0	\$0			
Discretionary Costs	\$0	\$0			
A. Total Assessed Costs	\$6,854	\$6,854	B. Total Assessed Financial Resources	\$1,374	\$1,374
Your application is subject to both a federal need assessment calculation based on Canada Student Loans Program policies regarding income and other resources, and a provincial need assessment calculation based on StudentAid BC policies regarding income and other resources.					

Your application is subject to both a federal need assessment calculation based on Canada Student Loans Program policies regarding income and other resources, and a provincial need assessment calculation based on StudentAid BC policies regarding income and other resources.

DOES THE NATIONAL STUDENT LOANS SERVICE CENTRE HAVE YOUR CORRECT BANKING INFORMATION?

If not, the processing of your student financial assistance will be delayed, and may be cancelled.

To update your banking information, download a banking information change form from the National Student Loans Service Centre at: [CanLearn.ca](https://CanLearn.ca)

**KEEP THIS NOTIFICATION FOR YOUR RECORDS**

**Breakdown of Assessment**

Costs and Resources

**BANKING INFORMATION**

## A7.4 Student FAQs

**Q:** Why did I not receive the full amount shown on my Notification of Assessment?

**A:** A portion of the funding may have gone to the school, check with the institution. There may be recent restrictions on the file - either federal or provincial, check with StudentAid BC.

**Q:** 1. My parents are not contributing to my education, but it shows a contribution on my NOA. How is that calculation done?

2. Why there is a student contribution when I do not have that kind of money?

**A:** StudentAid BC funding exists to supplement, not replace, funds available to students through individual and family financial resources, savings and income. The program evaluates a student's income and other financial resources against the costs of post-secondary study, including educational costs and typical living costs associated with a moderate standard of living.

The Expected Student Contribution is made up of:

1. The Fixed Student Contribution.
2. Merit-based scholarships and/or needs-based bursaries.
3. Targeted Resources, such as Government, institution, or private funding.

The Fixed Student Contribution for Dependent Students is based on the Total Family Income, not the student's income.

Parents, stepparents, sponsors or legal guardians of single dependent students are expected to contribute to the student's education based on their financial ability. Parental contribution is



based on a portion of parental discretionary income after deductions for taxes, C/QPP, EI and a moderate standard of living. Parental contributions vary by family income, assets and family size but do not depend on the living situation of the student.

Parents indicating they do not want to contribute towards educational or student living costs is not considered as an extenuating reason to reduce or waive the expected contribution.

Q: Can I receive more funding (student has received maximum funding)?

A: You have received maximum funding based on federal and provincial assessment criteria. StudentAid BC assistance in excess of the maximums is not subject to appeal.

Q: 1. Can you change the disbursement date?  
2. Can I receive all my funding upfront?

A: SABC cannot disburse funds prior to the study start date or disburse all the funding upfront.

If the student needs a fee deferral until loan funds are deposited, they should talk to the Financial Aid Office at their school and they may be able to be accommodated.

Funds are disbursed according to the following schedule:

- For program length of 17 weeks or less:
  - Student will receive 100% of their funding on the study start date
- For program length greater than 17 weeks:
  - At the start date of the study period, all Canada Student Loan, 50 percent of Canada Student Grant, and 50 percent of the B.C. Access Grant funding will be disbursed; and
  - At the midpoint of the study period, all B.C. Student Loan and the remaining portion of Canada Student Grant and the B.C. Access Grant funding will be disbursed.

If the total disbursement at the start date of the study period is less than 50 percent of the total award, a portion of the B.C. Student Loan will be released to ensure the student receives a minimum of 50 percent of the total award at the study period start date. The remainder of the award will be disbursed at the midpoint of the program

Q: How is the study period calculated into weeks?

A: To determine the study period in weeks for 6-12 week study periods, weeks are calculated based on the number of calendar days of study. When students are studying for four calendar days in a week, the week is rounded up. For example: 1-10 calendar days = 1 week, 11-17-calendar days = 2 weeks.

To determine the length of the study period in weeks for study periods greater than 12 weeks, multiply the number of months in an academic term by 4.3. To be included in the calculation, a calendar month must have 16 or more days of study including weekends. Thus, if a term ends

April 17, the month of April would be included in the calculation.

**Weeks of study calculation examples**

- Study period September 20 to April 12: The study period would be seven months. September and April have fewer than 16 study days. If the first month of the study period start date and last month of the study period end date both have fewer than 16 days, the days in the starting month will be borrowed and added to the days in the last month. If the total is more than 16 days, an additional month of funding can be given.
- Study period September 8 to April 12: The study period would be seven months. April has fewer than 16 days, the days from the beginning of the month to the study end date.
- Study period September 8 to April 16: The study period would be eight months. Both September and April have 16 or more study days.

Q: How is my living allowance determined? I live in Vancouver and it's very expensive.

A: Living allowance costs that reflect a Moderate Standard of Living are established each year by the Government of Canada for each category of student. The costs depend on the student's living situation, province and dependents and cover shelter, food, miscellaneous expenses and local transportation.

Q: My unmet need is high. Where can I access other funding to cover my unmet need?

A: Students in high-tuition programs or with significant financial commitments in addition to direct educational expenses may need to seek alternate sources of financial funding to support their education choices.

Financial planning is recommended before deciding to pursue post-secondary studies to ensure that enough resources are available to cover all costs.

Check with the Financial Aid Office at the school for information on bursaries and scholarships.

## Appendix 8: B.C. Access Grant

### A8.1 Purpose

This document provides an overview of the B.C. Access Grant for institution officials at B.C. public institutions. Students enrolled at private or out-of-province institutions are not eligible for the B.C. Access Grant.

### A8.2 Background/context

The B.C. Access Grant (BCAG), improves access and reduce the cost of post-secondary education for students from low and middle-income families who enroll in eligible programs at B.C. public post-secondary institutions.

The grant amount is tied to a student's income and family size. Low- and middle-income students whose total family income falls within the income threshold for eligibility will receive a grant amount calculated on a progressive slope. As students' family income increases, their grant award decreases.

The weekly maximum grant for students in programs 2 years or more in length is \$29.41. The weekly maximum grant for students in programs less than 2 years in length is \$117.65.

### A8.3 Eligibility Criteria

- Demonstrate at least \$1 of provincial assessed need
- Attend a B.C. public post-secondary institution
- Program is 2 years or more in length
- Enrolled in an eligible program leading to an undergraduate degree, certificate, or diploma (Master's and PhD programs are not eligible)
- Total family income under threshold for family size

## A8.4 Calculation for weekly BCAG

### Maximum Full-Time BCAG Award calculation:

Step 1. Calculate the weekly grant amount a student is eligible to receive based on their income and family size – see BCAG Threshold table for values. The Maximum Weekly Grant is \$29.41.

$$(\text{Maximum Weekly Grant} - (\text{weekly phase-out slope} \times (\text{total family income} - \text{applicable max grant income threshold based on family size}))) = \text{Eligible Weekly Grant}$$

Step 2. Calculate the study period grant amount based on the student's study period length.

$$\text{Weeks of study} \times \text{Eligible Weekly Grant} = \text{Total Grant}$$

Round to nearest dollar

## A8.5 BCAG Threshold table for Top Up

Family size	Income for max. grant [b]	Phase-out slope in % [c]	Income cap for receiving grants > minimum	Monthly Phase out rate	Weekly phase out slope (Phase out slope % /100) * (1/8) * 12 * (1/52)
1	\$31,868	9.52	\$42,372	0.0119	0.002746154
2	\$45,068	6.88	\$59,603	0.0086	0.001984615
3	\$55,196	5.92	\$72,088	0.0074	0.001707692
4	\$63,735	5.68	\$81,341	0.0071	0.001638462
5	\$71,258	5.44	\$89,640	0.0068	0.001569231
6	\$78,060	5.20	\$97,291	0.0065	0.001500000
7	\$84,313	5.04	\$104,154	0.0063	0.001453846

## A8.6 Scenarios

### Scenario 1

Married student with 1 dependent child, family size = 3

Total family income (spouse + student) = \$70,000

Weeks of study period = 17

Step 1

$(\$29.41 - (0.00170769 \times (\$70,000 - \$55,196)))$

$(\$29.41 - (0.00170769 \times \$14,804))$

$(\$29.41 - (25.2806428))$

Weekly BCAG = 4.1293572

Step 2

Weekly BCAG x Weeks of study

$4.1293572 \times 17 = 70.1990724$

Apply rounding = \$100.00 BCAG-TU

### Scenario 2

Single student, family size = 1

Total family income (student) = \$38,000

Weeks of study period = 34

Step 1

$(\$29.41 - (0.002746154 \times (38,000 - 31,868)))$

$(\$29.41 - (0.00274615 \times (6,132)))$

$(\$29.41 - (16.8393918)) = 12.5706082$  (weekly BCAG)

Step 2

Weekly BCAG x Weeks of study

$12.5706082 \times 34 = 427.4006788$

Apply rounding = \$427.00 BCAG-TU

### Scenario 3

Married Student with 2 dependent children, family size = 4

Total family income (student + spouse) = \$70,000

Weeks of study period = 47

Step 1

$(\$29.41 - (0.001638462 \times (70,000 - 63,735)))$

$(\$29.41 - (0.001638462 \times 6265))$

$(\$29.41 - 10.26495) = 19.14505$  weekly

Step 2

Weekly BCAG x Weeks of study

$19.14505 \times 47 = 899.81735$

Apply rounding = \$900.00 BCAG-TU

## Appendix 9: Example Hourly Attendance Record

### A9.1 Example record

<u>Student name:</u> Ima B. Student		<u>Program:</u> Office Administration		<u>Month:</u> October		<u>Total Program</u> Hours: 625	<u>Courseload</u> 100%
Week Ending:	Course Code:	Course Description	Time In	Time Out	Total hours	Required hours	Percentage of
					attended	of program	required hours
01-Oct-07	ABC2153	Implementing MS Windows 2005	4:41 PM	8:43 PM	4.02	5	
02-Oct-07	ABC2153	Implementing MS Windows 2005	12:36 PM	2:43 PM	2.07	5	
03-Oct-07	ABC2153	Implementing MS Windows 2005	10:26 AM	2:57 PM	4.31	5	
04-Oct-07	ABC2153	Implementing MS Windows 2005	3:55 PM	7:52 PM	3.57	5	
05-Oct-07	ABC2153	Implementing MS Windows 2005	11:27 AM	3:06 PM	3.39	5	
					17.36	25	69.44%
08-Oct-07					Thanksgiving	0	
09-Oct-07	ABC2153	Implementing MS Windows 2005	11:49 AM	4:07 PM	4.18	5	
10-Oct-07	ABC2153	Implementing MS Windows 2005	1:20 PM	4:37 PM	3.17	5	
11-Oct-07	ABC2153	Implementing MS Windows 2005	9:44 AM	1:17 PM	3.33	5	
12-Oct-07	ABC2153	Implementing MS Windows 2005	11:06 AM	3:30 PM	4.24	5	
					14.92	20	74.60%
15-Oct-07	ABC2154	Implementing MS Windows, Infra.	9:01 AM	1:48 PM	4.47	5	
16-Oct-07					absent	5	
17-Oct-07					absent	5	
18-Oct-07	ABC2154	Implementing MS Windows, Infra.	10:07 AM	5:05 PM	6.58	5	
19-Oct-07	ABC2154	Implementing MS Windows, Infra.	12:18 PM	4:57 AM	4.39	5	
					15.44	25	61.76%
22-Oct-07	ABC2154	Implementing MS Windows, Infr.	9:01 AM	1:48 PM	4.47	5	
23-Oct-07	ABC2154	Implementing MS Windows, Infr.	8:51 AM	2:25 PM	5.34	5	
24-Oct-07	ABC2154	Implementing MS Windows, Infr.	12:53 PM	5:54 PM	5.01	5	
25-Oct-07	ABC2154	Implementing MS Windows, Infr.	9:53 AM	2:08 PM	4.15	5	
26-Oct-07					absent	5	
					18.97	25	75.88%
29-Oct-07	ABC1234	Implementing Excel	4:14 PM	8:43 PM	4.29	5	
30-Oct-07	ABC1234	Implementing Excel	12:36 PM	2:43 PM	2.07	5	
31-Oct-07	ABC1234	Implementing Excel	10:00 AM	2:00 PM	4	5	
01-Nov-07					absent	5	
02-Nov-07					absent	5	
					10.36	25	41%
OCTOBER= irregular attendance, send warning letter.					77.05	120	64%

## Appendix 10: Withdrawals/Unsuccessful Completions Job Aid

### A10.1 Purpose

This document is a reference guide outlining the procedures to report Withdrawals and Unsuccessful Completions.

### A10.2 Background/context

A financial aid officer/post-secondary institution official must report to StudentAid BC within six weeks when a student on student financial assistance has:

- Failed to successfully complete a semester, term or study period;
- Registered for the minimum course load and it has been verified the student is not attending classes on a regular basis and is considered as withdrawn (where possible, a record of attendance should be submitted); or
- Not completed the program due to missed instruction days/hours by the end of the study period and must be reported as withdrawn.
- Does not maintain full-time student status or fails to maintain the minimum number of weekly instructional hours for non-academic (career training) programs, for the entire length of their study period, will be considered to have withdrawn.

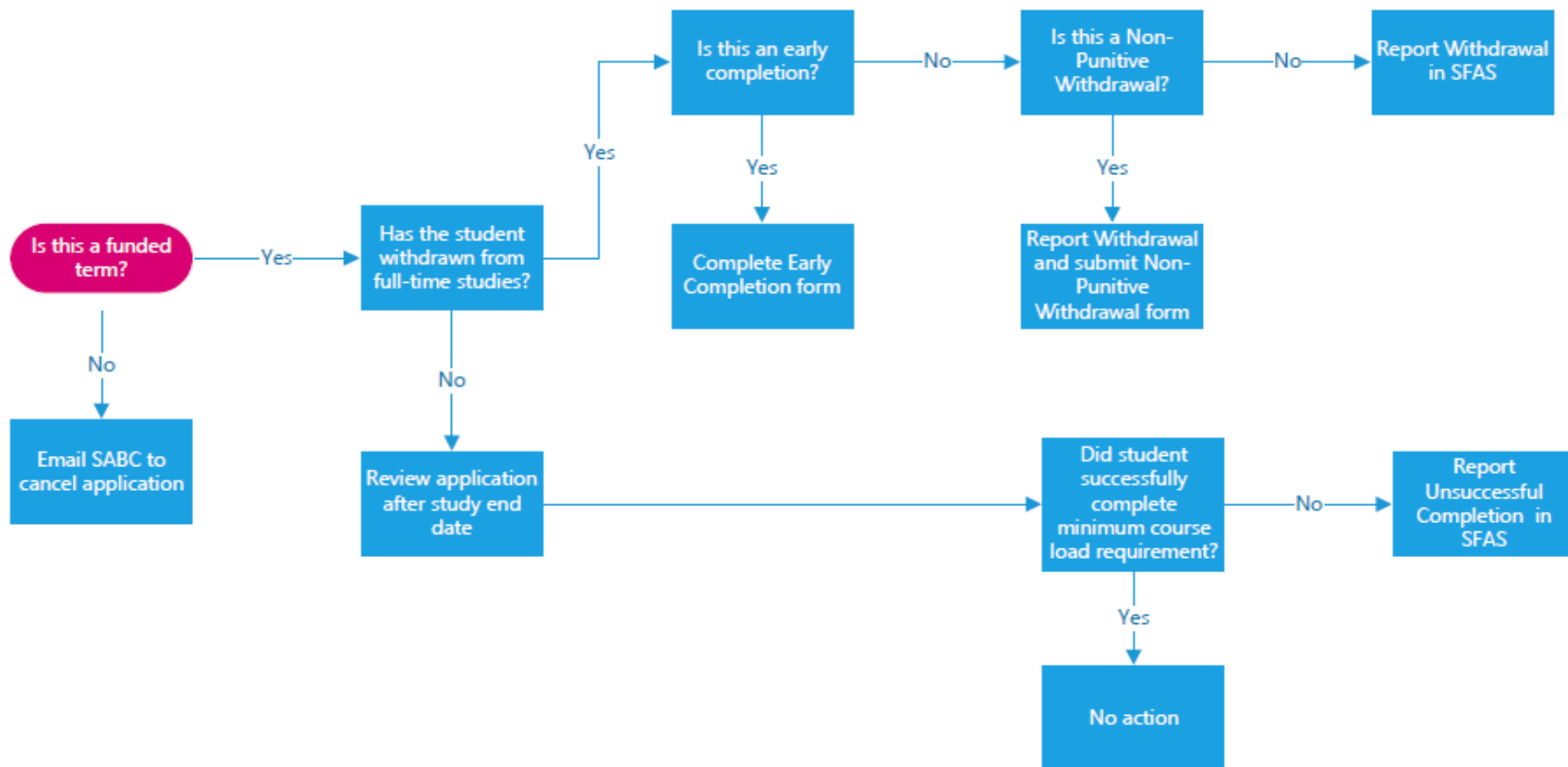
#### Non-Punitive Withdrawals (NPWD)

You may submit a non-punitive withdrawal if the student meets one of the following criteria:

- The student did not attend classes at all and repaid the disbursement in full within 30 days
- The student attended classes 10 calendar days or less and repaid the disbursement in full within 30 days
- The student completed their first term/semester, including exams (if applicable); and either did not return to full-time studies or attended 10 days or less in the next term/semester. The second disbursement was not issued, or the disbursement was repaid in full within 30 days.



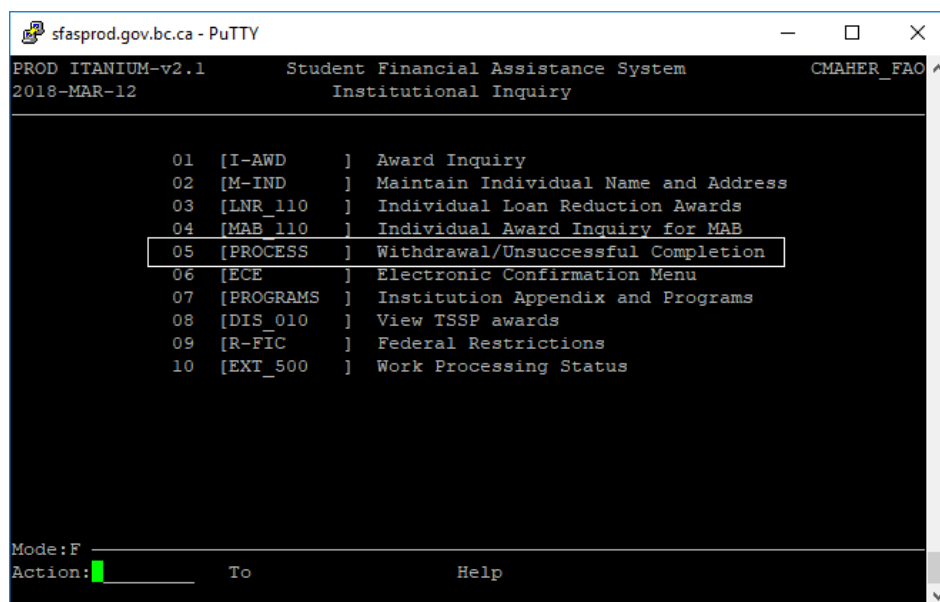
### A10.3 Withdrawal/Unsuccessful Completion Reporting Decision Tree



## A10.4 SFAS: Withdrawal Step by Step Guide

### Step 1

From the Institutional Inquiry screen, select – Withdrawal/Unsuccessful Completion. In the example below this is Option 5. Please note that throughout this guide these numbers may differ depending on your SFAS access permissions.



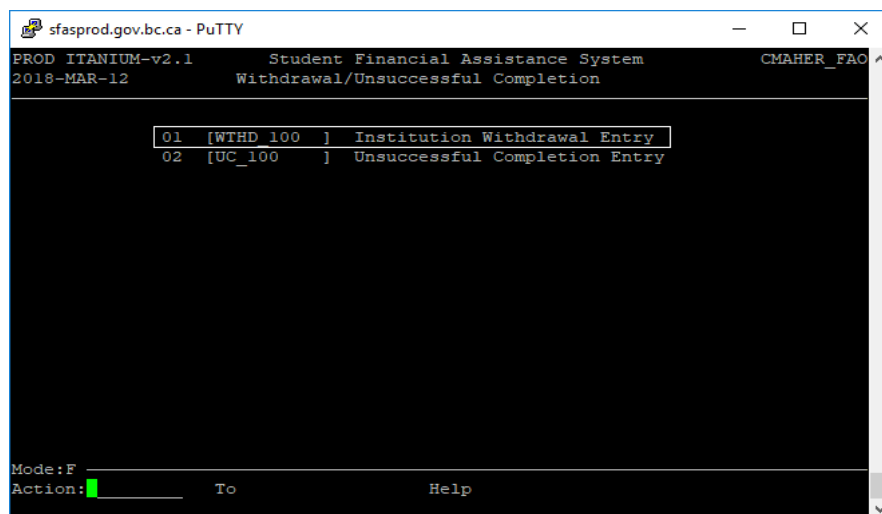
```
sfasprod.gov.bc.ca - PuTTY
PROD ITANIUM-v2.1      Student Financial Assistance System      CMAHER_FAO ^
2018-MAR-12           Institutional Inquiry

01 [I-AWD   ] Award Inquiry
02 [M-IND   ] Maintain Individual Name and Address
03 [LNR_110 ] Individual Loan Reduction Awards
04 [MAB_110 ] Individual Award Inquiry for MAB
05 [PROCESS ] Withdrawal/Unsuccessful Completion
06 [ECE     ] Electronic Confirmation Menu
07 [PROGRAMS] Institution Appendix and Programs
08 [DIS_010 ] View TSSP awards
09 [R-FIC   ] Federal Restrictions
10 [EXT_500 ] Work Processing Status

Mode:F
Action:  To Help
```

### Step 2

From the next menu, select – Institution Withdrawal Entry



```
sfasprod.gov.bc.ca - PuTTY
PROD ITANIUM-v2.1      Student Financial Assistance System      CMAHER_FAO ^
2018-MAR-12           Withdrawal/Unsuccessful Completion

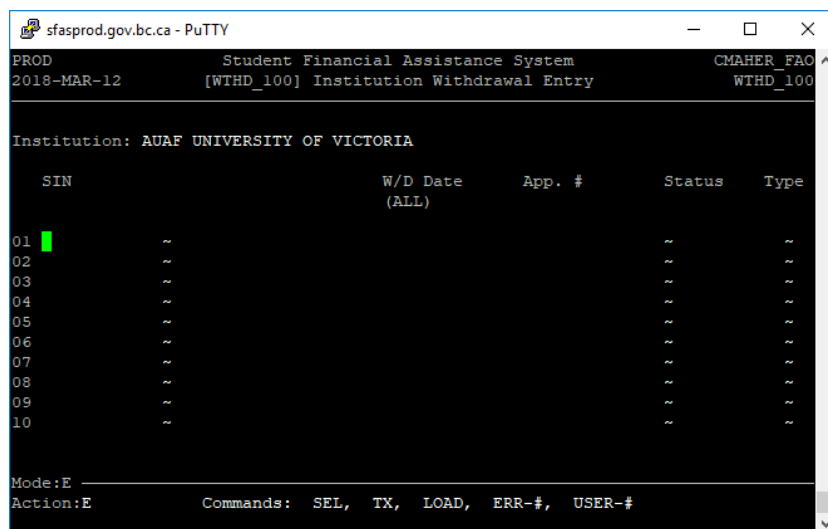
01 [WTHD_100] Institution Withdrawal Entry
02 [UC_100  ] Unsuccessful Completion Entry

Mode:F
Action:  To Help
```

## Step 3

This will bring up the Institution Withdrawal Entry (WTHD\_100) Screen.

Hit 'Enter' and SFAS will automatically populate your school code and name.



sfasprod.gov.bc.ca - PuTTY

PROD Student Financial Assistance System CMAHER\_FAO  
2018-MAR-12 [WTHD\_100] Institution Withdrawal Entry WTHD\_100

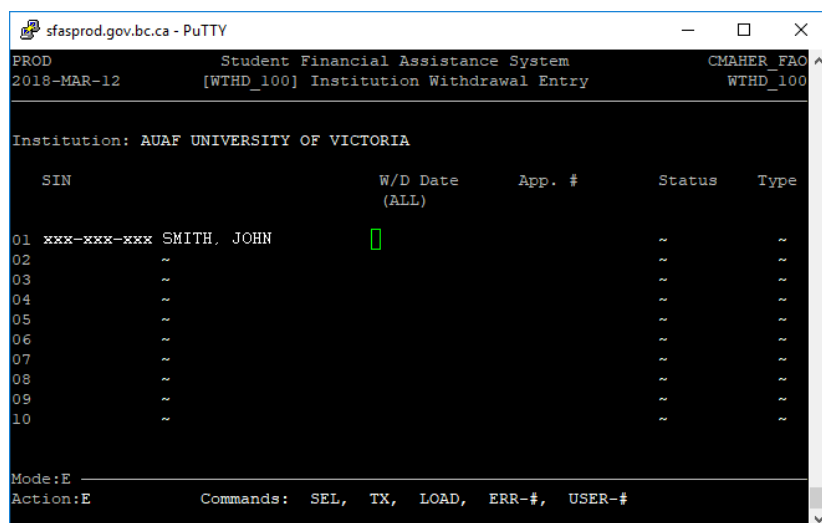
Institution: AUAF UNIVERSITY OF VICTORIA

SIN	W/D Date (ALL)	App. #	Status	Type
01	~	~	~	~
02	~	~	~	~
03	~	~	~	~
04	~	~	~	~
05	~	~	~	~
06	~	~	~	~
07	~	~	~	~
08	~	~	~	~
09	~	~	~	~
10	~	~	~	~

Mode:E  
Action:E Commands: SEL, TX, LOAD, ERR-#, USER-#

## Step 4

Input the student's social insurance number and hit 'Enter'.



sfasprod.gov.bc.ca - PuTTY

PROD Student Financial Assistance System CMAHER\_FAO  
2018-MAR-12 [WTHD\_100] Institution Withdrawal Entry WTHD\_100

Institution: AUAF UNIVERSITY OF VICTORIA

SIN	W/D Date (ALL)	App. #	Status	Type
01	xxx-xxx-xxx SMITH, JOHN	~	~	~
02	~	~	~	~
03	~	~	~	~
04	~	~	~	~
05	~	~	~	~
06	~	~	~	~
07	~	~	~	~
08	~	~	~	~
09	~	~	~	~
10	~	~	~	~

Mode:E  
Action:E Commands: SEL, TX, LOAD, ERR-#, USER-#

### Step 5

Enter the student's withdrawal date (YYY/MM/DD) and hit 'enter'. This will bring up the student's loan application number that is associated with the date of withdrawal entered. The 'Status' of the withdrawal will now show as 'Pending'.

If you are reporting a withdrawal for interest-free status, you will receive an error message indicating that there is no application number associated with the date entered. Hit "Enter" and proceed to Step 7 of this guide.

```

sfasprod.gov.bc.ca - PuTTY
PROD          Student Financial Assistance System      CMAHER_FAO
2018-MAR-12   [WTHD_100] Institution Withdrawal Entry  WTHD_100

Institution: AUAF UNIVERSITY OF VICTORIA

  SIN                W/D Date      App. #      Status      Type
                (ALL)
01 xxx-xxx-xxx SMITH, JOHN      2017-03-02      2017-123456  Pending      ~
02 ~
03 ~
04 ~
05 ~
06 ~
07 ~
08 ~
09 ~
10 ~

Mode:E
Action:E      Commands: SEL, TX, LOAD, ERR-#, USER-#

```

### Step 6

Once you hit enter, you will be brought down to line 02. This screen is designed to allow institutions to report multiple students in the same screen, so you can enter an additional withdrawal for a separate student while you are already in this screen.

## Step 7

Once the withdrawal(s) has been entered, type '/' and press Enter.

```

sfasprod.gov.bc.ca - PuTTY
PROD      Student Financial Assistance System      CMAHER_FAO
2018-MAR-12  [WTHD_100] Institution Withdrawal Entry  WTHD_100

Institution: AUAF UNIVERSITY OF VICTORIA

      SIN                W/D Date      App. #      Status      Type
                (ALL)

01 xxx-xxx-xxx SMITH, JOHN      2017-03-02      2017-123456      Pending      ~
02 //              ~                      ~              ~              ~
03              ~                      ~              ~              ~
04              ~                      ~              ~              ~
05              ~                      ~              ~              ~
06              ~                      ~              ~              ~
07              ~                      ~              ~              ~
08              ~                      ~              ~              ~
09              ~                      ~              ~              ~
10              ~                      ~              ~              ~

Mode:E
Action: /      Commands: SEL, TX, LOAD, ERR-#, USER-#
  
```

## Step 8

Once at the 'Action' line, type 'US' to save your changes.

**Make sure you have entered the information correctly before saving. Once these changes have been saved, the only way to make changes to the withdrawal is by contacting Student Aid BC.**

```

sfasprod.gov.bc.ca - PuTTY
PROD      Student Financial Assistance System      CMAHER_FAO
2018-MAR-12  [WTHD_100] Institution Withdrawal Entry  WTHD_100

Institution: AUAF UNIVERSITY OF VICTORIA

      SIN                W/D Date      App. #      Status      Type
                (ALL)

01 xxx-xxx-xxx SMITH, JOHN      2017-03-02      2017-123456      Pending      ~
02 //              ~                      ~              ~              ~
03              ~                      ~              ~              ~
04              ~                      ~              ~              ~
05              ~                      ~              ~              ~
06              ~                      ~              ~              ~
07              ~                      ~              ~              ~
08              ~                      ~              ~              ~
09              ~                      ~              ~              ~
10              ~                      ~              ~              ~

Mode:E
Action: US      Commands: SEL, TX, LOAD, ERR-#, USER-#
  
```

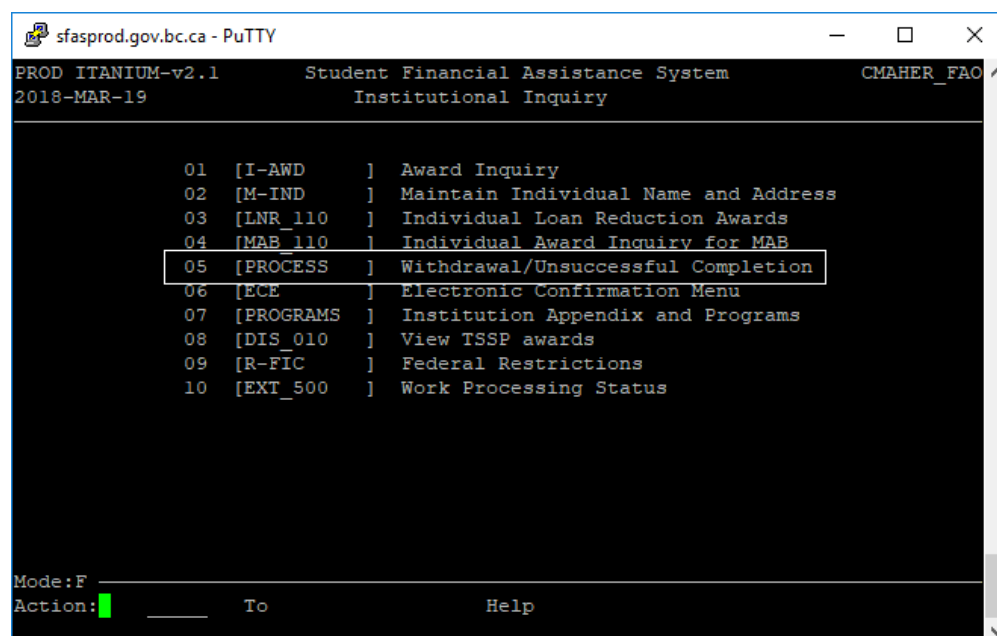
### Step 9

Please note that it can take up to 24 hours for the student's file to be updated and you will not be able to see the withdrawal on the account immediately. If you want to make sure that the withdrawal successfully saved, you can re-enter the student's information into the withdrawal screen. An error message will pop up saying that there is already a withdrawal on file for that loan period. This means that you have successfully reported the withdrawal via the SFAS system.

## A10.5 SFAS: Unsuccessful Completion Step by Step Guide:

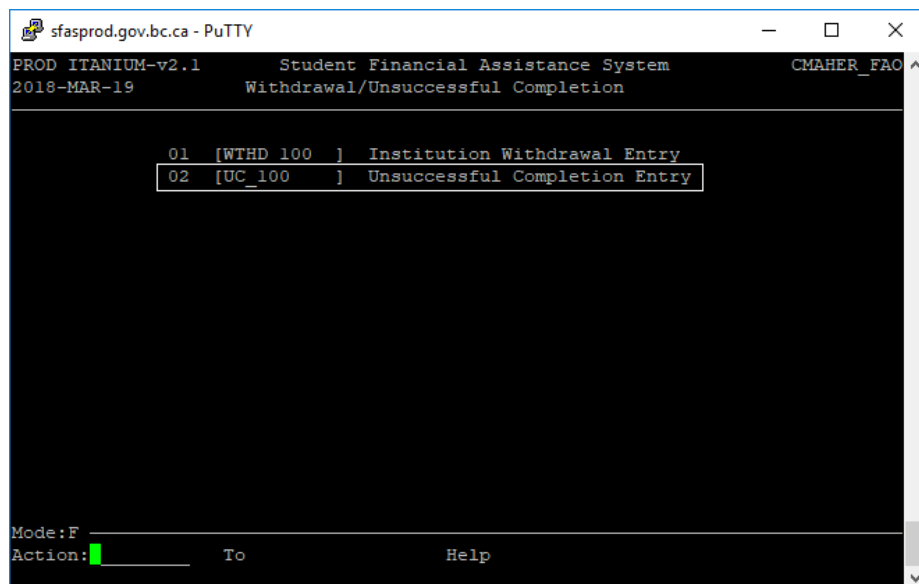
### Step 1

From the Institutional Inquiry screen, select – Withdrawal/Unsuccessful Completion



## Step 2

From this menu, select – Unsuccessful Completion Entry



## Step 3

Enter the student's SIN and hit 'Enter'.

Note: If you already have the correct student account open in the Award Inquiry screen, you can simply hit 'Enter' and the student's information should populate.

```

sfasprod.gov.bc.ca - PuTTY
PROD      Student Financial Assistance System      CMAHER_FAO ^
2018-MAR-19  [UC_100] Unsuccessful Completion Entry  UC_100

Allowable School Codes: AUAF|                               Total UC Weeks:  0
SIN/Name: 123-456-789      SMITH, JOHN

  Start Date / End Date  App. No.  Semester  Weeks  Status
01              /              >              A
02              /              >              A
03              /              >              A
04              /              >              A

Mode:F
Action:|      Commands:  A-Append Records,  USER-# ,  REV-#

```

#### Step 4

To get to Line 01 from the Action line, type 'A' then 'Enter' and input study dates. The application number will auto-populate based on inputted dates

Note: As UC's are reported to SABC by term, you will be entering the official start date and the official end date of the term the student did not successfully complete. The date is entered in (YYYY/MM/DD) format.

```

sfasprod.gov.bc.ca - PuTTY
PROD      Student Financial Assistance System      CMAHER_FAO ^
2018-MAR-19  [UC_100] Unsuccessful Completion Entry  UC_100

Allowable School Codes: AUAF|                               Total UC Weeks:  0
SIN/Name: 123-456-789      SMITH, JOHN

  Start Date / End Date  App. No.  Semester  Weeks  Status
01 2017-SEP-06 / 2017-DEC-18 2017-123456>|              A
02              /              >              A
03              /              >              A
04              /              >              A

Mode:F
Action:A      Commands:  A-Append Records,  USER-# ,  REV-#

```



## Step 5

Under 'Semester' type one of the following:

- 'F' for Fall (Sep-Dec)
- 'S' for Spring (Jan-Apr)
- 'M' for Summer (May-August)
- Hit 'Enter'

## Step 6

If all the information is correct, type '/' in the space and hit 'Enter'. This will take you back down to the Action Line.

```

sfasprod.gov.bc.ca - PuTTY
PROD          Student Financial Assistance System          CMAHER_FAO
2018-MAR-19   [UC_100] Unsuccessful Completion Entry       UC_100

Allowable School Codes: AUA|

SIN/Name: 123-456-789    SMITH, JOHN                      Total UC Weeks: 0

  Start Date / End Date  App. No.  Semester  Weeks  Status
01 2017-SEP-06 / 2017-DEC-18 2017-123456 >F Fall   ~A Active
  // ~

02      /                >                A
03      /                >                A
04      /                >                A

Mode:F
Action:  Commands: A-Append Records, USER-# , REV-#

```

## Step 7

To save, type 'US' and press 'Enter'. Unlike withdrawals, unsuccessful completions can be seen on a student's file as soon as they are reported. If you want to double check to make sure the UC was successfully reported, go into the WTHD screen in SFAS.

sfasprod.gov.bc.ca - PuTTY

PROD Student Financial Assistance System CMAHER\_FAO  
2018-MAR-19 [WTHD\_003] Withdrawal/UC Inquiry WTHD\_003

SIN: 123-456-789 SMITH, JOHN Showing: ACTIVE

Status	Type	Application	Wthd Date	Rsn	Wk	Start	End	Semester
ACTIVE	UC	~			17	2016-JAN-04	2016-APR-25	Spring
AUAZ		VANCOUVER ISLAND UNIVERSITY - ALL						
ACTIVE	UC	~			17	2017-JAN-04	2017-APR-25	Spring
AUAF		UNIVERSITY OF VICTORIA						
ACTIVE	UC	2017-123456	~		17	2017-SEP-06	2017-DEC-18	Fall
AUAF		UNIVERSITY OF VICTORIA						

Withdrawal/UC Status: ~

Policy: 2006/07 Pre-2006/07

Withdrawals : 0

Unsuccessful Compl. : 51 (wks) 0 (strikes)

Mode:F

Action: SEL

## A10.6 Paper Process:

- If a school official is not able to access SFAS, a Withdrawal or Unsuccessful Completion can be reported using the appropriate form (below).
- A Non-Punitive Withdrawal or Early Completion should always be reported using the appropriate form (below).

### Withdrawal:

[https://studentaidbc.ca/sites/all/files/form-library/withdrawal\\_notification.pdf](https://studentaidbc.ca/sites/all/files/form-library/withdrawal_notification.pdf)

### Unsuccessful Completion:

[https://studentaidbc.ca/sites/all/files/form-library/unsuccessful\\_completion.pdf](https://studentaidbc.ca/sites/all/files/form-library/unsuccessful_completion.pdf)

### Non-Punitive Withdrawal:

[https://studentaidbc.ca/sites/all/files/form-library/non\\_punitive\\_withdrawal.pdf](https://studentaidbc.ca/sites/all/files/form-library/non_punitive_withdrawal.pdf)

### Early Completion:

[https://studentaidbc.ca/sites/all/files/form-library/non\\_punitive\\_withdrawal.pdf](https://studentaidbc.ca/sites/all/files/form-library/non_punitive_withdrawal.pdf)

## Appendix 11 – How to update your SABC website listing

### A11.1 Purpose

This document provides instructions on how to update your institution's contact information on the StudentAid BC website.

### A11.2 Background/context

Students can search for the contact information of SABC designated institutions on the SABC website. SABC collects contact information from institutions when they are designated. Follow the steps below to if your contact information has changed since designation.

### A11.3 Instructions

Please review the contact information for your institution on the StudentAid BC website. To access this listing, follow the steps below:

#### STEP ONE:

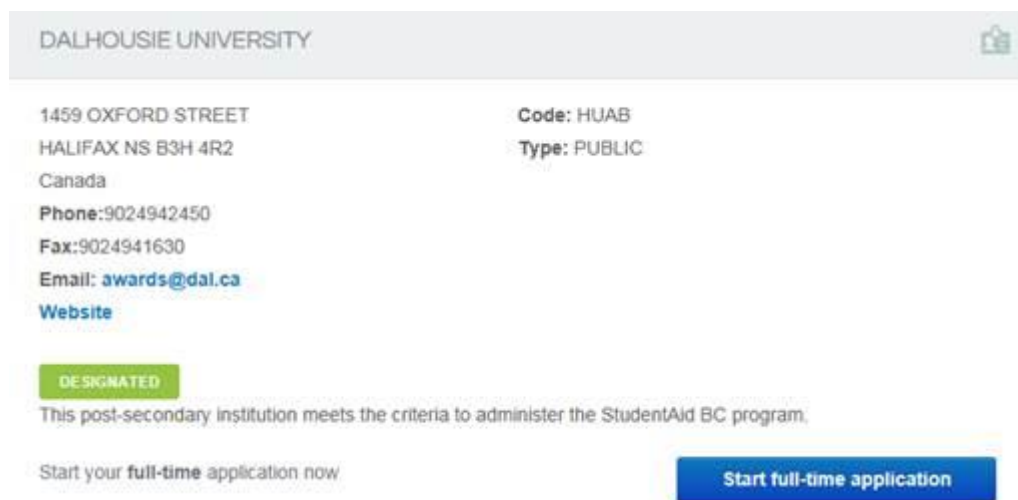
Visit [www.StudentAidBC.ca](http://www.StudentAidBC.ca) and click 'apply for a loan', 'check your school designation', then search for your institution.

#### STEP TWO:

Click on your institution name.

The screenshot shows a search interface on the StudentAid BC website. At the top, there is a search bar labeled 'Search for an institution' with the text 'dalh' entered. To the right of the search bar is a 'Search Tips' link. Below the search bar is a 'View All' button. Underneath that is a row of alphabet buttons from 'a' to 'z'. Below the alphabet buttons is a table with the following columns: Institution, City, Province, Country, and Designated. The table contains one row of data for 'DALHOUSIE UNIVERSITY' in 'HALIFAX', 'Nova Scotia', 'Canada'. The 'Designated' column for this row shows a green button labeled 'DESIGNATED'. A red arrow points to this 'DESIGNATED' button.

Institution	City	Province	Country	Designated
DALHOUSIE UNIVERSITY	HALIFAX	Nova Scotia	Canada	DESIGNATED



The screenshot shows a web form for Dalhousie University. At the top, there is a header bar with "DALHOUSIE UNIVERSITY" on the left and a small icon on the right. Below the header, the form contains the following information:

- Address: 1459 OXFORD STREET, HALIFAX NS B3H 4R2, Canada
- Phone: 9024942450
- Fax: 9024941630
- Email: [awards@dal.ca](mailto:awards@dal.ca)
- Website: [Website](#)
- Code: HUAB
- Type: PUBLIC

Below the contact information, there is a green button labeled "DESIGNATED". Underneath this button, a message states: "This post-secondary institution meets the criteria to administer the StudentAid BC program." At the bottom of the form, there is a blue button labeled "Start full-time application" and a link that says "Start your full-time application now".

### STEP THREE:

Review the information listed.

Contact [DESIGNAT@gov.bc.ca](mailto:DESIGNAT@gov.bc.ca) if changes are required.

## Appendix 12 – SFAS/SAIL Access Job Aid

### A12.1 Purpose

This document is a reference guide for all eligible institutions who wish to grant or delete access to their staff for SFAS/PuTTY and/or SAIL.

### A12.2 Background/context

B.C. Public, B.C. Private, and Canadian institutions can use the SFAS/PuTTY software to confirm student enrolment. In addition, B.C. Public institutions perform several other functions as it relates to programs and student applications.

### A12.3 Adding access to SFAS (B.C. Private and Canadian institutions only)

To request SFAS access for one of your staff, download the **Electronic Confirmation of Enrolment System Access Request Form** from the [Institution Officials](#) section of our website.

Complete the following information on the form:

- System requested: check off SFAS only
- Please Specify: Select NEW USER, in the Access Same As Employee, section, enter the information of a staff member who currently has access. If there is no such staff member, or you do not have this information, please enter "ECIN"
- Approved/Requested By: the supervisor of the staff member requiring access must complete this section.
- Conditions of Use Of Computer Data: the staff member requiring access to SFAS must complete this section.

Submit the completed forms via email to [designat@gov.bc.ca](mailto:designat@gov.bc.ca). **Please submit only one access request per email.** Access will be granted in 5-7 business days.

### A12.4 Adding access to SFAS/SAIL (B.C. Public institutions only)

To request SFAS and/or SAIL access for one of your staff, please go to the [Institution Officials](#) section of our website and download the **Electronic Confirmation of Enrolment System Access Request Form**.

Complete the following information on the form:

- System Requested: select SFAS and/or SAIL as required
- Please Specify: select New User, in the Access Same As Employee, section, enter the information of a staff member who currently has access. If there is no such staff member, or you do not have this information, please enter the code for the needed level of access:

- EI01 – Read ability on student/application screens (APP\*.QKS screens). Read only to student/application data
- EI02 – Updates to student/application screens/data. Write ability on application screens
- EI03 – Read/write only to institution (Appendix 3) data. Read ability on student/application screens (APP\*.QKS screens). Change access to institution appendix data
- EI04 – Write ability on application screens. Updates to student/application screens and institution (Appendix 3) data. Change access to institution appendix data
- If requesting SAIL access, check off BCeID (SAIL access) and enter the BCeID username of the staff member requiring access
- Approved/Requested By: the supervisor of the staff member requiring access must complete this section.
- Conditions of Use Of Computer Data: the staff member requiring access to SFAS/SAIL must complete this section.

Submit the completed forms via email to [designat@gov.bc.ca](mailto:designat@gov.bc.ca). **Please submit only one access request per email.** Access will be granted in 5-7 business days.

## A12.5 Removing Access to SFAS/SAIL

To request the removal of SFAS and/or SAIL access for one of your staff, please go to the [Institution Officials](#) section of our website and download the **Electronic Confirmation of Enrolment System Access Request Form**.

Complete the following information on the form:

- SYSTEM REQUESTED, select SFAS and/or SAIL as required.
- Please Specify: select Delete User
- APPROVED/REQUESTED BY, must be completed by the supervisor of the staff member to be removed
- Conditions of Use Of Computer Data, this page is not required when asking to remove access

Submit completed forms via email to us at [designat@gov.bc.ca](mailto:designat@gov.bc.ca). **Please submit only one access request per email.** Access will be granted in 5-7 business days.

## Appendix 13 – Student Financial Aid Partner Portal (SFAPP) Access Job Aid

### A13.1 Purpose

This document is a reference guide for all institutions when granting or removing access to the Student Financial Aid Partner Portal (SFAPP, or, “The Portal”).

### A13.2 Background/context

Access to the Portal allows institution staff to perform certain tasks based on the type of Profile assigned to them:

***Institution Administrators*** can grant or remove access for other staff, process and submit Appendix 3s, change institution information on the Portal, and submit and manage Designation Agreements (Institution Administrators at B.C. Privates only)

***Institution Users*** can process and submit Appendix 3s

***Institution Read-Only*** Users can read Appendix 3s

### A13.3 Granting Access to the Portal

To give a staff member access to the Portal, have one of your current Institution Administrators follow these steps:

1. Ensure the staff member has a Business BCeID registered under your institution’s BCeID account. Your institution’s BCeID Profile Manager can create new BCeIDs at [www.bceid.ca](http://www.bceid.ca)
2. Log in to [the Portal](#) using the Institution Administrator’s own Business BCeID username and password
3. If necessary, click “Switch Institution”
4. Click “Manage Users”
5. Under the list of BCeID usernames available, find the staff member requiring access and click “Grant Access”
6. Select the type of profile required: Institution Administrator, Institution User, or Institution Read-Only User

If no person on your staff currently has access as an Institution Administrator, StudentAid BC will have to set up a new Administrator’s profile for you. Send an email to [designat@gov.bc.ca](mailto:designat@gov.bc.ca) with the following information for the new Administrator:

- Full Name
- Role with the institution (Director, Financial Aid Officer, etc.)
- Phone Number

- Email
- Business BCeID username registered with the institution's BCeID account

### **A13.4 Removing Access to the Portal**

To remove a staff member's access to the Portal, have one of your current Institution Administrators follow these steps.

1. Log in to [the Portal](#) using the Institution Administrator's own Business BCeID username and password
2. If necessary, click "Switch Institution"
3. Click "Manage Users"
4. Under the list of BCeID usernames available, find the staff member requiring the change and click "Remove Access"

BCeIDs will remain on this list until they are deleted via your institution's account on the BCeID website.

### **A13.5 Changing Access to the Portal**

To change a staff member's profile role, have one of your current Institution Administrators follow these steps.

1. Log in to [the Portal](#) using the Institution Administrator's own Business BCeID username and password
2. If necessary, click "Switch Institution"
3. Click "Manage Users"
4. Under the list of BCeID usernames available, find the staff member requiring the change and click "Remove Access"
5. For the same staff member, click "Grant Access"
6. Select the type of profile required: Institution Administrator, Institution User, or Institution Read-Only User