

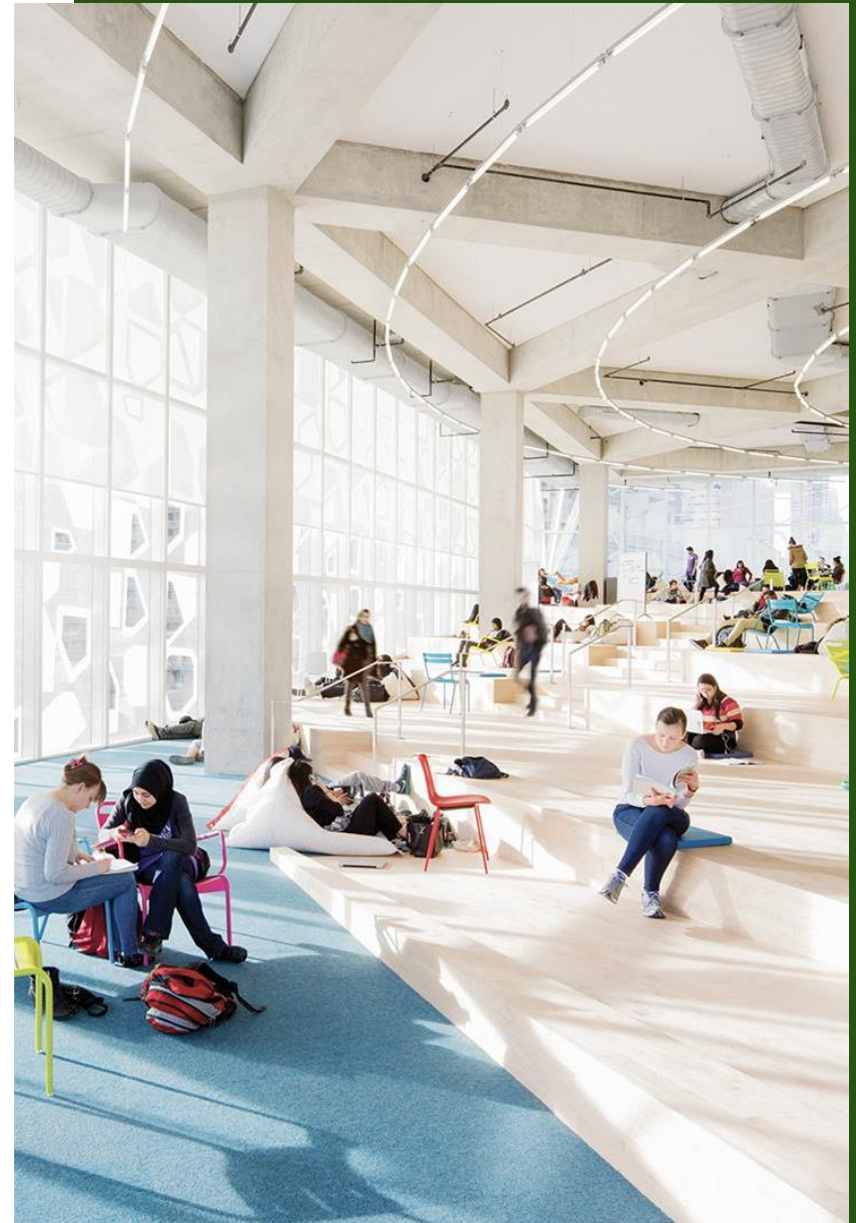
Personal Circumstance & Estimated Income Reviews

Presented by: Celeste Coles & Chris Rocha
Date: Dec 9, 2020



Agenda

1. **Introduction**
2. **Glossary**
3. **Personal Circumstance Review**
4. **Lower Estimated Income Review**
5. **Questions**



Introduction



Celeste Coles



Chris Rocha



Land Acknowledgement

Durham College (DC) is situated on the Traditional Territory of the Mississaugas and the territory that is covered by the Williams Treaty, and we are thankful for the opportunity to teach and learn on the lands of the Peoples of Mississaugas of Scugog Island First Nation.



Glossary

- **LEI:** Lower Estimated Income
- **PCR:** Personal Circumstance Review
- **ECR:** Exceptional Circumstance Review
- **LOP:** Loan Overpayment
- **G2L:** Grant to loan conversion
- **MCU:** Ministry of Colleges and Universities
- **SPS:** Study Period Start
- **SPE:** Study Period End
- **CRA:** Canada Revenue Agency
- **OSG:** Ontario Student Grant



Determining Review Eligibility

- Review OSAP application details
- Review OSAP assessment details
- Review academic history
- Ask probing questions to better understand students circumstances



Personal Circumstance Review

What is it?

When a student has experienced circumstances beyond their control which impacted their ability to fully participate academically resulting in an academic progress issue on their file.

Examples:

- Medical conditions
- Family crisis
- Pregnancy or parental leaves
- 36/65 placed on file in error
- 2 academic failures in one year (2 different institutions)



Documentation Requirements

Letter from student

Relevant documentation (e.g. medical documentation)

Third party documentation

****Reviews that do not include substantiating documentation should not be approved.****

Review Processing

• Processing Approvals

Use revert function and note profile

- Change Effective Date, if necessary

Record decision and rationale.

- Add comments to the student profile

• Denying the review?

- Document and record

****Inform the student that the institution cannot consider them for this review again if they fail to academically progress in the current year.****

Personal Circumstance Review

December 08, 2020 9:00 AM

User: CELESTE COLES

Work With Student Profile

- ▶ Student Summary
- ▶ Student Profile Details
- ▶ Profile Documentation
- ▶ SIR Check Details
- ▶ OEN Check Details
- ▶ Student Restrictions
- ▶ Academic Progress
- ▶ Bursary Recording

Administrative Functions

- ▶ Student Communications
- ▶ Enter Application
- ▶ Reset Password
- ▶ Student Profile Comments
- ▶ Student Hold

Student Inquiry

References

Help

Student Summary

Student Information

Name:	[REDACTED]	Action: RETURN TO APPLICATION > ACADEMIC SUMMARY >
SIN:	[REDACTED]	
OAN:	[REDACTED]	
OEN:	[REDACTED]	

- Academic Progress Information Exists
- Profile **Comments** Exist
- **OTG/OSG-Base Terms**
- LOP Exists
- **BRS** Exists



Application(s)

CoreFT	
2019-2020	WORK WITH > VIEW FAO STUDENT INQUIRY >
2018-2019	WORK WITH > VIEW FAO STUDENT INQUIRY >
2017-2018	WORK WITH > VIEW FAO STUDENT INQUIRY >
2016-2017	WORK WITH >
2015-2016	LOB ONLY
2014-2015	LOB ONLY
OSOG	
2016-2017	LOB ONLY



Personal Circumstance Review

Academic Summary

FI:	Academic year:	Institution:	Study Period(s):	Confirmed:	Action:
CoreFT	2019-2020	EVAL DURHAM COLLEGE	Jan 6, 2020 - Apr 17, 2020	Yes	SELECT > VIEW FAO STUDENT INQUIRY >
CoreFT	2018-2019	EVAL DURHAM COLLEGE	Sep 4, 2018 - Feb 25, 2019	Yes	SELECT > VIEW FAO STUDENT INQUIRY >
CoreFT	2017-2018	EVAL DURHAM COLLEGE	Sep 5, 2017 - Apr 27, 2018	Yes	SELECT > VIEW FAO STUDENT INQUIRY >
CoreFT	2016-2017	EVAL DURHAM COLLEGE	Sep 6, 2016 - Apr 21, 2017	Yes	SELECT >
CoreFT	2015-2016	EVBR SHERIDAN COLLEGE	Jan 11, 2016 - Aug 19, 2016	No	
CoreFT	2014-2015	EVAL DURHAM COLLEGE	Sep 2, 2014 - Apr 24, 2015	No	LOB ONLY

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Personal Circumstance Review

- If you approve a Personal Circumstance Review and the student fails to academically progress during the current year, a subsequent personal circumstances review cannot be approved by the institution
- Next steps for students who wish to receive consideration for current year:
 - **Subsequent Personal Circumstance Review: Ministry Authority**
 - **Exceptional Circumstances Review: Ministry Authority**



Subsequent Personal Circumstance Review

What is it?

When a student has experienced circumstances beyond their control which impacted their ability to fully participate academically resulting in an academic progress issue on their file in the **current year following approval of PCR for that academic year**

This review is Ministry authority.

Documentation Requirements

Letter from student

Relevant documentation (e.g. medical documentation)

Third party documentation

****Reviews that do not include substantiating documentation should not be approved.****

*****Incomplete submissions will not be considered*****

Review Processing

- Use FAO Upload Function to upload documentation including:
 - All documents submitted by the student
 - Letter from DSO, if applicable, outlining accommodations/services recommended and if said were utilized by the student
- Ministry may request additional documents
- All documentation from previous PCR
- If student is in-study or SPS will be in 1-2 months and they have an academic restriction, use Doc Type PCPR for uploading to priority queue



Exceptional Circumstance Review

Eligibility Requirements

Student must have:

1. Experienced an exceptional circumstance, AND
2. Circumstance led student to fully or partially withdraw
3. Due to withdrawal, one of the following occurred:
 - Restricted
 - LOP
 - G2L

This review is Ministry authority.



Review Requirements

Letter from student

Relevant documentation (e.g. medical documentation)

Third party documentation

Documentation from the institution (timeline, accommodations)

*****Incomplete submissions will not be considered*****

Procedure

- ECR Form (available on FAO Portal)
- Complete the EC Review Checklist
- Submit review to MCU via upload function to student's image queue
- Upload based on urgency:
 - ECR (Exceptional Circumstance Review)
 - ECPR (Exceptional Circumstances Priority Review)

How Students Feel...



I DON'T WANT TO BE A GROWNUP ANYMORE

There is too much paperwork



How FAO's Feel...



Exceptional Circumstance Review: How the MCU Feels...



Work from home



Expectation



Reality



Estimated Income Review

What is it?

Student may request their financial need and family income be assessed using spouse/parent estimated current year income as it would be a better reflection of their family's current financial circumstances due to a non-recurring and significant change to their income.

Examples:

- Death of a parent
- Separation/Divorce
- Loss of employment
- Illness/accident
- Retirement

****This review cannot be considered if prior year income and non-taxable/foreign income has not been verified****

Documentation Requirements

- Completed Request for Assessment of Parents'/Spouses Income form indicating non-recurring and major change in income that would substantiate using estimate of the parent(s)/spouses' current year income rather than verified prior year income
- Documentation for the explanation provided



Review Processing

- Edit parent/spouse income information and record estimated income value
- Upload documents to students image queue under FAREVIEW doc type

****OSAP will be reassessed using their actual 2020 income, and grants you have received based on the lower estimate may be converted to loans. ****

Master status:	Open	VIEW STUDENT SUMMARY > VIEW SAG > VIEW ALL CORE-FT APPLICATIONS >
Processing status:	Funding - Confirmation of Enrolment	
Institution:	EVAL - DURHAM COLLEGE	
Study Period(s):	September 8, 2020 - April 16, 2021 (32 weeks)	
Student Status:	Dependent	

Assessment Details		
Study Period	September 08, 2020 to April 16, 2021	32 weeks
Assessment Type	Federal and Provincial	

Costs			
Component	Federal	Provincial	Actions
Tuition	2723	2723	
Compulsory Fees	973	973	
Book & Computer	1672	1672	
Living Costs	4034	4034	VIEW LIVING CHART >
Child Care	0	0	
Return Travel	0	0	
Costs (Reviews)	0	0	
Total Costs	9,402	9,402	
Resources			
Component	Federal	Provincial	Actions
Student Fixed	0	3600	
Study Period Income	0	0	
RRSP (asset)	0	0	
Other Assets	0	0	
Parental	7012	16941	VIEW DETAILS >
Partner	N/A	N/A	
Federal Resource	N/A	1434	
Total Resources	7,012	21,975	
Financial Need			
Total	2,390	-12,573	

Assessment Values					
Total	Loans	Federal Grants	Provincial Grants	Date/Time	Actions
\$1434	Fed: \$1434	CSG-FT: \$0	OSG-Need: \$0	Aug. 07, 2020 8:13 PM	ELIGIBILITY >
		CSG-PD: \$0	OSG-TRV: \$0		
	Prv: \$0	CSG-Dep: \$0	OSG-COM: \$0		
		SB CSG-FT: \$0	LLG: \$0		

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Assessment Details

Study Period	September 08, 2020 to April 16, 2021	32 weeks
Assessment Type	Federal and Provincial	

Costs

Component	Federal	Provincial	Actions
Tuition	2723	2723	
Compulsory Fees	973	973	
Book & Computer	1672	1672	
Living Costs	4034	4034	VIEW LIVING CHART >
Child Care	0	0	
Return Travel	0	0	
Costs (Reviews)	0	0	
Total Costs	9,402	9,402	

Resources

Component	Federal	Provincial	Actions
Student Fixed	0	3600	
Study Period Income	0	0	
RRSP (asset)	0	0	
Other Assets	0	0	
Parental	1426	6467	VIEW DETAILS >
Partner	N/A	N/A	
Federal Resource	N/A	4786	
Total Resources	1,426	14,853	

Financial Need

Total	7,976	-5,451	
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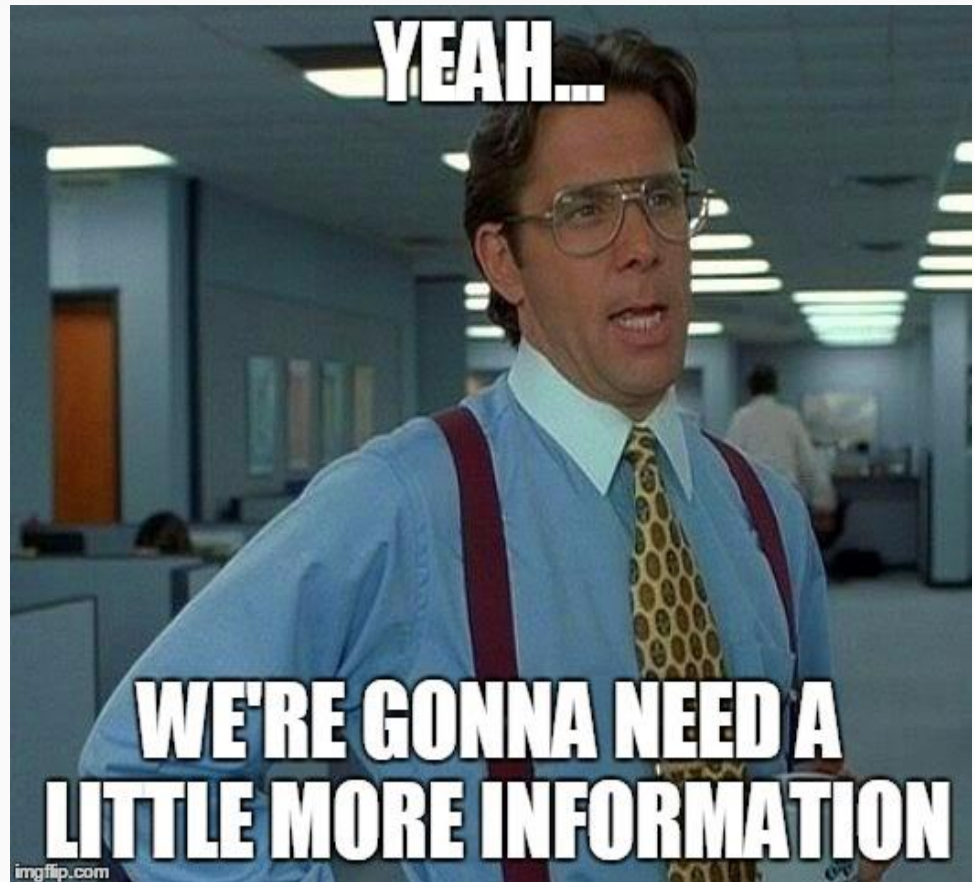
Assessment Values

Total	Loans	Federal Grants	Provincial Grants	Date/Time	Actions
\$4786	Fed: \$4673	CSG-FT: \$113	OSG-Need: \$0	Sep. 04, 2020 8:12 PM	ELIGIBILITY >
		CSG-PD: \$0	OSG-TRV: \$0		
	Prv: \$0	CSG-Dep: \$0	OSG-COM: \$0		
		SB CSG-FT: \$0	LLG: \$0		



Estimated Income Review: Documentation

- Request for Assessment of Parents'/Spouses Estimated Income form
- Letter from parents outlining non-recurring event and ***detailing how the estimated current year income was calculated***
- Documentation substantiating reason for non-recurring event
- ***Documentation substantiating how current year income was calculated***



Verifying Estimated Income (MCU Authority)



Verifying Estimated Income (MCU Authority)

- Ministry will verify estimated 2020 income with CRA
- If a spouse or parent has reported estimated 2020 Canadian non-taxable or foreign income, they will be required to complete a ***Current Year Income Verification: Canadian Non-Taxable and/or Foreign Income*** form after the end of 2020.
- **The Current Year Income Verification Form becomes an automatic supporting documentation requirement on the student's file when an estimated income review has been approved for their parent(s) or spouse.**
- OSAP reassessment may occur as a result of income verification
- Parent/Spouse income must be verified within 12 months of the SPS
- If 2020 income cannot be verified within 12 months of SPS, all OSG's will be converted to loan



Thank you for joining us!

