

Funding for Students with Permanent Disabilities

2019-2020 Guidelines



MAY 2019

Alberta 
Student Aid

THESE GUIDELINES ARE FOR INTERNAL USE ONLY

Summary of Changes

Alberta Student Aid, in conjunction with the Canada Student Loans Program, will periodically revise the Canada Student Grant for Students with Permanent Disabilities (CSG-PD), the Canada Student Grant for Services and Equipment for Students with Permanent Disabilities (CSG-PDSE) and the Alberta Grant for Disabled Students (GFD). Below is a summary of the most significant changes made since the release of the previous version of this manual.

- CSG-PDSE loan year maximum increased to \$20,000, refer to [Canada Student Grant for Services and Equipment for Students with Permanent Disabilities](#)
- Deadlines for submissions table added, refer to [Deadlines for Schedule 4 Submissions](#)
- Schedule 4 form has had significant changes this year, refer to [Completing a Schedule 4 for Students with Permanent Disabilities](#)
- Updated [Disability Grant for Services and Equipment Reconciliation Worksheet](#)
- Updated explanation for receipts submission, refer to [Grant Reconciliation and Receipt Submission](#)
- Changes to [Standard Costs and Frequency of Entitlement for Approved Equipment and Services](#)

Item	Change	Page
Computer Package	\$1,800 maximum	23
All-in-One Printer* (Printer/Scanner/Copier)	Once every 3 loan years	24
Closed circuit televisions (CCTVs)	Once every 7 loan years	25
Digital Voice Record/Smartpen	Once every 7 loan years	25
Braille portable note taker	\$6,000 maximum	26
FM Systems for use without hearing aids	Once every 5 loan years	26
Noise cancelling headphones	\$400 maximum	26
Amplified stethoscope	One time	27
A variety of assistive technology products with attendant subscription costs (e.g., scan and	One time plus upgrades as required	27

read, talking dictionary, text to audio, e-text reader, screen magnification) included in a single package Example: <u>Key to Access (Premier Literacy)</u>		
<u>Screen reading software</u> Examples include: → <u>JAWs</u> → <u>COBRA</u> → <u>HAL</u>	\$1,800; One time plus upgrades, as required	28
Note sharing	Up to a maximum of \$250 per course or \$500 per license, whichever is less	31

*As with laptop cases, All-in-One Printers are no longer considered part of the maximum for a laptop/computer package. The \$200 maximum is separate and student's eligibility for an All-in-One Printer can be reviewed every 3 loan years.

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Permanent Disability Definition

To be considered for disability-related funding a student must meet the Canada Student Loans Program (CSLP) definition of permanent disability as defined in the Canada Student Financial Assistance Regulations (CSFAR):

A functional limitation caused by a physical or mental impairment, that restricts the ability of a person to perform the daily activities necessary to participate in studies at a post-secondary level or the labour force and is expected to remain with the person for the person's expected natural life.

The definition can effectively be broken down into 3 components:

- “a functional limitation caused by a physical or mental impairment”
- “that restricts the ability of the person to perform the daily activities necessary to participate in studies at a post-secondary level or in the labour force”
 - NOTE: The functional limitation must have a significant impact on the student's ability to participate in education
- “and is expected to remain with the person for the person's expected natural life”
 - NOTE: Where a student has been symptom free for 3 or more years, it may be presumed that the disability is not permanent and would not be expected to affect the individual's ability to participate in post-secondary studies. Therefore, there would be no need for disability supports and no permanent disability eligibility.

For example, a prospective student may have cerebral palsy and be a wheelchair user. The functional limitation is the cerebral palsy, the restriction is mobility due to the limitation, and as cerebral palsy never changes, the condition is considered to remain for the person's natural life. This applicant meets the definition of a permanent disability for the purpose of student funding.

An applicant must meet all three of these criteria to be eligible for disability-related funding. Additional documentation may be requested when eligibility is not readily apparent. Should the documentation submitted to Alberta Student Aid not specifically demonstrate that all three points of the definition have been met; the request for disability funding may be delayed and/or denied. If the medical documentation does not provide sufficient detail to confirm that the student has a permanent disability as defined, the student needs to provide additional information.

Types of Grant Funding

Canada Student Grant for Students with Permanent Disabilities (CSG-PD)

The Canada Student Grant for Students with Permanent Disabilities is provided to address the financial need of students with a documented permanent disability. It is available once per loan year.

Description of funding:

- Students are issued a flat rate of \$2,000 per loan year regardless of calculated/requested need
- Available for students enrolled either in full-time or part-time studies
- Designed to offset a full-time or part-time student's exceptional education-related costs that are associated with their disability
- Provided on the basis of need to students who have a permanent disability
- Allocated before student loans

Eligibility:

- Must have at least \$1 of federal calculated need
- The educational institution/program must be designated for Canada Student Loans (CSL) funding
- Students must submit documentation with their Schedule 4 that describes the permanent nature of their disability
- Must meet the definition of permanent disability as per CSLP guidelines (see [Permanent Disability Definition](#))

Once the student receives this grant, **on subsequent applications** the student will not need to provide documentation describing the type of permanent disability or submit a new Schedule 4. The student will only need to:

- meet all eligibility criteria for receiving federal funding, and
- have at least \$1 of federal calculated need

Disbursements:

- Students funded for one semester will receive 100% of their funding at the beginning of their study period
- For students funded for more than one semester:
 - 50% is disbursed at the beginning of their study period
 - 50% is disbursed at the midpoint of the study period
- disbursements of the CSG-PD cannot not be moved up to earlier in the study period

Receipts:

- Not required for this grant

Canada Student Grant for Services and Equipment for Students with Permanent Disabilities (CSG-PDSE)

The Canada Student Grant for Services and Equipment for Students with Permanent Disabilities is provided to students who have a documented permanent disability that limits their ability to perform daily activities necessary to participate fully in post-secondary studies.

The grant is intended to support exceptional education-related costs associated with the student's permanent disability. Refer to the [Standard Costs and Frequency of Entitlement for Approved Services and Equipment](#) for equipment and service maximums.

Description of funding:

- Minimum \$100
- Maximum \$20,000 per loan year. The maximums for specific services and equipment as defined in the standard costs and frequency of entitlement still apply within this maximum. **Any costs exceeding \$20,000 (or the maximums set within the guidelines) are the responsibility of the public post-secondary institution**
- For educational disability-related services and equipment
- Available for students enrolled in full-time and part-time studies
- It is designed to offset a full-time or part-time student's exceptional education-related service and equipment costs associated with their disability

Eligibility:

- Must have at least \$1 of federal calculated need
- The educational institution/program must be designated for CSL funding
- A student must submit a Schedule 4 signed by a disability advisor, and have a completed full-time or part-time Alberta Student Aid application for the same study period
- Must meet the CSLP definition of permanent disability as defined in the CSFAR (see [Permanent Disability Definition](#)) and have provided eligible documentation to verify the permanent disability.

Disbursements:

- As this grant is for the purchase of equipment and/or services, it is disbursed in full at the program start date

Receipts:

- The appropriate receipts and any unused grant funding must be provided by the end of the current study period for services/equipment recommended on that specific Schedule 4. Refer to [Grant Reconciliation and Receipt Submissions](#).

Alberta Grant for Disabled Students (GFD)

The Alberta Grant for Disabled Students is provided to students who have a documented permanent disability that limits their ability to perform daily activities necessary to participate fully in post-secondary studies.

The grant is intended to support exceptional education-related costs associated with the student's permanent disability. Refer to the [Standard Costs and Frequency of Entitlement for Approved Services and Equipment](#) for equipment and service maximums.

Description of funding:

- Minimum \$50
- Maximum \$3,000 per loan year. **Any costs exceeding \$3,000 (or the maximums set within the guidelines) are the responsibility of the public post-secondary institution**
- For educational disability-related services and equipment
- Available for students enrolled in full-time studies
- Generally issued to students who do not have CSL eligibility (ex. program not designated for CSL funding or for periods of study less than 12 weeks in duration)
- Included in the maximum \$20,000 CSG-PDSE in an academic year
- \$3,000 may be issued in addition to the \$20,000 CSG-PDSE if the student applies for 10-12 months of study, or spring/summer courses

Eligibility:

- Must have at least \$1 of provincial calculated need
- A student must submit a Schedule 4 signed by a disability advisor, and have a completed full-time Alberta Student Aid application for the same study period. GFD is not eligible on part-time applications
- Must meet the CSLP definition of permanent disability as defined in the CSFAR (see [Permanent Disability Definition](#))

Additional information and eligible services and equipment:

- Students can also be considered for GFD only for parking if related to their permanent disability. Refer to the [Standard Costs and Frequency of Entitlement for Approved Services and Equipment](#)
- GFD is included in the maximum \$20,000 CSG-PDSE in an academic year. The only exception is when the student uses their entire \$20,000 CSG-PDSE for the fall/winter session, they could be eligible for up to an additional \$3,000 GFD for the spring/summer session

Disbursements:

- As this grant is for the purchase of equipment and/or services, it is disbursed in full at the program start date

Receipts:

- The appropriate receipts and any unused grant funding must be provided by the end of the current study period for services/equipment recommended on that specific Schedule 4. Refer to [Grant Reconciliation and Receipt Submissions](#).

Submitting Schedule 4 Requests

Submission Introduction

This guide provides step-by-step instructions on how to review and submit a Schedule 4. The goal is to train disability advisors how to complete, review, and recommend specialized services and equipment for students with permanent disabilities.

In order to be eligible for disability funding, the student must submit pertinent disability documentation along with a Schedule 4, and have a completed Alberta Student Aid application for the academic study period in which the Schedule 4 applies. After initial permanent disability status approval, in subsequent years a Schedule 4 is not required if the student does not require funding for services and/or equipment. Once approved, the student will automatically be considered for the \$2,000 CSG-PD grant without a Schedule 4 (they only need to have a federal calculated need to receive this grant). Alberta Student Aid adds a special status to the student's file; this alerts the Alberta Student Aid assessor to the fact that disability documents are on file and the student's application can be processed without a Schedule 4.

Educational Institution staff cannot see special statuses on the Students Finance System (SFS), but they can review Schedule 4s on previous applications on SFS Inquiry screens. Also, if the student received funding for disability-related services and/or equipment, it will be noted in the Student Award Letter which will appear in the list of student correspondence in SFS. To inquire about receiving access to Alberta Student Aid's SFS, please see our website:

<https://studentaid.alberta.ca/resources/resources-for-schools/alberta-student-aid-system/>

For situations where the student has to wait for assessments or appointments to see medical staff, the student's Alberta Student Aid funding application can be processed without the Schedule 4, and the Schedule 4 may follow later.

Deadlines for Schedule 4 Submissions

Grant	Length of Study	Days
CSG-PD and CSG-PDSE Services and/or GFD Services	Any length of study	30 days before current study period end date
CSG-PDSE Equipment and/or GFD Equipment	8-12 months	90 days before current study period end date
CSG-PDSE Equipment and/or GFD Equipment	4 months	30 days before current study period end date
CSG-PDSE Equipment and/or GFD Equipment	Less than 4 months	14 days before study period commences (ex: spring/summer/apprenticeship)

Disability Documentation Required Summary

Type of Disability	Documentation requirements	Notes about special issues/situations
Deaf, Hearing Impaired	<ul style="list-style-type: none"> • Audiologist report, or • Letter from physician with an explanation of the degree of hearing loss 	
Blind, Visually Impaired	<ul style="list-style-type: none"> • Specialist's report, or • Letter from physician with a description of the functional limitations 	A copy of a CNIB card is not sufficient, as this does not help us understand the degree of impairment and how the requested supports relate to the disability.
Learning Disability	<ul style="list-style-type: none"> • Psycho-educational report from a Psychologist, or • Neuro-psychological report 	<p>Assessment should be no older than 5 years. Exceptions may be made depending on situation and level of detail.</p> <p>A physician's diagnosis of a Learning Disability is not acceptable.</p>
Speech	<ul style="list-style-type: none"> • Speech language pathologist's report 	
Mobility Impairment	<ul style="list-style-type: none"> • Specialist's report, or • Letter from physician with explanation of nature of disability as functional limitation 	A functional assessment is ideal, as this would describe the degree of functional limitation and appropriate supports, but this is often difficult to get.
ADD/ADHD	<ul style="list-style-type: none"> • Psychologist's report, or • Neuropsychological report, or • Letter from a psychiatrist, or • Letter from a physician with details about the diagnosis 	Details from a physician to include a description of how the diagnosis was arrived at, demonstrating childhood history, differential diagnosis, etc.
Psychiatric or Psychological	<ul style="list-style-type: none"> • Psychologist's report with DSM diagnosis, or • Letter from a psychiatrist with DSM diagnosis, or • Letter from a physician with details about diagnosis including DSM 	A physician's letter needs to include a detailed description of the diagnosis, how the diagnosis was arrived at, functional limitations, and detailed information about history
Autism, Asperger, Rett	<ul style="list-style-type: none"> • Psychologist's report or • Letter from a psychiatrist 	
Brain Injury/Cognitive Impairment	<ul style="list-style-type: none"> • Neuro-psychological report, or 	

	<ul style="list-style-type: none"> Brain Injury/cognitive impairment report/assessment 	
Examples of other Permanent Disabilities	<ul style="list-style-type: none"> Chronic Fatigue/Pain: detailed letter from physician Irlen Syndrome: assessment report from a Certified Irlen Screener 	

Completing a Schedule 4 for Students with Permanent Disabilities

Information and Instructions page of the Schedule 4:

Students should sign page 1 of the Schedule 4 form. This page includes information and instructions that students should be familiar with before submitting a Schedule 4 with their disability advisor.

More information has been added to direct students to use Alberta Student Aid's Electronic Documents Upload.

You may request that this area be signed and dated by the student. This section was added at the request of disability advisors in order to verify prior to the counseling process that the student has read and understands the disability related funding material provided. However, the provision of a student signature is not mandatory for the purpose of processing the Schedule 4 at Alberta Student Aid.

Upload or Mail Your Form		
Send documents electronically 1. Visit studentaid.alberta.ca 2. Sign in to your account 3. Submit securely using Upload Electronic Document(s) For assistance: eDoc Upload FAQs	Mailing Address Alberta Student Aid Attention: Disability Grants PO Box 28000 Stn Main Edmonton AB T5J 4R4	
Applicant Agreement		
If I receive a disability grant for services or equipment for post-secondary students with permanent disabilities, I hereby agree to provide, by the end of my current study period, receipts which will show that the student aid was spent for its intended purposes.		
Include your name and Social Insurance Number on all receipts sent to the address above. Receipts may also be uploaded electronically.		
Applicant's Signature	Today's Date	Telephone Number (format: 999-999-9999)
	Day	Month
	Year	

documentation is being submitted.

Summary of Disability Documentation Required

Type of Disability	Documentation Required
Deaf, Hearing Impaired	<ul style="list-style-type: none"> • Audiologist report, or • Letter from a physician with an explanation of the degree of hearing loss
Blind, Visually Impaired	<ul style="list-style-type: none"> • Specialist report, or • Letter from a physician with a description of the functional limitations
Learning Disability	<ul style="list-style-type: none"> • Psycho-educational report from a Psychologist, or • Neuro-psychological report
Speech	<ul style="list-style-type: none"> • Speech language pathologist report
Mobility/Agility Impairment	<ul style="list-style-type: none"> • Specialist report, or • Letter from a physician with an explanation of the nature of the mobility/agility impairment (functional limitation)
ADD / ADHD	<ul style="list-style-type: none"> • Psychologist report, or • Neuro-psychological report, or • Letter from a psychiatrist, or • Letter from a physician with details about the diagnosis
Psychiatric or Psychological	<ul style="list-style-type: none"> • Psychologist report with a DSM diagnosis, or • Letter from a psychiatrist with a DSM diagnosis, or • Letter from a physician with details about the diagnosis including the DSM
Autism, Asperger, Rett	<ul style="list-style-type: none"> • Psychologist report, or • Letter from a physician with details about the diagnosis
Brain Injury/Cognitive Impairment	<ul style="list-style-type: none"> • Neuro-Psychological report, or • Brain injury/cognitive impairment report/assessment
Other Permanent Disability such as:	<ul style="list-style-type: none"> • Chronic Fatigue: a detailed letter from physician • Irlen Syndrome: assessment report from a certified Irlen Screener

Dates:

- Match the exact dates of the student's application period using a DD-MMM-YYYY format.
- Advisors should inquire with students regarding the application dates submitted by the student and/or confirm the student's dates through the Student Finance System (SFS) Educational Institution Inquiry screen.

Learning Assessment Fee:

The Learning Assessment fee is only for an assessment of the student's learning disability. Costs for other types of assessments are not eligible (e.g., living assessments, assistive technology assessments). CSG-PDSE/GFD will only cover the fee if the learning assessment confirms that the student has a learning disability (ex. Learning Disability in Mathematics).

If a student is submitting a request for the Learning Assessment fee reimbursement, you must include the full, complete assessment and an assessment receipt.

The assessment must be dated no earlier than six months prior to the student's current start date of studies.

The \$1,700 (or the 75% amount) is included in the maximum entitlement of \$20,000 per loan year.

CSG-PDSE/GFD will cover up to 75% of the cost to a maximum of \$1,700 per loan year, the student will be responsible for the remaining costs, for example:

- If the student's learning assessment fee is \$800, the CSG-PDSE/GFD will cover 75% or \$600 of that cost and the student will be responsible for the remaining \$200
- If the student's learning assessment fee is \$2,000, CSG-PDSE/GFD will cover \$1,500 of that cost and the student will be responsible for the remaining \$500

If part of the learning assessment fee was already reimbursed (Blue Cross/other insurance plan) this reimbursement must be deducted from the total paid. You must include these costs and approve them on the Schedule 4.

Applicant's Last Name			Applicant's First Name			Initials	
<input type="text"/>			<input type="text"/>			<input type="text"/>	
This schedule is complete only if all required documentation is submitted. Before you start, read the information on the Information and Instructions pages.						Social Insurance Number	
Application ID						<input type="text"/>	
<input type="text"/>							
Enter your current study period start and end dates for the 2019/2020 school year.			Start			End	
			Day Month Year			Day Month Year	
			<input type="text"/>			<input type="text"/>	
Learning Assessment Fee (enter 75% of the cost up to a maximum of \$1,700)						\$ <input type="text"/>	
						(You must attach your receipt.)	

Section 1 - Assistive Services:

When submitting assistive services requests, please ensure a rationale is given for each service requested that relates to the student's permanent disability, and/or is recommended in the student's medical documentation.

Estimates and resumes with credentials must be provided for tutor and academic strategy services, see highlighted portions.

Exam accommodation costs are ineligible.

Please refer to [Standard Costs and Frequency of Entitlement for Approved Services](#) more information.

Section 1 – Assistive Services

When requesting Assistive Services, you must submit cost estimates and cost breakdowns. Depending on the requested service, this may include: number of hours per week, number of weeks, cost per hour, and number of courses.

Enter TOTAL amount for the current study period:

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¹ For tutor rates over \$25 per hour, resumé/credentials must be provided.

² A resumé/credentials must be provided for all Academic Strategy requests.

Comments for Requested Assistive Services:

Section 2 – Equipment/Assistive Technology

When submitting equipment/assistive technology requests, please ensure a rationale is given for each item requested that relates to the student's permanent disability, and/or is recommended in the student's medical documentation.

An estimate is required for each piece of equipment. **This documentation is required each time a student requests equipment. Alberta Student Aid will not use estimates from a previous application.**

Provide estimates from the educational institution outlining the costs of alternate formats, if required. If the educational institution does NOT provide alternate formats, and the student requires a private sector provider, the student will need to submit an estimate. **Alternate Format for examinations is ineligible.**

Section 2 – Equipment/Assistive Technology

When requesting Equipment/Assistive Technology, you must submit a copy of an estimate/quote for each item.

Enter the description and amount for the current study period:

Electronic Reading/Writing Software (e.g. Kurzweil, Dragon)
_____ \$ _____

Assistive Software (e.g. Inspiration)
_____ \$ _____

Digital Recorder/Smartpen
_____ \$ _____

Assistive Devices for the Visually Impaired
_____ \$ _____

Assistive Devices for Hearing
_____ \$ _____

Alternate Formats
_____ \$ _____

Computer/Laptop/Tablet
_____ \$ _____

Other Equipment

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

Comments for Requested Equipment/Assistive Technology:

Section 3 – For Educational Institution Use Only – Do Not Write in this Area

The educational institution is only required to complete this section and provide the 'School Official' information if the student is enrolling between 40% and 59% of a full course load. If the student is enrolled in less than 40% of a full course load, the full-time application will be rejected and the student will be advised to submit a part-time application.

Section 3 – For Educational Institution Use Only - Do Not Write in this Area

Reduced Course Load (to be completed by the Disability Advisor/Reviewer or Financial Aid Officer or Registrar ONLY if you are enrolling in between 40% to 59% of a full course load and want to be considered for full-time student aid)

What is the student's percentage of a full course load? %

Signature of School Official

Printed Name of School Official

Today's Date

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Telephone Number (format: 999-999-9999)

Section 4 – For Use by Disability Advisor/Reviewer Only – Do Not Write in this Area

Check the Nature of the Permanent Disability.

Enter the TOTAL cost of the student's assistive services/equipment. Any costs over \$20,000 will be the responsibility of the Educational Institution for Public Post-Secondary Institutions. For Private schools, Alberta Student Aid will forward the documentation to Alberta Community and Social Services for their review for possible additional services/equipment funding.

Add any further comments on the student's situation that you feel is relevant to their funding, please include in the equipment or service comment areas. Examples:

- You know the student does not meet the definition for the permanent disability status but you were under pressure from the parents/student to submit it
- Service cost estimates
- Instructions on what Alberta Student Aid should fund if the request is over \$20,000

Sign, print your name and email clearly in case Alberta Student Aid needs to contact you, provide your direct phone number and date the Schedule 4.

Section 4 – For Use by Disability Advisor/Reviewer Only - Do Not Write in this Area

Nature of Permanent Disability (Documentation regarding the nature of permanent disability must be attached if not previously provided.) Please check appropriate box(es):

- Deaf, Hearing Impaired
- Blind, Visually Impaired
- Learning Disability (list below)
 -
 -
 -
- Speech
- Mobility/Agility Impairment
- ADD/ADHD
- Psychiatric or Psychological
- Autism, Asperger, Rett
- Brain Injury/Cognitive Impairment
- Other Permanent Disability (see *Information and Instructions* for definition of permanent disability)

TOTAL recommended services/equipment \$

Attach documentation itemizing the assistive services and/or equipment that covers the above.

Email Address of Disability Advisor/Reviewer

Signature of Disability Advisor/Reviewer

Name (please print)

Today's Date

Day	Month	Year
_	_	_ _

Direct Telephone Number of Disability Advisor/Reviewer (format: 999-999-9999)

Extension

For Internal Use Only – Do Not Write in the Area

This area is for use by Alberta Student Aid only. If the assistive services and equipment comments section do not provide the space you need to complete the student's Schedule 4 request, please attach a letter along with the Schedule 4.

For Internal Use Only - Do Not Write in this Area

CSG-PDSE:

GFD:

TOTAL:

Internal Comments:

Reviewer:

Date

Day	Month	Year
_	_	_ _

Schedule 4 Checklist

- Review the documentation to ensure the stated disability meets all three aspects of the definition of a permanent disability: ***A functional limitation that is caused by a physical or mental impairment, that restricts the ability of a person to perform the daily activities necessary to participate in studies at a post-secondary school level or the labour force and that is expected to remain with the person for the person's expected natural life.***
- The documentation must contain a clear diagnosis, be recent and be provided by the appropriate medical professional.
- Has the student applied for student aid? This can be verified by going on the Students Finance System (SFS). If the student's funding has already been processed for the academic period, this will be treated as a Request for Reconsideration (RFR).
- Is the Schedule 4 complete?
 - Tick the box that corresponds to the nature of the disability
 - Enter the amounts of all the assistive services and equipment/assistive technology you are recommending and applicable estimates/quotes as required
 - In the "Total recommended services/equipment" box, enter the total amount you are recommending. If this exceeds \$20,000, include a breakdown of how you would like the CSG-PDSE allocated
 - Add any relevant comments, cost breakdowns to the comment boxes in the applicable services and equipment sections
 - Review the services and equipment request. Verify relevance (based on the documentation) to the barriers created by the student's disability, ex: if the technology is needed by all students in the course, such as accounting software, it would not be a disability-related need
 - For equipment requests, Alberta Student Aid requires one quote/estimate for each product
 - Submit all the disability documentation along with the student's Schedule 4 request if this is their first Schedule 4. If the student has previously been approved as a student with a permanent disability, please only include the relevant quotes, estimates, tutor/strategist resumes, learning assessment fee receipt as needed, based on the requested services and equipment
 - Sign, provide your direct phone number, email address and date the Schedule 4
 - If only recommending a Reduced Course Load and/or not recommending any services or equipment funding: Enter "0" in the "Total Recommended Services/Equipment" box
- Advise the student:
 - What supports and services you've recommended (items and dollar amount)
 - That they will need to send receipts (as per the items and amounts you recommended) by the end of the study period, and/or send back any unused portion of the funds
 - That you will notify them if there is a change to the requested amount

- Alberta Student Aid sends the student their Student Award Letter through their online account. This letter will advise them of the outcome of their application/request. They should review this letter in detail as it states the approved amounts of the services and equipment. If they have issues seeing this letter through their online Alberta Student Aid account, please direct them to call the Alberta Student Aid Service Centre at 1-855-606-2096 (option #2 provides them with help logging into their online account).

Eligibility Clarification for Services and Equipment

Ineligible Services:

Service	Rationale for Denial	Notes
Learning Disability (LD) Assessments – ADD and ADHD: a) Cost of a LD Assessment to assess ADD/ADHD b) Cost of an LD Assessment when ADD/ADHD diagnosed but LD not diagnosed	Assessments are not included on the List of Eligible Exceptional Education- Related Services and Equipment published in the <i>Canada Gazette</i> . Assessment guidelines provide reimbursement funding of LD assessment (75% of maximum cost up to \$1,700 per loan year once a LD has been diagnosed). CSFAR only requires psycho-educational assessment for LD and not for other permanent disabilities. Medical documentation is needed for other PD eligibility assessments.	While a psycho-educational assessment is not required for Permanent Disability eligibility, these assessments are beneficial in providing supporting documentation for the recommended equipment and services to be funded under the grant. However, the assessment itself is not eligible under the grant.
Cost of Occupational Therapist Assessment to determine what specialized ergonomic equipment might be required	Ergonomic equipment is not on the list of eligible equipment approved by ICCSFA.	
Cost of a Mental Health Assessment	Mental health assessments are the responsibility of the individual. Medical documentation is the responsibility of the student.	
Cost of Proctoring for Exams, Cost of Exam Accommodations	Considered as the responsibility of the Educational Institution under Duty to Accommodate.	
Cost of LD for Post-Graduate Exams	This is regarding requests to have an LD assessment in order to procure extra time for taking the post-graduate exams. Students are not requesting the LD assessment to deal with the LD as an	This would be an exceptional situation. The student would have to first be eligible for CSL funding, which may not

Service	Rationale for Denial	Notes
	ongoing barrier to their current studies. The LD testing is requested to obtain special accommodations (longer exam time) allowed for students with LD when writing certain post-graduate entrance exams.	be approved when the post-graduate exams are written. If the exams are not part of the students regular tuition costs they are not considered for funding.

Ineligible Equipment:

Equipment	Rationale for Denial	Notes
Hearing Aids	Hearing Aids are not included on the List of Eligible Exceptional Education Related Services and Equipment published in the Canada Gazette. Hearing Aids are considered a daily living aid rather than specific to an educational setting.	It would be difficult to distinguish between hearing aids as a daily living aid and an exceptional educational cost.
Internet Costs	Internet costs are considered a normal cost of attending post-secondary education and as such are not a disability-related expense. Internet costs are included in the needs assessment determination for CSL.	
Ergonomic Mouse/Keyboard Other ergonomic equipment	Student would have to provide the estimates for the least costly equipment available. Is not eligible under the Canada Student Grant for Services and Equipment for Students with a Permanent Disability or the Alberta Grant for Disabled Students.	With the \$1,500 computer package, could get an ergonomic key board at this time.

Examples of Medical Situations, Conditions, and Reasoning

Examples of Ineligible Situations	Reasoning
The student had an ileostomy (and wears an ostomy pouch) and has Crohn's, colitis and night blindness.	The student was unable to obtain further medical documentation as the physician does not consider this a permanent disability or that the student has barriers to their post-secondary education because of these conditions.

<p>A student provides copies of their Disability Tax Credit.</p>	<p>This is not sufficient documentation. A person with a medical condition/disease has extra costs associated with the condition/disease so they would qualify for the Disability Tax Credit but they might not have restrictions regarding their activities and abilities with post-secondary education. An example would be a student with celiac disease.</p>
<p>The medical documentation indicates the student has stress with writing exams and suffers from anxiety.</p>	<p>Situational conditions are not considered 'permanent disabilities' for the purpose of funding as they are dependent on the situation.</p>
<p>The medical documentation is 2 years old and states anxiety and depression. With treatment the condition was 'unpredictable' regarding its permanency and the prognosis was 'cannot predict/uncertain' and notes indicated 'possible memory limitations'.</p>	<p>The medical documentation is not definitive. The fact that it states 'cannot predict', 'uncertain' and is 2 years old indicates that the situation is not diagnosed in its current state. We would require current documentation. To be considered a permanent condition the illness/pain needs to be consistent for 3 years or longer.</p>
<p>The diagnosis is ADD/ADHD and the documentation states 'patient symptoms seem to be under control yet will need to be taken into account if (the student) has difficulties'. In the boxes for permanent or chronic the physician left them blank but added 'possibly improving'.</p>	<p>Medical documentation must indicate that a permanent disability exists and clearly state the impact on the ability of the student to perform the daily activities necessary to participate in studies at a post-secondary level in accordance with the definition. With this documentation this student is not eligible for disability grants.</p>
<p>The diagnosis is Crohn's and the stated impact is stress with exams.</p>	<p>This student would not be eligible for disability grants as there is no impact indicated on daily activities. This is another example of a situational diagnosis.</p>
<p>The student is an insulin dependent diabetic.</p>	<p>Without further medical documentation this would not be eligible for disability grants. If there is an impact on daily activities necessary to participate in studies it could be reviewed further.</p>
<p>The documentation provided is a few months old from WCB and indicates a right knee injury impairment and a payout for a 4% impairment.</p>	<p>WCB documentation alone is not enough documentation. Medical documentation is required from a physician that indicates the current impact on the daily activities necessary to participate in studies at a post-secondary level and how long they are expected to remain.</p>
<p>The medical documentation indicates the student has rheumatoid arthritis and is not working.</p>	<p>Without further medical documentation this would not be eligible AT THIS TIME. Medical documentation indicating the severity and the impact on the 'daily activities necessary to</p>

	participate in studies at a post-secondary level' is required.
The student has a seizure disorder but has not had a seizure in 4 yrs. The student is on medication that affects their memory and concentration.	This student is eligible for disability funding even though they have not had a seizure in 4 years because they are taking medication due to the seizure disorder that causes memory and concentration barriers.
The student is a hemiplegic (cerebral palsy affecting one side of the body-in this case the left side).	The student is eligible for disability funding. Even though the physical aspect is on the left side of the body a student would require full use of their hands to hold books, arrange papers on their desk, etc.

Standard Costs and Frequency of Entitlement for Approved Services and Equipment

The standard costs and frequency of entitlements are applicable to the CSG-PDSE (maximum \$20,000) and GFD (maximum \$3,000) grants.

Approved Equipment Costs and Frequency of Entitlement

THESE COSTS ARE THE MAXIMUM ELIGIBLE AMOUNTS

Quotes/Estimates must be current (dated within 30 days) of the Schedule 4 request.

Note: Provincial assessment officers have discretion, on a case-by-case basis, to establish maximum admissible costs for education-related services and equipment related to a student's permanent disability and circumstances. The equipment costs indicated in the table below are to be used as guidelines only. Price estimates include a 15% tax rate.

Exceptional circumstances may be reviewed on an individual basis.

Equipment Category	Cost	Frequency of Entitlement Note: A loan year runs from August 1 to July 31.	Notes
1. Computers and Associated Technologies			
Complete Computer Systems, including peripheral devices (keyboard, mouse), MS Office 365 (Student Edition), and warranty (if not included).	\$1,800	Once every 4 loan years (upgrade or replacement, whichever is less).	<ul style="list-style-type: none"> → Includes desktops and laptops. → If funding is provided for a desktop or laptop, additional funding should not be provided for a tablet or mini-tablet. → Computer system purchase price should include a warranty (strongly recommended).

Equipment Category	Cost	Frequency of Entitlement Note: A loan year runs from August 1 to July 31.	Notes
Laptop/Tablet Carry Case	\$70	Once every 2 loan years	→ Not included in the computer package, unlike a printer, office software, operating system, mouse, etc. Not considered a peripheral device.
All-in-One Printer (Printer/Scanner/Copier)	\$200	Once every 3 loan years	→ Printers should normally be included as part of a complete computer system; however, if a student (1) already has a computer and only needs a printer, or (2) was previously approved a computer purchase without a printer, then a printer purchase should be approved.
Office Software	\$100	Once every 4 loan years.	→ It is recommended that office software should be included as part of a complete computer system, however, alternative software purchases may be approved. → Virtualization software to be identified at P/T discretion.
Operating System	Provincial/territorial discretion	Once every 2 loan years.	→ All computers should come with an operating system; however, if a student uses (or intends on using) disability assistive software that requires an updated or specialized operating system, then the upgrade should be approved.
External Monitor	Provincial/territorial discretion	One time.	→ External monitors should only be approved for students with low vision.
2. Tablets			
Tablet or mini-tablet and warranty (if not included)	\$650	Once every 4 loan years (upgrade or replacement, whichever is less).	→ Tablets or mini-tablets that run computer software and other applications may be recommended to perform a number of functions, including note-taking, time management, digital recorder, electronic reader, and assistance with oral communication.

Equipment Category	Cost	Frequency of Entitlement Note: A loan year runs from August 1 to July 31.	Notes
5. Spell Checkers			
Examples of spell checkers include: → <u>Franklin Language Master</u>	\$200		→ For students who are blind or have low vision and LD students.
6. Braille Products			
Braille Portable Note Taker	\$6,000	Once every 5 loan years (upgrade or replacement, whichever is less).	
Refreshable Braille Display	\$6,000 (initial purchase) \$500 (restore/refurbish)	Once every 5 loan years (refurbishment or replacement, whichever is less).	→ Rather than replace their refreshable braille display every 5 years, students should be encouraged to have it restored/refurbished. Servicing typically costs the fraction of the cost of a new model.
Braille Embosser (printer)	\$4,000	Once every 5 loan years (upgrade or replacement, whichever is less).	
7. Assistive Listening Devices			
FM Systems - For use without hearing aids	\$800	Once every five loan years	→ For students who are hard of hearing or have auditory processing disorders.
FM Systems - For use with hearing aids	\$4,000	One time.	→ For students who are hard of hearing.
Noise Cancelling Headphones	\$400	One time.	

Equipment Category	Cost	Frequency of Entitlement Note: A loan year runs from August 1 to July 31.	Notes
Amplified Stethoscope	\$700	One time.	→ For students who are hard of hearing and enrolled in nursing, medicine or paramedicine programs.
8. Assistive Technology Package			
A variety of assistive technology products with attendant subscription costs (e.g., scan and read, talking dictionary, text to audio, e-text reader, screen magnification) included in a single package Example: → Key to Access (Premier Literacy)	\$500	One time plus upgrades as needed.	
9. Other Software <i>* Software should include a maintenance (update) agreement, whenever possible.</i>			
<u>Voice Recognition Software</u> Examples include: → Dragon Naturally Speaking → iListen	\$500 (standard version) \$1,100 (professional version) \$2,000 (medical version)	One time plus upgrades every 2 loan years.	→ Standard version: Speech to text software for individuals who can access the keyboard and mouse. → Professional version: Speech to text software for individuals who cannot access the keyboard and mouse. Rationale outlining requirement for professional version must be provided. → Medical version: For students in medical programs only. Rationale outlining requirement for medical version must be provided.
<u>Audio to Text Conversion Software</u> - Digital recorder with	\$500	One time.	→ Allows for transfer of voice recorded notes to computer for conversion to text.

Equipment Category	Cost	Frequency of Entitlement Note: A loan year runs from August 1 to July 31.	Notes
Dragon Naturally Speaking bundle			
<u>Screen Reading Software</u> Examples include: → <u>JAWs</u> → <u>COBRA</u> → <u>HAL</u>	\$1,800	One time plus upgrades, as required.	
<u>Screen Magnification Software</u> Examples include: → <u>ZoomText</u> → <u>SuperNova</u> → <u>MAGic</u>	\$700	One time plus upgrades every 2 loan years.	
<u>Text to Speech Software</u> Examples include: → <u>Kurzweil 1000</u> → <u>OpenBook</u> → <u>ClaroRead</u> → <u>Kurzweil 3000/firefly</u> → <u>WYNN</u>	Up to \$2,000	One time plus upgrades every 2 loan years.	
<u>Assistive Writing Software</u> Examples include: → <u>TextHelp</u> → <u>WordQ / SpeakQ</u> → <u>Write: OutLoud</u> → <u>Co:Writer</u> → <u>Read and Write Gold</u>	\$1,000	One time plus upgrades every 2 loan years.	→ Most include word prediction, dictionary spell check, and text-to speech. → Read & Write Gold: only once per loan year as it's an annual subscription.

Equipment Category	Cost	Frequency of Entitlement Note: A loan year runs from August 1 to July 31.	Notes
<u>Organizational / Mapping Software</u> Examples include: → <u>Inspiration</u> → <u>Draft Builder</u> → <u>Spark Learner</u>	\$250	One time plus upgrades every 2 loan years.	→ Brainstorm mapping, outline building, writing process.
<u>Smartphone Applications</u> Examples include: → DyslexiaKey → Ghotit Real Writer	Costs vary depending upon service provider and smartphone used.	One time plus upgrades as necessary.	→ Must include a description of the application and how it relates to a student's permanent disability. → Some smartphone applications limit user access to one year, after which the subscription must be renewed (typically to upgraded software). Requests for renewal should be automatically approved; the student is not required to re-submit a description of the application and how it relates to their permanent disability. → Note: Funding is not provided to cover the costs of purchasing a smartphone or of data usage/contracts.
10. Other Equipment			
Coloured Overlay Sheets	\$50	One time.	→ For students with Irlen Syndrome / Scotopic Sensitivity Syndrome. → For use with books and/or computer and smartphone screens.
Coloured Lens Overlay	\$50	One time.	→ For students with Irlen Syndrome / Scotopic Sensitivity Syndrome.

Approved Services Costs and Frequency of Entitlement

If submitting the Schedule 4 request within 60 days of the study period end date you must ensure the service(s) have been used to the current time based on your estimate. The deadline to submit applications for services is at least 30 days prior to the student's study period end date.

Note: Provincial assessment officers have discretion, on a case-by-case basis, to establish maximum admissible costs for education-related services and equipment related to a student's permanent disability and circumstances. The service costs indicated in the table below are to be used as guidelines only. Price estimates assume no taxes on these services.

Exceptional circumstances may be reviewed on an individual basis.

Service	Cost	Frequency of Entitlement Note: A loan year runs from August 1 to July 31.	Notes
Specialized Tutor *see page 36	Up to a maximum of \$40 per hour. Estimates must be provided (including rate per hour, hours per week per course, number of courses, and number of weeks) to confirm cost breakdown.	A base of 2 hours per week per course or as otherwise recommended by a student's assessor or disability coordinator at the school. The cost depends on the course subject, the level of specialized knowledge required to address cognitive barriers, type of disability, and the qualifications of the specialized tutor. Tutors must have subject knowledge/education/training that is specifically related to the course(s) in which they are tutoring the student. The following examples would not be eligible for tutor funding: (1) Another student taking the course at the same time.	→ Specialized tutors should only be approved for courses in which a student has a demonstrated disability. For example, a student with a learning disability in math should not be approved funding for a specialized tutor for courses other than math. → Students who require (1) an increase in specialized tutoring hours, or (2) a specialized tutor for courses that they do not have a demonstrated disability in, are required to provide additional medical or specialist documents noting the reasons for the changes and how the specialized tutor is helping with their disability.

Service	Cost	Frequency of Entitlement Note: A loan year runs from August 1 to July 31.	Notes
		(2) A family member or friend or person with no background in the subject.	
Note Taking	Up to a maximum of \$500 per course.		<ul style="list-style-type: none"> → For service providers who take class notes for students with disabilities and who are not otherwise enrolled in the class. → If an individual provides support as both a tutor and a note taker, they may charge two separate fees.
Note Sharing	Up to a maximum of \$250 per course or \$500 per license, whichever is less.		<ul style="list-style-type: none"> → For students who share legible notes with the applicant for classes in which they are both enrolled (peer note takers). → This cost is to be paid to the peer note taker. If the notes are being copied multiple times for more than one student, the fee should only be paid once and only requested on one of the student's Schedule 4, not <u>every</u> student's Schedule 4 that is receiving a copy of the notes. → Other products such as Sonocent and Samson Go Mic should be considered in replacement of note sharing or note taking.
Reader	Up to a maximum of \$20 per hour.		<ul style="list-style-type: none"> → If reading technology is not available, students with low vision or learning disabilities may be approved funding for reading services for educational material. → If an individual provides support as both a tutor or note-taker and a reader, they may charge two separate fees.
Interpreter / Captioning / Oral Sign Language / Deaf-Blind Intervenor/Audio Descriptor	Up to a maximum of \$140 per hour.		<ul style="list-style-type: none"> → For example, American Sign Language (ASL).

Service	Cost	Frequency of Entitlement Note: A loan year runs from August 1 to July 31.	Notes
Educational Attendant Care (while at school)	Up to a maximum of \$60 per hour.	Number of hours will vary according to the recommendation of the assessor.	<ul style="list-style-type: none"> → Funding is intended to pay for attendant care while at school (for education-related activities) only. → Attendant care providers primarily provide physical assistance to students (e.g., help navigating classrooms or using lab equipment). → Attendant care providers must be fully certified according to their provincial/territorial regulatory body. → If an individual provides support as both a tutor/reader/note-taker and an educational attendant, additional rates may be considered.
Behavioural Interventionist	Up to a maximum of \$60 per hour.	Number of hours will vary according to the recommendation of the assessor and based on the student's individualized assessment.	<ul style="list-style-type: none"> → Funding is intended to pay for behaviour intervention while at school (for education-related activities) only. → Interventionists primarily work with students with Autism Spectrum Disorder to facilitate communication and positive behaviour. → Interventionists must be fully certified according to their provincial/regulatory body. → If an individual provides support as both a tutor/reader/note-taker and a behavioural interventionist, additional rates may be considered.
Alternative Formats: → E-text → Large or Braille print → Taped lectures (if available through the school)	Costs vary depending upon service provider and format used.	Once from initial print format.	<ul style="list-style-type: none"> → Some schools cover the costs of alternative formats as part of their duty to accommodate. If, however, a student's school does not cover these costs, funding should be approved. → Textbooks are scanned into electronic format (e-text) for reading. The e-text can also be converted into digital audio files for listening. For reading difficulties, the most popular programs used are Kurzweil, Wynn, TextHelp, and Read: Out Loud. For visual impairments, the most popular programs are JAWS, Window Eyes, Zoomtext, and Kurzweil.

Service	Cost	Frequency of Entitlement Note: A loan year runs from August 1 to July 31.	Notes
			→ Institutions may charge to have textbooks scanned into the required file format for students to use on their computers and/or digital media players.
Tinted Lenses for Irlen Syndrome	\$500	One time.	<ul style="list-style-type: none"> → For students with Irlen Syndrome / Scotopic Sensitivity Syndrome. → Maximum admissible cost includes shipping to and from the United States, where tinting process takes place. → The cost of the actual lenses being used to tint is not eligible.
Specialized Transportation	Prices vary depending on location, service provider's schedule, and availability.	Transport to the school address from the student's place of residence only.	<ul style="list-style-type: none"> → Transportation costs are included in all student's assessments under their monthly living allowances. Requests for transportation must exceed this allowance to be considered under grant funding. → Disability related transportation costs requests other than DATS (ex. parking, vehicle related transportation costs) which are necessarily higher because of a student's disability must clearly establish that accessible public transportation is not a viable option. → Additional stops, including for co-op work terms, practicums, internships, should not be considered.
Academic Strategy Sessions *See page 38	<p>\$25 to \$90 per hour, up to a maximum of \$900 per term.</p> <p>Estimates/cost breakdown must be provided (including rate per hour and number of hours per semester), as well as credentials of the strategist must be</p>	10 hours maximum per semester (4 months of study).	<ul style="list-style-type: none"> → This service would be for students with learning disabilities, ADHD, and/or other mental health disabilities. ADHD coaching is a different service and is not eligible for funding. → Funding should only be provided if the student's school does not provide academic strategists. → It is recommended that the service provider's credentials include a teaching degree in special education. → Group strategy sessions may be approved if specific rationale is provided as to how the session will address the

Service	Cost	Frequency of Entitlement Note: A loan year runs from August 1 to July 31.	Notes
	provided at the time of the request.		<p>student's identified functional limitation (e.g., time management, exam preparation).</p> <p>→ Academic strategists determine and implement appropriate academic accommodations and help students develop key study skills (organization and note-taking, memory, vocational direction, interpersonal dynamics, and time management) to promote academic success. Please note that life coaching is not eligible.</p>
Psychoeducational Assessment	75% of the assessment cost, up to a maximum of \$1,700.		<p>→ Only students who provide a psychoeducational assessment that confirms a diagnosis of a Learning Disability are eligible.</p> <p>→ Students are required to pay for their psychoeducational assessment upfront and receipts must be provided. Receipts must clearly indicate the amount paid and show if any part of the assessment was covered by another source (student/parent insurance plan, other private or government assistance program such as Community and Social Services).</p> <p>→ The psychoeducational assessment must be completed within 6 months of the current study period start date (current study period is the study period in which they have an active student loan application).</p>
Assistive Technology (AT) Set-Up/Install	<p>\$90 (one device per loan year).</p> <p>\$180 (multiple devices in the same loan year).</p>	<p>Once a lifetime per device.</p> <p>Once a lifetime per device.</p>	<p>→ Funding eligibility is for a one time set-up and install and/or training for a device for the students lifetime.</p> <p>Example: If AT set-up and install or training was previously awarded for one device in the current loan year and the student is requesting additional funding for 2 more devices they would only be eligible for an additional \$90 in each category.</p>

Service	Cost	Frequency of Entitlement Note: A loan year runs from August 1 to July 31.	Notes
AT Training	\$180 (one device per loan year). \$270 (multiple devices in the same loan year).	Once a lifetime per device. Once a lifetime per device.	

Tutoring Services Request Clarification:

All tutoring service requests must include a breakdown. This breakdown should include the following: hourly rate x hours per week/course x number of courses x weeks of study. Requests for tutoring must be directly related to the student's disability. Tutoring is to support students who, because of their disability, are experiencing difficulty in their course work and need assistance in maintaining a passing grade.

Specialized tutors are required for all requests (ex. tutors must have subject knowledge/education/training that is specifically related to the course(s) in which they are tutoring the student). Rate determination is based on the tutor's resume and credentials.

We require advisors to review tutor funding awarded in the past and how much tutor funding was utilized so requests are in line with how much the students tends to use during their studies.

Tutoring Service Requests for Condensed Programs:

A maximum of 1/3 tutor hours per hour in class (ex: if a student is in lectured classes for 6 hours per week, they may be eligible to receive 2 hours per week of tutoring).

Tutoring Services Rates Determination:

Rates of \$25 and under per hour – accepted without resume

Rates over \$25 per hour – resume must be provided and a copy of credentials (degree, diploma, certificate)

\$40/hour – Master's Degree with teaching experience

\$35 - \$39/hour – Master's Degree

\$30 - \$34/hour – Bachelor's Degree with teaching experience

\$26 - \$29/hour – Bachelor's Degree relative to the subject matter

\$20 - \$25/hour – Peers at least 2 years ahead of the current student in the same subject matter

\$15 - \$19/hour – Peer tutors

Tutoring Services Rates Determination for Apprentices Programs:

\$35 - \$40/hour – Journeyman with tutoring/teaching experience

\$26 - \$34/hour – Apprentices who have completed the program with teaching/tutoring experience

\$20 - \$25/hour – Peers at least 2 years ahead of the current student in the same subject matter

\$15 - \$19/hour – Peer tutors

Academic Strategy Request Clarification:

All strategist service requests must include a breakdown. This breakdown should include the following: hourly rate x number of sessions (usually 1 hour duration).

A resume and copy of credentials must be provided. For strategy classes, the syllabus must be submitted with the Schedule 4 request.

Academic Strategy Rates Determination:

\$90/hour – Master's in Education Psychology; Bachelor in Psychology and Bachelor in Education, and strategy experience

\$75 - \$89/hour – Master's Degree, Bachelor in Education and strategy experience

\$60 - \$74/hour – Master's Degree, Bachelor in Special Education and strategy experience

\$45 - \$59/hour – Bachelor in Special Education and strategy experience

\$35 - \$44/hour – Bachelor in Education, teaching experience and strategy experience

\$25 - \$34/hour – Academic Strategy experience

\$20 - \$24/hour – Strategies experience

Grant Reconciliation and Receipt Submissions

The appropriate receipts/unused funding refund must be provided by the end of the student's current study period for services/equipment recommended on that specific Schedule 4.

As most service and equipment grant funding is processed on the basis of estimates/quotes, not all recommended services and/or equipment may actually be used in the study period. In this case Alberta Student Aid expects that the unused portion will be refunded. If an educational institution is administering and tracking the student's services and equipment grant usage, you must advise what services and/or equipment were used and what is being refunded (see [Sample Receipt for Services and Equipment Provided by Education Institution](#) for a sample refund letter).

We will in turn advise the student in writing either that:

- all receipts have been received, or
- the student needs to provide missing receipts and a breakdown of services and equipment usage

If the appropriate receipts are not provided either by the student or the educational institution to justify the services and/or equipment:

- The CSG-PDSE/GFD grant will be treated as an overpayment
- The student will be sent a letter requesting repayment of the entire grant; or the unused portion; or the portion for which receipts were not provided (whichever is applicable)
- **Overpayments will be recovered by reducing future Services and Equipment grant eligibility for the CSG-PDSE. The GFD grant overpayment will be converted to loan**

Scenario:

A student received \$5,000 in CSG-PDSE for assistive services in 2018/2019. All \$5,000 was for tutoring and the student only used \$4,000. Along with the appropriate receipts, the student must return the unused \$1,000 grant funding to Alberta Student Aid as this is considered an overpayment.

- Student submitted receipts, but does not reconcile the \$1,000 from 2018/2019. They are considered overpaid \$1,000
- Student applies for CSG-PDSE for the 2019/2020 loan year for \$3,000 in services and equipment
- Approved amount will be reduced by the \$1,000 overpayment from 2018/2019
- Student's total CSG-PDSE award will be \$2,000
- Alberta Student Aid will send an email to the disability advisor and the student will also be notified that their CSG-PDSE was reduced due to an outstanding overpayment
- If the overpayment was for GFD from 2018/2019, the amount would have been converted to loan and therefore no overpayment would be applied to the 2019/2020 Schedule 4 request

Tutor and Academic Strategist Receipts:

When tutor and academic strategy receipts are submitted you are required to attach an attendance schedule/log for these sessions. Logs must include the hourly rate, duration of the session, and confirmation of payment. Receipts submitted without this information are not eligible.

Unused funding:

Alberta Student Aid requires all receipts and unused funding to be submitted at the end of the student's academic period to reconcile their disability grant funding. Unused funds must be submitted to Alberta Student Aid in the form of a cheque, money order, certified cheque, or bank draft. Students are **not able** to make disability grant repayments via online payment. Payments are to be mailed to the following address:

Alberta Student Aid
Attn: Disability Grants
Box 28000, Stn Main
Edmonton, Alberta T5J 1R9

Payments made through mail should not be sent by courier as they will not be delivered to Alberta Student Aid, and will eventually be returned to the student.

Disability Grant for Services and Equipment Reconciliation Worksheet:

This worksheet can be found on the Alberta Student Aid website here:

<https://studentaid.alberta.ca/media/23380/reconciliation-worksheet.pdf>. Students should be encouraged to submit the reconciliation worksheet along with their receipts/unused funding.

Sample Receipt for Services and Equipment Provided by Educational Institution:

(Date)

Re: (students name)
(SIN and/or ASN)
(Schedule 4 Funded Period)

Please be advised that we have received \$ _____ from (student's name) for their Services and Equipment funding. They have received the following services/equipment through (name of educational institution):

Amount of cheque received from student: \$ _____

Services and or Equipment Utilized:

(Name of the service)	\$ _____
(Name of the service)	\$ _____
(Name of the service)	\$ _____
(Name of the equipment)	\$ _____
(Name of the equipment)	\$ _____

Total services/equipment: \$ _____

Refund amount: \$ _____

Refunds for unused funds under \$25 are not required.

Enclosed is a refund cheque for this amount.

Or

This amount has been added to the enclosed refund cheque for \$ _____.

Sincerely,
(official's name)
(direct contact phone number)

Contacting Alberta Student Aid

Advisors who have questions related to the proper completion of Schedule 4s, appropriate medical documentation, or general questions related to disability funding, use the Schedule 4 inbox: ae.lf-schedule4@gov.ab.ca.

If advisors have inquiries regarding processing times and the cancelling of requests, please contact the Client Resolution Unit by calling 1-855-606-2096, option #4, option #1 (this option is specifically for educational institutions).

For access to SFS, please refer to: <https://studentaid.alberta.ca/resources/resources-for-schools/alberta-student-aid-system/>.

Alberta Student Aid Service Centre:

Students should be directed to call the Alberta Student Aid Service Centre at 1-855-606-2096 as their main resource for general inquiries regarding their student funding whether currently in studies or in repayment.

Hours of Operation and further contacts: <https://studentaid.alberta.ca/contacts/>