



FINANCIAL AID PROCESS & PROCEDURES

Staff Guide



STEP 1:

Member Service
Representative Review
Financial Aid Forms

TO RECEIVE AUTO 20%

HHI must be \$70,000 or less to qualify. Application must be completed with one of the following proofs of income:

- 2 pay stubs
- Proof of public assistance
- Letter from employer
- Self-written request letter

TO UTILIZE SCALE, UP TO 50%

To utilize eligibility scale, IRS Form 1040 and paystubs are required with any of the applicable documentation below:

- IRS Form 1040 - required
- 2 pay stubs/letter from employer - required
- Social Security/Disability proof
- Proof of public assistance

Public assistance includes: WIC, SNAP, Food Stamps, Medicaid, and TANF

STEP 2: MSR 1 will calculate member's monthly income with supporting documents and sign for approval.

STEP 3: MSR 2 will confirm calculation and sign off on approval.

FINANCIAL DOCUMENTS WILL NOT BE KEPT OR COPIED: return all documents to member.

STEP 4 - AWARD PROCESS BEGINS: MSR will provide member with the % amount they have been awarded.

STEP 5: Request member info form or program for sign-up.

STEP 6: MSR will add the qualifying % into CORE to be used for future sign-ups.

STEP 7: MSR will attach Financial Assistance Application & Request Letter (if applicable) to member's CORE record.

CORE WILL KEEP % ASSISTANCE UNDER EACH UNIT, RENEWABLE MAY 1ST OF EACH YEAR.

ADDITIONAL NOTES:

- Once assistance is applied in CORE, that same % will be used across all programs and membership.
- CORE will be set up to recognize 4 levels assistance: 20%, 30%, 40%, 50%.
- Personal Training is excluded from financial assistance discounting.
- If we cannot renew verification on a membership account, normal rates will be applied for the June 1st draft.
- This process will be effective May 1, 2022, as the renewal process happens. Any application received January-April will renew the following April.
- Participants in need of more than 50% support due to extreme circumstances must provide a written letter of need. Executive Director and VP of Operations must sign and approve the letter. Temporary support of 3-6 months can be provided.



YMCA Financial Assistance Eligibility Scale

To utilize eligibility scale, the following should be provided:

- IRS Form 1040 - required
- 2 pay stubs/letter from employer - required
- Social Security/Disability proof - if qualified
- Proof of public assistance - if qualified

Gross Annual Income	Number of Persons in Family							
	1	2	3	4	5	6	7	8
\$0-\$15,000	50%	50%	50%	50%	50%	50%	50%	50%
\$15,001-\$20,000	40%	50%	50%	50%	50%	50%	50%	50%
\$20,001-\$25,000	30%	40%	50%	50%	50%	50%	50%	50%
\$25,001-\$30,000	20%	30%	40%	50%	50%	50%	50%	50%
\$30,001-\$35,000	20%	20%	30%	40%	50%	50%	50%	50%
\$35,001-\$40,000	20%	20%	20%	30%	40%	50%	50%	50%
\$40,001-\$50,000	20%	20%	20%	20%	30%	40%	50%	50%
\$50,001-\$60,000					20%	30%	40%	50%
\$60,001-\$70,000						20%	30%	40%