Funding for Students With Disabilities Guide

Alberta
Student Aid

Contents

Funding for Students with Disabilities Guide 2023-2024

The purpose of this guide is to provide authorized post-secondary educational institution officials with information regarding many tasks they will need to complete, and for their students with disabilities who are applying for Alberta Student Aid funding. These items include (but are not limited to):

- Eligibility
- Types of Funding
- Definitions of Disability
- Services and Equipment
- Role of the educational institution Disability Advisor (or similar role)
- Repayment

The information in this guide applies to the 2023-24 Alberta student loan and grant year, for session start dates between August 1, 2023, and July 31, 2024, providing post-secondary educational institution representatives with important information on the funding process to help facilitate their support of students with disabilities who are applying for Alberta Student Aid.

This guide outlines the various types of funding provided—such as the Federal/Provincial Grant for Post-Secondary Students with Disabilities Schedule 4 form (referred to herein as *Schedule 4*)—while additionally directing educational institution representatives to more detailed resources on the [Alberta Student Aid website](). For further program updates, [*What's New*]() on the site is also a useful resource.

Post-Secondary School Representatives Only:

For students who began studies prior to August 1, 2023, please refer to the Alberta Student Aid Operational Policy and Procedure Manual 2022-23 or email the Client Resolution Unit.

Please email Client Resolution Unit:
- Email: cru@gov.ab.ca

Or, phone the Alberta Student Aid Service Centre
- 1-855-606-2096 (Select Option 4 and then Option 1)

For the 2023-24 Alberta student loan and grant academic year, this *Guide* highlights the federal and provincial program changes to the definitions and inclusions for the term 'disability' that deem a student, or a potential student with a disability, eligible for Canada or Alberta Student Aid funding.

Operational Policy and Procedure Manual

This guide is intended to be used in tandem with the Canada Student Financial Assistance Program (CSFAP) and Alberta Student Aid funding items set forth in the latest edition of the Alberta Student Aid Operational Policy and Procedure Manual 2023-24 (referred to as the Policy Manual)—with an emphasis on the procedures cited in Chapter 4: Disability: Permanent Disability, or Persistent and Prolonged Disability of that Manual.

With respect to both Canada and Alberta student loans and grants, and themes around eligibility and repayment, the policy manual contains updated content produced by the Alberta Student Financial Assistance Regulation and the CSFAP. As such, in this guide, as in all of Student Aid's publications and resources, we refer to two specific types of disability as outlined in the Policy Manual, that deem a student with disabilities eligible for Canada and Alberta Student Aid funding. These two types of disability are:

- Permanent Disability (PD), and,
- Persistent or Prolonged Disability (PPD).

Definition of a Permanent Disability (PD)

The Alberta Student Financial Assistance Regulation defines a **Permanent Disability (PD)** as:

Any impairment, including a physical, mental, intellectual, cognitive, learning, communication, or sensory impairment, or a functional limitation that restricts the ability to perform the daily activities necessary to pursue studies at a post-secondary level or to participate in the labour force and that is expected to remain with the person for the person's lifetime.

Definition of a Persistent or Prolonged Disability (PPD)

The Alberta Student Financial Assistance Regulation defines a **Persistent or Prolonged Disability (PPD)*** as**:**

Any impairment, including a physical, mental, intellectual, cognitive, learning, communication, or sensory impairment, or a functional limitation that restricts the ability of a person to perform the daily activities necessary to pursue studies at a post-secondary level to or participate in the labour force and has lasted, or is expected to last, for a period of at least 12 months but is not expected to remain with the person for the person's lifetime.

*Students with a PPD are required to attest to their disability status on every Student Aid application in order to maintain PPD status.

Note: For those students who attest no on an initial application, should their disability status change and, as a result, they attest to having a disability on a subsequent application, they will be required to re-verify their PPD on any future applications.

An applicant must meet one of these definitions of disability to be eligible for Canada or Alberta disability-related funding. Additional documentation may be requested when eligibility is not readily apparent. The disability funding may be delayed or denied if Alberta Student Aid deems the

documentation does not sufficiently demonstrate the student has one of the two types of disability as described above. In other words, if the student's medical documentation **does not provide** this adequate detail confirming their PD or PPD, the student will need to provide additional information.

Eligibility Criteria

There are three basic criteria that determine eligibility for Student Aid:

Program Eligibility

- The educational institution and program must be designated. Educational institutions and programs can be designated for federal and/or provincial funding.

Student Eligibility

- The student must be a Canadian citizen, permanent resident, or a convention refugee with protected person status.

- To qualify for provincial funding, students must also be residents of Alberta. This means that they have lived in Alberta for at least one year, or that Alberta is the most recent province they have lived in for 12 consecutive months without being in full-time studies.

- If applying for full-time studies, students must be registered in at least a 60% course load. However, for students with a PD or a PPD, this means taking at least 40% of a full-time course load.

Financial Eligibility

- For full-time funding, a student must demonstrate financial need. This means they have higher costs than the total of all their resources. The formula is:

  Allowable Costs minus Resources = Award (up to the loan maximum)

Types of Fundings

Students may be eligible to receive the following four types of funds:

- Canada Student Loans
- Alberta Student Loans
- Canada Student Grants
- Alberta Student Grants

Students could potentially receive any one of these fund types, or any combination of loans or grants, or all types of funding.

Alberta Student Loans are lent by and repaid to the Alberta Student Aid Service Centre through MyLoan. Canada Student Loans are lent by and repaid to the National Student Loan Service Centre (NSLSC). Grants issued by the service providers will be direct deposited to the student's bank account or sent by cheque if the student has not provided valid Canadian banking information.

There are a number of federal and provincial grants for students, and each type of grant has its own specific eligibility requirements. There are also grants designated specifically for students who have one of the two types of disabilities. Links will be provided to read more about grants below.

Full-Time Grants

Canada Grants

Alberta Student Aid provides a selection of **federal full-time grants** for eligible Alberta student borrowers.

Note: For purposes of this Guide, we are providing detailed explanations only about those grants that pertain to students with disabilities. For generic full-time Canada Grants, click on the following links:

- Canada Student Grant for Full-Time Students
- Canada Student Grant for Full-Time Students with Dependants

Canada Student Grant for Students with Disabilities

The Canada Student Grant for Students with Disabilities (CSG-D) is intended to address the financial needs of students with disabilities (PD or PPD).

Description of funding:
- Students are issued a flat rate of $2,800 per loan year, regardless of calculated or 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 associated with their disability (PD or PPD).
- Provided on a needs basis to students with either type of disability.
- Allocated before disbursement of student loans.

Eligibility:
- Must have at least $1 of federal calculated need.
- The educational institution and program must be designated for CSFAP funding.

Students must submit eligible medical documentation with their Schedule 4 form that describes the nature of their disability—i.e., a PD or a PPD. We encourage students to have an appropriate medical professional complete the Disability Verification Form.

Once the student receives the CSG-D, the student may not need to provide documentation describing their type of disability (PD or PPD), nor will they need to submit a new Schedule 4 **on subsequent applications** unless Alberta Student Aid requests they do so.

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, and,
    - 50% is disbursed at the mid-point of the study period.

Receipts:

- Not required for this Grant

Canada Student Grant for Services and Equipment – Students with Disabilities

The Canada Student Grant for Services and Equipment - Students with Disabilities (CSG-DSE) is provided to students who have a documented disability (PD or PPD) that limits their ability to perform the 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 disability.

Exceptional education-related services and equipment refers to eligible services and equipment that are required for the student to perform the daily activities necessary to pursue studies at a post-secondary school level. Purchases which support students outside of post-secondary education, or which are not primarily relevant to functional limitations in the post-secondary educational context, would not be eligible.

Funding Structure:

- Available for students enrolled in full-time and part-time studies

- Minimum $100 per loan year

- Maximum $20,000 per loan year

- Designed for educational disability-related services and equipment

- Designed to offset a full- or part-time student's exceptional education-related service and equipment costs associated with their disability

Note: The maximum amounts still apply for specific services and equipment; as defined in the Standard Costs and Frequency of Entitlements for Approved Services and Equipment Guide (Appendices 1 and 2).

Eligibility:

- Must have at least $1 of federal calculated need

- The educational institution/program must be designated for federal funding by the CSFAP

- A student must submit a Schedule 4, signed by an educational institution Disability Advisor (or an equivalent role), and have completed an application for full-time or part-time Student Aid for the same study period

- Students who have not yet established a PD or PPD must submit eligible medical documentation. The Disability Verification Form is encouraged when necessary (i.e. it cannot be used for verification of a learning disability).

- Must meet the CSFAP definitions of PD or PPD as defined in the Canada Student Financial Assistance Regulations (CSFAR) and in the [Policy Manual](#) and provide eligible documentation to verify the disability

Disbursements:
- Disbursed in full at the program start date as this grant is for the purchase of equipment and/or services

Receipts:
- The appropriate receipts and any unused grant funding must be provided to Student Aid by the end of the current study period for services/equipment approved on that specific Schedule 4 (see [Grant Reconciliation and Receipt Submissions](#) in this guide).

Alberta Grants

Student Aid provides a selection of **provincial grants** for eligible Alberta student borrowers. Students who are not in multi-year programs, or who have no federal eligibility, could qualify for Alberta Student Aid-provided Alberta grants.

Note: For purposes of this guide, we are only providing detailed explanations about provincial grants pertaining to students with disabilities. For generic full-time Alberta grants, see the following information:

- [Alberta Student Grant For Full-Time Students (ASG-FT)](#)

Alberta Grant for Students with Disabilities (GFD)

The [Alberta Grant for Students with Disabilities (GFD)](#) is provided to students who have a documented disability (PD or a PPD) and are not eligible to receive the [Canada Student Grant for Services and Equipment – Students with Disabilities (CSG-DSE)](#), or have costs not covered by the CSG-DSE.

The Grant is intended to support exceptional education-related costs associated with the student's disability.

Exceptional education-related services and equipment refers to eligible services and equipment that are required for the student to perform the daily activities necessary to pursue studies at a post-secondary school level. Purchases which support students outside of post-secondary education, or which are not primarily relevant to functional limitations in the post-secondary educational context, would not be eligible.

Funding structure:
- Available for students enrolled in full-time studies only.
- Minimum $50.
- Maximum $3,000 per loan year (not to exceed the costs of the services and/or equipment required).

Note: The maximum amounts still apply for specific services and equipment; as defined in the Standard Costs and Frequency of Entitlements for Approved Services and Equipment Guide ([Appendices 1 and](#)

<u>2</u>).

For Educational Disability-Related Services and Equipment
- When a student meets the eligibility criteria for both the CSG-DSE and the GFD, it will be the CSG-DSE funds that are allocated first.
- Students in study periods of 10 to 12 months may receive a maximum of $23,000 in that study period (combined CSG-DSE of $20,000 and GFD of $3,000).
- Students in study periods of fewer than 10 months may receive a maximum of $20,000 (combined CSG-DSE and GFD in that study period).

Eligibility:
- Student must have completed a Student Aid application for full-time studies for the same study period.
- Students attending part-time studies are not eligible for the GFD.
- Student must have at least $1 of provincial calculated need.
- Student must submit a Schedule 4 signed by an educational institution Disability Advisor or an equivalent role.
- Student must submit eligible documentation to verify their disability (i.e., <u>Disability Verification Form</u>).
- Student must meet one of the definitions of disability (either a PD, or a PPD) as defined in the Student Financial Assistance Regulations (SFAR) and the policy manual and have provided eligible documentation to verify their disability (i.e., Disability Verification Form referred to above).

Additional Information and Eligible Services and Equipment:
- Students with a disability may also be considered for GFD funding for parking if there is a disability-related need for it. Rationale and appropriate documentation to verify the disability-related need is required.

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

Receipts:

By the end of the study period, the student must provide receipts to show that the grant was used for its intended purposes for the study period. Any unused or undocumented grant funding must be returned to Student Aid or it will be deemed an overpayment and added to the students existing loan balance. If the student does not have an existing loan, one will be created for them.

Full-Time Application

All students need to have a verified <u>Alberta.ca Account</u> to log in to the Student Aid system. Learn more at: <u>Student Aid Verified Accounts</u>

Apply Early!

We recommend students apply early for Student Aid funding. Once they have applied online, they will want to submit their Schedule 4 2023-24 form as soon as possible.

Note: While you are able to access the Alberta Student Aid system to see information pertaining to applicants and funded students, privacy (FOIP) reasons dictate you may not actually fill out or submit applications on a student's behalf. Rather, when they require assistance, direct students to the following tools:

- The Apply section on the Alberta Student Aid website,
- The videos Create your Student Aid Account and Complete your Application, and
- The Student Aid Worksheet Full-Time available in the Resources section.

Application Deadlines

- For the Canada Student Grant for Students with Disabilities to be provided, all students must have their applications submitted **at least 30 calendar days prior to the student's study period end date.**
- Where Equipment/Assistive Technology is requested, and the study period is:
  - less than 4 months (e.g., spring/summer semester, apprenticeship classroom instruction), the Schedule 4 **must be received prior to the study period start date.**
  - between 4 to 6 months, the Schedule 4 must be received **at least 30 calendar days prior to the study period end date.**
  - between 7 to 12 months, the Schedule 4 must be received **at least 90 calendar days prior to the study period end date.**

In some cases, particularly where the student had applied previously and has full Student Aid system access and had been assessed **as a student with a disability**, their application may be assessed and processed automatically. If this is the case, and the student requires services and equipment, we will reassess their application once we receive the Schedule 4 and cost estimates.

Federal/Provincial Grant for Post-Secondary Students with Disabilities Schedule 4 2023-24 Form

In order to be eligible for disability funding, the student must submit requisite disability documentation along with a Schedule 4 2023-24 form and have completed an Alberta Student Aid application for the academic study period in which the Schedule 4 applies.

The Schedule 4 is required if:
- a student is a first-time applicant,
- a student with a disability (PD or PPD) is requesting services and/or equipment costs for the study period for which they are applying,
- a student is enrolling in a reduced-course load (40% to 59% of a full-time course load).

Schedule 4 Submission Process and Exceptions
- Students can upload their Schedule 4 by logging in to their secure Alberta Student Aid account and clicking on the Upload Documents tab.

- If a first-time application comes in with one of the two types of disability indicated, but without the Schedule 4, we will process the application without disability funding. When the Schedule 4 is received, if the application has been processed, it will be flagged for the [Review Process](#) as a [Request for Reconsideration](#). If the application is still pending, we will flag the application in order to consider the Schedule 4 as part of the initial assessment.
    - **Note**: Students with a PPD who attest no on an initial application will be required to [re-verify PPD](#) on future applications, where applicable, should their status change again.
- Once a PD or PPD is established, the student will automatically be considered for the $2,800 [Canada Student Grant for Students with Disabilities (CSG-D)](#)—without a Schedule 4. To receive this grant, they are only required to have a federally calculated need and provide disability attestation on subsequent loan applications.

Also:

- Once approved, a Schedule 4 is not required in future years if:
    - the student does not require funding for services and/or equipment, or,
    - the student is enrolled in at least a 60% course load.
- Educational institution staff can review Schedule 4 on a student's previous applications using the Alberta Student Aid system inquiry screens. If the student had received funding for disability-related services and/or equipment, it will also be noted in the Student Award Letter that will appear in the comprehensive list of student correspondence on the system. To inquire about receiving access to the Alberta Student Aid system, see [Access for Schools](#).
- In situations where the student has to wait for medical assessments or appointments relevant to the application process, the student's funding application may be processed without the Schedule 4. The completed form may follow later.

Submission Deadlines for the Schedule 4

Grant	Length of Study	Days
CSG-D and CSG-DSE Services and/or GFD Services requests	Any length of study	30 days before current study-period end date
CSG-DSE Equipment and/or GFD Equipment requests	Seven to 12 months	90 days before current study-period end date
CSG-DSE Equipment and/or GFD Equipment requests	Four to six months	30 days before current study-period end date
CSG-DSE Equipment and/or GFD Equipment requests	Fewer than four months	No later than the study-period start date (e.g., spring/summer/apprenticeship)

Schedule 4 - Information and Instructions Pages

The cover page of the Schedule 4 2023-24 form includes the definitions for both a permanent disability, and a persistent or prolonged disability, the types of funding available, information on reduced-course loads if applicable and an application checklist of everything that should be submitted with the Schedule 4. There is also information on this page that provides Schedule 4 application deadlines.

Information and Instructions – Continued

This section provides tips for completing the Schedule 4. Students that are applying for the first time and must submit medical documentation are encouraged to have the Disability Verification Form completed by the appropriate medical professional as indicated directly on the form, noting that students with a diagnosis of a Learning Disability must submit an eligible Psychoeducational Assessment report.

Eligible documentation (i.e., the Disability Verification Form), is required only for first-time applicants with a disability. It must indicate that the disability meets the definition of either a permanent disability or a persistent or prolonged disability.

Eligible documentation should include information such as the assessment date, diagnosis, doctor's information, and any recommended supports. It is recommended students use the Disability Verification Form when possible. These medical documents are required for the Student Aid assessment, and will be used later if the student applies for the Repayment Assistance Plan for Borrowers with a Disability (RAP-D).

In addition to referring to Chapter 4 of the policy manual (disability section), the table below provides a breakdown of the types of documentation required depending on the student's type of disability. Students are encouraged to have the appropriate medical professional complete the Disability Verification Form, the exception being students with a diagnosis of a Learning Disability; these students must submit an eligible Psychoeducational Assessment.

Summary of Disability Documentation Required

Type of Disability	Documentation requirements	Notes about special issues/situations
Deaf, Hearing Impaired	• Audiologist report, *or* • Letter from physician with an explanation of the degree of hearing loss	
Blind, Visually Impaired	• 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 ASA understand the degree of impairment and how the requested supports relate to the disability.

Learning Disability	• Psychoeducational report from a psychologist, *or* • Neuro-psychological report	Assessment should be no older than five years, if conducted before the age of 18. Exceptions may be made depending on situation and level of detail. **Current exception for 2023-2024 loan year to allow up to seven years if extenuating circumstances prohibit a student from obtaining an updated assessment. Rationale will need to be included for review.** A physician's diagnosis of a Learning Disability is not acceptable.
Speech	• Speech language pathologist's report	
Mobility Impairment	• 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	• 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	• Psychologist's report with *The Diagnostic and Statistical Manual of Mental Disorders (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	• Psychologist's report *or* • Letter from a psychiatrist	
Brain Injury/Cognitive Impairment	• Neuropsychological report, *or* • Brain Injury/cognitive impairment report/assessment	

Examples of other PDs or PPDs	• Chronic Fatigue/Pain: detailed letter from physician • Irlen Syndrome: assessment report from a Certified Irlen Screener	

Details regarding the information required for eligible receipts are also listed on this page. This includes the deadlines to submit them, as well as what information a receipt must include to be considered for grant reconciliation.

Upload Schedule 4 and Receipts

This section includes information regarding the process for students to submit the Schedule 4 and receipts by uploading them directly to the student's account. This is the fastest and most secure way for students to provide information to Student Aid.

Return Unused Funds

Details are included in this section regarding the process for students to return unused funds.

Applicant Agreement

The Applicant Agreement section ensures the student has read and understands that they will submit receipts to reconcile their CSG-DSE, as approved on their Schedule 4, and that any unused funding will be returned to Student Aid by the end of their study period.

You may use this page as part of the counselling process. Although the Applicant Agreement section is not mandatory, students are encouraged to acknowledge it, sign it, and include it with the Schedule 4 package.

Schedule 4 – Page 1

The first mandatory page of the Schedule 4 contains all the student's information: their name, SIN, application ID, and study period dates.

Study Period Dates:

- Match the exact dates of the student's application period using a YYYY-MM-DD format.
- Advisors should inquire with students regarding the application dates submitted by the student or confirm the student's dates through the Alberta Student Aid system's educational institution Inquiry screen.

When reviewing the Schedule 4, you will want to pay close attention to the program dates, particularly when it comes to documenting services and equipment. Requests for services and equipment must match the study period for which the student is applying.

Section 1 – Nature of Disability

This section must be completed by the Disability Advisor/School Official.

When necessary, review the Summary of Disability Documentation Required in the chart above, to ensure submission of the appropriate medical documentation (i.e., Disability Verification Form).

Section 2 – Reduced Course Load

- The educational institution is only required to complete this section if the student is enrolling in 40% to 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.
- For students studying at 60% of a full-course load or greater, this section does not need to be completed.

Section 3 – For Educational Institution Use Only – Signature by Disability Advisor/School Official

Print your name and email address clearly should Student Aid need to contact you; provide your direct phone number and date the Schedule 4.

Note: With the submission of Schedule 4's now occurring electronically, by email or having the student upload them to their Student Aid account, **you are not required to sign the Schedule 4**. Simply provide your name and contact information as authorization to ensure we know who to contact should there be further questions/clarification regarding the completed Schedule 4.

For the 2023-2024 loan year, Student Aid has re-arranged sections of the Schedule 4 application to allow school officials to submit only Page 1 of 3 for Schedule 4 requests that are requesting the CSG-D and/or Reduced Course Load. For services and equipment requests, pages 1 to 3 must be submitted.

Instructions for Schedule 4 submissions:
- **Canada Student Grant for Students with Disabilities and/or Reduced Course Load Requests** – Submit Page 1 with supporting medical documents.
- **Services and Equipment Requests** - Submit Pages 1, 2 and 3 of this form with supporting medical documents/quotes/cost breakdowns.

Schedule 4 – Page 2

Section 4 - Assistive Services

When submitting assistive services requests, please ensure a rationale is given for each assistive service requested that relates to the student's disability and that each recommended service is included in the student's medical documentation (i.e., the Disability Verification Form). Estimates and résumés with credentials must be provided for tutor and academic strategy services (see highlighted portions).

Please enter amounts requested to the nearest dollar. Round up the monetary amount when the number to the right of the decimal point is five or greater. Keep the monetary amount the same if the number after the decimal point is four or less. For example: if the item is $175.42, it rounds down to $175.

Exam accommodation costs are ineligible**.**

The Standard Costs and Frequency of Entitlements for Approved Services and Equipment Guide will provide you with more information on eligible Services (Appendix 2).

The bottom section is where you can include the necessary cost breakdowns and all disability related rationale for assistive services requests. This may also include any further comments on the student's situation that you feel are relevant to their funding.

Examples:

- You know the student does not meet the definitions for PD or PPD, but you were under pressure from the student, or parents of the student to submit the documentation,
- You know that specific services requested is/are not eligible or exceed maximum eligible amounts, and/or
- Instructions on what Student Aid should fund if the request is more than $20,000.

Learning Assessment Fee

The Learning Assessment Fee is the only student assessment that may be eligible for reimbursement. Costs for other types of assessments are not eligible (e.g., living assessments, assistive technology assessments, ADHD Assessments, occupational or physical therapy assessments, and doctor's notes). CSG-DSE/GFD will cover the fee if the learning assessment confirms that the student has a learning disability. However, students who sought a psychoeducational assessment to confirm a learning disability, but whose assessment confirms a different permanent disability or a persistent or prolonged disability, are also eligible for reimbursement.

If a student is submitting a request for the Learning Assessment Fee reimbursement, you must include the complete assessment signed by the medical professional, along with an assessment receipt.

- The assessment must be dated no earlier than six months prior to the student's current start date of studies.
- Included in the maximum entitlement of $20,000 per loan year is 100% of the cost (up to a maximum of $3,500).
- The CSG-DSE will cover 100% of the cost to a maximum of $3,500 per loan year. The student will be responsible for the remaining costs. For example:
  - If the student's learning assessment fee is $4,000, the CSG-DSE will cover 100% or up to the maximum of $3,500 of that cost and the student will be responsible for the remaining $500.

Note: Students not eligible for CSG-DSE may be eligible for reimbursement under the Alberta Grant for Students with Disabilities (GFD) for a maximum of $3,000.

Proof of payment for a learning assessment must be provided for the cost to be considered, as well as a full copy of the signed report confirming the learning-disability diagnosis. If the learning-assessment fee is fully covered by insurance, the cost cannot be considered by Student Aid. If the learning-assessment fee has been partially reimbursed by insurance, the amount reimbursed by insurance cannot be considered by Student Aid but **must be noted in the request**.

As noted above, costs for other types of assessments are not eligible.

Schedule 4 – Page 3

Section 5 – 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 PD or PPD, or is recommended in the student's medical/disability documentation.

An estimate/vendor quote is required for each piece of equipment, and this can include screen shots of review carts for online purchases. This documentation is required each time a student requests equipment; Alberta Student Aid will not use estimates from a previous application.

Please follow the same rounding rules for equipment as indicated in the Assistive Services section above.

The Standard Costs and Frequency of Entitlements for Approved Services and Equipment Guide will provide you with more information on eligible Equipment/Assistive Technology (Appendix 1).

There is a section to include all disability related rationale for equipment/assistive technology requests. If you have any further information to provide our office regarding the Schedule 4 submission, you can enter it here. This may include any further comments on the student's situation that you feel are relevant to their funding.

Examples:

- You know the student does not meet the definitions for PD or PPD, but you were under pressure from the student, or parents of the student to submit the documentation,
- You know that specific equipment/assistive technology requested is/are not eligible or exceed maximum eligible amounts, and/or
- Instructions on what Student Aid should fund if the request is more than $20,000.

Total Recommended Services and Equipment/Assistive Technology:
Enter the **total cost** of the student's assistive services/equipment, including the Learning Assessment reimbursement if applicable. If the student is attending a public post-secondary institution, any costs more than $20,000 will be the responsibility of the educational institution. For private career colleges, Student Aid will forward the documentation to Alberta Community and Social Services for its review of possible additional services/equipment funding.

Disability Grant for Services and Equipment Reconciliation Worksheet

The Disability Grant for Services and Equipment Reconciliation Worksheet is available in the Applications and Forms section of the Student Aid website.

The *Worksheet* can be used to help students track the money they have received for services and equipment, the amount used, and the amount that needs to be returned to Student Aid.
Note: When students upload this form to their Student Aid account, they should include their receipts.

Duty to Accommodate

Student Aid does not cover the costs associated with anything that falls under the Duty to Accommodate information sheet published by the Alberta Human Rights Commission.

You are required by Alberta Human Rights legislation to accommodate a person's needs regardless of disability, mobility issues, etc. For example, ensuring your building is wheelchair-accessible would fall under the Duty to Accommodate; Student Aid does not reimburse or otherwise cover these costs.

Anything you put on the Schedule 4 is considered a requirement for the student to attend educational institution. If we cannot fund it (for instance, because the costs exceed $20,000), it is your obligation to provide it under the Duty to Accommodate. For more information as to what is considered a disability and an explanation of accommodation requirements, visit Alberta Human Rights Commission.

Schedule 4 Checklist

- Review the documentation to ensure the stated disability meets one of the two definitions of disability as set forth by the Canada Student Financial Assistance Program and the policy manual.
- The documentation must contain a clear diagnosis, be recent, and be provided by the appropriate medical professional.
- **Verify**: Has the student applied for Student Aid funding? This can be confirmed by logging on to the Alberta Student Aid system. If the student's funding has already been processed for the academic period, this will be treated as a Request for Review.
- Is the Schedule 4 complete?
    - Tick the box that corresponds to the nature(s) of the disability.
    - Enter the amounts of all the assistive services and equipment/assistive technology you are recommending along with the applicable estimates/quotes as required. Remember the rounding rules from the Assistive Services and Equipment/Assistive Technology sections.
    - In the Total Recommended Services/Equipment box, enter the total amount you are recommending and include the cost of the Learning Assessment fee when applicable. If this exceeds $20,000, include a breakdown of how you would like the CSG-DSE allocated.
    - Add any relevant comments and 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. For example, 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, Student Aid requires one quote or estimate for each product.
    - If this is the student's first Schedule 4, or in cases where a student with a PPD may need to re-verify their PPD, see the definition of PPD at the beginning of this document. Submit all the disability documentation along with the student's Schedule 4 request. If the student has previously been approved as a student with a disability, please only

> include the relevant quotes, estimates, tutor/strategist résumés, learning-assessment fee receipt, as needed, based on the requested services and equipment.
>
> o Sign, provide your direct phone number, email address, and date the Schedule 4. If only recommending a reduced-course load, and not recommending any services or equipment funding: Enter '0' in the Total Recommended Services/Equipment box.

- **Advise the student**:
    - o of the supports and services you've recommended (items and dollar amount),
    - o they will need to submit their receipts, as per the items and amounts you recommended, by the end of the study period, or send back any unused portion of the funds,
    - o you will notify them if there is a change to the requested amount. 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.

        Note: If they have issues seeing this letter in their secure Alberta Student Aid account, direct them to call the **Service Centre at 1-855-606-2096** (select Option 2).

Disability-Related Employment Supports

If students at private career colleges or attending out-of-province or out-of-country educational institutions exceed the maximum amount of either the $20,000 Federal CSG-DSE, or the $3,000 Alberta GFD on the Schedule 4, Student Aid will forward their disability documentation to Alberta Community and Social Services for review. This office will contact the student directly with the outcome.

For more information, see Disability Related Employment Supports on alberta.ca.

Assessing Principles

In addition to grants, there are some other exceptions we make when doing the assessment for students with disabilities.

Students with either a permanent disability (PD) or a persistent or prolonged disability (PPD) are eligible to receive CSFAP loan funding for 520 weeks, as opposed to the standard 340 weeks; this means students may have CSFAP loan eligibility after reaching the provincial lifetime loan limit.

Reduced-Course Load

A student with a disability (PD or PPD) could also be eligible to study at a reduced-course load. If a student enrolls in 40% to 59% of a full-course load, the educational institution's Disability Advisor, or an equivalent role, will need to fill out the Reduced-Course Load section of the Schedule 4 for each study period in which the student is taking a Reduced-Course Load, and submit it to Student Aid.

A student could also drop between 40% and 59% of a course load during their study period. When this happens, a new Schedule 4 with the reduced-course load section completed is required. We would also accept a letter from the educational institution's Disability Advisor, or an equivalent role.

Alternatively, these students could submit an application for part-time funding.

Things to consider:
- Will this student want the increased debt that will likely come with receiving full-time funding?
- Will this student require the living allowance associated with full-time funding?

Educational Institutions Completing Disability Advisor Section

Under the Disability Advisor section of the Schedule 4, enter the following:
- Indicate the nature of the disability (PD or PPD).
- List the full recommended amount for services and equipment for this study period, including Learning Assessment Fee when applicable, even if the total exceeds $20,000.

The Schedule 4 can be signed/completed by a representative in the educational institution's disability office, or by an educational institution's designee, or by the student. The educational institution's representative will need to provide their contact information including their email address, printed name, and telephone number.

This information is being reviewed by our Disability Unit specifically for the purpose of evaluating and assessing the student's disability status; for this reason, we ask that **educational institutions please provide us with a direct line to contact the educational institution representative** should any additional information or clarification be required, or if any issues arise.

Educational institutions are responsible for the information provided on the educational institution portion of the form. If a third-party service provider has made recommendations, we will need to consult with the educational institution if we have any questions about the Schedule 4. We do not work directly with third parties. Since all requests made on the Schedule 4 fall under the educational institution's duty to accommodate, educational institution reps will want to ensure they are aware of what the request is for. We also want the student to be aware of the request, as it is their money, and they have a right to know what they are receiving funding for.

Disability Advisor Role

The Disability Advisor signing/completing the Schedule 4 must:
- verify that the disability meets Student Aid's and the CSFAP's definitions of permanent disability (PD), or persistent or prolonged disability (PPD), and is backed by supporting documentation such as the Disability Verification Form.
- confirm that the supports requested relate directly to the disability and address any barriers created by the disability – i.e., can you rationalize the request?
- assist the student by completing Page 1 of the Schedule 4.

Note: If a student has received disability funding in previous years, we ask that you review what they have received in the past, if possible, prior to submitting the request. For example, did a student receive services-and-equipment funding that went unused? If so, it may not be necessary to request it again.

Communication with Students

To ensure the assessment is done as correctly and timely as possible, it may help to review the Schedule 4 and instructions with the student. You may also assist the student by communicating to them the **definitions of the two types of disability**.

If you know that the Schedule 4 or documentation does not meet the guidelines, but a student is requesting you submit it anyway, you can make a comment on the Schedule 4, so that when we review the submission, we have a better understanding of the circumstances.

Eligibility Clarification for Services and Equipment

Ineligible Services

Service	Rationale for Denial	Notes
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 CSFAP.	
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.	
Costs for Medication or therapies/treatment (including but not limited to Psychology/Psychiatry/Counselling, Physical Therapy, etc.)	Not eligible for funding through the grant program as they would likely be required regardless of whether student is attending post-secondary.	

Ineligible Equipment

Equipment	Rationale for Denial	Notes
Aids to Daily Living (e.g., Hearing Aids and Corrective Lenses)	Aids to Daily Living, including Hearing Aids and Corrective Lenses, for example, are not included on the List of Eligible Exceptional Education Related Services and Equipment published in the Canada Gazette. Hearing Aids and Corrective Lenses are considered a daily living aid rather than specific to an educational setting.	It would be difficult to distinguish between hearing aids or corrective lenses as a daily living aid and an exceptional educational cost.
Personal Use Devices	Including but not limited to: cellular phones, smart watches, clocks, timers, daily planners.	

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 PD or a PPD, or that the student has barriers to their post-secondary education because of these conditions.
A student provides copies of their Disability Tax Credit.	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.
The medical documentation indicates the student has stress with writing exams and suffers from anxiety.	Situational conditions are not considered 'disabilities' for the purpose of funding as they are dependent on the situation.

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 PD, or PPD, the physician left them blank but added 'possibly improving'.	With this documentation this student is not eligible for disability grants. Medical documentation must indicate that one of the two types of disability exists (i.e., a PD or a PPD) 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 definitions of PD or PPD.
The diagnosis is Crohn's, and the stated impact is stress with exams.	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.
The student is an insulin-dependent diabetic.	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.
The documentation provided is a few months old from WCB and indicates a right knee injury impairment and a payout for a 4% impairment.	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.
The medical documentation indicates the student has rheumatoid arthritis and is not working.	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 participate in studies at a post-secondary level' is required.
The student has a seizure disorder but has not had a seizure in four years. 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 four 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.

Summary of Changes for 2023-2024

Alberta Student Aid, in conjunction with the Canada Student Financial Assistance Program (CSFAP), will periodically revise the Canada Student Grant for Students with Disabilities (CSG-D), the Canada Student Grant for Services and Equipment - Students with Disabilities (CSG-DSE) 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.

- For the 2023-2024 academic year, grants will increase by 40 per cent over the 2019-2020 pre-pandemic funding year amounts. The CSG-D will increase to $2,800 during the 2023-2024 loan year.
- As determined by CSFAP for the 2023-2024 loan year, the temporary expansion of the psychoeducational assessment to allow provincial officials discretion to accept assessments of up to seven years old when conducted before the age of 18 has been retired. Assessments completed before the age of 18 cannot be older than five years.

Summary of Changes to Standard Costs and Frequency of Entitlement for Equipment and Services:

Item	Change
Digital Voice Recorder	$250
C-Pen	$400
C-Pen and Smartpen	Students can be eligible for both
Office Software	Annual cap
FM Systems - For use without hearing aids	Once every four loan years
FM Systems - For use with hearing aids/cochlear implants	$6,000 Once every four loan years
Headphones	$800 Once every four loan years
Digital Stethoscope	Once every four loan years
Voice Recognition Software	$1,000, monthly or annual subscription
Note Taking	Up to a maximum of $1,000 per course
Reader	Increase to maximum eligible hourly rate
Typist / Transcriptionist	Increase to maximum eligible hourly rate
Educational attendant care	Increase to maximum eligible hourly rate
Behavioral Interventionist	Increase to maximum eligible hourly rate
Psychoeducational Assessment	Update to eligibility criteria

Standard Costs and Frequency of Entitlement for Approved Services and Equipment

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

Approved Equipment Costs and Frequency of Entitlement
See Appendix 1

Approved Service Costs and Frequency of Entitlement
See Appendix 2

Grant Reconciliation and Receipt Submissions

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

As most services-and-equipment grant funding (i.e., CSG-DSE/GFD) is processed on the basis of estimates or quotes, not all recommended services and equipment funding may actually be used in the study period. In this case, 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 equipment was used and what is being refunded.

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 equipment:
- the CSG-DSE/GFD will be treated as an overpayment.
- Student Aid will send the student a letter requesting repayment of the entire grant, or the unused portion, or the portion for which receipts were not provided. Whichever is applicable.

Note: CSG-DSE overpayments will be recovered by reducing future CSG-DSE eligibility. GFD overpayments will be converted to a loan.

Tutor and Academic Strategist Receipts
- When Tutor and Academic Strategy receipts are submitted, the educational institution and/or student 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.

  Note: Receipts submitted without this information will not be eligible.

Unused Funding

In order to reconcile their disability grant funding, Student Aid requires students to submit all of their receipts and unused funding at the end of students' academic period. Students submit receipts by uploading them to their secure Alberta Student Aid account. Students must submit payment for any unused funds to Student Aid by using one of the following payment options:

- Online via their bank, at their bank, or by telephone banking using the payee name:
  Grant - Alberta Student Aid, and referencing their Alberta Student Number.

  OR:

- Mail a cheque or money order for any unused funds, payable to the Government of Alberta, to the following address indicating the student's name and social insurance number:

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

Do not send payment by courier as it will not be delivered to Student Aid and will eventually be returned to the student**.**

Disability Grant for Services and Equipment Reconciliation Worksheet

We encourage students to submit the [Disability Grant for Services and Equipment Reconciliation Worksheet](#) along with their receipts/unused funding.

[Repayment Assistance and Special Consideration](#)

Several repayment options are specific to learners with a disability:

[Repayment Assistance Plan for Borrowers with a Disability, or RAP-D](#)

- RAP-D is available for both Federal and Provincial loans (i.e., for consideration of both Canada and Alberta Student Loans), only one [Repayment Assistance Plan for Borrowers with a Disability Application](#) needs to be submitted to the National Student Loans Service Centre for RAP-D.
- Students will need to reapply for RAP-D every six months.
- Loans must be in good standing.
- The balance will be reduced to $0 after 10 years.

Special Consideration – Alberta Only
- [Special Consideration](#) removes Alberta Student Loans from active collection.
- Submit a Special Consideration from Alberta Student Funding, Form L, and an Income Expense Statement, Form J, along with a medical questionnaire, Form K, or similar document.

- We will also accept a proof of approval by the Canada Student Financial Assistance Program for the Severe Permanent Disability Benefit.

In order to be eligible for special consideration, students must have:
- a functional limitation that limits their ability to earn a living, *or,*
- a financial situation that does not allow them to make their Alberta Student Loan payments, *or,*
- zero financial resources that would enable them to substantially reduce the balance of their loans (RRSP's, bonds, etc.).

Resources and Contacts
This section highlights some of the most requested resources and contact information to help you with Student Aid related tasks and processes.

Resources
Most of the resources discussed here are found on studentaid.alberta.ca. We ask you to access information from the online source to ensure you are viewing the most up-to-date version. Links are provided for your convenience; however, links can change as we make regular updates and improvements to the website. If you notice any broken links, email: SA Web Services.

Alberta Student Aid Website
The Alberta Student Aid website contains all the latest updated information regarding Alberta Student Aid policies, programs, and procedures. Browse the website regularly for new information and materials.

Operational Policy and Procedures Manual 2023-24
The Alberta Student Aid Policy Manual provides the most up-to-date policy and procedural guidance regarding the Student Aid program for both full- and part-time students from application to repayment. It is intended to be the primary reference point for all policy and procedural information for post-secondary educational institutions, students, and staff of Student Aid.

Scholarships and Awards
Alberta's government offers scholarships and awards to encourage and reward the excellence of Albertans in post-secondary study. Access a number of valuable resources such as:

- Alberta Scholarships and Alberta Learning Information Services (ALIS) allows students, parents and educational institution representatives the option of searching valuable online databases
- Other various scholarship resources and application information

Resources for Schools
The Alberta Student Aid website contains a number of resources for post-secondary educational institution representatives.

Confirmation of Registration (COR) documents

The following Guides can be found in the [Resources for Schools](#) section on the Alberta Student Aid website:

- COR Tip Sheet includes acceptable parameters to use when confirming registration
- COR User Guide
- COR Part-time Guide
- Guidelines to Support Automated COR
- Manual COR Instructions
- COR Methods for educational institutions explains in detail the pros and cons of each COR method available to post-secondary educational institutions
- Various other informational guides

Alberta Student Aid Emails

Educational institutions can sign up to receive important information regarding systems and program information via email.

- [Subscribe Now](#)

Contacts

Please **do not share** these Government contacts with students, they are **for educational institution use only**. Students should contact the [Service Centre](#).

Grant Funding for Students with Disabilities

Questions regarding the Schedule 4 2023-24 form: **Disability Advisors** who may have questions related to the appropriate completion of either the Schedule 4, or the [Disability Verification Form](#) for students with a permanent disability (PD), or a persistent or prolonged disability (PPD), or medical documentation, or general questions related to disability funding **can email**:

- ae.lf-schedule4@gov.ab.ca (**This email is for school use only**.)

Client Resolution Unit

Post-secondary educational institution representatives have direct access to the Client Resolution Unit at Student Aid. Student Aid's skilled program and policy experts can assist you with a range of inquiries including student-specific situations, and policy and procedure clarification.

If an educational institution representative has questions or concerns regarding the information in this guide, or the Alberta Student Aid program, email the [Client Resolution Unit](#).

Alternatively, you may phone the Service Centre:
- 1-855-606-2096 (Option 4 and then select Option 1)

Alberta Student Aid Service Centre

Students should be directed to contact the [Service Centre](#). This team of front-line inquiry experts will be able to assist students with all their questions and concerns including application assistance, program information, and explaining Alberta Student Aid system, policies, and processes.

National Student Loans Service Centre (NSLSC)

For questions regarding the Canada Student Financial Assistance Program including disbursements and repayment information, contact the [National Student Loans Service Centre](#) (NSLSC).

Appendix 1:

Approved Equipment Costs and Frequency of Entitlement

These Costs are the Maximum Eligible Amounts

Quotes/Estimates must be current for 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 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, external monitor), MS Office 365 (Student Edition), and warranty (if not included)	$2,000	Once every four loan years	• Includes desktops, laptops, and tablets. • 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 for a minimum of three years. • **Note**: Only one computer package (i.e., desktop, laptop, or tablet) can be approved.
Laptop/Tablet Carry Case	$140	Once every four loan years	• Not included in the computer package, unlike office software, operating system, mouse, etc.; not

Equipment Category	Cost	Frequency of Entitlement **Note: A loan year runs from August 1 to July 31**	Notes
			considered a peripheral device.
All-in-One Printer (Printer/Scanner/Copier)	$200 $500 (see Note)	Once every four loan years	• Printers may 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. The $200 cap remains the same regardless of whether it is an individual purchase, or as part of the overall $2,000 complete computer system cap. • **Note**: Students diagnosed with blindness/visual impairment are exempted from the $200 cap and can purchase a printer up to $500 with appropriate disability-related rationale.
Office Software	$100	Annually	• 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 provincial discretion. • Subscriptions can be preferred when necessary for student's educational tasks and when cost-effective; costs may exceed

Equipment Category	Cost	Frequency of Entitlement **Note: A loan year runs from August 1 to July 31**	Notes
			the cap provided a sufficient rationale, which can be accepted at provincial and territorial discretion.
Operating System	Provincial/territorial discretion	Once every four 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	$500 $1,000 (see Note)	One time	• While external monitors are most commonly recommended for students with low vision, this equipment may also be appropriate for other physical or other disabilities with appropriate rationale and documentation provided. • **Note**: Requests exceeding $500 should be accompanied by a sufficient disability related rationale and documentation justifying the greater cost.
2. Electronic Magnification Systems			
Generally referred to as electronic video magnifiers or closed circuit television systems (the latter being what the guidelines used to refer to)	$5,500	Once every seven loan years	• Electronic Magnification Systems should only be approved for students with limited vision.

Equipment Category	Cost	Frequency of Entitlement **Note: A loan year runs from August 1 to July 31**	Notes
• eSight			
3. Digital Voice Recorders/SmartPens			
Examples of companies that make digital voice recorders and/or SmartPens include: • Sony • Olympus • Philips • LiveScribe	$250 (digital voice recorder) $400 $500 (specialized digital recorder)	Once every four loan years	• To be used for the purpose of recording of class lectures/discussions, or storage of audio text files (e.g., text books). • Specialized Recorders – those with, for instance, larger buttons or talking menus – are eligible for purchase provided the student's documentation includes a disability related rationale justifying the required features. • Students are able to purchase either the single pen, or a bundle which includes case, ink refills, and smart notebooks. The stated cap applies for ether single pen or bundle.
C Pen	$400	Once every four loan years	
4. Braille Products			
Braille Portable Note Taker	$6,000	Once every five loan years (upgrade or replacement, whichever is less)	
Refreshable Braille Display	$6,000 (initial purchase)	Once every five loan years (refurbishment or replacement, whichever is less)	• Rather than replace their refreshable Braille display every five years, students should be encouraged to have it restored or refurbished; servicing typically costs a fraction of the cost of a new model.

Equipment Category	Cost	Frequency of Entitlement **Note: A loan year runs from August 1 to July 31**	Notes
	$500 (restore/ refurbish)		
Braille Embosser (printer)	$4,000	Once every five loan years (upgrade or replacement, whichever is less)	
5. Assistive Listening Devices			
FM Systems - For use without hearing aids	$1,200	Once every four loan years	• For students who are hard of hearing or have auditory processing disorders.
FM Systems - For use with hearing aids	$6,000	Once every four loan years	• For students who are hard of hearing. • Students with cochlear implants can apply for funding with a doctor's recommendation.
Headphones – examples include: • Noise Canceling; • Bone Conduction; • Noise Isolating; • Headset with microphone	$800	Once every four loan years	• For students with hearing loss or attention issues. Headphones can be intended to reduce ambient noise, amplify sound or cancel others, and be used for voice recognition software. Rationale is required justifying the need for headphones and relation to student's disability. If a student requires multiple headphones for different uses, then a rationale is required, and total cost must remain within the cap. • Headsets are normally offered as part of a computer package; therefore, rationale may be required explaining why a

Equipment Category	Cost	Frequency of Entitlement **Note: A loan year runs from August 1 to July 31**	Notes
			headset with a microphone is required outside of that offered in a computer package.
Digital Stethoscope	$700	Once every four loan years	• For students who are hearing impaired and enrolled in nursing, medicine, or paramedicine programs.
6. 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, smartphone applications) included in a single package • TextHelp	$500	One time plus upgrades or annual subscription costs as needed	
7. Other Software ** Software should include a maintenance (update) agreement, whenever possible*			
Voice Recognition Software Example • Dragon	$1,000 $1,000 (Legal version) $2,000 (Medical	One time plus upgrades every two loan years Monthly or annual subscription	• Subscriptions can be considered, with the stated cap applying for total price across years of subscription. • Legal version: For students in law or paralegal programs; rationale outlining requirement for legal version must be provided.

Equipment Category	Cost	Frequency of Entitlement **Note: A loan year runs from August 1 to July 31**	Notes
version)			• Medical version: For students in medical programs only. Rationale outlining requirement for medical version must be provided.
Computer-Based Hearing Aid Application • SonicCloud	$1,000	Annual subscription or longer-term subscription as preferable	
Audio to Text Conversion Software Bundle • Digital recorder with Dragon	$500	One time	• Allows for transfer of voice-recorded notes to computer; for conversion to text.
Screen Reading Software • JAWs • SuperNova Screen Reader	$1,800	One time plus upgrades, as required	
Screen Magnification Software • ZoomText • SuperNova • MAGic	$1,000	One time plus upgrades every two loan years	
Text to Speech Software • Kurzweil 1000 • OpenBook • Claroread • Kurzweil 3000/firefly • Natural Reader • Speechify	Up to $2,000	One time plus upgrades every two loan years	

Equipment Category	Cost	Frequency of Entitlement **Note: A loan year runs from August 1 to July 31**	Notes
Assistive Writing Software • TextHelp (Standard & Gold) • WordQ / SpeakQ • Co:Writer • Grammarly Premium • Antidote	$1,000	One time plus upgrades every two loan years, or lifetime license if available (and more cost-effective)	• Most include word prediction, dictionary spell check, and text-to-speech.
Organizational / Mapping Software • Inspiration • Spark Learner • Clickup	$250	One time plus upgrades every two loan years	• Brainstorm mapping, outline building, writing process.
Smartphone Applications • DyslexiaKey • Ghotit Real Writer • Otter.ai • Whereby	Costs vary depending upon service provider and smartphone used	One time plus upgrades as necessary, or annual subscriptions if more cost-effective	• Must include a description of the application and how it relates to the student's 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 with quotes provided; the student is not required to re-submit a description of the application and how it relates to their disability. • Smartphone applications that are part of an assistive technology package should be subject to maximums in that category.

Equipment Category	Cost	Frequency of Entitlement Note: A loan year runs from August 1 to July 31	Notes
			• **Note**: Funding is not provided to cover the costs of purchasing a smartphone or for data usage/contracts.
Note taking devices or computerized note taking Examples include: • Sonocent • Samson Go Mic • Glean	$500 $600 per lifetime license, or fixed period as applicable	Every four loan years	
8. 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.
Ergonomic Equipment/Furniture • Table/Standing Desk • Ergonomic Chairs • Rolling Backpack/Laptop Case	Table/ Standing Desk $700 Ergonomic Chairs $600 Rolling backpack/ laptop case $250	One time	• Disability related rationale and documentation is required to indicate a need for the request. • **Note**: ergonomic furniture required for while the student is on campus is not eligible.

Appendix 2

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. 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 additional details at end of document	Up to a maximum of $60 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 two hours per week, per course, or as otherwise recommended by a student's assessor or disability coordinator at the educational institution. For students attending Private Career College programs/Condensed Programs - see additional details at end of document. 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 and how the specialized tutor is helping with their disability. **Tutors must have subject knowledge/education/training that is specifically related to the course(s) in**	• Costs of either in-person or online/video tutoring are eligible for funding. • 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.

Service	Cost	Frequency of Entitlement Note: A loan year runs from August 1 to July 31	Notes
		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** (2) **A family member or friend or person with no background in the subject.**	
Note-taking	Up to a maximum of $1,000 per course		• For service providers who take class notes on behalf of students with disabilities 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. • If a student requests both note taking and note sharing services, rationale is required as to why both are required.
Note-sharing	Up to a maximum of $250 per course or $500 per licence, whichever is less (see note-taking devices in equipment section above)		• 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 forms—**not every** student's Schedule 4

Service	Cost	Frequency of Entitlement **Note: A loan year runs from August 1 to July 31**	Notes
			who 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. • If a student requests both note taking and note sharing services, rationale is required as to why both are required.
Reader	Up to a maximum of $25 per hour		• 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 a note-taker and a reader, they may charge two separate fees, depending on the service being provided.
Typist/Transcriptionist	Up to a maximum of $35 per hour	Two hours per week per course	• Provides a service for students with functional impairment in typing their coursework—for example, in thesis- or extended writing-based projects
Orientation and Mobility Specialist (O&M)	Up to a maximum of $110 per hour	Up to 10 hours per semester	• An O&M Specialist provides training designed to develop or relearn the skills and concepts a blind or visually impaired person needs to travel safely and independently through their environments. • The required hours per semester may vary significantly depending on the size and complexity of the institution

Service	Cost	Frequency of Entitlement Note: A loan year runs from August 1 to July 31	Notes
			campus, or the need to access multiple campuses. Requests in excess of the identified maximum (10 hours per semester) should be accompanied by additional information and rationale for the increase. • O&M Specialists must be fully certified according to their provincial/regulatory body. The Canadian Institute for the Blind is likely the best source of standards for credentials. • However, if the applicant's institution provides an Orientation and Mobility Specialist, reimbursement is not eligible.
Interpreter/ Captioning/Oral Sign Language/Deaf-Blind Intervener/Audio Descriptor/Remote Communication Access Real-Time Translation	Up to a maximum of $140 per hour		• E.G.: American Sign Language (ASL)
Educational Attendant Care	Up to a maximum of $80 per hour	Number of hours will vary according to the recommendation of the assessor	• Funding is intended to pay for attendant care for activities related to participating in post-secondary education. • 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

Service	Cost	Frequency of Entitlement **Note: A loan year runs from August 1 to July 31**	Notes
			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.
Behavior Coach, Trainer, Assistant or Strategist/Education Interventionist	Up to a maximum of $80 per hour	Number of hours will vary according to the recommendation of the assessor, and based on the student's individualized assessment	• Funding is intended to pay for behavior support/coaching for education-related activities only. • The support can be provided to students who experience a functional limitation related to behavior. • Behavior coaches must have a Bachelor's degree, diploma, or certificate in a related field (e.g., rehabilitation, psychology, PDP/Teacher's Training, Special Education, Community Support Work, Social Services, etc.) and more than one year's related experience, or an equivalent combination of training and/or experience. • They primarily work with students with Autism Spectrum Disorder to facilitate communication and positive behavior. • If an individual provides support as both a tutor/reader/note-taker and a behavioral interventionist, additional rates may be considered for the appropriate service.

Service	Cost	Frequency of Entitlement **Note: A loan year runs from August 1 to July 31**	Notes
Alternative Formats: • E-text • Large or Braille print • Taped lectures (if available through the educational institution)	Costs vary depending upon service provider and format used.	Once from initial print format. The cost to purchase textbooks is not eligible. These costs are included in the student's loan assessment.	• Some educational institutions cover the costs of alternative formats as part of their duty to accommodate. If, however, a student's educational institution 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. • Institutions may charge to have textbooks scanned into the required file format for students to use on their computers and/or digital media players. • If the institution does **not** provide alternate formats and the student requires a private sector provider, the student will need to submit an estimate for this cost from the service provider. • Alternate formats for examinations are ineligible
Tinted Lenses for Irlen Syndrome	$500	One time	• For students with Irlen Syndrome / Scotopic Sensitivity Syndrome. • Maximum admissible cost includes shipping to and from the United States, where tinting

Service	Cost	Frequency of Entitlement **Note: A loan year runs from August 1 to July 31**	Notes
			process takes place. • The cost of the actual lenses being used to tint or the glasses frames are not eligible.
Specialized Transportation	Prices vary depending on location, service provider's schedule, and availability.	Transport to the educational institution address from the student's place of residence only	• Disability-related transportation-costs requests other than DATS (e.g., 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. The request should be cost-effective and is approved at provincial discretion. • Additional stops for internships and practicum placements can be considered if sufficient rationale is provided. These stops must be directly related to fulfilling the requirements of the student's post-secondary program of study.
Academic Strategy Sessions *See additional details at end of document	$25 to $100 per hour, up to a maximum of $1,000 per term 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 provided at the	10 hours maximum per semester (four months of study) Five hours maximum for intersessions (i.e., spring or summer)	• 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 educational institution does not provide academic strategists. • It is recommended that the service provider's credentials **include a teaching degree in special education**.

Service	Cost	Frequency of Entitlement **Note: A loan year runs from August 1 to July 31**	Notes
	time of the request.		• Group strategy sessions may be approved if specific rationale is provided as to how the session will address the student's identified functional limitation (e.g., time management, exam preparation). • 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.
Psychoeducational Assessment (Learning Assessment)	100% of the assessment cost, up to a maximum of $3,500		• Students with Learning Disabilities are required to provide a psychoeducational assessment as proof of their disability. • 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). • Students who sought a psychoeducational assessment to confirm a learning disability, but whose assessment confirms a different PD or PPD, are also

Service	Cost	Frequency of Entitlement **Note: A loan year runs from August 1 to July 31**	Notes
			eligible for reimbursement. • Any psychoeducational assessment costs paid by third-party insurance or governmental or non-governmental sources, are not included in the reimbursement, which would only recover remaining outstanding costs. The reimbursement will cover only what the students pays. • However, psychoeducational assessment costs paid by targeted governmental programs, where the reimbursement is not retained by the student, are eligible.
Assistive Technology (AT) Setup/Install AT Training	$90 (one device per loan year) $180 (multiple devices in the same loan year) $180 (one device per loan year) $270 (multiple devices in the same loan year)	Once a lifetime per device Once a lifetime per device Once a lifetime per device Once a lifetime per device	• Funding eligibility is for a one-time setup and install, and/or training for a device for the student's lifetime. **Example:** If an 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 two more devices, they would only be eligible for an additional $90 in each category. • Funding should **only be provided** if the student's educational institution does not provide AT Training/Setup/Install Services.

Tutoring Services Requests Clarification

All tutoring service requests must include a breakdown. This breakdown should include the following:

- **Hourly Rate x Hours per Week, (or 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 (e.g., tutors must have subject knowledge, education, or 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 ascertain how much tutor funding was used so requests are in line with how much the students tend to use during their studies.

Tutoring Service Requests for Condensed Programs

A maximum of one-third tutor hours per hour in class (e.g., if a student is in lectured classes for six hours per week, they may be eligible to receive two hours per week of tutoring).

Tutoring Services Rates Determination

Rates of $25 and under per hour – accepted without résumé
Rates over $25 per hour – résumé and copy of credentials (degree, diploma, or certificate) must be provided.

$51 - $60 per hour – Master's Degree (or higher) relative to the subject matter with teaching experience
$41 - $50 per hour – Master's Degree relative to the subject matter
$36 - $40 per hour – Bachelor's Degree relative to the subject matter with teaching experience
$26 - $35 per hour – Bachelor's Degree relative to the subject matter
up to $25 per hour – Peer Tutor relative to the subject matter

Tutoring Services Rates Determination for Apprentice Programs

- $46 to $60 per hour – Journeyperson with tutoring/teaching experience
- $36 to $45 per hour – Apprentices who have completed the program with teaching/tutoring experience
- $26 to $35 per hour – Apprentices who have completed the program
- up to $25 per hour – Peer Tutor in the program

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 one-hour duration)**

A **résumé** 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 - $100 per hour – PhD in Psychology; Master of Education (Psychology); Bachelor's degree in Psychology, and Bachelor of Education, and strategy experience

$75 - $89 per hour – Master's Degree, Bachelor of Education, and strategy experience

$60 - $74 per hour – Master's Degree, Bachelor of Special Education, and strategy experience

$45 - $59 per hour – Bachelor of Special Education and strategy experience

$35 - $44 per hour – Bachelor of Education, teaching experience, and strategy experience

$20 - $34 per hour – Academic Strategy experience