Nurse Corps (NC) Scholarship Program (SP)

Confirmation of Interest (COI) User Guide

July 2022

CONTENTS

PART 1 | INTRODUCTION

NC SP CONFIRMATION OF INTEREST USER GUIDE

Purpose: The Nurse Corps (NC) Scholarship Program (SP) Confirmation of Interest (COI) user guide serves as the main guide to answer analyst questions regarding issues applicants may face when completing their COI Process. In addition to this user guide, applicants must be familiar with the NC SP Application Program & Guidance, as some of the questions will be program based and will not be discussed in this user guide. The primary intent of this user guide is to focus on the functionality developed for the NC SP COI.

Roles: There are no roles associated with the NC SP online application. The Confirmation of Interest (COI) is on the applicant portal, and is only accessible to applicants that have been offered an award. Program will not have roles or accounts for these screens.

Precondition: The applicant must be offered an Award and sent a Confirmation of Interest (COI).

## PART 2 | APPLICANT CONFIRMS INTEREST AND ACCEPTS AWARD

WELCOME SCREEN

After application review and external review are complete, Program selects applicants to award and sends these individuals the Confirmation of Interest (COI) email. The email provides the selected applicants a link to the portal notifying them that there has been an update to their application. The applicant will need to log into his/her application to view and complete the COI. The first page of COI is the Welcome Screen.

STEPS

1. Applicant receives their Confirmation of Interest email.
2. Applicant logs into NC SP Application Portal.
3. Applicant is directed to the COI Welcome Screen.
4. Applicant reviews Welcome Screen content.
5. Applicant clicks "Start COI".
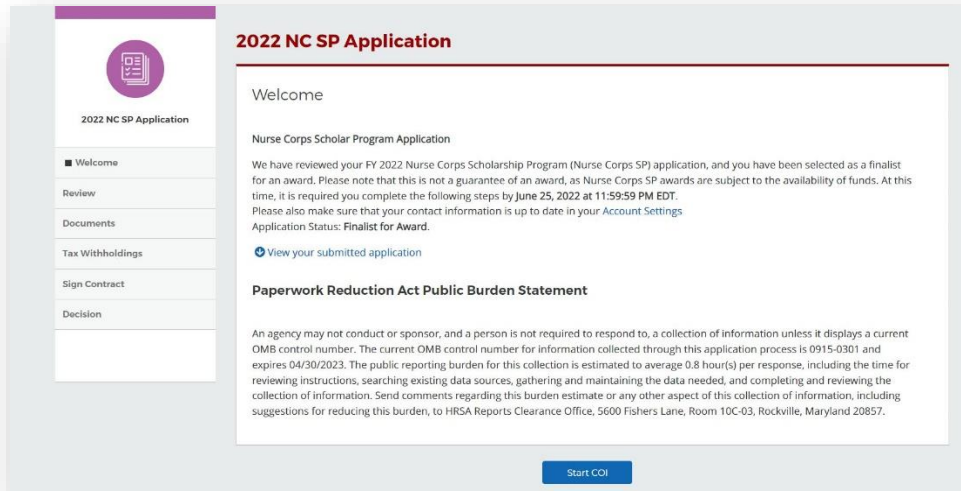
BUSINESS RULES

- Applicants will have the ability to view the left-hand navigation.
  - The Welcome screen will be enabled in the left-hand navigation.
  - All additional screens will be disabled in the left-hand navigation until the current screen is completed.
- Applicants have the ability to view their application status.
- Applicants have the ability to download their submitted application (PDF).
- Applicants have the ability to view the Paperwork Reduction Act Public Burden Statement.
- Applicants must complete all COI screens in one sitting. They will be directed to the Welcome screen each time they open COI.

REVIEW SCREEN – CONTACT INFORMATION

The applicant will need to ensure that their contact information is up to date. NC SP uses the primary email address to communicate application status changes and requests for additional information needed.

STEPS

1. Applicant clicks on the "Account Settings" link to navigate to the page and confirm their information. They can make changes to the fields on this page if necessary.
2. Applicant clicks "Continue".

BUSINESS RULES

- Applicant can make updates to account settings if necessary.

REVIEW SCREEN – SCHOOL INFORMATION

Applicants verify whether there are changes to the school the NC SP program expects them to attend.

STEPS

1. Applicant reviews the school listed as the Verified School.
2. Applicant responds to question regarding whether there is a change to the school listed in Step 1.
   a. If an applicant has questions they may contact NC SP via email.

BUSINESS RULES

- Applicant sees name of school verified by analyst

- o Note: Analysts have the ability to update the school after the applicant's submission during application during review.
- Applicant can respond to indicate whether there is a change to the school listed. However, the applicant cannot directly make any updates to the school listed.

REVIEW SCREEN – CONFIRM INTEREST

The Confirm Interest card is where the applicant indicates their intention to either accept or decline the NC SP Award.

STEPS

1. Applicant reviews statements.
2. Applicant selects response indicating their decision to either:
   a. Confirm intention to accept award by clicking "I wish to be considered for the 2022 Nurse Corps Scholarship Program Award."
   b. Decline their award by clicking "I am no longer interested in receiving the 2022 Nurse Corps Scholarship Program award".

BUSINESS RULES

- If applicant confirms their interest, the system will display the Banking Information card next
- If applicant declines their interest, the Decline COI card is displayed (see Part 3: Applicant Declines Interest).
- The alert will notify the user of the date and time the COI expires.
  - o **Important:** The applicant is required to complete COI by the expiration date to continue to be considered for an award.

REVIEW SCREEN – BANKING INFORMATION

On the Banking Information card the Applicant designates the account where funds from their award should be deposited. **Note:** While the applicant indicates where they should receive the funds, they are not guaranteed an award at this point.

STEPS

1. Applicant enters the Bank Name.
2. Applicant selects the Account Type.
3. Applicant enters and confirms his/her bank's Routing number.
4. Applicant enters and confirms his/her bank's Account number
5. Applicant clicks Submit.

BUSINESS RULES

- Routing #'s must be:
  - 9 digits
  - Start with 0, 1, 2, or 3 digit.

- Applicant is required to complete all fields.
- The Routing Number and Re-enter Routing number fields must match.
- The Account Number and Re-enter Account number fields must match.

DOCUMENTS SCREEN

The Documents screen prompts the applicant to upload completed Enrollment Verification Form(s) for program to review.

STEPS

1. Applicant clicks "Select or Drop File Here" button or drags file to this button to begin upload process
2. Applicant selects document they want to upload using file explorer. This step is skipped if they dragged the file into the box in Step 1.
3. Applicant selects the document type for the file upload
4. Applicant can enter an optional comment if desired
5. Applicant and clicks "Upload"
6. Applicant verifies file uploaded
7. Applicant clicks Continue to proceed to next screen.

BUSINESS RULES

- Applicants are required to upload a completed Fall Enrollment Verification form
- Applicants should upload a completed Summer Enrollment Verification form if this term is required for their program and they are requesting funding for it
- System shall allow Applicant to remove document(s) they have previously uploaded

TAX WITHHOLDINGS SCREEN

The Tax Withholdings screen allows the applicant to provide their W4 tax information via the Electronic Withholding Allowance Certificate. Applicants will verify the accuracy of their tax information and electronically sign their certificate.

Applicants must indicate whether they wish to receive their tax documents electronically or by mail.

STEPS

1. Applicant reads the instructions and clicks Continue.
2. Applicant inputs their tax information (W4 Form information) on the Electronic Withholding Allowance Certificate.
3. Applicant certifies that they have verified their tax information and declare that it is accurate to their knowledge.
4. Applicant inputs their signature information.
5. Applicant reads Tax Document agreement
6. Applicant makes selection indicating their tax document delivery preference
   a. Electronically via BHW portal account
   b. By Mail
7. Applicant must click "Sign and Continue" to continue to the next section

BUSINESS RULES

- Applicants are required to input their tax withholding information. The following fields are included on the form:
    - Filing Status
    - Exactly Two Jobs (Optional)
    - Amount Claimed for Dependents (Optional)
    - Other Income (Optional)
    - Deductions (Optional)

- o Extra Withholding Amount (Optional)
- o Tax Exemp status
- Applicants are required to certify they have provided correct tax withholding information.
- After self-certification, applicants will be required to enter the following information, which will qualify as signing the contract:
  - o SSN
  - o Confirm SSN
  - o Security Question
  - o Security answer
  - o Password
- The SSN and Confirm SSN numbers must match for the applicant to sign. The SSN entered by the applicant must also match the SSN used upon application submission.
  - o If the SSN entered on COI does not match the SSN entered on the application, the applicant can either re-enter the SSN on COI, or contact the Call Center to reach out to Program if they believe the SSN they have entered on COI is correct, and the SSN they had entered on their application is incorrect
- The system will generate and store an electronically signed electronic federal tax withholdings document (W4) to the applicant profile upon full submission of the COI.
- Once the applicant is converted to a participant, the PDF export of the W4 form information will be accessible from the Participant profile, Tax information tab.
- If the applicant does not complete the COI, or is deemed ineligible, the tax selections will not be saved.

SIGN CONTRACT SCREEN

The Sign Contract screen is the final step of the applicant's COI process. The applicant will download the contract, self-certify that they have read the contract, and electronically sign the contract. Note: The applicant's signature only indicates their agreement, and the contract still needs to be countersigned by the NC SP program.

STEPS

1. Applicant downloads their NC SP contract for review.
2. Applicant confirms or updates Years of Funding Requested.
3. Applicant completes the self-certification question.
    a. If applicant declines certification by answering "No", the Decline COI card is displayed (see Part 3: Applicant Declines Interest).
4. After self-certification, applicants will be required to enter the following information, which will qualify as signing the contract:
    a. SSN
    b. Confirm SSN
    c. Security answer
    d. Password
5. Applicant selects Submit.

6. System displays Accepted Award landing page.

BUSINESS RULES

- Applicants are required to confirm the number of Years of Funding Requested
- Applicants are required to certify that they have read the contract and agree to the statements.

- If the applicant indicates "No" to having read the contract, they will be directed to the Ineligible landing page upon selecting Sign and Submit
- If the applicant indicates "Yes" to having read the contract, they will be required to enter the following information, which will qualify as signing the contract:
  - SSN
  - Confirm SSN
  - Security answer
  - Password
- The SSN and Confirm SSN numbers must match for the applicant to sign. The SSN entered by the applicant must also match the SSN used upon application submission.
  - If the SSN entered on COI does not match the SSN entered on the application, the applicant can either re-enter the SSN on COI, or contact the Call Center to reach out to Program if they believe the SSN they have entered on COI is correct, and the SSN they had entered on their application is incorrect.
- Accepted Award landing page will display a link to applicant's submitted application
- Applicants have the ability to view their application status from the Accepted Award landing page.
- Applicants have the ability to download their submitted application (PDF) from the Accepted Award landing page.
- Applicants have the ability to download their signed contract from the Accepted Award landing page.

PART 3 | APPLICANT DECLINES INTEREST

The previous sections outlined the steps taken if the applicant accepts COI and the offer for an award. This section details the two steps an applicant can take to decline their award.

DECLINE COI – REVIEW SCREEN

The first opportunity to decline COI is on the Review screen on the Confirm Interest card. The user will complete COI with decision to decline their award if they respond that they decline or do not accept the certification statements. Upon declining, the applicant will be directed to the Declined Award landing page.

STEPS

1. Applicant completes the Welcome Screen and is taken to the Review Screen.
2. Applicant completes Steps 1-3 on the Review Screen.
3. Applicant selects "I am no longer interested…" and sees the Decline COI card.
4. Applicant enters reason why he/she is declining award.
5. Applicant selects Decline.
6. Applicant is navigated to the Declined Award landing page.

BUSINESS RULES

- Once COI is declined, the COI process will end and the system updates applicant's external and internal status to Declined Award.
- Applicants have the ability to download their submitted application (PDF) from the Declined Award landing page.

DECLINE COI – SIGN CONTRACT SCREEN

The second opportunity to decline COI is on the Sign Contract screen, certification question. The user will end their COI process here if they choose to decline and will be navigated to the Declined Award landing page.

STEPS

1. Applicant completes the Welcome Screen and is taken to the Review Screen.
2. Applicant completes Steps 1-4 on the Review Screen.
3. Applicant completes and signs the Tax Withholdings screen.
4. Applicant selects "No" to the self-certification question on the Sign Contract screen.
5. Applicant enters reason why he/she is declining award.
6. Applicant selects Decline.
7. Applicant is navigated to the Declined Award landing page.

BUSINESS RULES

- Once Applicants Decline, they complete the COI process and the system updates applicant's external and internal status to Declined Award.
- Applicants can download the PDF export of their submitted application from the Declined Award landing page.