



PA State Grant Program
**2020-21 INSTITUTIONAL COST
POLICIES & INSTRUCTIONS**

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I. INTRODUCTION & GENERAL INFORMATION

The Pennsylvania Higher Education Assistance Agency is legislatively authorized to administer the Pennsylvania State Grant Program and will be referred to as “PHEAA” or “the Agency” in this document. The purpose of this document is to outline the PA State Grant Program cost collection policies for the Summer 2020 and the 2020-21 Academic Year.

School Type	Description
0	4-Year Private Colleges and Universities
1	Pennsylvania State System of Higher Education (PASSHE)
2	State-Related Institutions
3	2-Year Private Colleges
4	Community Colleges
5	Hospital Schools of Nursing
7	Business Schools
8	Technical Schools

Note: School Types are located on the College/Institution Grant Specific Display (FG3M). Additionally, the 3rd position of the school's six-position PHEAA code indicates the School Type.

II. COLLECTION PERIOD

As described in the Costs and Award Adjustments section of the current Pennsylvania State Grant Program Handbook, PHEAA collects the costs used in calculating the PA State Grant annually, from mid-March through mid-April. PHEAA uses these collected costs to process students for eligibility in the upcoming summer period and academic year.

All Pennsylvania schools are required to submit the Educational Cost Form to ensure the school contact information is current and statistical information is correct. Awarding may be delayed if costs are not submitted on time.

Non-Pennsylvania schools are highly encouraged to submit the Educational Cost Form to afford students the benefit of having increased costs considered in the award calculation. Utilization of prior-year costs may result in lower eligibility, especially if the non-Pennsylvania school has not reported costs for multiple years.

Cost updates, whether revisions or new, submitted after the communicated deadline are considered late. This information is stored and used as baseline data for the subsequent academic year. The Agency reserves the right to accept costs submitted as “on-time” after the published deadline due to extenuating circumstances. However, due to budget limitations, PHEAA cannot guarantee that any cost increases submitted after the published deadline will be recognized.

The Agency reserves the right to place a school on processing hold until costs are submitted, reviewed, and approved. The processing hold action may result in a delay of student eligibility notifications for students enrolled at that school.

PHEAA begins sending eligibility notifications to students beginning in early May and continues to send notices as needed throughout the award year.

III. PHEAA CODE

You must use the six-position, PHEAA-assigned institution code, also known as the “PHEAA code” in order to report costs. PHEAA codes can be found on your institution's PA State Grant rosters in PageCenter.

IV. TUITION & FEES

PHEAA categorizes tuition and fees according to the following three institutional or “School Types” as defined by regulation:

1. Business, Trade, or Technical (BTT) Institutions as described in Section A.i. School Type “7” or “8.”
2. Hospital Schools of Nursing as described in Section A.ii. School Type “5.”
3. All other institutions as described in Section A.iii. School Types “0”, “1”, “2”, “3” or “4.”

A. TUITION

i. STANDARD TUITION FOR BUSINESS, TRADE, & TECHNICAL (BTT) INSTITUTIONS

Tuition reported must be the standard costs attributable to a complete program of study. PHEAA will annualize complete program tuition so that the payment period costs reflect the prorated amount equivalent to full-year, full-time enrollment. Since costs are reported for a complete program, PHEAA does not recognize increases after the deadline (reference Section II, Collection Period). Increases that occur after the deadline and which are in excess of 25% may be reported on an individual student basis. Refer to Section V.A, Specific Program of Study or Cohort Costs.

ii. STANDARD TUITION FOR HOSPITAL SCHOOLS OF NURSING

Tuition reported must be the standard cost based upon full-year, full-time enrollment attributable to a specific academic year and academic level of enrollment. Do not include costs for summer terms. If the curriculum includes courses taken through consortium agreements with affiliate institutions, these costs should be included as well if the Hospital School of Nursing is paying the PA State Grant award.

iii. STANDARD TUITION FOR ALL OTHER INSTITUTION TYPES

Tuition reported must be the standard tuition rate based upon full-year, full-time enrollment. This would generally be the tuition rate charged for 12 to 18 credits per term, which is then annualized.

There are a number of institutions that charge tuition by specific criteria such as the number of enrolled credits, by academic major, by academic level, or by other factors. In these cases, institutions may use one of the following methods to report tuition:

1. Report a weighted-average, full-time tuition that takes into account all Pennsylvania undergraduates who are enrolled on a full-time basis.
2. Community Colleges that choose to report a weighted average tuition must calculate and report separate weighted tuitions for sponsoring and non-sponsoring school district or areas.
3. Report tuition based on enrollment in 24 credits per year.
4. Report tuition based on 30 credits per year if this represents the academic load of the majority of students at the institution.

iv. BRANCH CAMPUSES

When branch campus costs are not separately reported and branch campus students are charged reduced tuition and fees compared to main campus students, then these students may need to be identified and processed separately with the lesser costs. Refer to the Costs and Award Adjustments section of the current PA State Grant Program Handbook. Contact sghelp@pheaa.org with the subject line “Branch Campus Costs” for additional assistance.

v. EVENING TUITION

Separate standard evening tuition may be reported based upon full-year, full-time enrollment if:

- The evening program meets the PA State Grant Program criteria for approval; and
- The standard evening costs differ from the standard day tuition by at least 25%.

If different costs are reported for evening, the school is required to ensure that the student's record reflects evening enrollment prior to certifying eligibility.

vi. NON-SPONSORING DISTRICT

Community Colleges must separately report the additional tuition charged to students from non-sponsoring school districts or areas.

B. FEES

i. ALLOWABLE FEES FOR BUSINESS, TRADE, & TECHNICAL (BTT) INSTITUTIONS

Allowable fees are those charges, exclusive of tuition, books, and supplies, assessed to all full-time, full-year students in addition to their program- or course-specific fees or charges. Fees reported must be the standard fees attributable to a complete program of study. PHEAA will annualize complete program fees so that the payment period costs reflect the prorated amount equivalent to full-year, full-time enrollment. Fees are payment for services and do not result in the receipt of a tangible product and are assessed at the beginning of the term as part of the institutional bill. These fees generally include such items as student activity fee, health services fee, technology fee, facility fee, lab fee, program- specific equipment utilization fee, or other such charges.

a. STUDENT ACTIVITY FEE

Student activity fees fund different types of activities, school programs, and events. The common denominator of these activities is that the money is used for the benefit of the student body.

b. HEALTH SERVICES FEE

Health Services fees are mandatory charges assessed by the institution for the intention of covering most services offered by the school's health center.

c. TECHNOLOGY FEE

Technology fees include those that are for the purposes of providing Internet connections, computer labs, etc. These fees do not include the cost of computers, hardware, software, or other electronic devices and equipment. These purchase costs are accounted for in the PA State Grant standard Books and Supplies allowance.

d. FACILITY FEE

Facility fees include charges for the purposes of providing continued use, upgrades, and additions to campus facilities.

e. OTHER FEES

Other fees may be allowable if they are assessed to all full-time, full-year students at the institution at the beginning of the term as part of the institutional bill. To whom and when this assessment

is applied can vary by institution and includes fees such as registration fees, enrollment fees, and security fees.

ii. ALLOWABLE FEES FOR HOSPITAL SCHOOLS OF NURSING

Required or allowable fees are those charges, exclusive of tuition, books, uniforms, and supplies, assessed to all full-time, full-year students. Fees reported must be the standard fees attributable to a specific academic year of enrollment. Fees are payment for services and do not result in the receipt of a tangible product and are assessed at the beginning of the term as part of the institutional bill. These fees generally include such items as student activity fee, health services fee, technology fee, facility fee, lab fee, program-specific equipment utilization fee, or other such charges.

a. STUDENT ACTIVITY FEE

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Health Services fees are mandatory charges assessed by the institution for the intention of covering most services offered by the school's health center.

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d. FACILITY FEE

Facility fees include charges for the purposes of providing continued use, upgrades, and additions to campus facilities.

e. OTHER FEES

Other fees may be allowable if they are assessed to all full-time, full-year students at the institution at the beginning of the term as part of the institutional bill. To whom and when this assessment is applied can vary by institution and includes fees such as registration fees, enrollment fees, and security fees. Uniform costs are part of the Books and Supplies allowance and, therefore, should not be included under fees.

iii. ALLOWABLE FEES FOR ALL OTHER INSTITUTION TYPES

Required or allowable fees are those charges, exclusive of tuition, books, and supplies, assessed to all full-time, full-year students at an institution at the beginning of the term as part of the institutional bill. These are not program- or course- specific fees or charges. Fees are payment for services and do not result in the receipt of a tangible product. Required or allowable fees generally include such items as student activity fee, health services fee, technology fee, facility fee, or other such charges.

It is important to note that postsecondary institutions have different names for the same types of fees. It is not possible to provide an exhaustive list of the names or name variations of all fees. Therefore, PHEAA provides guidance so that your institution can understand what is permissible.

a. STUDENT ACTIVITY FEE

Student activity fees fund different types of activities, campus programs, and events. The common denominator of these activities is that the money is used for the benefit of the student body.

b. HEALTH SERVICES FEE

Health Services fees are mandatory charges assessed by the institution for the intention of covering most services offered by the school's health center.

c. TECHNOLOGY FEE

Technology fees include those that are for the purposes of providing Internet connections, computer labs, etc. These fees do not include the cost of computers, hardware, software, or other electronic devices and equipment. These purchase costs are accounted for in the PA State Grant standard Books and Supplies allowance.

d. FACILITY FEE

Facility fees include charges for the purposes of providing continued use, upgrades, and additions to campus facilities.

e. OTHER FEES

Other fees may be allowable if they are assessed to all full-time, full-year students at the institution at the beginning of the term as part of the institutional bill. To whom and when this assessment is applied can vary by institution and includes fees such as registration fees, enrollment fees, and security fees.

iv. EXCLUDED FEES FOR ALL INSTITUTION TYPES

One-time or "as needed" fees may not be included since these do not meet the definition of being assessed to all full-time, full-year students. Inclusion of fees which are not allowed may result in an administrative finding in a program review. Additionally, excluded fees may not be included in an individual student's Cost Override request (please refer to the Different Educational Costs section of the PA State Grant Program Handbook).

Excluded fees include, but are not limited to:

- late fees
- damage fees
- replacement fees
- fines or penalties
- uniforms
- parking or transportation fees
- locker rentals
- license
- cleaning fees
- drop-add fees
- transcript fees
- orientation fees
- testing fees
- graduation fees
- application, admission, or acceptance fees
- vaccinations

a. GENERAL FEES

PHEAA cannot accept fees labeled as "general." In order to be included, these fees must be itemized with specific information regarding the charges.

b. BOOKS & SUPPLIES

PHEAA provides a standard allowance for all students for books and supplies. Therefore, charges for these items should not be included in institutional fees.

As part of the PA State Grant award calculation, the Agency provides a standard books and supplies allowance for all students. This amount incorporates the cost of tangible items such as uniforms, books (permanently purchased, rented or exchanged), classroom/homework supplies (paper, notebooks, pens, etc.), computers, hardware, software, and other electronic devices and equipment.

c. OTHER EXCLUDED FEES

Other fees may not be allowable if they are not assessed to all full-time, full-year students at the institution at the beginning of the term as part of the institutional bill.

V. COSTS

A. SPECIFIC PROGRAM OF STUDY OR COHORT COSTS

If a specific program of study or cohort of students has costs (combined tuition and allowable fees) that differ from the standard, reported costs by 25% or more, students enrolled in that program or cohort may require individual reporting of costs by your institution.

As noted in the Pennsylvania State Grant Program Handbook, PHEAA cannot give special processing consideration for cohorts of students whose charges are a higher or lower tuition than those reported on the annual cost form. In unique circumstances only, schools who are willing to monitor these students throughout the year may submit a special alternate budget to PHEAA during the annual cost collection effort. If the Agency approves the use of a secondary budget, the cohort of students would be separated by a unique PHEAA code and PHEAA-assigned OE suffix. The school would be responsible for accepting all consequences of maintaining this unique suffix including, but not limited to, managing the enrollment coding for each student to ensure each PA State Grant record has the proper PHEAA-assigned OE suffix.

i. COST ADJUSTMENTS FOR INDIVIDUAL STUDENTS

As noted in the Pennsylvania State Grant Program Handbook, when the tuition and fees costs used by PHEAA for the term in question exceed the student's actual tuition and fees costs for the academic year reported by at least 25%, the school is required to report to PHEAA the actual costs incurred by the student if these fall below the cost cap when annualized.

Schools may request reconsideration when the costs incurred by the student for either tuition and/or fees exceed the costs reported to and used by PHEAA by at least 25%.

ii. LIVING EXPENSES

As part of the PA State Grant award calculation, the Agency provides a standard Educational Expense Allowance (EEA) for all students. This amount includes an allowance for living and commuting expenses. Although PHEAA is not currently using institutionally reported costs for Room and Board to calculate the student's award, this data is required for statistical analysis.

iii. "ACTUAL" DEFINITION

A selection of "actual" on the State Grant Costs on the Web form must be made when the school offers institutional room and/or board plans. "Actual," in this instance, does not mean that the school's

governing body has finalized the costs for the award year. It simply means that the school “actually” has its own housing and meal plans.

iv. “ESTIMATED” DEFINITION

A selection of “estimated” on the State Grant Costs on the Web form must be made when the school does not provide school-sponsored housing or board plans. Estimated figures are the same as those used for off-campus Title IV cost calculations.

v. ROOM

Room consists of costs associated with a standard double room for residence halls (dormitories) or school-sponsored housing under the control of the postsecondary institution.

vi. BOARD

Board consists of costs associated with a 20 to 21 meal-per-week plan. This may include an allowance for flexible spending dollars. If your school only offers meal plans that are less than 20 to 21 meals per week, please supply the cost associated with the meal plan that offers the most number of meals per week.

B. DIFFERENCES IN COSTS FROM PRIOR-YEAR SUBMISSION

PHEAA annually reviews tuition and fee increases from one award year to the next for purposes of evaluating the accuracy of reporting by postsecondary institutions. PHEAA may contact your school to verify accuracy when:

- The tuition reported for the current year exceeds the prior-year tuition by approximately 3.5% or more.¹
- The fees reported for the current year exceed the prior-year fees by approximately \$300 or more.
- A change of ownership has been reported to PHEAA.

If your school plans to submit increases over the tolerance guidelines listed, PHEAA requests a proactive approach on the part of the school. This means that an email should accompany your cost submission. This will help PHEAA to expedite the review process.

Email sghelp@pheaa.org with the subject line “State Grant Program Cost Increase.” The body of the email should provide information which confirms the increase and supporting reasons for increases that exceed the tolerances listed.

VI. SCHOOL DEMOGRAPHICS & STATISTICAL INFORMATION

PHEAA collects demographic and statistical information on the cost form. This information must be submitted at the time of cost data submission.

A. SCHOOL EIN

PHEAA requires schools to report the Federal Employee Tax Identification Number (EIN). When submitting this data, please do not include dashes.

B. SCHOOL DEMOGRAPHICS

PHEAA requires the school to provide the legal name and address of the school.

¹ Figures used are guidelines. PHEAA reserves the right to verify the accuracy of all reported data.

C. ENROLLMENT STATISTICS

As part of this annual data collection, selected institutional enrollment statistics are required. This is part of PHEAA's ongoing commitment to effectively plan for and evaluate the PA State Grant Program. Access to timely and accurate, institutional-level enrollment data for degree-seeking, Pennsylvania-resident undergraduates facilitates these activities. As part of this effort, the following mandatory questions are included on the cost-reporting form:

- Number of undergraduate degree-seeking, Pennsylvania-resident, full-time students;
- Number of undergraduate degree-seeking, Pennsylvania-resident, part-time, but at least half-time students; and
- Number of undergraduate degree-seeking, Pennsylvania-resident, less than half-time students.

For institutions that enroll students in certificate, diploma, and other formal, non-degree (but credential-granting) programs of study or that do not report enrollment to IPEDS, please base your responses on the enrollment values your institution uses for standard internal reporting purposes for the fall (or equivalent) term of the current academic year.

D. SCHOOL CONTACT INFORMATION

PHEAA requires the name, title, telephone number, and email address of the Director of Financial Aid and the Primary PA State Grant Contact. If you require that additional contacts be added in order to receive program communications, please email sghelp@pheaa.org with the name, title, telephone number, and email address of those additional school contacts.

VII. ACADEMIC CALENDAR

A. GENERAL QUESTIONS

Schools must report details regarding their academic calendar to ensure that processing of eligibility and disbursements is accurate.

B. SCHEDULE

In order to coordinate the disbursement of PA State Grant funds with your school's academic calendar, your school must verify the academic schedule by which the school operates: two semesters (or trimesters) or three quarters. Please refer to the Term Start Dates and Term Length sections of the Pennsylvania State Grant Program Handbook for specific requirements.

If your institution plans on changing your academic schedule from one year to the next, you must contact us at sghelp@pheaa.org as soon as possible. Changes of schedule between terms during the same academic year are strongly discouraged and must be communicated to PHEAA as soon as possible and no later than August 1.

C. EVENING CLASSES

Schools are required to report if evening classes are offered. Additionally, schools are required to report costs for evening programs when they differ from costs for day. If different costs are reported for evening, the school is required to ensure that the student's record reflects evening enrollment prior to certifying eligibility. Please refer to the Evening and Weekend Schedules section of the Pennsylvania State Grant Program Handbook for specific requirements.

D. SUMMER TERM ENROLLMENT

Schools are required to report if a summer term is offered and the school has elected to participate in the PA State Grant Program for the summer term. The summer term is a “header” for purposes of PA State Grant Cost submission. For example, 2020 Summer costs are reported at the same time as the academic year 2020-21. When a school indicates participation in the summer term, separate costs must be reported.

Schools that elect to participate in offering Summer PA State Grants and answer “yes” to the question “Does your school offer summer term enrollment on at least a half-time basis?” are expected to provide summer term costs. The response to the summer participation question is housed on the College/Institution Grant Specific Display (FG3M) next to the label “Elig Summer Classes.”

For non-participating schools (response of “no”), the school:

- Will not be asked to provide summer term costs.
- Must follow the deadlines and rules for opting out of summer term participation as outlined in the Student Certification of Eligibility section of the Pennsylvania State Grant Program Handbook.
- Should make it clear to the student body that the school will not be found as a selection when applying for a Summer PA State Grant.

E. ACADEMIC CALENDAR SECTION: INSTITUTIONAL TYPE SPECIFIC QUESTIONS

PHEAA requests additional calendar information based upon three institution types:

- Business, Trade, & Technical (BTT) Institutions as described in Section VI.E. School Type “7” or “8.”
- Hospital Schools of Nursing as described in Section VI.I. School Type “5.”
- All other institutions as described in Section VI.L. School Types “0”, “1”, “2”, “3” or “4.”

F. ADDITIONAL QUESTIONS (BUSINESS, TRADE, OR TECHNICAL INSTITUTIONS)

PHEAA requires Business, Trade, & Technical (BTT) Schools to respond to additional unique questions to record operating details.

i. TYPE OF CREDIT HOURS

For BTT schools that operate on a semester schedule and use credit hours (not clock hours) to certify eligibility, the response to this question is “semester.” However, BTT schools that operate using quarter schedules may structure programs using quarter- or semester-based credits. PHEAA must clarify what type of credit is used. The type of academic credits used to credit awards makes a difference in determining the number of credits required to meet half-time and full-time minimums. Schools may use either semester program credit hours or quarter credit hours but must use only one consistent measure for the program length and individual term enrollments.

For more information on enrollment minimums, please refer to the Pennsylvania State Grant Program Handbook.

The response to the credit hours question is housed on the College/Institution Grant Specific Display (FG3M).

ii. INTERNSHIP, EXTERNSHIP, OR ON-THE-JOB TRAINING

Business, Trade, and Technical schools are required to report if any of the approved programs offer training that takes place outside of the classroom. Detailed credit and clock hours must be provided and the internship, externship, or training must comply with PHEAA’s requirements. Please refer to the Approved Program of Study section of the Pennsylvania State Grant Program Handbook.

G. ADDITIONAL QUESTIONS (HOSPITAL SCHOOLS OF NURSING)

PHEAA requires Hospital Schools of Nursing to respond to additional unique questions to record operating details.

i. CURRICULUM CHANGES

Hospital Schools of Nursing must report if there have been curriculum changes in the past 2 years or if the school anticipates such in the next 2 years.

ii. SUMMER COSTS

Hospital Schools of Nursing institutions must provide summer costs separately from academic year costs. Students will have to complete the Summer PA State Grant Application in order to be evaluated for summer term eligibility.

H. ADDITIONAL QUESTIONS FOR ALL OTHER INSTITUTIONAL TYPES

PHEAA requires all other School Types to respond to additional unique questions to record operating details. These questions do not apply to Community Colleges.

i. BONA FIDE FIVE-YEAR PROGRAMS

When a school responds in the affirmative to the question regarding bona fide five-year program offerings, the school is then required to report, by name, all baccalaureate degree programs which require more than 4 academic years of full-time study for all students to PHEAA on the cost form. Schools should not report five-year degree programs which lead to a dual baccalaureate degree or are a result of multiple majors within the degree, as these are ineligible five-year programs. The school is also required to submit evidence of the bona fide five-year program status such as the most recent description in the course catalog, etc. For more information on bona fide five-year undergraduate programs, please refer to the Pennsylvania State Grant Program Handbook.

VIII. TERM START DATES

PHEAA collects term start dates by the following two "School Types:"

- Business, Trade, & Technical (BTT) Institutions as described in Section VIII.A. School Type "7" or "8."
- All other institutions as described in Section VII.B. School Types "0", "1", "2", "3", "4" or "5."

School Types are located on the College/Institution Grant Specific Display (FG3M). Additionally, the 3rd position of the school's six-position PHEAA code indicates the School Type.

A. BUSINESS, TRADE, & TECHNICAL (BTT) INSTITUTION TYPES

Since BTT institutions report costs to PHEAA on a program by program basis, start dates for each term summer, fall, winter (if applicable), and spring must be provided for each approved program of study. Start dates should not include dates for intersessions or modules. For more information on combining modules to meet term length requirements, refer to the School & Program Eligibility section of the Pennsylvania State Grant Program Handbook. If a school enrolls students continuously, for example, on a weekly basis, that school must:

- First select start dates that fall within the term start date ranges described in the Student Certification of Eligibility and Program Reviews and Audits sections of the Pennsylvania State Grant Program Handbook.

- Next, that school should map out a cohort of students from the program start to completion and report those term start dates to PHEAA.
- Finally, as part of the school's responsibility in updating enrollment with PHEAA, the school would need to separately monitor students that do not fall within the cohort of students with the reported start date ranges. For more information, please refer to the Program Reviews and Audits section of the Pennsylvania State Grant Program Handbook.

Example 1

School A operates on quarter schedule with 12-week terms, enrolls weekly, and reports the following start dates:

- Summer – May 28, 2020
- Fall – August 20, 2020
- Winter – November 5, 2020
- Spring – February 4, 2021

Student A begins enrollment on January 29, 2021. Even though this date is only one week prior to the reported cohort's spring term start date, Student A is beginning a winter quarter and must be monitored and reported accordingly.

B. ALL OTHER INSTITUTION TYPES

Report the beginning of each term, summer, fall, winter (if applicable), and spring. Start dates should not include dates for intersessions or modules. For more information on combining modules to meet term length requirements, refer to the School & Program Eligibility section of the Pennsylvania State Grant Program Handbook. For information on the treatment of intersessions or "winterim" terms at semester schools, please refer to Chapter 2 of the Pennsylvania State Grant Program Handbook..

IX. PROGRAM-LEVEL INFORMATION - BUSINESS, TRADE, OR TECHNICAL (BTT) INSTITUTION TYPES

Since BTT institutions must acquire PA State Grant approval on a program-by-program basis, schools must report to PHEAA immediately any changes to previously approved programs as cited in the School & Program Eligibility section of the Pennsylvania State Grant Program Handbook. Reporting of additional program structure details is required so that PHEAA may ensure these details remain within the program guidelines.

A. CLOCK/CREDIT HOURS INFORMATION

BTT schools are required to provide the following program-level information:

1. Total credit hours or clock hours in the program (report only one measure, entering zeros for the other measure).
 - If program measured in clock hours, report the total number of clock hours. Since credits do not apply and since the current online form will not allow blanks, enter zeros in corresponding credit fields as an indication that clock hours are used.
 - If program measured in credits, report the total number of semester or quarter credits. Since clock hours do not apply and since the current online form will not allow blanks, enter zeros in corresponding clock hour fields as an indication that credit hours are used. In this case, the "Total Course Hours" field on the State Grant Program of Study display (FG4B transaction) will be blank as shown below.

Example 2 - FG4B

TOTAL COURSE HOURS
TOTAL TERMS

6

2. Required internship/externship credit hours or clock hours (report only one measure).
 - If program measured in clock hours, report the total number of clock hours. Since credits do not apply and since the current online form will not allow blanks, enter zeros in corresponding credit fields as an indication that clock hours are used.
 - If program measured in credits, report the total number of semester or quarter credits. Since clock hours do not apply and since the current online form will not allow blanks, enter zeros in corresponding clock hour fields as an indication that credit hours are used.
3. Whether the program credential is an Associate in Specialized Business (ASB), an Associate in Specialized Technology (AST), or neither (certificate/diploma), please follow this new instruction.

Note: Reporting ONLY ONE measure on the online cost form, as noted in Section IX.A, paragraphs 1 and 2, is an instruction that became effective with the 2017-18 Award Year information.

B. TERM SCHEDULE

BTT schools are required to provide details on each approved program.

i. PROGRAM NAME

Schools must confirm the program name, as approved by its licensing authority and/or accrediting agency, on the cost form. PHEAA stores these names (sometimes abbreviations) and:

- Provides a list of approved program names for selection by students in the drop-down functionality on the PA State Grant Form (SGF) and online enrollment change form;
- Publishes a list of approved program names as part of the paper PA State Grant Status Notice instructions as well as the PA State Grant Program Manual.

ii. PROGRAM CODE

The two-position program code, as assigned by PHEAA upon program approval, must be associated with the appropriate program name.

iii. SHORT MODULES, IRREGULAR TERMS, CONTINUOUS ENROLLMENT

Schools must indicate if the program's schedule is comprised of short modules (less than 10 weeks at a quarter school; less than 15 weeks at a semester school), irregular terms of varying lengths, or continuous enrollment without specific terms. Schools that have any of these structures must provide the detail so that PHEAA may provide special crediting and/or processing instructions, as necessary.

iv. TERM DETAILS BY PROGRAM

Schools must provide the details on each term begin date, the number of weeks, the number of clock hours, or the number of credit hours dependent upon which academic measure is used for the program, as outlined in Section IX.A, and the total cost per term.

- If program measured in clock hours, report each term's number of clock hours. Since credits do not apply and since the current online form will not allow blanks, enter zeros in corresponding credit fields as an indication that clock hours are used.
- If program measured in credits, report each term's number of semester or quarter credits. Since clock hours do not apply and since the current online form will not allow blanks, enter zeros in corresponding clock hour fields as an indication that credit hours are used.

Note: Reporting ONLY ONE MEASURE on the online cost form, as noted in Section IX.B.iv, is an instruction that became effective with the 2017-18 Award Year information.

PHEAA records the total number of terms (semesters or quarters) required for completion of the program and displays this information in the "Total Terms" field on the FG4B transaction. The Agency carries this information forward from year to year and reviews upon submission of the cost form. The "Total Terms" information is required since PHEAA uses this figure to limit students to the maximum number of payments allowed for a particular program of study.

Example 3 - FG4B

TOTAL COURSE HOURS	1500
TOTAL TERMS	5

Please refer to the PA State Grant Costs & Award Adjustments section of the Pennsylvania State Grant Program Handbook.

PHEAA provides space for up to 12 terms labeled term 1 through term 12. When combining modules in order to meet the PA State Grant Program semester or quarter definitions, you must report this information to PHEAA. If the number of modules exceeds 12, you may combine modules for purposes of submitting the cost form but must also submit a detailed curriculum plan and send via email to sginstitutioneligibility@pheaa.org. A blank form to record this information is available within the cost form application. Although the combining of modules and crediting rules are noted in the PA State Grant Costs and Award Adjustments section of the Pennsylvania State Grant Program Handbook, PHEAA may provide "Special Crediting Instructions" to schools in these situations. Having the specifics of the program structure readily available for PHEAA staff, including Program Review, promotes a better audit trail and eases understanding of compliance with procedures.

Example 4 - Online form does not accommodate number of modules required

School A operates on quarter schedule. The Business Administration program composition is 12-week quarter terms comprised of three, 4-week long consecutive modules. The program requires 2 academic years to complete which translates to six "Total Terms." This equates to 18 modules. Since the cost form only permits the entry of 12 terms, School A may submit the information with the modules already combined. However, School A must also provide the detailed curriculum plan to PHEAA via email.

Example 5 - Online form does accommodate number of modules required

School B operates on quarter schedule. The Computer Operations program composition is 12-week quarter terms comprised of two, 6-week long consecutive modules. The program requires 2 academic years to complete which translates to 6 "Total Terms." This equates to 12 modules. The cost form permits the entry of 12 terms, so School B must indicate each six-week long module under "term." PHEAA will combine these modules and mark the "Total Terms" for the program as six.

v. ORPHANED MODULES

When a school is combining modules to create a “term,” the structure may result in extra modules that are unable to be included in a term. In this instance, the school must report that module as part of the overall program structure. However, the school may not permit any PA State Grant awards for students attending during these periods. PHEAA will not use the module as part of the “Total Terms.”

Example 6

School A operates on quarter schedule. The Health Administration program is structured as 19, 4-week long modules. The term composition is 12-week quarter terms comprised of three, 4-week long consecutive modules. The program requires 2 academic years to complete which translates to six “Total Terms” with an extra 4-week long module, which is not included for PA State Grant purposes.

vi. CREDIT/CLOCK HOURS LESS THAN FULL-TIME

When a school reports a term that meets the minimum term length requirements (whether using combined modules or not), there may be instances, by virtue of program structure, where the term credit and/or clock hours do not meet the full-time enrollment definition. This may occur for one or more of the program’s terms. When the term meets the requirement for half-time, the school is required to monitor students enrolled in that term and mark those students as enrolled “half-time.” The school may receive “Special Crediting Instructions” as a reminder.

Example 7

School A operates on quarter schedule. The Medical Assisting Technician program is structured as 10, 5-week long modules plus one, ten-week long module. The school’s “Total Terms” on FG4B is six terms (quarters) which would normally equate to a 2.0 PA State Grant award counter. The ten, 5-week long modules are combined to make five, 10-week long quarter terms. Each module awards seven semester credit hours. Therefore, each quarter term is structured as 14 semester credits and eligible for full-time PA State Grant awards. The 11th term, which is 10-weeks long meets the PA State Grant minimum term length requirement for a quarter term. However, it only awards seven semester credit hours, which only permits half-time PA State Grant eligibility. All students enrolled in that term must be reported as “half-time.”

vii. CHANGES TO THE NUMBER OF “TOTAL TERMS”

When a school changes the structure of a previously approved program even when the change does not require a review by its licensing authority and/or accrediting agency, the changes must be reported to PHEAA as soon as they are identified.

Please do this by emailing sginstitutioneligibility@pheaa.org. If the changes cause increases or decreases to the number of terms required for program completion, these must be reviewed by PHEAA. Since PHEAA’s system is academic year-based and the “Total Terms” field stored in each academic year is program-based, your school will require special instructions.

Example 8 - Assumes Semesters

Increases in terms: When a school increases the number of terms it requires to complete a program, the “Total Terms” are increased in the year being reported on the cost form only. This action will allow the new cohort of students the extra term of aid it requires to complete the program. However, if there is a cohort of students that are enrolled under the old structure and, therefore, are not eligible for the extra term of PA State Grant aid, the school is responsible for monitoring and requesting that the extra term be cancelled for the reason “maximum number of payments” (Cancel “U”). This may be done via the Special Request function in Partner Interface.

Program	2019-20	2020-21
Business Management	five terms	six terms

Student	Cohort	2020-21
Student A	five-term cohort	Eligibility should be canceled for sixth term
Student B	six-term cohort	Student is awarded

Example 9 - Decrease in

Decreases in terms: When a school decreases the number of terms it requires to complete a program, the "Total Terms" will be decreased in the year being reported on the cost form only. This action will allow reject students (Reject "Y") for the reaching the maximum number of payments for the program. However, if there is a cohort of students that are enrolled under the old structure and, therefore, are eligible for the extra term of PA State Grant aid, the school is responsible for monitoring and requesting that the extra term of aid be reinstated by PHEAA. This may be done via the Special Request function in Partner Interface.

Program	2019-20	2020-21
Business Management	six terms	five terms

Student	Cohort	2020-21
Student A	five-term cohort	No issues, will not be rejected until after five terms are awarded (future year)
Student B	six-term cohort	Reject "Y"; school must request that PHEAA allow the sixth term payment

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PHEAA's earnings are used to support its public service mission and to pay its operating costs, including administration of the Pennsylvania State Grant and other state-funded student aid programs. As the only major federal loan servicer with a nonprofit public service mission, PHEAA devotes its energy and resources to help ease the financial burden of higher education for its primary stakeholders – Pennsylvania students and families.

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