



Pennsylvania State Grant Program Virtual Workshops

2020-21 Academic Year & 2021 Summer Term

Administering Adds, Drops, & Withdrawals

June – August 2020



Administering Adds, Drops, & Withdrawals



This content has been abridged and does not supersede current program policy. For complete guidance on program administration, please refer to the *2020-21 PA State Grant Program Handbook*.

Award Adjustments

- PA State Grant term awards are subject to change when a student alters their enrolled courses prior to the end of the term

Adds

Course(s) for which the student registers after the start of the term which will appear on the student's transcript

Drops

A course(s) the student was registered for but was removed from the student's schedule and no attempted course credit exists or will exist

Withdrawals

Course(s) for which student is charged by the school and attempted credits appear on transcript

Adds

- May occur any time during the term
- Required to report and monitor changes that may impact a student's eligibility from adding classes
 - Consider all eligibility impacts (e.g., cost adjustments)
 - May establish eligibility or cause a loss of eligibility
 - Must be considered even if award has already been credited
- Courses added in later modules may impact when PA State Grant award can be credited

Adds

- Examples:

Student	Initial Term Enrollment	Initial Term Status	Changed Term Enrollment	Changed Term Status	Changes to Report
Claire	3 Classroom	Less than Half-time	3 Classroom 3 Online	Half-time	Report enrollment mode and update enrollment status
Phil	6 Classroom	Half-time	6 Classroom 3 Online	Half-time	Update enrollment mode
Alex	6 Classroom 3 Online	Half-time	6 Classroom 6 Online	Full-time	Update enrollment status
Luke	6 Classroom 6 Online	Full-time	9 Classroom 6 Online	Full-time	No changes to report
Hailey	3 Classroom 3 Online	Half-time	3 Classroom 6 Online	Half-time	Update enrollment mode*

***Note:** If the student is attending a Non-HQD school and does not request an ADA exception, PHEAA will cancel the award once 30 days expires (Cancel "L").

Drops

- Differ from withdrawals
 - Usually no tuition charges will remain on the student's account
- Typically occur during a set period at the start of the term
- Do not count toward enrollment and cannot be used when paying the PA State Grant award
- Must refund disbursed amount or employ excess cash/netting principles



Drops

- Required to report and monitor changes that may impact a student's eligibility from dropping classes

Enrollment Status

Report the new enrollment status



Additional Eligibility

Assess and report other eligibility impacts (e.g., remedial exceptions)

Enrollment Mode

Report the updated enrollment mode

Non-HQD Schools: Update and monitor if student moves to mode 3 or mode 4

Adds & Drops



- Students Jay, Cam, and Mitchell are enrolled at PHEAA Institute of Art

Student	Initial Term Enrollment	Initial Term Status	Changed Term Enrollment
Jay	6 Classroom 3 Online	Half-time	6 Classroom 6 Online (3 remedial credits)*
Cam	6 Classroom	Half-time	3 Classroom
Mitchell	6 Classroom 3 Online	Half-time	3 Classroom 6 Online

**Assumes student used .50 remedial counter prior to term enrollment.*



Questions

- What enrollment and eligibility updates should be reported for Jay? For Cam? For Mitchell?
- Is there any difference in eligibility if PHEAA Institute of Art is HQD vs. Non-HQD?

Adds & Drops



Answers

- Enrollment and eligibility updates are needed for each student:

Student	Initial Term Enrollment	Initial Term Status	Changed Term Enrollment	Update
Jay	6 Classroom 3 Online	Half-time	6 Classroom 6 Online (3 remedial credits)	Report as Full-time (1-3 remedial)
Cam	6 Classroom	Half-time	3 Classroom	Report as Less than Half-time
Mitchell	6 Classroom 3 Online	Half-time	3 Classroom 6 Online	Change from mode 2 to mode 3

**Assumes student used .50 remedial counter prior to term enrollment.*

- If PHEAA Institute of Art is considered HQD, then there will be no additional impacts. If the school is considered Non-HQD, then Mitchell's award may be cancelled if the student is not granted an ADA exception.
 - Cam will not have eligibility regardless of the school's HQD or Non-HQD status, since he is now less than half-time.



Withdrawals

- Can occur before or after the add/drop deadline
- Encompasses situations when the student:
 - fully or partially withdraws;
 - takes a leave of absence;
 - changes from an approved to a non-approved program of study;
 - is terminated, expelled, suspended, or dismissed; or
 - passes away during the term

Withdrawals

- Criteria for evaluating withdrawals for adjustment
 - State Grant award was final
 - Award was disbursed and credited to the student's account after certification of eligibility (date of crediting must be documented)
 - Crediting was based on the enrollment status and mode prior to withdrawal

Example: On August 25, the school was issued a disbursement roster which included a full-time award for the student. On September 1, the school reviewed eligibility and issued a final credit of the full-time award. The student then withdrew from all courses on September 15. The student retains the counter and is eligible to retain an award but the amount may require an adjustment.



If a student has withdrawn from school prior to the generation of the disbursement/reconciliation roster or prior to final crediting, cancel for “not enrolled.”

Withdrawals



- PHEAA University's Summer I session begins May 15 and ends July 18. The first roster is received on July 2
- Lily withdraws from Summer I on June 1 and during the institution's 40% tuition refund period

Questions

- Should Lily's award be evaluated as a withdrawal? Why or why not?
- What should the school report as Lily's final enrollment status?



Withdrawals



Answers

- No. Lily withdrew on June 1, prior to the Summer term disbursement on July 2.
 - Lily would also not be evaluated for withdrawal if funds were disbursed, but not yet credited to his school account.
- PHEAA University should report Lily as “not enrolled.”

Withdrawal Procedures

- Refund due PHEAA will depend upon:
 - the date of withdrawal; and
 - the school's tuition refund policy

Adjustment Steps

STEP
1

Determine the portion (%) of tuition refund

STEP
2

Check the amount of PA State Grant retained does not exceed that portion permitted under school's tuition refund policy

STEP
3

Advise the student to pay when amount is small to save award counter and avoid Academic Progress issues

STEP
4

Report award adjustments via Partner Interface

Withdrawals

Q&A



- Alex was awarded and credited a \$2,000 full-time Fall semester grant for enrolling in 12 classroom credits
- Alex withdraws at the end of the second week of classes and according to school policy, receives a 75% tuition refund

Questions

- What amount, if any, would Alex be eligible to retain?
- What should be reported as Alex's final enrollment status and mode?

Withdrawals



Answers

- Alex would be able to retain 25% of the PA State Grant or \$500.
- Alex's final enrollment status would be full-time and enrollment mode would be mode 1.
 - No additional changes would be made to the enrollment mode unless other changes had taken place prior to withdrawal.



Withdrawals in Modular Terms

- When combining modules, a payment may only be made at the **beginning of the last module** based on the number of enrolled credits **minus any withdrawn credits** that occurred prior to crediting for the term

Total withdrawal from all credits in every module

Cancel for "Not Enrolled" and do not pay PA State Grant

Withdrawal resulting in full-time enrollment

Student eligible for full-time PA State Grant award payment

Withdrawal resulting in half-time enrollment

Reduce to half-time and pay half-time PA State Grant

Withdrawal down to less than half-time enrollment

Report as "Less than half-time" and do not pay a PA State Grant

Note: Adjustment Steps are only applicable if the student's PA State Grant award is paid at the beginning of the last module and the student subsequently withdraws from the last module.

Withdrawals to At Least Half-time

Option 1:

Apply the withdrawal policy on the **full-time** award

- + Award amount may be higher than the half-time award
- Full-time award counter used creates possible satisfactory Academic Progress issues

Option 2:

Report the student as **half-time**

- + Reduces satisfactory Academic Progress issues
- Award may be less than the adjusted full-time award
- Enrollment mode must be re-evaluated which may impact eligibility at Non-HQD schools

Withdrawals



- PA State Grant eligible students, Gloria and Manny attend PHEAA Tech, a semester school.

Gloria			
Variables	Module D (Fall)	Module E (Fall)	Module F (Fall)
Number of Weeks	5	5	5
Date of Registration	7-10-2020	7-10-2020	7-10-2020
Start Date	9-16-2020	10-21-2020	11-25-2020
Number of Credits	6 classroom	6 online	6 online
Withdrawal	6 online credits on 10/30 (Module E)		

Manny		
Variables	Term A (Fall)	Module I (Fall)
Number of Weeks	15	3
Date of Registration	7-10-2020	7-10-2020
Start Date	9-1-2020	10-21-2020
Number of Credits	9 classroom	6 online
Withdrawal	6 classroom credits on 10/30 (Term A)	

Questions

- Assuming the students were credited on the start date of the final module, what should PHEAA Tech report as their final enrollment statuses and modes after withdrawal?

Withdrawals



- Gloria should be reported as full-time with an enrollment mode 2 (at least 50% classroom).
 - When Gloria is evaluated for eligibility at the start of the final module, the crediting must be based on the 18 total enrolled credits (6 classroom/12 online), minus the withdrawn credits (6 online).
- Manny could either be reported under:
 - The original enrollment status and mode for which crediting occurred (full-time/mode 2), adjusting the award if necessary; or
 - Half-time status, with an enrollment mode 3 (greater than 50%, but less than 100% distance education).

Gloria			
Variables	Module D (Fall)	Module E (Fall)	Module F (Fall)
Number of Weeks	5	5	5
Date of Registration	7-10-2020	7-10-2020	7-10-2020
Start Date	9-16-2020	10-21-2020	11-25-2020
Number of Credits	6 classroom	6 online	6 online
Withdrawal	6 online credits on 10/30 (Module E)		

Manny		
Variables	Term A (Fall)	Module I (Fall)
Number of Weeks	15	3
Date of Registration	7-10-2020	7-10-2020
Start Date	9-1-2020	10-21-2020
Number of Credits	9 classroom	6 online
Withdrawal	6 classroom credits on 10/30 (Term A)	

Withdrawals

Unofficial Withdrawals

- Investigate students with all F grades to determine whether grades were earned
 - Completed term = earned grades
 - “No show” = “Not Enrolled”
 - If the last date of attendance or activity is documented, follow the Adjustment Steps
 - If a last date of attendance **and** activity cannot be determined mark as “Not Enrolled”

Retroactive Withdrawals

- If withdrawal occurs after term and payment of PA State Grant, follow Adjustment Steps

Award Increases after Withdrawal

- If award increases after crediting and withdrawal, follow the Adjustment Steps on the **original amount**



Wrap Up

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Reminders & Resources

Reminders



- 2020-21 PA State Grants finalized in May 2020
 - Maximum award increased to \$4,525
 - Award increase made possible by Coronavirus Aid Relief and Economic Security (CARES) Act funding
 - No award adjustment factor applied for online enrollment (HQD schools only)
 - Student award notifications began in June 2020
 - Award information accessible via Partner Interface and weekly PageCenter reports

Reminders

- 2019-20 Academic Year and 2020 Summer awarding, disbursement and reconciliation underway
 - Review [PHEAA.org/COVID19](https://www.pheaa.org/COVID19) for policy adjustments, FAQs, etc.
- Institutional contacts and information
 - Email PHEAA staff when contacts change or need updated
 - Confirm and update access to PHEAA systems annually or as needed



Reminders



- Post-workshop Q&A released this Fall
- Order the 2020-21 Handbook and other print materials from PHEAA.org
- Please complete the survey
 - Feedback is used to plan for future workshops and to create new training materials

Resources



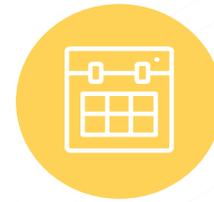
Web

- PHEAA.org
- [Alec](#)



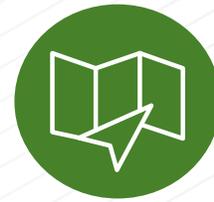
SGSP Staff

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Events

- Webinar Series
- Conferences
- Workshops



Print

- Brochures
- Calendars
- FAQs

Thank You!