**Agenda**

**HOUSEKEEPING ITEMS**
PA State Grant and Special Programs (SGSP) staff welcome attendees, review agenda and explain how to access session materials.

**PROGRAM BASICS**
Panelists provide a high-level recap on the program's background, institution eligibility requirements, and student eligibility requirements.

**AWARDING & CERTIFICATION**
Staff will discuss how awards are calculated and review the various aspects of the program's certification and disbursement processes.

**WRAP UP & QUESTIONS**
Presenters will highlight resources to help with managing the program, discuss future training events, and provide an opportunity for attendees to ask questions.

The content included in this presentation is intended to provide supplemental instruction on the PA Targeted Industry Program and does not supersede program policy as written in the current PA-TIP Guidelines.
Program Background

- Enacted into law under Act 82 of 2012
- Administered in conjunction with PA Department of Education (PDE) and the PA Department of Labor and Industry (L&I)
- Legislatively designed to:
  1. Provide need-based grants to eligible students
  2. Target programs of study that train individuals for areas of immediate employment needs
- Program focuses on specific occupations in Health, Energy, Advanced Materials and Diversified Manufacturing, and Agriculture and Food Production
Institution Eligibility Requirements

To participate, institutions must:

- Be located in PA and have federal Title IV eligibility
- Have completed an application by the deadline
- Have, and submitted to PHEAA, a current approved Eligibility and Certification Approval Report (ECAR)
- Have an eligible program of study that meets program requirements:
  - Must be federal Title IV eligible
  - Must be at least 10 weeks but less than 2 academic years in length
  - Cannot be a PA State Grant eligible program
  - Must not be completed via 100% distance education
  - Must correspond to a 2020-21 approved Classification of Instructional Program (CIP) Code

The 2020-21 institution application period has ended. Look for the 2021-22 application in Spring 2021!
Institution Eligibility Requirements

• Maintain financial records that reflect all PA-TIP transactions
  – Separate bank accounts are recommended for PA-TIP funds
• Timely notify PHEAA, in writing, of any institutional changes (e.g., ownership, status, name, etc.)
  – Failure to notify PHEAA may result in administrative findings
• Perform periodic reviews to maintain user access requests
• Retain records for 5 years from the date on which the reconciliation roster is certified
To receive an award, students must:

- Be a U.S. Citizen or eligible non-citizen
- Be a PA resident and not incarcerated
- Have an EFC of 12,000 or less
- Have received a high school diploma, GED, or recognized homeschool certificate
- Attend a PA-TIP approved institution and be enrolled in an approved program of study
- Not have exhausted their PA-TIP award counter
- Not be in default or owe a PA State Grant refund
- Maintain federal Title IV satisfactory academic progress
Student Eligibility Requirements

• Students must also:
  – Not be receiving a PA State Grant for the same enrollment
  – Complete the FAFSA® and PA-TIP application by May 1, 2021
    • Veterans must submit a copy of their DD214
    • Applications available on PHEAA.org/PATIP
  – Be enrolled on a full-time basis
    • Part-time enrollment permissible at nonprofit institutions

• Awards issued on first-come, first-served basis
  – Applicants Not Selected Report in PageCenter can be used to determine an ineligibility reason
CIP Code Appeals

- PHEAA, L&I, and PDE reviewed the CIP Code List to ensure that approved programs aligned with the program’s goal
  - The list of eligible programs of study was updated to remove programs that do not align with an in-demand occupation

- Appeals process created to enable institutions to demonstrate that a specific program of study still meets an area of localized need
  - Appealed programs of study are institution-specific
  - Approved program appeals will be approved through the 2022-23 Award Year

- Students that were eligible to receive an award in 2019-20 will be grandfathered until no longer enrolled or program completion
  - After grandfathered students complete the program, a school will not be able to enroll new students without a new approved appeal

- Review Appendix D of the 2020-21 PA-TIP Guidelines
Awards issued on first come, first-served basis
  – Students notified via letter
Student must have unmet need to be considered for an award
Institutions review eligibility using the most recent Applicant Certification and Status Listing (ACSL) as a guide
Institutions determine final award amount for eligible students and report to PHEAA
  – Students eligible for the Fostering Independence through Education Tuition Waiver (FosterEd) Program should not have their waiver considered when calculating the PA-TIP award

Both PHEAA and the institution are responsible for confirming the student’s eligibility
  – PHEAA performs initial check
  – Institutions conduct secondary eligibility review
The PA-TIP Award Estimator can be used to document award calculations and confirm the student’s eligibility.

**Maximum award is lesser of:**

- Full-time Students = 75 percent of net cost (program costs minus resources) or maximum PA-TIP amount (whichever is less)
- Half-time Students = 75 percent of net cost (program costs divided by 2 and then minus resources) or maximum half-time PA-TIP amount (whichever is less)
- Veteran Students = 100 percent of program costs or maximum full-time (or half-time) PA-TIP amount (whichever is less)

### Full-time Enrollment Example

<table>
<thead>
<tr>
<th>Annual Program Costs</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition</td>
<td>$10,000</td>
</tr>
<tr>
<td>Fees</td>
<td>$50</td>
</tr>
<tr>
<td>Living Expense Allowance</td>
<td>$4,000</td>
</tr>
<tr>
<td>Books</td>
<td>$0</td>
</tr>
<tr>
<td>Supplies</td>
<td>$2,000</td>
</tr>
<tr>
<td><strong>Total Program Costs</strong></td>
<td><strong>$16,050</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Resources</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Pell Grant</td>
<td>$6,095</td>
</tr>
<tr>
<td>Employer Tuition Reimbursement</td>
<td>$0</td>
</tr>
<tr>
<td>Other Gift Aid</td>
<td>$4,000</td>
</tr>
<tr>
<td><strong>Total Resources</strong></td>
<td><strong>$10,095</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Award Calculation</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Cost</td>
<td>$16,050 - $10,095 = $5,955</td>
</tr>
<tr>
<td>Award Amount (Lesser of)</td>
<td>75% of Net Cost ($4,466) OR PA-TIP Maximum ($4,123)</td>
</tr>
<tr>
<td>Full-time PA-TIP Award</td>
<td>$4,123</td>
</tr>
</tbody>
</table>
Awarding

- Lois W. and Francis W. are enrolled in the 12-week Animal Nutrition program at PHEAA Community College, a nonprofit institution.
- The FAO determines the costs and available resources for both students.
- In determining the awards, the FAO realizes Francis is a veteran.

Questions

- What is the PA-TIP award for Lois? For Francis?
- **Bonus:** If Francis is receiving a PA Chafee ETG award, it can be presumed that the student is also eligible for the FosterEd Waiver. Is the institution required to apply FosterEd Waiver before determining the PA-TIP amount?

### Annual Program Costs

<table>
<thead>
<tr>
<th></th>
<th>Francis</th>
<th>Lois</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition</td>
<td>$16,000</td>
<td>$16,000</td>
</tr>
<tr>
<td>Fees</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Living Expense Allowance</td>
<td>$4,000</td>
<td>$4,000</td>
</tr>
<tr>
<td>Books</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Supplies</td>
<td>$2,000</td>
<td>$2,000</td>
</tr>
<tr>
<td><strong>Total Program Costs</strong></td>
<td><strong>$22,000</strong></td>
<td><strong>$22,000</strong></td>
</tr>
</tbody>
</table>

### Resources

<table>
<thead>
<tr>
<th></th>
<th>Francis</th>
<th>Lois</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Pell Grant</td>
<td>$3,000</td>
<td>$6,000</td>
</tr>
<tr>
<td>Employer Tuition Reimbursement</td>
<td>$0</td>
<td>$14,000</td>
</tr>
<tr>
<td>PA Chafee ETG Award</td>
<td>$5,000</td>
<td>$0</td>
</tr>
<tr>
<td><strong>Total Resources</strong></td>
<td><strong>$8,000</strong></td>
<td><strong>$20,000</strong></td>
</tr>
</tbody>
</table>
Awarding

<table>
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<th>Annual Program Costs</th>
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<th>Lois</th>
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<tr>
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<td>$0</td>
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<tr>
<td>Living Expense Allowance</td>
<td>$4,000</td>
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<tr>
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<td>$0</td>
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<tr>
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</tr>
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<tr>
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<td>$0</td>
<td>$14,000</td>
</tr>
<tr>
<td>PA Chafee ETG Award</td>
<td>$5,000</td>
<td>$0</td>
</tr>
<tr>
<td><strong>Total Resources</strong></td>
<td><strong>$8,000</strong></td>
<td><strong>$20,000</strong></td>
</tr>
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</table>

**Award Calculation**

<table>
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<th>Costs</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Amount (Lesser of)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-Veteran = 75% of Net Cost (Program Costs minus Resources) or PA-TIP Maximum Award</td>
<td>$22,000 or $4,123</td>
<td>$1,500 or $4,123</td>
</tr>
<tr>
<td>Veteran = 100% of Program Cost or PA-TIP Maximum Award</td>
<td>$4,123</td>
<td>$1,500</td>
</tr>
<tr>
<td>PA-TIP Award</td>
<td>$4,123</td>
<td>$1,500</td>
</tr>
</tbody>
</table>

**Answers**

- Lois would have a PA-TIP award of $1,500. The award for Francis would be $4,123.
- **Bonus:** No. Since Francis can be presumed eligible for the FosterEd Waiver, PHEAA Community College should first calculate the PA-TIP award without consideration of the FosterEd waiver. The school could then apply the PA-TIP award (or other gift aid) for expenses outside of mandatory fees and tuition.
Certification

• ACSLs available in PageCenter (GRANTS application)
  – New versions generate biweekly when updates are available

• Using the most recent ACSL, schools review student eligibility, calculate amounts, and certify awards
  – Certification is a requirement for disbursement
  – Certify awards for terms that have already begun

• Submit ACSL only when reporting changes/updates
  – Student changes identified using a pound (#) or asterisk (*)

• Awards must be certified within 30 days of eligibility notification or term start date, whichever is later
  – Awards not certified within 30 days are subject to cancellation
  – All awards must be certified by July 1, 2021
• To certify the ACSL:
  – Indicate “Y” or “N” in the Academic Progress field
  – Provide a Graduation Date (or correct date, if provided)
  – Correct information in Enrollment Status, EFC, Pell, Gift Aid, Total Award, and Certified Amount fields, if applicable
  – Indicate “$0” in the Certified Amount field to cancel the term award
  – Send one completed (signed and dated) ACSL
Crediting

• Preliminary credits must be adjusted if student’s eligibility changes
• Final crediting indicates:
  – Federal verification is completed, if selected
  – All eligibility checks have been performed for the term/payment period
  – Certification has been provided to PHEAA via the ACSL
• Awards must be identified as “PA-TIP Grant”
  – Include the date funds were posted, the amount, and the term
• Refund the amount of any credit balance to the student within 30 days

If student is not enrolled at the time of crediting or if eligibility is questionable, do not credit.
Crediting

- Crediting must occur on a term-by-term basis
  - Term eligibility may be dependent upon when the student starts class
  - Schools with **irregular schedules** will be placed on a semester schedule

<table>
<thead>
<tr>
<th>SEMESTER</th>
<th>START DATES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall</td>
<td>July 1 – November 15</td>
</tr>
<tr>
<td>Spring</td>
<td>November 16 – March 15</td>
</tr>
<tr>
<td>Summer</td>
<td>March 16 – June 30</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>QUARTER</th>
<th>START DATES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall</td>
<td>July 1 – November 1</td>
</tr>
<tr>
<td>Winter</td>
<td>November 2 – February 1</td>
</tr>
<tr>
<td>Spring</td>
<td>February 2 – May 1</td>
</tr>
<tr>
<td>Summer</td>
<td>May 2 – June 30</td>
</tr>
</tbody>
</table>

Example: PA-TIP recipient, Malcolm, begins enrollment at a semester school on November 5. Since the student’s start date falls within the fall semester term start date range, the student would be eligible, have the award disbursed and be credited for the fall semester. A student who begins enrollment on November 25 would not be eligible for a fall PA-TIP award, but instead should be considered for spring awarding, disbursement and crediting.
Disbursement

• Only includes funds for students with certified awards

• Runs on a monthly basis
  – Scheduled as closely as possible to the institution’s academic calendar

• Number of payments corresponds to program length

<table>
<thead>
<tr>
<th>PROGRAM LENGTH</th>
<th>NUMBER OF PAYMENTS</th>
<th>CONSIDERATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>10-18 Weeks</td>
<td>1 for semester/quarter schools</td>
<td>Entire award amount is sent in one payment</td>
</tr>
<tr>
<td>19-36 Weeks</td>
<td>2 for semester schools/3 for quarter schools</td>
<td>Annual award amount is divided between terms (fall, winter, and spring, as applicable)</td>
</tr>
<tr>
<td>37-52 Weeks</td>
<td>3 for semester schools/4 for quarter schools</td>
<td></td>
</tr>
</tbody>
</table>

Award amounts for the summer term will be the same as the amount determined for the initial term of eligibility.
Disbursements

For clock hour schools with continuous enrollment:

1. Issue initial payment according to semester term start dates

2. Credit subsequent payments based on program length (number of weeks ÷ number of payments)
   - Contact PHEAA if you have payment periods with start dates that fall within the same term start date range

<table>
<thead>
<tr>
<th>PROGRAM</th>
<th>TOTAL PROGRAM LENGTH</th>
<th>PAYMENT PERIOD 1 - START DATE (TERM)</th>
<th>PAYMENT PERIOD 2 - START DATE (TERM)</th>
<th>PAYMENT PERIOD 3 - START DATE (TERM)</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHEAA Technical School</td>
<td>26 Weeks</td>
<td>Student enrolled September 7, 2020 (certify fall)</td>
<td>December 7, 2020 (certify spring)</td>
<td>N/A Semester Schedule</td>
</tr>
<tr>
<td></td>
<td>2 Payment Periods</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Disbursement

- PA-TIP recipients, Dewey W. and Cynthia S., are attending a continuous enrollment, clock hour institution.
- Dewey is enrolled in a 42-week Practical Nursing that begins November 2.
- Cynthia is enrolled in a 24-week, Medical Records Technology program that begins November 16.

Questions

- Which term is Dewey initially eligible for and what other term(s) of eligibility does Dewey have? Cynthia?
- **Bonus:** If both students are eligible for the annual maximum ($4,123), what are the award values for each term?

<table>
<thead>
<tr>
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<th>START DATES</th>
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<tbody>
<tr>
<td>Fall</td>
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<td>Spring</td>
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</tr>
<tr>
<td>Summer</td>
<td>March 16 – June 30</td>
</tr>
</tbody>
</table>
**Disbursement**

**Answers**

- Since Dewey started classes on November 2, the initial term would be fall. Dewey would also be awarded for the spring and summer terms.
- Since Cynthia started classes on November 16, then the initial awarded term would be spring. Cynthia would also be eligible for summer; however, the institution should contact PHEAA before paying the summer award, as the start date falls within the spring term.
- **Bonus:** Dewey and Cynthia would receive awards valuing $2,061 for all awarded terms.

<table>
<thead>
<tr>
<th>STUDENT</th>
<th>PROGRAM LENGTH/ # OF PAYMENTS</th>
<th>PAYMENT PERIOD 1</th>
<th>PAYMENT PERIOD 2</th>
<th>PAYMENT PERIOD 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dewey</td>
<td>42 Weeks / 3 Payment Periods</td>
<td>AWARD VALUE</td>
<td>AWARD VALUE</td>
<td>AWARD VALUE</td>
</tr>
<tr>
<td></td>
<td>Enrolls 11/2/20 (certify fall)</td>
<td>1/8/21 (certify spring)</td>
<td>5/17/20 (certify summer)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>$2,061 (.50)</td>
<td>$2,061 (.50)</td>
<td>$2,061 (.49)</td>
<td></td>
</tr>
<tr>
<td>Cynthia</td>
<td>24 Weeks / 2 Payment Periods</td>
<td>N/A</td>
<td>Enrolls 11/16/20 (certify spring)</td>
<td>2/8/21 (certify summer)</td>
</tr>
<tr>
<td></td>
<td>Not enrolled</td>
<td>$2,061 (.50)</td>
<td>$2,061 (.49)</td>
<td></td>
</tr>
</tbody>
</table>
Disbursements

• Funds disbursed via Automated Clearinghouse (ACH)
  – Available in 14 business days

• Rosters are available in PageCenter
  – Email patip@pheaa.org to request notifications

• Certify and return rosters within 30 calendar days of generation or within 30 days of the first day of the term (whichever is later)
  – Late rosters may result in a disbursement hold
Withdrawals

- Cancel awards for students who withdraw prior to certification
- Full withdrawals that occur after crediting may require a refund depending upon the enrollment change date
  - If 60 percent or more of the term complete = no refund required
  - If less than 60 percent complete = refund amount equal to the percentage of the term not completed

Example: Student was awarded $2,061 during a 10-week term/pay period and completed three of the 10 weeks. Since the student completed 30% of the term, the school would refund $1,442 (70%) of the award.
Withdrawals

• Partial withdrawals to half-time will result in half-time consideration
  – Includes when student is enrolled in modules
  – Schools ineligible for half-time awards must refund the student’s entire term award
Refunds

• Students determined ineligible after disbursement, may require a refund to PHEAA
  – Report ineligible students and reason via disbursement roster or ACSL
  – Refund award amount within 45 days of reporting to PHEAA to avoid a disbursement hold
• Email fmeftadmin@pheaa.org detailing the date the refund was sent, the refund amount, the program name, and the refund reason

Outstanding Refunds Report in PageCenter lists the refunds due for each student per term.
Annual reconciliation process begins in July
  – Serves as final opportunity to report student status changes
    • All awards must be certified by July 1, 2021 or within 30 days after the term begins, whichever is later
  – Reconciliation roster must be certified within 30 days of receipt
    • Changes after the initial reconciliation roster must be reported to PHEAA in writing
  – Outstanding rosters will prevent future disbursements
Resources

• **Events:**
  – Webinar Series
  – Conferences/Workshops

• **Print Materials:**
  – Student-facing
  – School-facing

• **Web:**
  – PHEAA.org
  – Alec

• **SGSP Staff:**
  – 1-800-443-0646
  – patip@pheaa.org
Join Us Next Time!

Spring 2021 Webinar Series to be announced in January!

Session descriptions and registration information will be available via PHEAA.org/SGSPtraining.
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@FedLoan Servicing
@aesSuccessorg

PHEAA

@PHEAAStudentAid

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Thank You!