PHEAA
Pennsylvania Higher Education Assistance Agency

Ready to Succeed Scholarship Program

Program Overview

September 2020
PA State Grant & Special Programs

Agenda

Review program eligibility and processing steps from nomination all the way through reconciliation

- Introductions
- Presentation
  - RTSS Basics
  - Certification
  - Disbursement & Reconciliation
- Reminders & Wrap Up

RTSS Basics

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Background

- Created by the Pennsylvania General Assembly in 2014
  - Administered by PHEAA with support from the Pennsylvania Department of Education (PDE)
- Recognized that many middle-income families did not meet traditional PA State Grant 'need' requirement
  - Targets middle-income students that could still benefit from free financial aid
  - Program aims to reduce student loan indebtedness
- Funded via an annual Commonwealth appropriation
  - 2020-21 Appropriation: $5.5 million

Institution Requirements

- To participate, institutions must:
  - Be approved for participation in the PA State Grant Program as of June 30
  - Be headquartered and domiciled (HQD) with their principal location in Pennsylvania
    - If owned by a parent company, the parent company must also be HQD in Pennsylvania
  - Submit a one-time application by the deadline
    - Branch campuses must be approved separately unless institution is processed as a “roll-up school”
  - Notify PHEAA in a timely manner of any institutional (e.g., ownership, location, name, etc.) changes

Institution Requirements

- Terms must comply with requirements for both minimum and maximum term length and term start date ranges as outlined in PA State Grant Handbook
- Must maintain financial records that reflect all RTSS transactions
  - Any account containing RTSS funds must have the term “RTSS” in the name of the account

Student Eligibility

- RTSS students must meet PA State Grant eligibility requirements and:
  - Have an annual family income of $110,000 or lower
    - PA State Grant Reject E and Reject M students can be considered
  - Have completed at least one academic year
  - Achieved a minimum cumulative GPA of **3.25**
- Students may receive RTSS in conjunction with PA State Grant
  - Minimum award is $500
  - PA State Grant must be less than $1,501
- If all eligibility requirements not met, student is ineligible
- Students will follow the standard PA State Grant Program application process

Processing Cycle

RTSS Candidates	Nomination	Eligibility Run	Certification Run	Award Certification	Monthly Disbursement
PHEAA reviews complete PA State Grant records and provides a list of potentially eligible students	School reviews list of candidates and nominates (or excludes) based on GPA and Academic Level criteria	On Wednesdays, PHEAA performs additional checks on nominated students and either awards or rejects	After eligibility, PHEAA conducts a process that presents schools with lists of awarded students	After reviewing awards, schools certify student eligibility and prepare to receive funds	PHEAA disburses funds for schools that have certified awards for eligible students

Nominations

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Nominations

- Work only from the list of student candidates
  - Candidates screened for PA State Grant eligibility and annual household income
- Confirm satisfactory Academic Progress
  - Comparison of the number of credits earned to the credits needed to meet the RTSS (or PA State Grant) enrollment minimums during the last award cycle
  - Include Reject E and Reject M students
- Submit enrollment and eligibility updates (e.g., not enrolled) before reporting any RTSS data (e.g., exclusions, GPA, etc.)

Nominations

- Nominate all eligible students for **all current and future terms** prior to the first eligibility run of the award year
  - Nomination period for initial eligibility run is mid-September through mid-October
    - Initial eligibility run scheduled for October 14, 2020
  - Nominations can be submitted after this initial period
  - Awards issued on first come, first served basis
- Do not report GPA or Academic Level for candidates who do not meet all eligibility requirements
  - Exclude enrolled but ineligible students

Academic Achievement

- GPA achievement measured using a snapshot
- Based upon when school checks PA State Grant satisfactory Academic Progress

PA State Grant Yearly Cycle Options					School Checks GPA and RTSS Snapshot Taken
Summer Header	Summer	Fall	Winter (if applicable)	Spring	End of Spring term
Summer Trailer	Fall	Winter (if applicable)	Spring	Summer	End of Summer term

- Cumulative GPA cannot be rounded
- Remedial credits may be applied towards GPA
- Do not report fluctuations after snapshot is taken

Academic Level

- Based upon when school checks PA State Grant satisfactory Academic Progress
- May include all college credits on the student's transcript
  - Exclude remedial credits
- Academic Level after second-year status is institutionally defined
- Fluctuations after the snapshot should not be reported

Transfer Students

- May be considered for RTSS eligibility
- GPA and Academic Level criteria based on when student begins at your institution

Prior Transfer

- Use the cumulative GPA and credits earned at your institution if established when your school checks progress

New Year Transfer

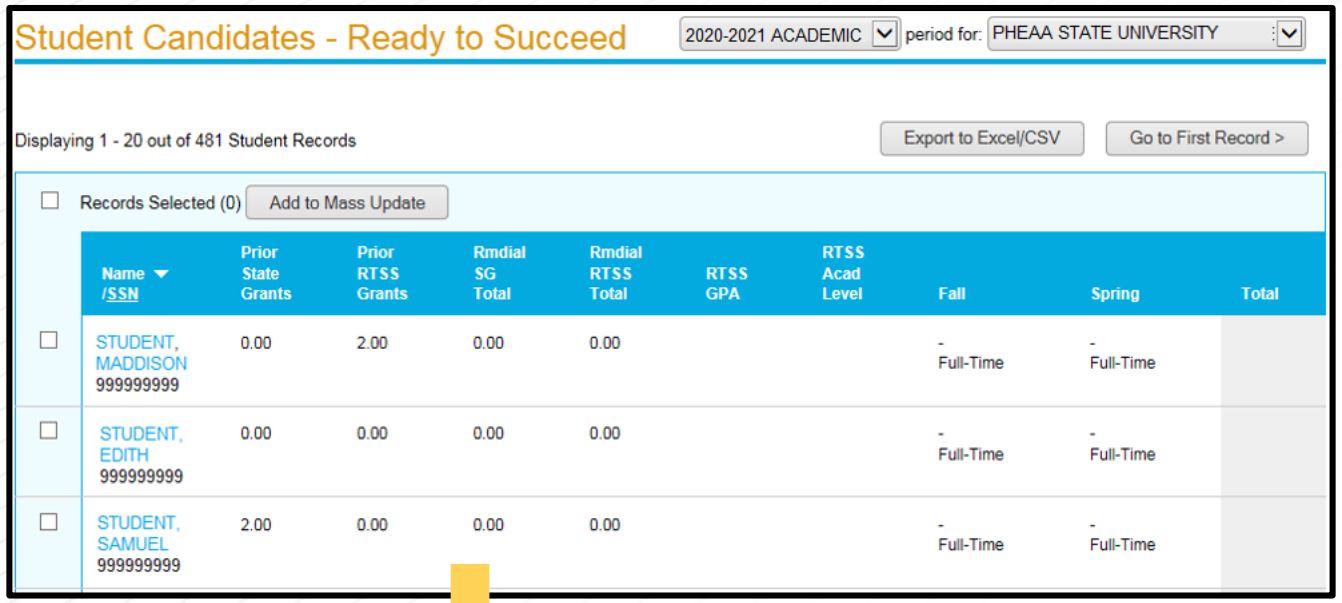
- Use the lowest cumulative GPA from all prior institutions
- Student is **not** eligible if any prior cumulative GPA is below 3.25

Mid-Year Transfer

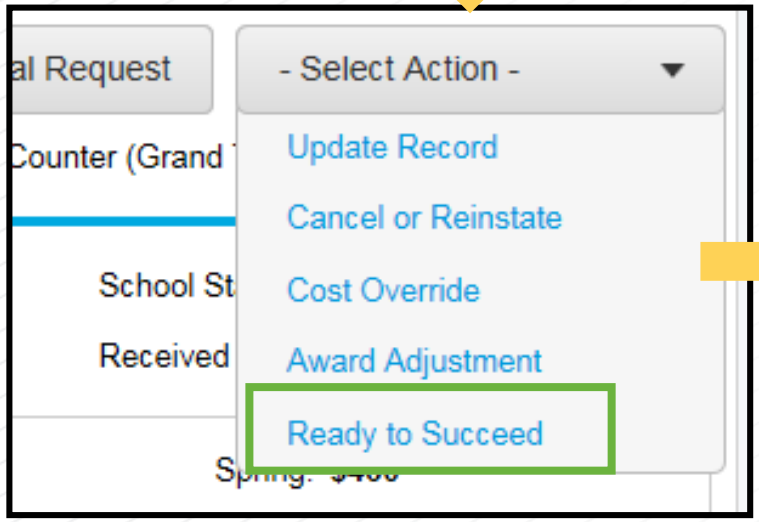
- Retain RTSS eligibility if nominated by previous institution
  - May lose eligibility as a result of Academic Level or PA State Grant eligibility changes

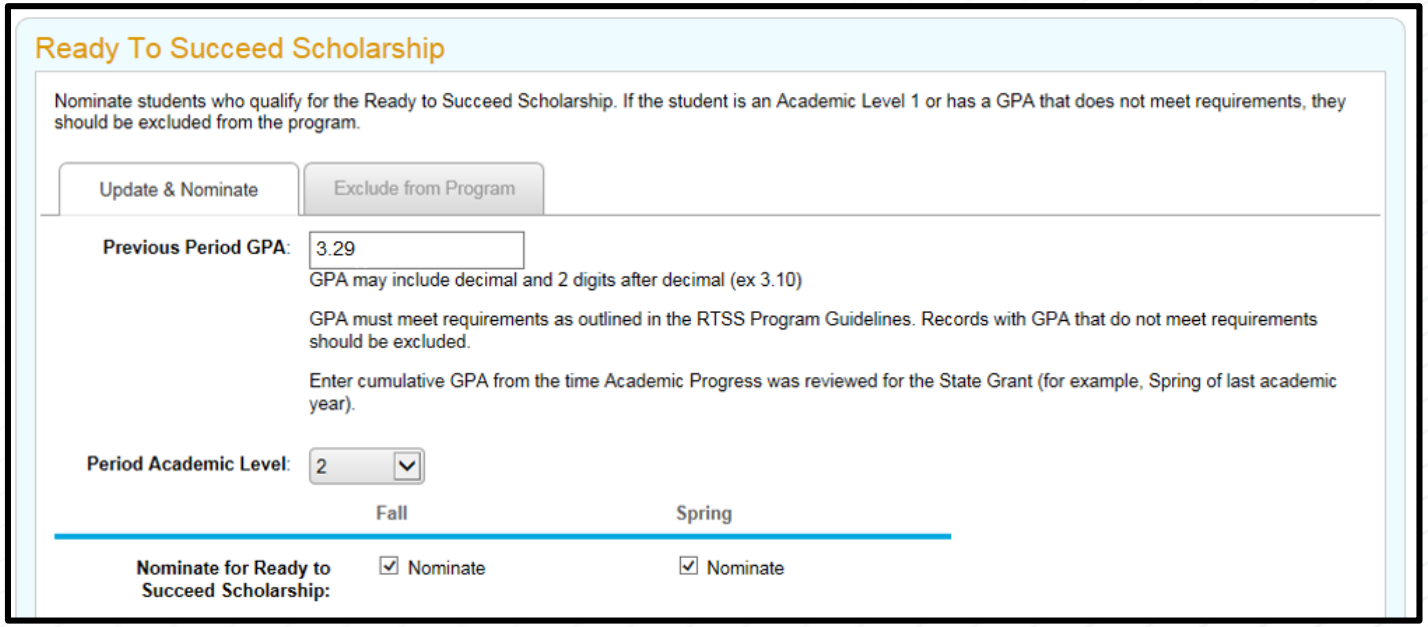
Nominations

Single Student Update



1. Select a student from the candidate listing
2. Choose “Ready to Succeed” from the Update Record drop down
3. Report GPA and Academic Level and then nominate for all applicable terms

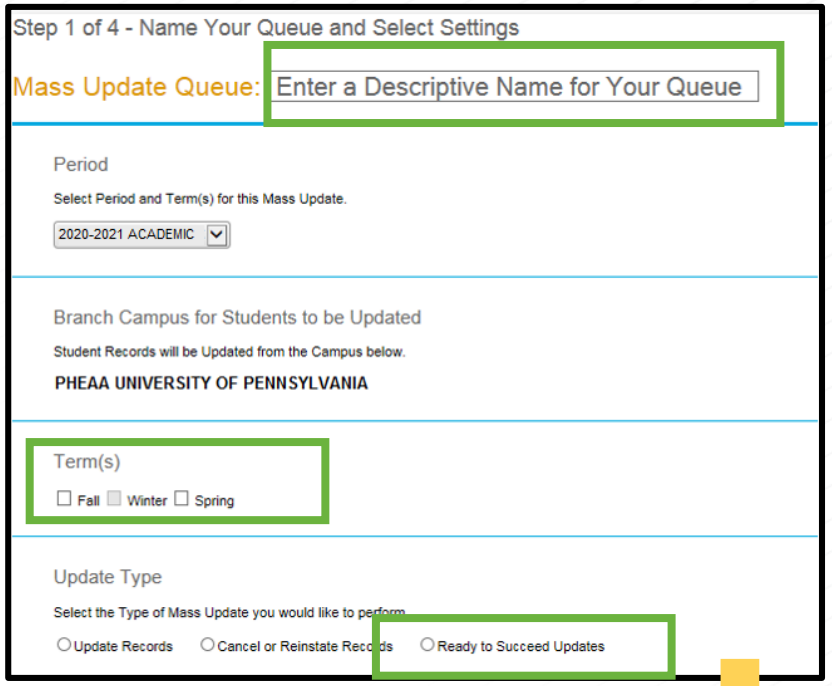


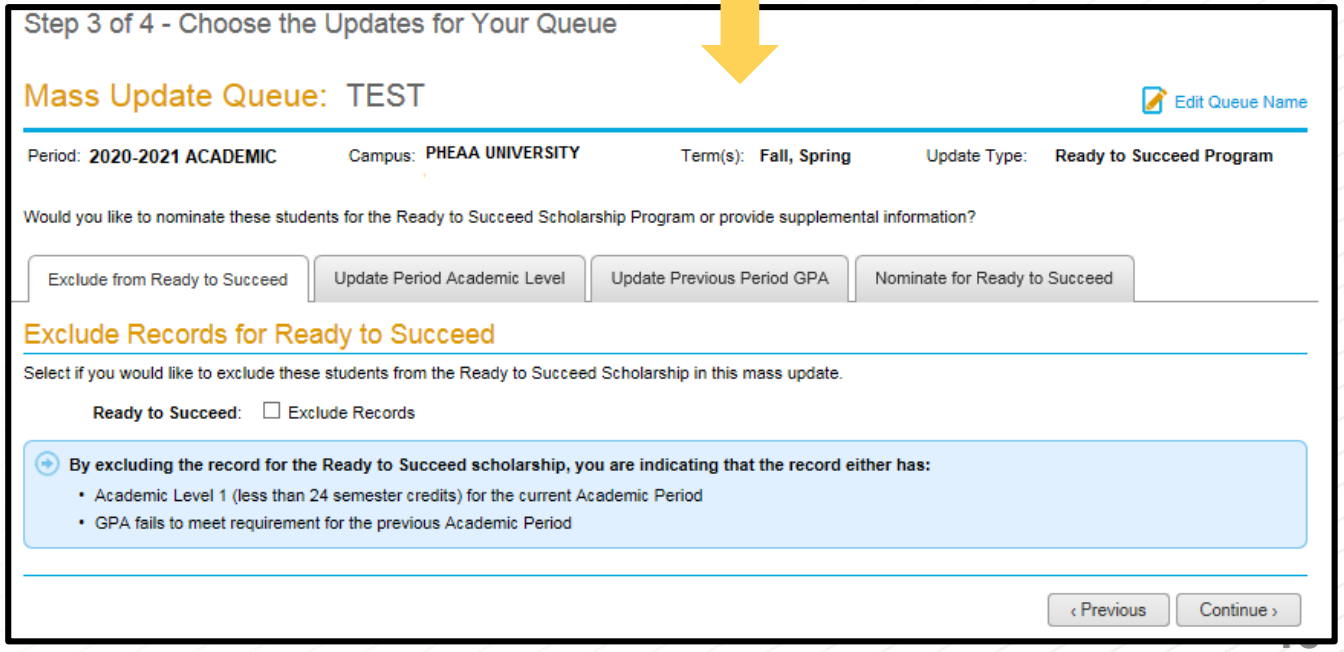


Nominations

Mass Update

1. Name the file, select the terms, and choose “Ready to Succeed Updates”
2. Enter SSNs or Account Numbers for students
3. Update same criteria for multiple students at one time (e.g., exclusions, nominations, GPA, etc.)





RTSS Partner Interface User Guide available on PHEAA.org/training!

Nominations

Examples

Student	Situation*	RTSS Eligible	Action
"Leslie Knope"	Student attended three institutions before enrolling at PHEAA Community College for the Fall 2020 term. Leslie's prior cumulative GPA's were 3.249, 3.71, and 3.84. Leslie will transfer in 52 credits.	No	Exclude from current year RTSS participation as Leslie has a prior cumulative GPA that was below the 3.25 minimum requirement.
"Ann Perkins"	Earned a 3.43 cumulative GPA and is considered an Academic Level 3 when Academic Progress is reviewed. Ann enrolled in the Summer 2020 term and now has a cumulative GPA of 3.20.	Yes	Nominate for all applicable terms as Ann met the Academic Level and GPA requirements when the snapshot was taken after the spring term.
"April Ludgate"	Received two full-time PA State Grant awards in the prior academic year and earned 14 credits in fall and 9 credits in spring. April also earned 3 credits in the summer and has a cumulative GPA of 3.89.	No	Exclude from current year RTSS participation. Student did not meet the Academic Level 2 requirement by the time Academic Progress was checked.

**Assumes progress is checked after spring.*

Certification

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Eligibility Run

- Eligibility Run performs additional checks and sorts by first come, first served program criterion based upon the FAFSA® completion date
  - Process will award the student or assign a reject reason
    - Reject N used when program funds have been exhausted
    - Students notified of RTSS eligibility via Account Access
  - Eligibility Runs scheduled weekly for award year
    - RTSS awards only available for the academic year; no summer term awards
- Award increases or reinstatements evaluated during Eligibility Runs
  - Example:

Student	RTSS Award Fluctuation	Cause of Award Change	Record Before Change	Record After Change	Eligibility Run Results
"Ron Swanson"	Award increase	Enrollment status increased to full-time	Half-time fall award for $500	No immediate change. The record will continue to display as $500 for the half-time award.	If funds are available, the award will be updated. If no funds, award will remain the same and be evaluated in future runs.

Certification

- Student-level certification required for nominated and awarded RTSS students before disbursement occurs
  - Certification Run provides schools with a list of nominated and awarded students
- Certification window opens based upon institution's term start dates
- Review and update eligibility prior to certifying an award
  - Withhold certification for students undergoing a review
  - Withdrawal timing may impact award certification

Example: *Student "Andy Dwyer" is eligible for PA State Grant and RTSS. Andy fully withdraws from PHEAA Tech after being nominated for a RTSS award. PHEAA Tech has credited the PA State Grant award but the RTSS award has not be certified. After Andy's withdraw, the RTSS award should be cancelled and not certified. The withdrawal procedures would only apply to the PA State Grant award.*

Certification

- Changes to student eligibility after the award has been certified will require recertification of the award
  - Occurs when award amount increases, decreases, or is reinstated
  - Moves back to “Needs Certification” during the next certification batch process
- Awards certified after the close of the payment window will be included with the next disbursement
- PHEAA may cancel pending awards after 60 days
  - Use School Portal to track students pending certification

Disbursement & Reconciliation

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Disbursements

- Prerequisites:
  1. Students must be nominated for any eligible terms
  2. Nominated students must have been processed through an Eligibility Run
  3. Student awards must have been certified before the monthly window closes

- All funds are disbursed via EFT
  - Funds available in the school account 14 business days after disbursement generated
  - May credit awards once disbursement is initiated
- Rosters are available via Partner Interface, PageCenter, and Disbursement Transmissions
- Do not certify term disbursement rosters
  - Multiple term disbursement rosters may be received
  - Only reconciliation roster should be certified and returned

Crediting

- Preliminary credits must be adjusted or removed if student's eligibility changes
- Must occur on a term-by-term basis and after the certification of all eligibility requirements
  - Date of award crediting, term, year, and amount must be documented in student's account

Excess Cash

- Created when student cancellations or adjustments are performed
- Institution may:
  - Refund excess cash to PHEAA
  - Apply excess funds disbursed for a student to the **same student's** account for a subsequent term
- Institution may not:
  - Net funds between RTSS and PA State Grant programs
  - Offset excess cash between RTSS-eligible students

Reconciliation

- Represents the academic year closeout
  - Final chance to ensure PHEAA and school records match
  - “Balance Due PHEAA” and “Balance Due School” both equaling zero alone does not equate to student-level reconciliation
- Reconciliation Roster generation begins in May
  - Certify and return rosters within 30 days of receipt
  - EFT may accompany roster if funds due institution
  - Additional rosters will be automatically generated by PHEAA or may be requested by the institution
- Outstanding rosters or refunds will result in a disbursement hold
- Best practices and examples available in RTSS Guidelines

Refunds

- Refunds may be required as a result of an overaward/overpayment or Program Review finding
- No PHEAA Collectables
- View outstanding student-level refunds in School Portal
- Refund Group must be created for refunds due PHEAA
  - Group may be modified up until PHEAA processes the invoice and funds
  - Track refund receipt via OC/WebConnect

Disbursements

Use FG3S to verify **disbursement amounts**, anticipated **EFT dates**, or **reconciliation roster status**

```
FG3S I 2020;A;S;00999900;01;0000                          RTSS COLLEGE DISBURSEMENT
OE CODE       00999900 01    APP YEAR 2020-21 SCROLLING  1 OF  1 PAGE  1 OF  4
PHEAA CODE    000000                    ACAD YEAR            LAST USER P000001
THE PHEAA STATE UNIVERSITY OF PENNSYLVANIA                 LAST UPDATE 06/01/2021
ACADEMIC SCHEDULE S SEMESTER
TERM BEGIN DATES - FALL 08/26/2020                         SPRING 01/21/2021
POSS DISB  DATES - FALL 08/26/2020                         SPRING 01/21/2021

TYPE          DISB AMOUNT     (PCT)     DATE PAID    ROSTER DATE    STATUS/DATE
5 RECON$    $           0     (100%)    06/14/2021    05/25/2020     C   06/01/2021
5 RECON$    $           0     (100%)    05/21/2021    05/03/2021     C   05/17/2021
3 SPRING    $     123,475     (100%)    03/24/2021    03/04/2021     P   03/04/2021
2 WTR DI    $       1,818     (100%)    12/24/2020    12/04/2020     P   12/04/2020
1 FALL D    $     103,046     (100%)    11/20/2020    10/30/2020     P   10/30/2020

   F1=HELP      F2=SET2      F3=EXIT      F4=RECON     F5=RFR       F6=FG3M
   F7=PRVDISB   F8=NXTDISB   F9=PRT       F10=PAGEBK   F11=PAGEFWD  F12=CAN
```

Reconciliation

```
FG3S I 2020;A;S;00999900;01;0000            RTSS COLLEGE RECONCILIATION DISPLAY
OE CODE       00999900 01    APP YEAR 2020-21                      PAGE  4 OF  4
PHEAA CODE    000000                    ACAD YEAR              LAST USER FGXVA
THE PHEAA STATE UNIVERSITY OF PENNSYLVANIA                   LAST UPDATE 09/09/2021

                          RECONCILIATION DETAIL SUMMARY

 TOTAL AWARDS                      $     318,205  REMAINING FUNDS DUE
                                                   NEEDS CERTIFIED $            0
 ACTUAL DISBURSED AMOUNT           $     320,229   CERTIFIED       $            0
                                                   TOTAL           $            0
 TOTAL COLLEGE REFUND              $       2,024
 TOTAL PROGRAM REVIEW REFUND       $           0  OUTSTANDING REFUNDS
                                                   TOTAL           $            0

                                                  CLEAN ROSTER NEEDED  NO

                                                  RECONCILED YES    09/09/2021


    F1=HELP      F2=FG3Y      F3=EXIT      F4=SUMMARY   F5=RFR       F6=FG3M
    F7=          F8=          F9=PRT       F10=PAGEBK   F11=PAGEFWD  F12=CAN
```

Use FG3S to identify **outstanding refunds**, if a **clean roster** is needed, or if your school is considered **reconciled**

Reminders & Wrap-Up

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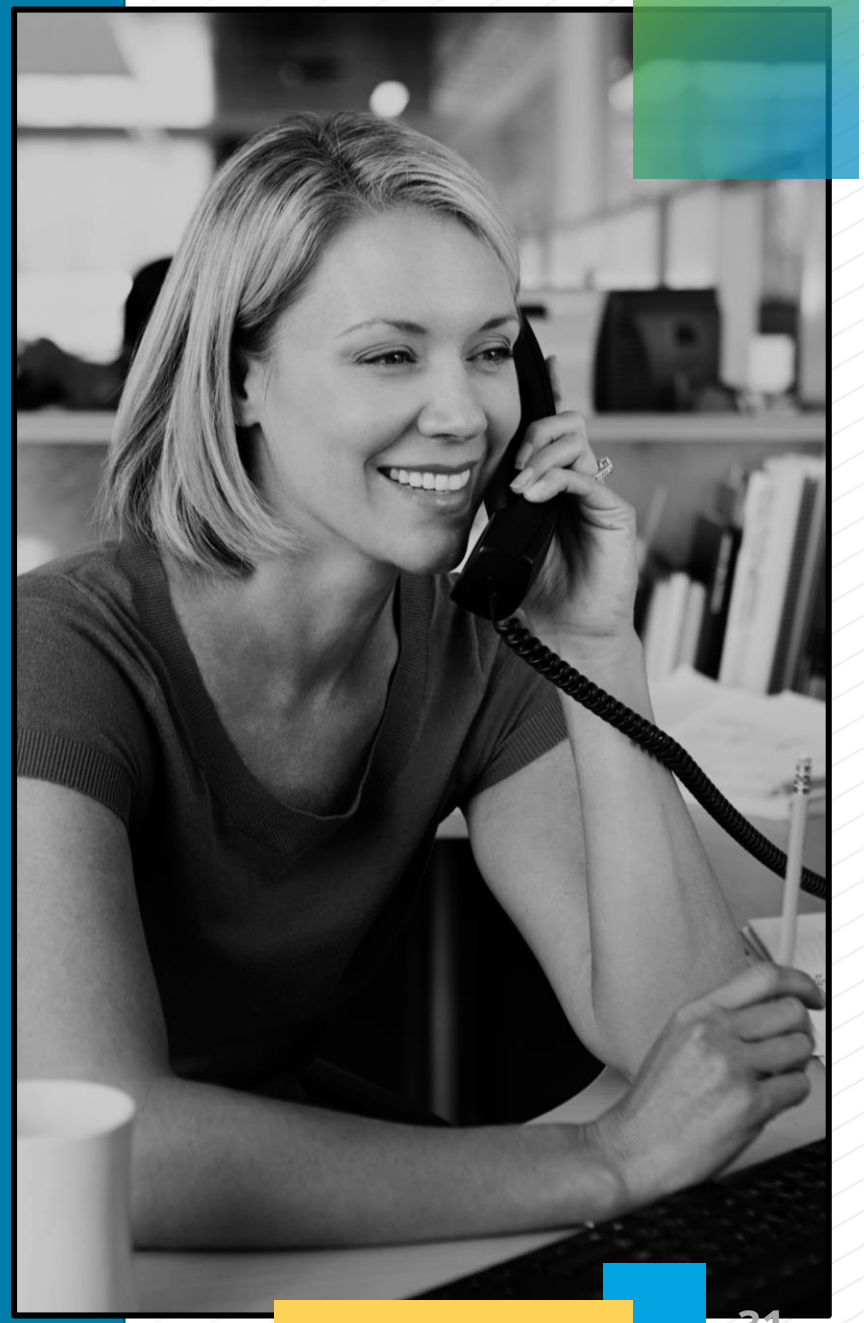
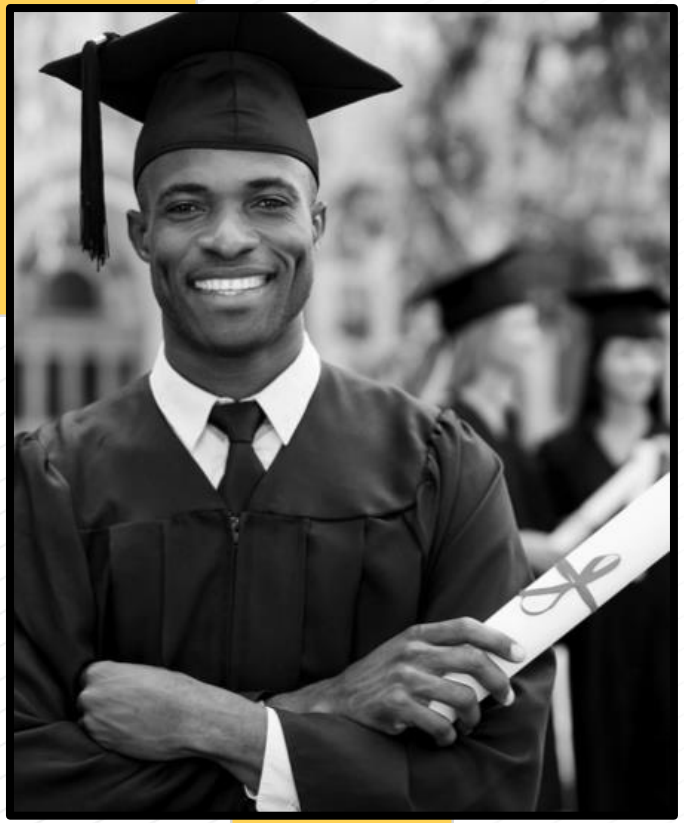
Reminders

- Nominate all eligible students for all eligible terms in time for the initial eligibility run
  - Awards not guaranteed for students nominated after initial run
- Submit timely student enrollment and eligibility updates via School Portal or Certification Transmissions
- Eligibility, Certification, and Disbursement Schedule published in Document Library
  - Eligibility runs weekly
  - Awards must be certified before monthly certification window closes to be included in monthly disbursement



Reminders



- Students whose family income has decreased in comparison to the original income reported can contact PHEAA
- Retain RTSS records for at least 5 years for Program Review purposes
- Update your institution's RTSS contact with PHEAA via email to rtss@pheaa.org
- No institutional outcome reporting
  - Encourage awarded students to complete RTSS Survey when released in Spring 2021

Join Us Next Time!

- Wednesday October 21, 2020
  - Fostering Independence Tuition Waiver (FosterEd) Program

    Waiver Review & Certification
- Wednesday November 18, 2020
  - Pennsylvania Targeted Industry Program (PA-TIP)

    Award Certification & Disbursement

Session descriptions and registration information available via PHEAA.org/SGSPtraining.

Resources

- **Web:**
  - PHEAA.org
  - Alec
- **SGSP Staff:**
  - 1-800-443-0646
  - rtss@pheaa.org
- **Events:**
  - Webinar Series
  - Conferences/Workshops
- **Print Materials:**
  - Student-facing
  - School-facing

Get Social w/ PHEAA

PHEAA

American Education Services

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@aesSuccessorg

@FedLoan Servicing

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@PHEAAStudentAid

PHEAA - Creating affordable access to higher education.

Thank You!

PHEAA

Pennsylvania Higher Education Assistance Agency