



2020-21 PROGRAM GUIDELINES

PA State Work-Study Program (SWSP)



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2020-21 Program Guidelines

PA State Work-Study Program (SWSP)

Introduction

The Pennsylvania Higher Education Assistance Agency (PHEAA)-administered PA State Work-Study Program (SWSP) is made possible through General Assembly funding and with the cooperation of Pennsylvania postsecondary institutions and employers. The purpose of SWSP is to provide students with an opportunity to gain career-related work experience and, at the same time, earn funds to assist them in meeting today's costs for postsecondary education.

The 2020-21 Program Guidelines provide participating schools and employers with the requirements for participation and administration of SWSP funds for this program year. PHEAA will publish updates to this document if additional changes become necessary. Any deviation from these guidelines could result in the loss of approval to participate in the program as notified in writing by PHEAA.

I. Employer Participation

To participate in SWSP during the 2020-21 Program Year, the employer must meet the following criteria:

A. Employer Eligibility

Be a Federal, State, or Local Government Agency; Public School District; Private Nonprofit Organization; Public Nonprofit Organization; For-Profit Organization; or Postsecondary Institution.

B. Employer Approval for Participation

Employers who wish to receive PHEAA approval to participate in the SWSP Program must submit the documents outlined below.

i. PHEAA Work-Study Employer Application & Renewal

a. New Employers

Employers who did not participate in the 2019-20 Academic Year must complete and submit the *PHEAA State Work-Study Employer Application* (available online at [PHEAA.org/employer](https://www.pheaa.org/employer)).

b. Renewal Employers

Employers previously approved for the 2019-20 Academic Year must complete and submit the 2020-21 Program Year Work-Study Employer Renewal by the term deadline date. This was provided to employers in March 2020 via PageCenter ("WORKSTDY" application, pageset 'MFJGR20).

c. Summer Term Employers

Employers who wish to participate in the 2021 Summer term must complete the *2021-22 Renewal Form*, which will be generated in March of 2021.

d. Deadlines

The employer must submit the application or renewal form by the following deadline dates in order to participate in the corresponding SWSP term:

- 2020-21 Academic Year or 2020 Fall Term only: November 1, 2020.
- 2021 Spring term only: December 9, 2020.
- 2021 Summer term: June 30, 2021.

ii. PA State Work-Study Program (SWSP) Employer Agreement

All employers must complete a one-time *PA State Work-Study Program (SWSP) Employer Agreement*. Upon processing of the employer's first SWSP student application, PHEAA will provide the employer with this agreement to complete. PHEAA will retain this agreement in its permanent files and will not require the employer to execute a new agreement except in rare cases, which may require a new agreement, such as a change in EIN. Employers are also required to notify PHEAA in writing if there is a change regarding status as a nonprofit/for-profit organization or status as a public/private organization. All changes may be sent to swsp@pheaa.org.

iii. ACH Authorization Agreement

All SWSP funds are disbursed to a participating institution via electronic funds transfer (EFT), which requires the institution to have an approved PHEAA Automated Clearing House (ACH) Authorization Agreement on file.

The PHEAA ACH Authorization Agreement can be requested by contacting PHEAA Financial Management at 717-720-2168 or via email at fmftadmin@pheaa.org.

iv. Business Partner Access Management System (BPAMS)

All employers must have a signed and executed *Remote Access Agreement (RAA) and Authoritative Source (AS) Form* on file and are required to maintain access requests for their users. Questions regarding the RAA can be directed to swsp@pheaa.org.

Once processed, the RAA and AS grant the employer access to PageCenter, OC/WebConnect (Matching Funds Online System), and MyFileGateway. For information on how to access and use these PHEAA systems, please visit [PHEAA.org/training](https://pheaa.org/training). Specific documents can be found by clicking 'State Grant and Special Program Resources' then 'SGSP General Resource' or 'State Work-Study Resources.'

C. Employer Expectations

The following are employer expectations:

1. Ensure that employment or work conditions comply with all federal, state, and local laws.
2. Have established payroll procedures and add the approved SWSP student to the payroll.
3. Pay 100 percent of the student's earnings for hours worked minus federal, state, and local taxes as well as all required associated payroll costs, including Workers' Compensation.
4. If hours worked exceed the student's approved maximum weekly hours for this program, the employer must ensure the student is compensated in full.
5. The employer may not displace regular employees (including those on lay-off or on strike), or interfere with existing contracts via the placement of a SWSP student.

6. SWSP jobs may not include any political activity. Projects, assignments, activities, etc., involving lobbying are prohibited and cannot be assigned to SWSP students. **Businesses involved in lobbying may not be approved.**
7. SWSP jobs may not involve construction or maintenance of any part of a building used for religious worship or sectarian instruction.
8. SWSP jobs must be in the public interest and not limited to the internal interests of the organization.
 - Work is in the public interest if the work performed contributes to the general welfare of the community, rather than work performed for a particular interest or group.
 - Work is not in the public interest if it primarily benefits the members of an organization that has membership limits, such as a credit union, a fraternal or religious order, or a cooperative.

For example, an organization such as a private nonprofit civic club may employ a student if the student's work is for the club's community drive to benefiting the homeless. If the student's work is limited to the internal interests of the club, such as a campaign for membership, the work benefits a particular group and is not in the public interest.

9. The employer must ensure no student is denied work or subjected to different treatment on the grounds of race, color, religion, creed, ancestry, age (40 or over), gender, national origin, disability, genetic information, use of a guide or support animal because of blindness, deafness or physical handicap of the user or because the user is a handler or trainer of support or guide animals, or any other factor protected by law.

II. Student Eligibility

To participate in SWSP, the student must meet the following criteria:

- Submit a SWSP student application by the appropriate deadline date (see Section IV 'Student Application/ Placement Process').
- Be a Pennsylvania resident.
- Be enrolled on at least a half-time basis (6 or more credits) in a PA State Grant approved higher education institution, in a program of study of at least two academic years in length.
- Be eligible for a PA State Grant, if an undergraduate student, or have unmet financial need verified by the student's Financial Aid Office if a graduate student.
- Be able to benefit from a career-related work experience.
- Not be in default or pending default on an education loan.

III. Student Hiring Process

A. Student Placement & Application

Students who wish to participate in SWSP must first locate an eligible employer. To find an eligible employer, students can:

- Contact their postsecondary institution's Financial Aid Office to inquire if the school itself is an approved SWSP employer and has available SWSP jobs.
- Contact another postsecondary institution's financial aid office to inquire if the school is an approved SWSP employer and has available SWSP jobs. The student may work at a postsecondary institution the student is not attending.
- Search for an approved employer online at [PHEAA.org/swsp-jobsearch](https://www.pheaa.org/swsp-jobsearch).
- Locate an employer not currently approved for SWSP, but willing and eligible to participate. Important information for prospective employers and schools is available at [PHEAA.org/employer](https://www.pheaa.org/employer).

Once the student has located a potential employer, the student must contact the employer to set up an interview. A permanent, non-SWSP employee at the employer is required to interview potential SWSP students.

Upon completion of the interview process, if the employer wishes to hire the student for the academic year through SWSP then the student and employer must complete the *2020-21 Academic Year SWSP Student Application/Placement Form*.

If the student intends to work during the Summer 2021 term, the *2020-21 Summer SWSP Student Application/Placement Form* must be submitted. The summer application will be available online at [PHEAA.org/workstudy](https://pheaa.org/workstudy) in early March 2021.

- The student must complete the 'STUDENT DATA' section (page 1) and the employer must complete the 'EMPLOYER DATA' section (page 2). The completed SWSP student application must then be submitted PHEAA via one of the following two methods:
 - All SWSP employers with Matching Funds system access are required to process student SWSP applications via the PHEAA online work-study system.
 - A new employer without system access may submit the *SWSP Student Application-Placement Form* via fax to 717-720-3786, email to swsp@pheaa.org, or mail to PHEAA, PA State Work-Study Program, PA State Grant and Special Programs, P.O. Box 8157, Harrisburg, PA 17105-8157.

Note: Employers who submit SWSP student applications via the online work-study system should not mail a hard copy to PHEAA.

B. Employer Responsibilities

The employer must provide a job description for each SWSP position to ensure that the employer is placing the SWSP applicant in a career-related position.

PHEAA will not approve a student to work prior to the date we receive the student application or the date the employer enters the application into the online work-study system.

PHEAA will not reimburse wages earned for any student prior to that student's participation approval. The employer can verify a student's approval via the following methods:

- The SWSP Applicant Status Listing (Pageset: MFJIF10)
- A copy of the student's SWSP Placement/Approval document (notification letter)
- The SWSP student application display (MF04 transaction) in the PHEAA online work-study system (for employers with online access)

The student's supervisor must be a non-SWSP employee of the organization and must ensure that all assignments, tasks, and projects are consistent with the student's job description. A family member must not be assigned to supervise a related SWSP student.

The supervisor must ensure each student is advised of the following at the beginning of each term via a brief orientation or correspondence:

- Hourly rate of pay (cannot be less than the prevailing minimum wage)
- Employment start and end dates
- Scheduled work hours (not to exceed 40 hours per week) the student is expected to work
- Job description and associated responsibilities
- Pay dates
- Safety rules

If the employer leaves a SWSP student alone on the premises in charge of company property, or sends the student on assignment, the student must have the ability to contact a regular full-time employee of the organization. The employer must provide the student with procedures and information required to contact the full-time employee.

If the employer terminates the student's employment prior to the expected end date provided on the original *SWSP Student Application/Placement Form* or entered into the online work-study system, the employer must immediately contact PHEAA to provide a work end date.

C. Program Calendar

i. Application Deadlines

The employer must submit either the online SWSP student application or the completed *SWSP Student Application/Placement Form* to PHEAA on or before the following application filing deadline dates:

- 2020-21 Academic Year or Fall term only: November 1, 2020
- 2020-21 Spring term only: March 1, 2021
- 2021 Summer term: June 30, 2021

ii. Term Dates

Start and end dates for the 2020-21 SWSP terms are as follows:

- 2020-21 Academic Year: August 10, 2020 – May 15, 2021
- 2020-21 Spring term only: December 7, 2020 – May 15, 2021
- 2021 Summer term: May 2, 2021 – August 14, 2021

IV. Student Earnings & Award Determination Process

PHEAA is responsible for confirming the student meets all SWSP eligibility requirements at the time we process the SWSP student application (see Section IV Application Process).

If a student is eligible for SWSP at the time of application, the student will retain eligibility through the end employment date listed on that student's application. However, students who are no longer enrolled in postsecondary education are not eligible for continued SWSP participation, and their eligibility will cease the date we are notified. Employers are required to discontinue reporting of a student's hours for reimbursement and notify PHEAA upon receiving notification that the student has ceased enrollment at a postsecondary institution.

PHEAA calculates a student's SWSP award amount as the maximum amount of student earnings eligible for a percentage match per term at the time of application processing. Applications must be complete in order to determine the student's award amount. The SWSP award amount is determined by the following application data:

- The work start and end dates
- The approved hourly pay rate
- The maximum number of weekly hours the student may work

The maximum SWSP student earnings eligible for a percentage match for the 2020-21 Academic Year is \$5,000 and the 2021 Summer term is \$5,000. Please note that this award amount is not the total amount that the employer can receive in reimbursement per student; the amount available for reimbursement is indicated in the last two columns of the scenarios below (see Section VI Reimbursement Process).

STUDENT AWARD SCENARIOS

	Maximum Weekly Hours	Number of Weeks in Employment Term	Pay Rate	State Work-Study Award	Students Actual Earnings	Maximum Nonprofit Reimbursement	Maximum For-profit Reimbursement
Student A	20	13	\$9.00	\$2,340	\$2,340	\$1,170	\$936
Student B	30	14	\$7.25	\$3,045	\$3,045	\$1,522	\$1,218
Student C	40	14	\$10.00	\$5,000	\$5,600	\$2,500	\$2,000

PHEAA notifies SWSP applicants of their eligibility via mail upon processing of the completed SWSP application. Employers are notified of SWSP applicant eligibility via the SWSP Applicant Status Listing (see Appendix A) that is generated on a weekly basis (provided there are changes from the most recent listing). Employers may access this Applicant Status Listing via their PageCenter mailbox in the WORKSTDY application, pageset MFJIF10.

The SWSP Applicant Status Listing will contain the following information regarding the applicant(s):

- Last four digits of the student’s Social Security number (SSN)
- Name
- Address and phone number
- Program major
- Job code
- Application Status
- Date application received
- Employment start and end dates
- Maximum weekly hours
- Hourly rate
- Total SWSP award
- Expected graduation date
- Enrollment status

Employers should contact PHEAA if they believe any information provided on the SWSP Applicant Status Listing is incorrect.

V. Reimbursement Process

A. Reimbursement Percentage Determination

PHEAA will reimburse a SWSP employer a percentage of the student’s SWSP award for each dollar earned up to the award maximum. The reimbursement percentages are as follows:

REIMBURSEMENT PERCENTAGES

Employer Type	Reimbursement Rate
For-profit, Public or Private Business	40% of every dollar earned up to the student’s award amount
For-profit, Postsecondary Institutions	
Non-profit, Public or Private Organizations	50% of every dollar earned up to the student’s award amount
Government Agencies	
Non-profit, Postsecondary Institutions	
School Districts	

SWSP employers are required to pay students 100 percent of any earnings.

PHEAA reserves the right to limit employer reimbursement based on program funding. When necessary, employer allocations and reimbursement limits will be established. PHEAA will notify employers of the amount of their annual allocations (if applicable) prior to the start of the applicable period.

B. Reporting Hours Worked

The employer must submit weekly hours worked by SWSP students to PHEAA in order to receive reimbursement. Hours will only be accepted when reported after the hours are worked by the student. Hours reported more than 60 days after the work week end date will be considered late, and a PHEAA match may not be paid.

i. Reporting Methods

Employers may report hours worked to PHEAA by using one of the following formats:

- **Hours file submission:** Employers now have the option of reporting SWSP hours via My File Gateway (MFG), PHEAA's web-based file transfer system. Employers who opt to use this process will receive a weekly Excel file from PHEAA in their MFG mailbox every Monday that contains all students approved for SWSP participation. Employers will then update hours worked by each student and upload this file via their MFG mailbox for processing by PHEAA.
 - Employers interested in submitting hours via MFG must notify SWSP staff via email to request that the organization be set up to receive these weekly files.
- **Online System:** All approved employers for the Matching Funds Employer online access may enter the student's hours via the Matching Funds Online system.
- **SWSP Time Report:** Employers experiencing technical difficulties while reporting hours may submit their completed time report via fax to 717-720-3786, or via mail to PHEAA, PA State Work-Study Program, PA State Grant and Special Programs, P.O. Box 8157, Harrisburg, PA 17105-8157.

ii. Reporting Deadlines

The deadlines to submit 2020-21 SWSP student hours for reimbursement are as follows:

- 2020-21 Academic Year: July 5, 2021
- Summer 2021: October 10, 2021

C. Disbursement of Funds

PHEAA will schedule disbursements to occur monthly as close to the 15th as possible. When the 15th falls on a Friday, Saturday, Sunday, or holiday, disbursement will occur on the next available business day.

PHEAA will provide the employer with a SWSP Disbursement Roster with each disbursement. Employers must retrieve the disbursement roster from the employer's PageCenter mailbox ("WORKSTDY" application, pageset MFJGY200). Employers are required to certify the hours reported, make any necessary changes, and return a copy of the certified roster before PHEAA will disburse further funds.

Employers may return certified rosters via fax to 717-720-3786, or via mail to PHEAA, PA State Work-Study Program, PA State Grant and Special Programs, P.O. Box 8157, Harrisburg, PA 17105-8157.

PHEAA will notify employers with a SWSP Disbursement Roster more than 45 days past due. Employers will receive this notification through PageCenter ("WORKSTDY" application, pageset MFJH740). PHEAA will withhold all future disbursements until the employer returns the certified roster.

PHEAA reserved the right to hold disbursement to an employer for failure to comply with regulations set forth in these program guidelines.

i. Postsecondary Institutions

PHEAA reserves the right to hold disbursement to an institution that is closing or is on a restriction or oversight by the United States Department of Education (USDE) for participating in any Title IV program. We also reserve the right to hold any disbursements to an institution if the accrediting agency suspends or cancels approval for the school. Any questions regarding holding disbursement should be directed to PHEAA via email at swsp@pheaa.org. PHEAA will exercise this right to determine the eligibility of the institution to receive further funding.

VI. Appeal Process

An employer that wishes to appeal a decision by PHEAA concerning student eligibility or reimbursement must complete and submit the *SWSP Appeal Form*, which is available online at PHEAA.org/employer. Instructions on how to complete and submit the appeal are located on the form.

PHEAA will review the *SWSP Appeal Form* and notify the employer via email of the determination to approve or deny the appeal.

VII. Reconciliation Process

At the end of a term, a reconciliation roster will be generated for employers who are owed funds from PHEAA or owe PHEAA a SWSP refund. Employers who have not returned a previous roster, are not owed funds, or do not owe funds to PHEAA will not receive a reconciliation roster.

- The SWSP Reconciliation Roster provides the employer with a final opportunity to submit corrections to student work hours or changes to a student's status. The reconciliation roster must be completed and returned to PHEAA within 30 days of receipt. PHEAA will withhold all future disbursements until the employer returns the certified reconciliation roster and any refund due (if applicable).
- If the employer determines changes have occurred concerning student hours worked after they have completed reconciliation, the employer should contact SWSP staff.

VIII. Refund Process

If, after review of a SWSP disbursement or reconciliation roster, the employer determines that student hours previously reported are incorrect, the employer must correct the hours on the certified roster and return it to PHEAA. If the subsequent changes result in a decrease in the student's gross earnings, a refund will be due. PHEAA will notify all employers via email if a refund becomes due. Specific refund information can be found on the SWSP disbursement roster.

Refunds returned via ACH or wire transfer should be transferred to M & T Bank, PHEAA Operations, with a brief description of the payment reason and identifying the funds as "SWSP."

All SWSP refund payments made by check should be addressed to PHEAA, P.O. Box 64849, Baltimore, MD 21264-4849.

Note: All refunds must include a reference to the program and program year. Failure to include this information delays processing of the refund and may result in your institution being placed on a disbursement hold.

IX. Retention of Records & Program Reviews

In accordance with these Program Guidelines, SWSP employers are required to retain all records necessary for the certification of student eligibility and reimbursement of SWSP funds. Employers must retain copies of

all signed SWSP student applications and maintain copies of payroll records. **Employers must retain these records for at least 5 years** from the date the SWSP student application was completed or the date on which the institution completes certification of the disbursement roster.

Note: Employers who submit SWSP student applications via the online work-study system should not mail a hard copy to PHEAA.

These records may be requested and examined as part of the Program Review process of PA State Grant and Special Programs by PHEAA. Findings in the program review of the PA State Work-Study Program may result in refunds to PHEAA and/or be considered in combination with other PHEAA-administered program findings to determine if four or more administrative findings have been identified. Four or more administrative findings indicate a high error rate, and a follow-up program review for the next academic year will be scheduled.

Below are examples of the most common PA State Work-Study findings:

- Actual SWSP hours are less than reported to PHEAA
- Student not paid for all SWSP hours worked and reported to PHEAA
- SWSP hourly pay rate is less than the prevailing minimum wage
- SWSP hours submitted for student who is not eligible based on current enrollment status
- Inadequate payroll procedures
- Non-compliant supervision

For additional details on the PA State Grant and Special Programs program review process, please visit [PHEAA.org/ProgramReview](https://pheaa.org/ProgramReview).

Appendix A

SWSP Applicant Status Listing

SWSP Applicant Status Listing

SWSP CONTACT		STATE WORK STUDY PROGRAM					Page: 1
PHEAA UNIVERSITY		Pennsylvania Higher Education Assistance Agency					
GRANTS DEPARTMENT		2020-2120 ACADEMIC YEAR APPLICANT STATUS LISTING 09/05/2019					
1200 N 7TH STREET							
HARRISBURG, PA 17102							
Student Information	Job/Status	Start Date/ Ending Date	Weekly Hours	Hourly Rate	Total Award	Requested to Work Holiday Hours	
XXX-XX-1234 *COUGAR, JOHN 123 MAIN STREET HARRISBURG, PA 17105 Telephone: (717) 123-4567 Program Major: A01 - ACCOUNTING	B02 - ACCOUNTING ASST APPROVED	08/14/2020 05/05/2021	40.00	\$10.00	\$4,000	YES	
		Date App Recd: 08/01/2020	Expected Graduation Date: 05/2021		Enrollment Status: F - FULL-TIME		
XXX-XX-4567 *EAGLE, JANE M 1000 BROAD STREET PHILADELPHIA, PA 19146 Telephone: (215) 999-1976 Program Major: M04 - MARKETING	B57 - MARKETING NOT ELIGIBLE	08/13/2020 05/05/2021	30.00	\$09.50		NO	
		Date App Recd: 08/01/2020	Expected Graduation Date: 05/2021		Enrollment Status: F - FULL-TIME		
XXX-XX-9876 STEELER, TOM C 999 1 ST STREET PITTSBURGH, PA 15102 Telephone: (412) 999-9999 Program Major: P53 - PUBLIC RELATIONS	B20 - PUBLIC RELATIONS AST INCOMPLETE	01/01/2021 05/05/2021	35.00			YES	
		Date App Recd: 12/01/2020	Expected Graduation Date: 05/2021		Enrollment Status: H - HALF-TIME		
*= New Student or Change in Status							
Note: The hourly rates reflect the amount you, as the employer, have submitted for the student unless the hour rate exceeds \$25.00/hr. The SW hourly rate cap is \$25.00, meaning that you will only be reimbursed up to that maximum rate.							
In the event that an applicant is not employed by your organization, please notify PHEAA so that funds reserved for the individual may be released to provide awards for other applicants.							
Your organization/company is eligible to receive reimbursement for 50% of students' approved earnings.							
If you have any questions, please contact Special Programs associates at 1-800-443-0646, option 3, option 2, a private number reserved for the use of financial aid administrators and employers or you may email Matching Funds staff at swsp@pheaa.org .							

Created in 1963 by the Pennsylvania General Assembly, the Pennsylvania Higher Education Assistance Agency (PHEAA) has evolved into one of the nation's leading student aid organizations. Today PHEAA is a national provider of student financial services, serving millions of students and thousands of schools through its loan guaranty, loan servicing, financial aid processing, outreach, and other student aid programs.

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.

PHEAA conducts its student loan servicing operations nationally as FedLoan Servicing and American Education Services (AES). PHEAA operates its digital technology division as Avereo. For more information, visit PHEAA.org.

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