Pennsylvania National Guard Educational Assistance Program Certification Procedures

2021-22 Program Year

Jointly administered by the Department of Military & Veterans Affairs and the Pennsylvania Higher Education Assistance Agency
Document Changes

Document Version Control

<table>
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<th>Date</th>
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<tr>
<td>1.0</td>
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Introduction

The Pennsylvania Higher Education Assistance Agency (PHEAA) and the Pennsylvania Department of Military and Veteran Affairs (DMVA) jointly administer the PA National Guard Educational Assistance Program (EAP) for members of the Pennsylvania National Guard. This program provides financial assistance for eligible members of the Pennsylvania National Guard.

This document contains the new 2021-22 Pennsylvania National Guard Educational Assistance Program Certification Procedures. The certification procedures provide student eligibility criteria and related certification steps, in addition to disbursement and refund information. It is suggested that a copy of the 2021-22 EAP Certification Procedures be provided to those campus offices that actually post and credit the EAP funds after student eligibility has been certified. An electronic copy of the 2021-22 EAP Certification Procedures will be made available on the Document Library. Institutions must review the following guidelines in their entirety.

The 2021-22 Certification Procedures are designed to provide guidance for this program year. PHEAA will publish updates to this document if additional changes become necessary.

Access to PHEAA Documents & Reports

Business Partner Access Management System

Business Partner Access Management System (BPAMS) is the web interface designed to manage requests for access to PHEAA systems. With this application, business partners—their users, requesters, and their Authoritative Sources—can submit requests for access to PHEAA systems.

All institutions must have a signed and executed Remote Access Agreement (RAA) and Authoritative Source Form on file. Questions regarding the RAA can be directed to SGSP_BPAMS_Processing@pheaa.org.

All institutions are required to review and maintain access requests for their users.

Once processed, the forms grant access to the following PHEAA systems and School Portal (Alec) to include:

- **PageCenter** – PageCenter is a tool that provides schools with student status and disbursement roster reports and information via the internet in a secure environment. PageCenter is used for accessing information only and cannot be used to make changes electronically.
  - Training and reference material are available on the PA State Grant and Special Programs Resources and Training webpage at PHEAA.org.
  - Each institution will have its own mailbox within PageCenter, to which all reports and listings will be delivered. All EAP material will be available in the NGEAP application within that mailbox.
Document Library - Document Library is an online repository, storing, and organizing documents such as program guidelines, and memoranda.

My File Gateway - My File Gateway is a web-based product that allows for the sharing and transferring of files between PHEAA and the institution through secure mailboxes. Users can upload to and download from only those mailboxes to which they have access. When sending documents to PHEAA via My File Gateway, also email the program email box to alert staff the documents are available for download.

For additional information on how to access and use PHEAA systems, visit PHEAA.org/training. Specific documents can be found by clicking “State Grant and Special Program Resources” then, “General SGSP Resources.”

I. Institution Eligibility

To be eligible for EAP participation, institutions must:

- Be physically located in Pennsylvania
- Be United States Department of Education (ED) approved for participation in federal Title IV student aid programs
  - PHEAA may also approve a Pennsylvania institution upon request by the DMVA, if such institution is accredited by either a regionally or nationally recognized accreditation agency.

II. Institutional Changes

Institutions must report all approved changes to PHEAA to include status changes, name changes, and location or ownership changes by emailing eap@pheaa.org.

- You must report all approved institutional changes to PHEAA. PHEAA may need to assign your institution a new PHEAA code (where applicable) and may need to assign a PHEAA suffix to accompany your institution’s federal OE Code in order to begin processing your students under the institutional change.
  - Status Changes – Institutions are required to notify PHEAA in writing if there is a change regarding status as a non-profit/for-profit institution or status as a public/private institution.
  - 2-Year Degree-Granting Institutions – 2-year institutions that seek to offer 4-year degrees must be granted approvals through their accreditors and state licensing authority prior to seeking approval from the U.S. Department of Education (ED). Your institution must keep PHEAA current on this transition by calling 800-443-0646, Option 3 or emailing eap@pheaa.org.
  - Business, Trade, and Technical (BTT) Institutions – BTT institutions that seek a change in status to a 2-year private or 4-year degree-granting institution must seek approval through their accreditors and state licensing authority prior to seeking approval from ED. Your institution must keep PHEAA up to date on this transition by calling 800-443-0646, Option 3 or emailing eap@pheaa.org.

- New owners or new holding/controlling groups of an approved institution are required to notify PHEAA in writing within 30 days of the date of the ownership change. Be aware that a notice of change in ownership is required even in cases where the immediate owner remains unchanged. As a general guideline, if ED considers it to be a change of ownership, then it should be reported to PHEAA and PDE for evaluation.

III. Student Application

The EAP application is created by PHEAA in consultation with the DMVA and is updated annually. In addition to the EAP application, first-time EAP recipients must submit a Master Promissory Note (MPN) which commits recipients to repaying the EAP grant received if they do not fulfill the required 6-year Pennsylvania National Guard service commitment.

NOTE: EAP applicants are not required to apply for the PA State Grant Program.
Current 2021-22 applications are available at PHEAA.ORG/EAP. When members complete the required forms, these forms are reviewed by the PA National Guard Education Services Office. DMVA will review all data contained on the application for eligibility, completion, and accuracy. A new application is required for each school year. The EAP academic year starts with the fall term and ends with the following summer term.

The filing deadline is determined and enforced by the PA National Guard:

- The initial deadline to request funding for timely payment is June 30, 2021, and applications will be accepted until January 15, 2022, as funding allows. Applications received after January 15 will not be accepted, unless determined an exception by the DMVA.

IV. Student Eligibility Requirements

To be eligible for the EAP grant, applicants must (at a minimum):

- Sign a 6-year service agreement with the Pennsylvania National Guard
- Be enrolled in a degree-granting or certificate-granting curriculum, course of study, or training program required for entrance into a specific career at an approved Pennsylvania institution of higher learning, as determined by PHEAA
- Not be a recipient of a Reserve Officer Training Corps (ROTC) Line Scholarship
- Not have exceeded the maximum benefit allowed of 10 full-time semesters or the equivalent

V. Eligibility Notification

A. Student Notification

The DMVA identifies eligible applicants. PHEAA then determines if there is remaining eligibility for each applicant and mails an eligibility notice to each recipient. Denied EAP applications are not forwarded to PHEAA. Members will receive a denial notice via email and should reach out to the DMVA with any questions or concerns.

PHEAA maintains a portal interface that provides convenient online access for students to view their EAP eligibility status.

B. Award Listings

Schools are provided with enrollment and award eligibility information for each EAP recipient enrolled at the institution via an Award Listing (AL). The AL will be placed on PageCenter and labeled E21AWDLST, with a description of the report to the right of it that is “EAP Award Listing.” After the initial AL is placed on PageCenter, institutions will receive an updated AL every week.

The listing will also be a means for schools to notify PHEAA of changes to student records, including demographic information.

New recipients or those with an updated eligibility status will be displayed at the top of the AL. New recipients will have an asterisk (*) preceding their Social Security number and those with an updated status will be identified by a pound sign (#).

Questions regarding verification of a recipient's eligibility should be addressed with DMVA via email at patricia.m.troutman.nfg@mail.mil.
VI. Award Determination

A. Undergraduates

An undergraduate is a student who does not already possess a bachelor’s degree or its equivalent and is enrolled in an undergraduate program of study.

i. Full-time Students

A student must be enrolled for at least 12 credits a semester (1 to 11 semester credits or the equivalent) to receive a full-time EAP award. A full-time award is either the actual tuition charged plus technology fee (technology fee not to exceed $239 per semester) of the institution in which the student is enrolled, or the annual tuition rate charged to a full-time student at a member institution of the Pennsylvania State System of Higher Education (PASSHE) ($4,097 per semester), whichever is less. The per credit maximum is capped at $342 per credit. See “EAP Award Chart 2021-22 Academic Year” for term equivalents.

ii. Less-than-full-time Students

A less-than-full-time student enrolled in less than 12 credits a semester (or the equivalent) is considered a part-time student and is only eligible for a part-time award.

Part-time awards will be either the actual tuition charged for the part-time course of study plus technology fee (technology fee not to exceed $20 per credit) in which the student is enrolled, or the per-credit annual tuition rate charged to a student at a member institution of a PASSHE school ($342 per credit with a maximum of 11 credits per semester), whichever is less. See “EAP Award Chart 2021-22 Academic Year” for term equivalents.

B. Post-baccalaureate & Graduate Students

A graduate student is a student who already possesses a bachelor’s degree or its equivalent.

A student who already possesses a bachelor’s degree or its equivalent and is continuing their education can only be funded as a part-time student even if they are attending classes full time; maximum funding for these students is capped at 11 credits (or the equivalent).

Awards will be either the actual tuition charge for the part-time course of study plus technology fee (technology fee not to exceed $20 per credit) in which the student is enrolled, or the per-credit annual tuition rate charged to a student at a member institution of a PASSHE school ($342 per credit with a maximum of 11 credits per semester), whichever is less. See “EAP Award Chart 2021-22 Academic Year” for term equivalents.

NOTE: An EAP member's award amount should be calculated using the actual tuition rate plus technology fee charged to a Pennsylvania resident even if the member is not a PA resident.

Pennsylvania National Guard members attending a community college shall be charged the local sponsoring rate.
## EAP Award Chart 2021-22 Academic Year – Summer 2022

<table>
<thead>
<tr>
<th>School Type</th>
<th>Credits</th>
<th>Maximum Award Amount Per Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate Full Time</td>
<td>Semester (using semester credits)</td>
<td>12 or more (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Semester (using quarter credits)</td>
<td>18 or more (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Semester (using clock hours)</td>
<td>450 or more (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Quarter (using quarter credits)</td>
<td>12 or more (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Quarter (using semester credits)</td>
<td>8 or more (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Quarter (using clock hours)</td>
<td>300 or more (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Semester (using semester credits)</td>
<td>11 or less (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Semester (using quarter credits)</td>
<td>16.5 or less (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Semester (using clock hours)</td>
<td>412.5 or less (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Quarter (using quarter credits)</td>
<td>11 or less (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Quarter (using semester credits)</td>
<td>7.32 or less (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Quarter (using clock hours)</td>
<td>275 or less (or the equivalent)</td>
</tr>
<tr>
<td>Students Who Already Hold A Bachelor's Degree or Its Equivalent Full Time</td>
<td>N/A</td>
<td>See Part-time Schedule</td>
</tr>
<tr>
<td></td>
<td>Semester (using semester credits)</td>
<td>Capped at 11 or less (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Semester (using quarter credits)</td>
<td>Capped at 16.5 or less (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Semester (using clock hours)</td>
<td>Capped at 412.5 or less (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Quarter (using quarter credits)</td>
<td>Capped at 11 or less (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Quarter (using semester credits)</td>
<td>Capped at 7.32 or less (or the equivalent)</td>
</tr>
<tr>
<td></td>
<td>Quarter (using clock hours)</td>
<td>Capped at 275 or less (or the equivalent)</td>
</tr>
</tbody>
</table>

**NOTE:** Schools with irregular calendars may differ from the chart.

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* The Technology fee reported should not exceed $239 per term for full-time students and $20 per credit for less-than-full-time students.

** Due to rounding, the final term a member attends may vary slightly.
VII. Student Eligibility Verification

A. Enrollment Status

Because PHEAA processes an award based on the student’s projected enrollment status for the entire academic year and summer term on the EAP application, the school is required to report changes to the enrollment status on which awards have been based.

i. Undergraduates

A student must be enrolled for at least 12 semester credits (or the equivalent) to receive a full-time EAP award. See “EAP Award Chart 2021-22 Academic Year” on Page 9 for the equivalents of full-time and part-time enrollment. These are the same equivalents that are used for the PA State Grant Program.

If, at any time, there is a change to the recipient’s enrollment, the school is required to report the recipient’s correct number of credits and tuition costs. It should be noted that reported costs should be rounded up to the next whole dollar amount (no cents). For example, if a student listed with a full-time award on the Award Listing or Disbursement Roster is enrolled on a less-than-full-time basis, the school must withhold crediting and report the recipient’s correct number of credits and tuition costs.

If a student is enrolled in a term that is not reflected on the Award Listing or Disbursement Roster, the school must contact the Education Office to verify eligibility before adding the award. See “E. How to Contact the DMVA” on Page 13 for more information.

See “VIII. Reporting Student Eligibility Changes” on Page 13 for the different ways changes can be reported.

ii. Post-baccalaureate & Graduate Students

If a graduate student is enrolled with a greater number of credits than indicated (but less than 12) and the student's award is less than the maximum indicated in the EAP Award Chart 2021-22 Academic Year or less than the student’s tuition, the school should report the recipient’s correct number of credits and tuition costs. If a graduate student is enrolled with a lesser number of credits than indicated and the student’s award is less than the maximum indicated in the EAP Award Chart 2021-22 Academic Year or less than the student’s tuition, the school is required to report the recipient’s correct number of credits and tuition costs.

iii. Non-standard Enrollment Schedules

When certifying eligibility for a student enrolled in a program of study that follows a non-standard academic schedule, it is important to verify whether the student is eligible for a full-time award or a part-time award. EAP utilizes the PA State Grant criteria when determining if students in non-standard terms should be considered full time or part time. According to the PA State Grant criteria, a student must be enrolled in a minimum of 15-18 weeks for a semester and minimum of 12 credits for full-time enrollment in a semester.

Students falling below this minimum are processed as less-than-full-time. To determine if an EAP applicant should be considered full time or part time, multiply the number of weeks in each term by .706 (since 12 credits divided by 17 weeks = .706). For example, a student enrolled in a 27-week term would need to take at least 19 credits in order to be considered full time (since $27 \times .706 = 19$).
If calculations result in part-time status, contact PHEAA at eap@pheaa.org to verify accurate processing.

<table>
<thead>
<tr>
<th>Schedule</th>
<th>Calculation</th>
<th>Term Length</th>
<th>Required Number of Credits for Full-time Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Semester</td>
<td>12 credits minimum/17 weeks = .706 credit factor</td>
<td>20 weeks</td>
<td>.706 X 20 weeks = 14.12 or 14 credits</td>
</tr>
<tr>
<td>Quarter (using quarter credits)</td>
<td>12 credits minimum/11 weeks = 1.091 credit factor</td>
<td>13 weeks</td>
<td>1.091 X 13 weeks = 14.183 or 14 credits</td>
</tr>
<tr>
<td>Quarter (using semester credits)</td>
<td>12 credits minimum/11 weeks = .727 credit factor</td>
<td>13 weeks</td>
<td>.727 X 13 weeks = 9.451 or 9 credits</td>
</tr>
</tbody>
</table>

EAP-approved programs that are less than one term in length, using the calculation in the above paragraph, will be awarded at a part-time rate not to exceed the maximum part-time award or tuition charges, whichever is the lesser amount.

**Example:**

6-week, EAP-approved program times .706 = 4 credits equivalency

**iv. Interim or Intersession**

EAP cannot fund the “winter” session at a semester school for full-time students (12 or more credits). Winter session credits at a semester school for part-time students may be applied to the fall or spring semester EAP grant calculation. Winter credits can only be added to a part-time fall or spring semester. The school should report the tuition charged the student plus technology fee, not to exceed $20 per credit, by adding the part-time winter session enrollment to the fall or spring semester.

**Example:**

If a student is enrolled in 6 credits/$150 per credit during the winter session at a school and 3 credits/$150 per credit during the spring semester, the institution would report 9 credits/$1,350 tuition in the spring semester.

Award calculation and funding caps remain as stated in the Award Determination section of the procedures.

**B. Program of Study**

An EAP recipient must be enrolled in a federal Title IV eligible degree or certificate-granting program of study or a PHEAA-approved course of study at an approved Pennsylvania institution, such as the Act 120 Police Academy or Commercial Driving License (CDL) programs.

**C. Academic Progress**

Although there is no academic progress requirement for a student to receive an EAP grant, students who routinely receive EAP aid for courses they do not successfully complete will utilize all EAP eligibility prior to completing their program of study.

**D. Other Aid**

The legislation that governs this program specifies that a Pennsylvania National Guard member is not eligible for an EAP grant if the member is receiving a Reserve Officer Training Corps (ROTC) Scholarship. Guaranteed Reserve Forces Duty Scholarship and Dedication National Guard Scholarship recipients are eligible. The legislation also prohibits PHEAA from reducing any aid it awards due to the student's receipt
of an EAP grant. For example, the student’s PA State Grant (if any) shall not be reduced or adjusted as a result of the student receiving an EAP grant.

**NOTE:** Adjustments to federal aid may be required by the federal regulations that govern those programs.

EAP grants should continue to be included as a resource for federal student aid purposes. Public Law 111-39 (H.R. 1777) signed into law on July 1, 2009, excludes all federal Veterans’ grants when calculating a student’s estimated financial aid. EAP grants are funded with state funds and are not a federal Veterans’ grant.

EAP grants are capped by law at the tuition for the approved program of study in which the eligible Soldier or Airman is enrolled or the resident annual tuition rate charged at a PASSHE school, whichever is less. Thus, under no circumstances may the amount of an EAP grant exceed these tuition amounts.

However, the provisions setting the maximum amount of EAP grants do not specifically designate those grants for the sole purpose of defraying tuition and fees. EAP grants can be used for the costs of pursuing approved programs of study up to the Allowable Cost of Attendance (COA), as specified below:

- **Tuition and Fees** – Tuition and fees for the institution or program of study
- **Books and Supplies** – A book allowance of $500* per semester ($333 per quarter)
- **Education Expense Allowance (EEA)** – Room and board or commuter allowance is a standard educational expense allowance of $2,000* per semester ($1,333 per quarter)

Schools should apply Federal Tuition Assistance (FTA) payments and all other military aid before applying the EAP grant. In some circumstances, payment of the EAP grant in the proper sequence will result in EAP funds exceeding the cost of attendance; in such a case, the excess EAP grant should not be paid to the Soldier or Airman since that would result in the member receiving more than the allowable Cost of Attendance. The excess payment must be returned to PHEAA see “Appendix B” on Page 21.

**NOTE:** Only tuition costs plus technology fee can be used to calculate the amount of the EAP award. The above allowable cost of attendance is used by institutions to calculate the processing of EAP funds, see “Overview of the Offset Process” on Page 22.

### E. Different Educational Costs

When the student’s actual tuition is different than the tuition used in calculating the student’s award, as shown on the disbursement roster, the institution is required to report the actual tuition incurred by the student and the reason for the difference.

**NOTE:** EAP awards are made in whole dollars only. Round all figures down to the nearest whole dollar.

### F. Student Withdrawal

#### i. Partial Withdrawal

If a student is enrolled full time and withdraws from classes during the term, the school must report the reduction in credits, regardless of the timing during the term and whether or not funds have been credited to the student's account. If the service member changes from full-time status or has a reduction in credits, they are only eligible for the tuition amount charged for the credits completed or the maximum per credit EAP award, whichever is the lesser amount, regardless of the school's tuition refund policy.
ii. Complete Withdrawal

If a student is enrolled full time or part time and withdraws from all classes during the term which results in tuition charges per the school's tuition refund policy, the service member is still eligible for EAP funding whether or not the award has been credited to the student's account at the time of withdrawal. The institution is only required to return any amount of EAP award for the student that exceeds the tuition amount charged or the maximum EAP award for the number of credits the student was taking at the time of withdrawal, whichever is the lesser amount.

VIII. Reporting Student Eligibility Changes

A. Reporting a Change in Tuition

All changes in tuition (increase/decrease) should be reported to PHEAA on the Award Listing or Disbursement Roster.

Reference 2021-22 PA State Grant Handbook: Allowable Cost of Attendance

B. Reporting a Change in Credits

i. Decreasing Credits & Canceling Awards

These changes should be reported to PHEAA on the Award Listing or Disbursement Roster.

ii. Increasing and Decreasing Credits for Part-time and Full-time Students

These changes should be reported to PHEAA on the Award Listing or Disbursement Roster.

C. Adding EAP Funding for a Term That Does Not Show an Award

If a PA National Guard member is enrolled for a term at your school and an EAP award is not shown on the Award Listing or the Disbursement Roster for that term, the DMVA must be contacted to verify eligibility before an EAP award can be granted. If the member is eligible, verification will be forwarded to PHEAA for processing. If the request to add a term is sent directly to PHEAA, it will not be processed and the school will be notified.

D. Refusal of EAP Award

If a student wishes to refuse an EAP award, the student must contact their unit of assignment or the PA National Guard Education Services Office for assistance.

E. How to Contact the DMVA

Email Mrs. Pat Troutman at patricia.m.troutman.nfg@mail.mil. The Pennsylvania National Guard Education Services Office can also be reached via phone at 717-861-9343 (for school use only). This contact information is only to be provided to the financial aid office to assist in awarding EAP funds. Students should not be provided this contact information.

NOTE: If students have questions regarding eligibility, they should be advised to contact their PA National Guard unit of assignment.
F. How to Contact PHEAA

Disbursement Rosters and Award Listings can be sent to PHEAA via fax at 717-720-3786 or via email at eap@pheaa.org. Mailing instructions are noted on the roster. PHEAA staff can also be reached toll-free at 800-443-0646, a number reserved only for the use of financial aid administrators.

IX. Summer Term

The summer term is considered a “trailer,” and funds will be disbursed and reconciled as part of the preceding academic year. Therefore, the academic year disbursement roster includes the summer term as the last term of the year (SUM22).

- Undergraduate – Summer 2022 awards are based on the 2021-22 tuition costs and full-time and part-time award amounts.
- Post-Baccalaureate Graduate – Summer 2022 awards are based on the 2021-22 tuition costs and part-time award amounts.

X. Handling of Funds

A. Crediting Funds

i. Initial Crediting

Upon review of the Award Listing, institutions are encouraged to post a preliminary credit of the EAP award to the student’s account, provided that the school agrees to remove the credit (in part or in its entirety) if full certification later reveals the student to be ineligible for any reason.

ii. Final Crediting

The reconciliation roster is the final roster of the program year which summarizes all terms of enrollment beginning with fall and ending with summer (summer is a trailer term). Final crediting should be based on the actual tuition charged plus technology fee.

Questions regarding verification of a recipient’s eligibility should be addressed to the DMVA via email at patricia.m.troutman.nfg@mail.mil.

B. Disbursement Process

i. Payment of EAP Funds

PHEAA transfers EAP funds to institutions electronically through the Automated Clearing House (ACH). If your institution has not already completed an ACH Form, or you want the EAP funds deposited into an account other than the account to which PA State Grant and other program funds are deposited, an ACH form must be completed. If your institution has already completed an ACH Form and you want the EAP funds transferred to the same account listed on that ACH Form, send an email to fmeftadmin@pheaa.org to confirm that EAP funds can be transferred to the bank account information currently on file with PHEAA.

PHEAA and DMVA, jointly, reserve the right to determine continued EAP eligibility of the institutions for reasons to include but not limited to: closing, restriction, or oversight by ED for participation in any Title IV program or if the accrediting agency suspends or cancels approval for the school. Institutions must promptly alert PHEAA of pending issues or concerns at eap@pheaa.org.
ii. Disbursement Rosters

Disbursements are triggered by the creation of a disbursement roster, which will be placed in the institution's PageCenter mailbox. Schools can choose to be automatically notified through PageCenter when a roster has been placed in their PageCenter mailbox. If you are a new user and need to request access to PageCenter or for instructions on how to navigate through PageCenter, see “Appendix D” on Page 30.

iii. Processing of Rosters

Disbursement Rosters are generated to the school's PageCenter mailbox and must be processed by the institution. The eligibility of each recipient listed must be certified in accordance with the requirements outlined in these procedures. After eligibility is certified and funds are credited for each recipient, the institution must return the entire roster, including the signed certification page, to PHEAA within 30 days of the date on the roster. Failure to return the roster for a particular term in a timely manner may result in the withholding of all future disbursements of EAP funds until the institution complies.

In the event that the institution has not returned the Disbursement Roster as specified above and future funding is delayed, the students affected should not incur late charges due to the noncompliance of the institution.

Institutions that are unable to verify enrollment within the 30 days should still return the certified roster. Any additional changes required after the roster is returned should be reported to PHEAA either on the weekly Award Listing or via emailing eap@pheaa.org.

Detailed information for each EAP recipient is provided on the disbursement roster. This includes demographic information, award amounts, and the enrollment data that was used in determining award amounts.

Institutions are required to verify the accuracy of this information before posting a final credit to the student's account.

For more information on interpreting the Disbursement Rosters and an explanation of the offset process, see “Appendix B” on Page 21.

iv. Reporting Changes

In all cases where a Guard member may not be eligible for an EAP award or an award should be increased or added, the school should refer to REPORTING STUDENT ELIGIBILITY CHANGES to determine how to report the change. Be certain to indicate the student's revised tuition and number of credits only. Do not adjust the award amount as the new EAP award amount will be automatically calculated once PHEAA enters the updated tuition and credits. Indicate in the “Comments” section possible award adjustment due to “Cost of Attendance” adjustments. If the original roster was already forwarded to PHEAA, the changes must be noted on an amended PHEAA roster or an Award Listing. Upon receipt of this information, the student's eligibility will be recalculated and reflected on the next Award Listing, and a new eligibility notice will be sent to the student. The financial aid administrator should not credit the EAP disbursement until the Award Listing reflects the correct enrollment information. Therefore, if an Award Listing is received that is dated after the most recent disbursement roster, utilize the award information contained in that listing.

All questions or problems related to these Certification Procedures or completing the disbursement roster should be directed to PHEAA at 800-443-0646, or via email to the EAP mailbox at eap@pheaa.org. This phone number is provided to assist the financial aid office; this information should NOT be provided to the students. Students with questions must go through the chain of command and contact their PA National Guard unit of assignment.
v. Returning the Roster

All certified rosters must be returned to PHEAA. Before returning a certified roster to PHEAA, verify that the tuition amount, number of credits, and institutional information are correct, and indicate any changes. Do not make any unnecessary notes or comments on the roster, as this will only slow processing.

The following methods can be used to return the rosters:

- The most secure way to return a PHEAA roster is to use My File Gateway, which is an easy-to-use process requiring no advanced technical skill or knowledge and offers a secure web portal for schools to send and receive data. See “Appendix B” on Page 21 or instructions on transmitting rosters through My File Gateway. Schools that are not currently set up to participate in My File Gateway should contact PHEAA staff at eap@pheaa.org, and we will walk you through the process. In addition, since there is currently no automatic notification, schools returning rosters through the My File Gateway process must contact PHEAA staff (at the same email as above) to let them know a PHEAA roster has been sent to PHEAA via My File Gateway so PHEAA staff can retrieve it.

- The roster can be returned by faxing the completed roster and signed certification page directly to PHEAA at 717-720-3786.

- The roster can be mailed to:
  
  PA Higher Education Assistance Agency Educational Assistance Program
  P.O. Box 8157
  Harrisburg, PA 17105-8157

C. Reconciliation

The final EAP roster for the program year is the Reconciliation Roster. This reconciliation roster is a summary of all enrollment changes, disbursements, and refunds during the program year. All schools with EAP students will receive a reconciliation roster, regardless if the school is due funds. Reconciliation rosters are generated in July to the institution’s PageCenter mailbox.

If it is determined that additional award changes are needed after the reconciliation roster has already been returned, contact PHEAA staff at eap@pheaa.org. The reconciliation roster is the last EAP payment for the school year. Schools requesting additional funds after the initial reconciliation roster has been processed must do so within 45 days of that roster date. Requests for additional funds received after the 45-day initial reconciliation deadline will be denied.

**NOTE:** Funds from two different funding years cannot be intermingled.

D. Refunds

i. Excess Funds

Schools are encouraged to retain any unused funds and credit the funds to subsequent recipients. These may be funds for EAP recipients who did not enroll or who have had their awards reduced due to enrolling for a lesser number of credit/clock hours. Excess funds that remain after the initial reconciliation roster has been processed must be returned to PHEAA within 90 days from the date of the roster and should include a copy of the reconciliation roster. Institutions that voluntarily return excess funds on a term-by-term basis throughout the academic year should strive to do so as early in the term as possible. A refund check that arrives AFTER the next term’s Disbursement Roster has already been produced will NOT be reflected on that roster.
Accordingly, funds returned may have already been deducted from the next disbursement; therefore, any refund made will be returned on the institution's next roster. For additional information, see “Appendix B” on Page 21 that follows this section.

ii. Returning Funds

After processing the reconciliation roster, the institution is required to return all funds for recipients who failed to enroll in classes and which have not been used to award subsequent recipients.

Refund checks should be made payable to:

PHEAA
P.O. Box 64849
Baltimore, MD 21264-4849

Institutions that prefer to send refunds via ACH can reference the EAP Refund Instructions document located in the Document Library at PHEAA.org. If unable to locate the document, email eap@pheaa.org for assistance.

The refunds should be identified as “Educational Assistance Program (EAP)” funds and include a brief description of the payment reason. An email indicating the the refund is related to EAP, the refund amount, and date sent must be emailed to FMGrants@pheaa.org. Subsequent disbursements and rosters (excluding the upcoming fall disbursement) will be withheld pending receipt of outstanding reconciliation refunds due to PHEAA. When returning funds, schools must be certain that an original roster or a copy of the roster has been returned to PHEAA. Schools should send one check or wire transfer covering all award changes rather than an individual check/wire transfer for each student. These steps will ensure timely and accurate processing of your payment.

XI. Retention of Records & Program Review

In accordance with these certification procedures, all schools are required to retain all records necessary for the certification and disbursement of the EAP funds for at least 5 years from the date on which the institution completes certification of the reconciliation roster.

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 EAP Program Review may result in refunds to PHEAA and 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 EAP program findings:

- Student awarded the EAP grant for the term they were not enrolled
- Student withdrew completely or partially from the classes, and the EAP grant was not adjusted correctly
- Student was enrolled in non-standard term and their enrollment and award were not calculated correctly
- Student was eligible for EAP funding they were not awarded
- The student's awarded amount of EAP grant does not match the amount credited to the student's account

For additional information on the PA State Grant and Special Programs Program Review process, visit PHEAA.org/ProgramReview.
XII. Mobilization to Active Duty

The Board of Governors Policy 1983-19-A, B8 states: Full refund of tuition shall be granted to students of PASSHE universities who are military reservists or members of the National Guard and are ordered to active military service by the President of the United States. Additionally, the Higher Education Relief Opportunities for Students Act of 2003, Public Law 108-76 reads: All institutions offering postsecondary education should provide a full refund (or credit) of tuition and related fees to students who are affected individuals for that portion of a period of instruction such a student was unable to complete, or for which such individual did not receive academic credit, because they were called up for active duty or active service.

Activated soldiers must provide the school with a copy of the mobilization order for EAP grant to be refunded. If timing does not permit the Soldier opportunity to present military orders to the school, these orders may be faxed or mailed to the University Registrar’s Office or Financial Aid Administrator. Refunds for activated Soldiers should be sent to PHEAA as outlined in the “Returning Funds” above. The institution must send a copy of the Soldier’s mobilization order along with the next certified roster that is returned to PHEAA, which will be forwarded to the DMVA.
Appendix A

Award Listing
### Directions for Award Listing Updates:

**Other Benefits** – Only update with the reduced EAP award if other military benefits have been applied (Federal Tuition Assistance (FTA) or Post 911 Gi Bill). At no other time should this field be updated.

- **Tuition Per Term** – Update actual tuition charged plus technology fee only on the line provided (do not include additional fees).
- **Enrollment Cred/Clk Hrs** – Update only credits or clock hour on the line provided to include all changes to enrollment. Clock hours will be converted to credits using the below formula:
  - 1 Semester Credit = 37.5
  - 1 Quarter Credit = 25 Clock Hours

**NOTE:** Award Listings are generated weekly to provide current enrollment details. Institutions are not required to return the Award Listing, but can use the document to report changes to PHEAA. Only update underlined fields on the Award Listing, unless canceling an award or providing updates to demographic information.
Appendix B

Sample Roster
Overview of the Offset Process

The offset of funds within a program year is the process by which PHEAA will decrease or withhold the amount of funds disbursed to your institution in order to collect outstanding funds that are owed to PHEAA as a result of cancellations or adjustments to previously disbursed awards. The example above contains two students where an offset occurred.

Student Test 1 was originally processed with a fall award in the amount of $1,000. However, after the funds were disbursed, the fall award was canceled and now those funds are due back to PHEAA. In order for PHEAA to collect the outstanding fall funds, the spring funds in the amount of $1,000 are retained by PHEAA. This occurrence of an offset is evident by looking at the “Current Payment” column. This column displays NONE due to the fact that we are not paying out any funds for this student as a result of the offset of funds – even though the student is eligible for a spring award in the amount of $1,000. Student Test 2 also had an offset occur between fall and spring. The fall award was originally $1,000, but after the fall disbursement was run, the award was reduced to $500. In order to collect these funds, the spring payment is reduced to $500, which is evident by looking at the “Current Payment” column.

Regardless of the offset, the student is still eligible for a spring award in the amount of $1,000 and should be credited with a spring award equal to that amount. Questions regarding this process should be directed to PHEAA staff via email to eap@pheaa.org.
Financial Aid Offices – For your convenience, the EAP Certification Procedures are located on PHEAA’s Document Library. Contact Pat Troutman at patricia.m.troutman.nfg@mail.mil or 717-861-9343 if you have any questions. The above phone number and email address are provided to assist schools. This information should not be provided to the students; they should contact their unit of assignment with questions.
Explanation of Disbursement Roster Terminology

EAP Disbursement Roster

Total Grant – The student's EAP eligibility at your institution

Current Disbursement – The amount to be credited to the student's account

Calc Disbursement – The 2021-22 cumulative total of all EAP funds disbursed for the student to date.

EAP Refund Requested:

- Current – Based on an enrollment change or other changes which reduced the student's eligibility, this is the amount of the calculated disbursement which is now due back to PHEAA. Funds will remain in this column on subsequent rosters until they are either “recovered” by PHEAA or returned by your institution.

- Previous – If PHEAA is unable to recover a current EAP refund request by reducing a subsequent disbursement to your institution, those funds must be returned to PHEAA after processing the Reconciliation Roster. Funds returned to PHEAA will appear in this column on future rosters.

EAP Summary Page

Provides totals for the academic year concerning the number of recipients, prior actual disbursements, refunds returned to PHEAA, award amounts, and disposition of funds.

Total Current Payment (as of this roster) – The current value of all EAP awards disbursed for students at your institution during the academic year, less prior actual disbursements and plus total refunds that were returned to PHEAA

Actual Disbursement – Actual funds that will be disbursed with the roster

Total Number of Recipients on Roster – Actual number of students listed on the roster

Certification Page

The Certification Page must be completed and returned with one certified copy of the entire roster to PHEAA within 30 days of the date on the roster. Failure to do so will delay future disbursements.
Appendix C

How to Determine 2021-22 EAP Awards
How to Determine 2021-22 EAP Awards

Steps to Apply

Step 1: Determine the maximum EAP award amount based on the student’s enrollment status, number and type of credits enrolled, and the PASSHE annual tuition rate, see “EAP Award Chart 2021-22 Academic Year” on Page 9.

Step 2: Calculate the Cost of Attendance (COA) by adding the amount calculated in Step 1 to the allowances below:

- **Books and Supplies** – A book allowance per semester of $500 for full-time enrollment and $250 for part-time enrollment (divide $1,000 by two for semester schools); quarter school allowance per quarter of $333 for full-time enrollment and $167 for part-time enrollment (divide $1,000 by three for quarter schools)

- **Education Expense Allowance (EEA)** – Room and board or commuter allowance is standard educational expense allowance per semester of $2,000 for full-time enrollment and $1,000 for part-time enrollment (divide $4,000 by two for semester schools); quarter school allowance per quarter of $1,333 for full-time enrollment and $667 for part-time enrollment (divide $4,000 by three for quarter schools)

**NOTE:** Only the tuition plus technology fee can be used to calculate the amount of the EAP award. The above allowable cost of attendance is used by institutions to calculate the processing of EAP funds only for undergraduate students.

Step 3: Calculate Actual EAP Award Eligibility.

The actual EAP award cannot exceed the Allowable COA minus other military aid. Other military aid includes Federal Tuition Assistance (FTA) and Post 911 GI Bill. The military aid must be applied in the following order:

1. FTA
2. Post 911 GI Bill
3. EAP

Allowable COA minus FTA minus Post 911 GI Bill = EAP award eligibility, not to exceed value of EAP award from Step 1.

To summarize, schools should apply FTA payments and other military aid before applying EAP grants. In some circumstances, processing of the EAP grant in the proper sequence will result in excess EAP funds; in such a case, the excess EAP money should not be paid to the Soldier or Airman since that would result in the member receiving more than the Allowable Cost of Attendance. The excess payment must be returned to PHEAA for deposit in the EAP account.
**Examples**

**Example: 1**

Student Enrolled Full Time with Tuition Plus Technology Fee = $2,500/Term

**Step 1:** The maximum allowable EAP award is $2,500 since this is the lesser of the PASSHE annual tuition rate of $4,097 and the tuition plus technology fee charged to the student.

**Step 2:** Calculate the Allowable Cost of Attendance by using the tuition, fees, $500 books and supply allowance, and $2,000 educational expense allowance.

**Step 3:** Determine the actual amount of the EAP award. It is either the amount of the initial EAP award or the balance of the “Cost of Attendance” minus FTA and Post 911 GI Bill, whichever is the lesser amount. In this example, it is $2,400.

<table>
<thead>
<tr>
<th>Allowable Cost of Attendance**</th>
<th>Military Aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition Plus Technology Fee</td>
<td>Deduct FTA</td>
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<tr>
<td>Additional Fees</td>
<td>Deduct Post 911 GI Bill</td>
</tr>
<tr>
<td>Books and Supplies</td>
<td>Adjusted EAP Award Amount</td>
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<tr>
<td>Educational Expense Allowance</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$5,400</strong></td>
</tr>
</tbody>
</table>

**NOTE:** $100 to be returned to PHEAA ($2,500 minus $2,400) Student Enrolled Full Time with Tuition Plus Technology Fee = $4,097/term

**Example: 2**

Student Enrolled Full Time with Tuition Plus Technology Fee = $4,097/Term

**Step 1:** The maximum allowable EAP award is $4,097 since this is equal to the PASSHE annual tuition rate of $4,097 and the tuition plus technology fee charged to the student.

**Step 2:** Calculate the Allowable Cost of Attendance by using the tuition, fees, $500 books and supply allowance, and $2,000 educational expense allowance.

**Step 3:** Determine the actual amount of the EAP award. It is either the amount of the initial EAP award or the balance of the “Cost of Attendance” minus FTA and Post 911 GI Bill, whichever is the lesser amount. In this example, it is $3,597.

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Tuition Plus Technology Fee</td>
<td>Total Allowable Cost of Attendance</td>
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<td>Additional Fees</td>
<td>Deduct FTA</td>
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<tr>
<td>Books and Supplies*</td>
<td>Deduct Post 911 GI Bill</td>
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<tr>
<td>Educational Expense Allowance*</td>
<td>Adjusted EAP Award Amount</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$8,597</strong></td>
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</table>

**NOTE:** $500 to be returned to PHEAA ($4,097 minus $3,597) * From PA State Grant Allowable Cost of Attendance.

**Example: 3**

Student Enrolled in 11 credits at a Quarter School with Tuition Plus Technology Fee = $3,200/term

**Step 1:** The maximum allowable EAP award for one quarter is $2,508 since this is the maximum EAP award for a student enrolled less-than-full-time.

**Step 2:** Calculate the Allowable Cost of Attendance by using the actual tuition plus technology fee, additional fees, $333 books and supply allowance, and $1,333 educational expense allowance.
Step 3: Determine the actual amount of the EAP award. It is either the amount of the EAP award from Step 1 or the balance of the “Cost of Attendance” minus FTA and Post 911 GI Bill, whichever is the lesser amount. In this example, it is $2,266.

<table>
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<tr>
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<tr>
<td>Tuition Plus Technology Fee</td>
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<td>Books and Supplies*</td>
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<td><strong>$5,266</strong></td>
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NOTE: $242 to be returned to PHEAA ($2,508 Less-than-full-time Quarter Award minus $2,266)

Example: 4

Student Enrolled Full Time with Tuition Plus Technology Fee = $2,500/term

**Step 1:** The maximum allowable EAP award is $2,500; this is the lesser of the annual tuition rate of $4,097 charged to a PASSHE student and the tuition plus technology fee charged to the student.

**Step 2:** Calculate the Allowable COA by using the tuition plus technology fee, additional fees, $500 books and supply allowance, and $2,000 educational expense allowance.

**Step 3:** Apply FTA funding ($1,500); then apply EAP ($2,500). In the example below, the entire EAP award can be retained by the school; $1,000 would be used to cover the balance of the tuition and $400 would be used to cover the fees, leaving $1,100 to be returned to the student for allowable COA.

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<tr>
<td><strong>Total Allowable Cost of Attendance</strong></td>
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NOTE: Member gets $1,100 towards books, room, & board

Example: 5

Student Enrolled Full Time with Tuition Plus Technology Fee = $4,097/term

**Step 1:** The maximum allowable EAP award is $4,097; this is equal to PASSHE annual tuition rate of $4,097 and the tuition plus technology fee charged to the student.

**Step 2:** Calculate the Allowable COA by using the tuition plus technology fee, additional fees, $500 books and supply allowance, and $2,000 educational expense allowance.

**Step 3:** Apply FTA funding ($3,000); then apply EAP ($4,097). In this example, the entire EAP award can be retained by the school; $1,097 would be used to cover the balance of the tuition and $1,200 would be used for the fees, leaving $1,800 to be returned to the student for allowable COA.
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**NOTE:** Member gets $1,800 towards books, room, & board

**Example: 6**

Student Enrolled Full-Time with Tuition = $6,000/term

**Step 1:** The maximum allowable EAP award is $4,097, which is equal to PASSHE annual tuition rate of $4,097.

**Step 2:** Calculate the Allowable COA by using the tuition plus technology fee, additional fees, $500 books and supply allowance, and $2,000 educational expense allowance.

**Step 3:** Apply FTA funding ($3,000); then apply EAP ($4,097). In this example, the entire EAP award can be retained by the school; $3,000 would be used to cover the balance of the tuition and $1,097 would be used toward fees, leaving $303 due to the school.

<table>
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<th>Allowable Cost of Attendance</th>
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**NOTE:** Member is responsible for the outstanding fee balance of $303
Appendix D

PageCenter Reports
PageCenter Reports

PageCenter

Reports & Descriptions

The following reports are available in your school's PageCenter mailbox. Below is a brief description of the information provided on each report.

- **National Guard Report (NGEAP)**
  - **EAP Award Listing (AWDSLT)** – Schools are provided with enrollment and award eligibility for each EAP recipient enrolled at the institution via an Award Listing (AL). The listing will also be a means for schools to notify PHEAA of changes to student records, including demographic information. New recipients or those with an updated eligibility status will be displayed at the top of the AL. Award Listings are generated weekly for the most recent 2 years.
  - **EAP Disbursement Roster (DSBSRT)** – Disbursements are accompanied by a roster, which must be processed by the institution. The eligibility of each recipient listed must be certified in accordance with the requirements outlined in the Certification Procedures. After eligibility is certified and funds are credited for each recipient, the institution must return the entire roster, including the signed certification page, to PHEAA within 30 days of the date on the roster. Detailed information for each EAP recipient is provided on the disbursement roster. This includes demographic information, award amounts, and the enrollment data that were used in determining award amounts. Institutions are required to verify the accuracy of this information before posting a final credit to the student’s account.
  - **EAP Disbursement EFT Letter (DSBEFT)** – Pageset is a letter to provide an institution the amount and date on which EAP funds are transferred to the institution's designated bank account.

- **Outstanding Items Report** – The Outstanding Items Report, accessed via PageCenter (“Grants” Pageset LWT41LWT41R3 titled “Outstanding Items Report”), enables the institution to view reconciliation rosters due to PHEAA. All other outstanding items can be verified through the institution's Partner Interface dashboard.

- **SGSP Institutional Contacts Report** – The SGSP Institutional Contacts Report, available via multiple applications within an institution's PageCenter mailbox, is designed to ensure that the delivery of important program communication is sent to the appropriate staff by providing a monthly list of the current institutional contacts on file for PHEAA-administered programs. So that the correct personnel at your institution can receive information needed to resolve operational and processing issues and find out about PHEAA-developed resources and events, it is critical that your institution regularly review the contacts listed and email the appropriate program inbox with any corrections and adjustments and review subsequent reports to confirm that the updates were made. You may also contact PA State Grant & Special Programs staff for confirmation and additional details.
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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<th>Board of Directors</th>
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<td><strong>Representative Michael Peifer</strong></td>
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<td>Chairman, Pike/Wayne</td>
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<td><strong>Senator Wayne D. Fontana</strong></td>
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<td>Vice Chairman, Allegheny</td>
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<td><strong>Secretary of Education</strong></td>
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Pennsylvania Higher Education Assistance Agency
1200 North Seventh Street, Harrisburg, PA 17102-1444 • 1-800-692-7392

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