2021-22 Program Guidelines

Fostering Independence Through Education Tuition Waiver Program

PHEAA
# Document Changes

## Document Version Control

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td></td>
<td>2020-21 Initial Publication</td>
</tr>
<tr>
<td>2.0</td>
<td>09/01/21</td>
<td>2021-22 Annual Updates</td>
</tr>
</tbody>
</table>

## Summary of Changes

<table>
<thead>
<tr>
<th>Section</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title Page</td>
<td>Program name amended to Fostering Independence Through Education TuitionWaiver Program</td>
</tr>
<tr>
<td>I.B.i.c. My File Gateway</td>
<td>Section added</td>
</tr>
<tr>
<td>II. Student Eligibility</td>
<td>File a PA State Grant Form or PA State Grant Summer Application, if applicable, for the terms for which the waiver is being requested</td>
</tr>
</tbody>
</table>
| III. B. i. Waiver Listing                    | • Section added  
• Minimum Enrollment tables inserted  
• Institutions may choose to waive charges in addition to tuition and mandatory fees |
| III. B. ii. Denial Listing                   | Section added                                                                                                                        |
| IV. A. ii. Certification                     | • Graduation date added  
• Waiver calculation example added  
• More detailed guidance added throughout |
| IV. B. Reconciliation Waiver Listing         | Section added                                                                                                                        |
| V. Annual Reporting Requirements             | Renamed                                                                                                                               |
| VI. A. Record Retention                      | Such records must be retained for at least 5 years from the date the institution completes certification of the Reconciliation Waiver Listing (PageSet FCFSXH510) |
| VI.B.i. Program Review                       | • Program Review Findings increased from 6 to 7, one revised:  
• Institution did not follow published institutional policy with regard to SAP and unmet cost  
• Waiver amount credited to the student account does not match what was reported to PHEAA |
| Appendices A & B                             | 2020-21 appendices deleted; new Appendix A, PageCenter Reports                                                                      |
| Appendix B, FosterEd Waiver Listing          | • Previously Appendix C  
• Legend 2, reason 06 added – No PA State Grant application                                                                            |
| Appendix C, FosterEd Student Certification Best Practices | • Previously Appendix D  
• Clarifications and bullets added                                                                                                                                 |
| Appendix D, FosterEd Denial Listing          | • Previously Appendix E  
• New image of Denial Listing  
• New list of denial reasons                                                                                                                |
# Table of Contents

**Introduction** .................................................................................................................. 4

I. **Institution Participation** ........................................................................................................ 4
   A. Point of Contact .................................................................................................................. 4
   B. Access to PHEAA Documents & Reports ......................................................................... 5

II. **Student Eligibility Requirements** .......................................................................................... 6

III. **Waiver Determination Process** .......................................................................................... 7
   A. PHEAA Responsibilities ..................................................................................................... 7
   B. Institution Responsibilities ................................................................................................. 7

IV. **Waiver Certification Process** ............................................................................................. 9
   A. Waiver Listing .................................................................................................................... 9
   B. Reconciliation Waiver Listing ......................................................................................... 11

V. **Annual Reporting Requirements** ......................................................................................... 11
   A. How to Report .................................................................................................................... 11

VI. **Retention of Records & Program Review** ......................................................................... 12
   A. Record Retention ............................................................................................................... 12
   B. Program Review ............................................................................................................... 12

**Appendix A**

PageCenter Reports ................................................................................................................... 13

**Appendix B**

FosterEd Waiver Listing ............................................................................................................ 16

**Appendix C**

FosterEd Student Certification Best Practices ........................................................................ 19

**Appendix D**

FosterEd Denial Listing ............................................................................................................. 21
Introduction

In 2019, the Commonwealth of Pennsylvania passed Act 16, as amended by Act 91, creating the Fostering Independence Through Education Tuition Waiver (FosterEd) Program. FosterEd provides tuition waivers at postsecondary institutions for eligible youth who are or have been in foster care. The program is being administered collaboratively by the Pennsylvania Higher Education Assistance Agency (PHEAA) in conjunction with the PA Departments of Education (PDE), Human Services (DHS), and Labor & Industry (L&I).

Under this program, postsecondary institutions in Pennsylvania are required to designate a Point of Contact (POC) and waive all institutional charges for tuition and mandatory fees that remain after all federal, state, and other gift aid has been applied to the accounts of all eligible students.

The 2021-22 program guidelines provide postsecondary institutions with the requirements for participation and administration of FosterEd for this program year. PHEAA will publish updates to this document if additional changes become necessary.

I. Institution Participation

Postsecondary institutions in Pennsylvania approved by the U.S. Department of Education (ED) for Title IV funding must provide the waiver to all eligible students. Eligible students are those who self-identify to the school and are subsequently determined as eligible or those students identified by PHEAA via a Waiver Listing (PageSet FCFSXGZ210).

To administer the FosterEd Program, institutions need the following:

A. Point of Contact

Each institution is required to designate one or more staff as a Point of Contact (POC) for individuals eligible for FosterEd. It is the responsibility of the institution to determine who is most qualified.

i. POC Responsibilities

The POC shall have or ensure the delegation of the following duties:

- Serve as the primary contact for all eligible individuals applying to or attending the institution.
- Provide all applicants with information and referrals for on-campus support services and resources, including but not limited to:
  - Admissions
  - Housing
- Financial aid
- Health
- Mental health
- Academic advising
- Tutoring
- Career services

- Provide all applicants or students with information and referrals as available for off-campus support services, including transitional housing, medical insurance, and services.

- Assist students in obtaining verification of foster care status on or after age 16, as specified in “II. Student Eligibility Requirements” on Page 6. There are four possible sources of verification:
  - A copy of a court order that verifies that the youth was in foster care from the local Court of Common Pleas; or
  - A statement (verbal or written) from the County of Placement Office (County Children and Youth Agency) or Department of Human Services (a list of County Children and Youth Agencies can be found in the PA Department of Human Services Provider directory); or
  - A statement from a private provider agency that delivers child welfare services that the youth was in foster care; or
  - A statement from an attorney, guardian ad litem, or court-appointed special advocate verifying the person’s relationship to the student and that the youth was in foster care.

- Document that eligibility was obtained, or the reason that eligibility was denied, and the source of this verification.
  - Eligibility may be verified via documentation, email, or phone call.
  - Eligibility verified by any method should be documented by the POC in the student’s file.
  - The student is not required to obtain verification but may provide a form of acceptable documentation.
  - Verification of eligibility must be shared with PHEAA, if not already on file, by submitting an email to FosterEd@pheaa.org within 30 days of obtaining eligibility.

- Assist students in accessing available federal and state financial aid resources and in identifying further scholarship and grant opportunities.
  - Resources to support students in applying for additional aid can be found at PHEAA.org.

**ii. Contact Information for the POC**

Must be posted on the publicly accessible website of the institution, and should be shared with PHEAA for the purposes of program administration. The FosterEd POC and FAA form is available at PHEAA.org and may be submitted to FosterEd@pheaa.org.

**B. Access to PHEAA Documents & Reports**

**i. 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 remote access agreement (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™):

a. **PageCenter**

   PageCenter is a secure report repository. Each institution will have its own mailbox within PageCenter to which all reports and listings will be delivered and divided into separate applications. FosterEd reports will be in the “STEP” application.

b. **Document Library**

   Document Library is an online repository, storing and organizing documents, such as program guidelines, memoranda, etc.

c. **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.

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

**II. Student Eligibility Requirements**

To be eligible for a FosterEd waiver, a student must:

- Be a current resident of Pennsylvania at the start of and during the term for which the waiver is awarded
- Have not reached age 26 by July 1 immediately prior to the upcoming academic year in which the waiver will be awarded
- Have graduated from high school or have received a Commonwealth Secondary School Diploma
- Be eligible for services under Pennsylvania’s John H. Chafee Foster Care Program for Successful Transition to Adulthood
  - Be identified as a youth who is in foster care or was discharged from foster care on or after attaining age 16, OR has exited foster care on or after age 16 to adoption or permanent legal guardianship
- Be enrolled as an undergraduate, on at least a half-time basis, in a postsecondary institution that is approved by ED for Title IV student assistance programs in Pennsylvania
- Have unmet cost for the PA Chafee Education and Training Grant (Chafee ETG), as determined by the postsecondary institution
- Maintain federal satisfactory academic progress, as defined by the institution
- Not be in default on a federal student loan or owe a refund on other Title IV aid
- File a Free Application for Federal Student Aid (FAFSA®) for the academic year for which the waiver is being requested
- File an application for Chafee ETG by May 1, 2022
- File a PA State Grant Form or PA State Grant Summer Application, if applicable, for the terms for which the waiver is being requested
• Have not previously received a waiver for 5 years (consecutive or not), defined as 10 semesters or the equivalent, for undergraduate study

**NOTE:** A student may be eligible for Chafee ETG but not receive an award for reasons including, but not limited to, missing the application deadline, funding limitations, or reaching the maximum Chafee ETG award counter. A student may still be eligible for FosterEd in these situations.

An eligible student who transfers to another institution should contact PHEAA immediately at FosterEd@pheaa.org; the student should also communicate with the POC at the transfer institution.

### III. Waiver Determination Process

#### A. PHEAA Responsibilities

PHEAA is responsible for the initial FosterEd eligibility checks and confirming a student:

- Is a resident of Pennsylvania
- Has not reached age 26 by July 1 immediately prior to the upcoming academic year for which the FosterEd waiver would be received
- Has graduated from high school or received a Commonwealth Secondary School Diploma
- Is eligible for services under Pennsylvania’s John H. Chafee Foster Care Program for Successful Transition to Adulthood
- Is not in default on a federal student loan or does not owe a refund on other Title IV aid
- Has filed the required applicable year FAFSA
- Has submitted a complete Chafee ETG application
- Has not previously received a waiver for 5 academic years (consecutive or not), defined as 10 semesters or the equivalent

Once it is determined a student meets the above criteria, the student will appear on the FosterEd Waiver Listing (PageSet FCFSXGZ210) of the institution the student is attending. The Waiver Listing (PageSet FCFSXGZ210) is made available to postsecondary institutions via their PageCenter mailbox and is updated on a biweekly basis. A student who does not meet the eligibility criteria will appear on the FosterEd Denial Listing (PageSet FCFSXH321) with the reasons for denial.

#### B. Institution Responsibilities

**i. Waiver Listing**

Upon receipt of the Waiver Listing (PageSet FCFSXGZ210) from PHEAA, the institution must confirm a student:

- Is enrolled at least half time in undergraduate courses in an approved program of study.

**Credit Enrollment Minimums**

<table>
<thead>
<tr>
<th>Academic Period</th>
<th>Semester Schedule</th>
<th>Quarter Schedule Using Semester Credits</th>
<th>Quarter Schedule Using Quarter Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-time Term</td>
<td>12 credits</td>
<td>8 credits</td>
<td>12 credits</td>
</tr>
<tr>
<td>Full-time Year</td>
<td>24 credits</td>
<td>24 credits</td>
<td>36 credits</td>
</tr>
<tr>
<td>Half-time Term</td>
<td>6 credits</td>
<td>4 credits</td>
<td>6 credits</td>
</tr>
<tr>
<td>Half-time Year</td>
<td>12 credits</td>
<td>12 credits</td>
<td>18 credits</td>
</tr>
</tbody>
</table>
Clock Hour Enrollment Minimums

<table>
<thead>
<tr>
<th>Academic Period</th>
<th>Two Payment Periods</th>
<th>Three Payment Periods</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-time</td>
<td>Minimum of 450 clock hours of instruction per payment period</td>
<td>Minimum of 300 clock hours of instruction per payment period</td>
</tr>
<tr>
<td>Half-time</td>
<td>Minimum of 225 clock hours of instruction per payment period</td>
<td>Minimum of 150 clock hours of instruction per payment period</td>
</tr>
</tbody>
</table>

- Has “unmet cost” as determined by the postsecondary institution (the difference between a student’s cost of attendance, as defined by the Federal Student Aid handbook, and all federal or federally-supported gift aid)
  - The federal Expected Family Contribution (EFC) is not used when determining eligibility
- Has made satisfactory academic progress, as determined by the postsecondary institution

Upon receipt of the Waiver Listing (PageSet FCFSXG210) from PHEAA for FosterEd, the institution must confirm if a student should complete additional applications for state or federal grants.

- The Waiver Listing (PageSet FCFSXG210) provided by PHEAA will indicate whether a student has applied for the PA State Grant.
- The POC shall assist students in identifying further scholarship and grant opportunities, in consultation with the institution’s financial aid department, but eligibility for the waiver is not contingent upon receiving additional sources of aid.

Once the institution determines a student meets the requirements in the Student Eligibility section, the institution must then:

- Waive or apply a credit for all institutional charges for tuition and mandatory fees which remain after all other scholarships and grants have been applied on a term-by-term basis
  - Other scholarships include all gift aid, defined as student aid that is not required to be earned or repaid
  - Institutions may choose to waive charges in addition to tuition and mandatory fees.
- Refund any payments received on a student’s account from the student for tuition or mandatory fees within 30 days from the generation date of the Waiver Listing (PageSet FCFSXG210) provided by PHEAA

**NOTE:** An institution should not delay conditional aid packaging or preliminary crediting of a student account for tuition and mandatory fees for a student who meets all institutional eligibility checks when the institution has verification of the student’s foster care eligibility.

An institution may not withhold a FosterEd waiver if a student meets all requirements listed in the Student Eligibility section, unless a student declines the waiver.

It is not an eligibility requirement that a student be PA State Grant eligible nor receive other sources of gift aid.

An institution may not reduce the waiver by the amount of gift aid a student might have received but did not, regardless of the reason.

**Example:**

A student applies for and is eligible for the FosterEd waiver in the amount of $10,687. The student applied for the PA State Grant but was denied because the application was late. The school, in the original packaging of the waiver, assumed the student would receive the PA State Grant and,
therefore, decreased the waiver value by the PA State Grant maximum award. The school will now have to repackage the student without the assumed PA State Grant award, increasing the waiver by the assumed award.

ii. Denial Listing

Upon receipt of the Denial Listing (PageSet FCFSXH3210 – see “Appendix D” on Page 21), the institution must review the denial reasons for each student. The POC must work with students on the Denial Listing (PageSet FCFSXH3210) with a correctable denial to help students become FosterEd eligible. Correctable denial reasons include, but are not limited to:

- Eligibility pending DHS review
- No FAFSA or FAFSA is incomplete
- Incomplete Chafee ETG application

IV. Waiver Certification Process

A. Waiver Listing

Institutions with FosterEd eligible students are required to certify student eligibility and waiver amounts for tuition and mandatory fees each term by returning the certified Waiver Listing (PageSet FCFSXGZ210).

Institutions are also required to return a Reconciliation Waiver Listing (PageSet FCFSXH510) at the end of each academic year.

i. Mandatory Fees

Mandatory fees are defined as either charges that are typically assessed to all students at the beginning of a term or fees that are required as a part of a student's academic program or credential completion. The following categories of fees must be waived, notwithstanding the particular labels that institutions may assign:

- Fees for student activities, any health services, technology, facilities and capital improvements, and orientation
- Fees specific to an academic program or any of its required elements, such as lab, software, and materials fees (includes uniforms or other required items)
- Other fees, such as college or comprehensive fees, should be waived if they are assessed to students at the institution at the beginning of the term or as part of the institutional bill

NOTE: Institutions must waive or apply a credit for any other fees not listed above that meet the definition of mandatory.

Eligible FosterEd recipients are provided to institutions on the Waiver Listing (PageSet FCFSXGZ210) which is made available via PageCenter on a biweekly basis.

Institutions are required to certify FosterEd eligibility within 30 days of a student appearing on a Waiver Listing (PageSet FCFSXGZ210) or within 30 days of the term starting, whichever comes later. The Waiver Listing (PageSet FCFSXGZ210) provides student detail and summary information, as well as a Certification Page to be signed by an authorized school official.

ii. Certification

The institution must complete the following fields for each student:
• **Graduation Date** – Should be submitted in MMDDYYYY format. If the actual date of the student’s graduation cannot be determined, a reference to expected month and year is sufficient.

• **Enrollment Status** – The FosterEd recipient must be enrolled on at least a half-time basis for each term a FosterEd waiver is received. The Waiver Listing (PageSet FCFSXGZ210) enrollment status field must be populated with one of the following codes:
  - 1 – Full time
  - 2 – At least half time
  - C – Not enrolled/withdrawn (not charged)
  - E – Enrolled less than half time

• **Academic Progress** – In order to receive a FosterEd waiver, a student must make satisfactory academic progress, as defined by the institution. A student granted academic progress due to an appeal to retain other financial aid should be considered as meeting academic progress for FosterEd.

• **Approved Program of Study** – The eligible FosterEd recipient must be enrolled in a Federal Title IV approved undergraduate certificate, diploma, or degree (associate or bachelor’s degree) program of study during each term for which a FosterEd waiver is received.

• **Waiver Amount** – The amount of tuition and mandatory fees to be waived based upon the total tuition and mandatory fees minus federal, state, and other gift aid, as defined in the Student Eligibility section. The waiver amount should include aid awarded by the institution on the sole basis of FosterEd eligibility. Institutional aid awarded on the basis of other eligibility criteria as part of a student’s financial aid package is considered gift aid and should not be included. If a student is currently not enrolled or has withdrawn and has not been charged, a zero should be entered and the related reason should be notated in the “Comments” section of the Waiver Listing (PageSet FCFSXGZ210).

Examples of Calculating a Student’s Annual Waiver

<table>
<thead>
<tr>
<th>Student</th>
<th>Cost of Attendance</th>
<th>Tuition and Mandatory Fees</th>
<th>Total Amount of Gift Aid</th>
<th>Amount to be Waived Annually</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>$32,608</td>
<td>$18,564</td>
<td>$11,485</td>
<td>$7,079</td>
</tr>
<tr>
<td>B</td>
<td>$25,259</td>
<td>$13,457</td>
<td>$12,787</td>
<td>$670</td>
</tr>
<tr>
<td>C</td>
<td>$10,467</td>
<td>$8,160</td>
<td>$8,160</td>
<td>$0</td>
</tr>
</tbody>
</table>

• **Reasons for Waiver Value of Zero (if applicable)** – Any waiver with a zero dollar balance must be accompanied by an explanation. This free form area allows institutions to provide the reason for a zero dollar balance. Some examples include “no unmet cost” or “student declined waiver.”

**NOTE:** Signed and dated documentation should be obtained for any eligible student opting to decline FosterEd. Institutions should establish their own internal documentation process and retain these records as part of ongoing program administration.

**iii. Withdrawals or Enrollment Changes**

Student status adjustments should be handled as follows:

- If a student’s change in status results in adjustments to charges and financial aid, the amount of the waiver would be increased or decreased to cover charges for all remaining tuition and fees.
- If a student withdraws or drops to less-than-half-time status prior to charges being applied to the student account, the student is ineligible for the waiver for that term.
If a student ceases at least half-time enrollment or becomes ineligible after the waiver for the term has been applied, the waiver should remain in place.

Students who withdraw, transfer, or become ineligible should be identified to PHEAA via the FosterEd Waiver Listing (PageSet FCFSXGZ210).

**B. Reconciliation Waiver Listing**

Reconciliation for the FosterEd Program is scheduled for mid-June. A FosterEd Reconciliation Waiver Listing (PageSet FCFSXH510) will only be generated in the PageCenter mailbox for an institution that has previously completed certification for all students on its Waiver Listings (PageSet FCFSXGZ210).

Institutions must review and confirm a student's record matches the final status reported on the Reconciliation Waiver Listing (PageSet FCFSXH510). Changes must be noted on the Reconciliation Waiver Listing (PageSet FCFSXH510) and returned to PHEAA with a completed certification page. If the institution determines there are no changes, the completed certification page must be returned by the institution. The institution must return its certification of the Reconciliation Waiver Listing (PageSet FCFSXH510) within 30 days of generation.

If the institution determines that there are changes to a student's eligibility status after reconciliation, the institution should contact FosterEd staff to request another Reconciliation Waiver Listing (PageSet FCFSXH510).

**V. Annual Reporting Requirements**

Annually, all institutions of higher education must report the following information directly to PDE:

- Number of students receiving a Chafee ETG (found at the end of the biweekly waiver listings)
- Number of students who apply for the FosterEd Program (equivalent to number who applied for the Chafee ETG Program, and can be found at the end of the biweekly waiver listings)
- Number of students participating in the program that received a FosterEd waiver (found at the end of the biweekly waiver listings)
- Retention rate of students participating in the program (not applicable for 2021-22 academic year)
- The number of participating students with remaining unmet financial need
- Recommendations on how to improve outreach to students who are or may potentially be eligible for participation
- Recommendations on how to improve delivery of services to eligible students
- Impediments to retaining eligible students

**A. How to Report**

To report the required information to PDE, the data must be submitted to collab.pde.pa.gov/OPHE/HigherEdReporting/SitePages/Home.aspx.

**i. Login Directions**

Institutions should use their PA Login information to access the report. A user's Keystone Login will **NOT** work.

An institution that is not registered with a PA Login from the previous year should:

- Register for a new username and password at palogin.state.pa.us/Login/User/RegisterNew.
Once a new username is established, access must be granted. Send the username and email address to ra-highereducation@pa.gov with the subject line “Request Access.” **DO NOT** send your password.

### ii. Deadline

The deadline for reporting required information is March 1, 2022. Other general questions should be directed to PDE at ra-highereducation@pa.gov.

---

**VI. Retention of Records & Program Review**

**A. Record Retention**

In accordance with these guidelines, institutions are required to retain, for possible review and audit by PHEAA, all records necessary for the certification of student waiver eligibility and the crediting of FosterEd waivers to student accounts. Such records must be retained for at least 5 years from the date the institution completes certification of the Reconciliation Waiver Listing (PageSet FCFSXH510).

**B. Program Review**

As part of the Program Review process, PHEAA may conduct further examinations of student accounts and records as it deems necessary. Findings in the Program Review may result in adjustments to the applied waiver 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 will be scheduled for the next academic year. Review [PHEAA.org/ProgramReview](http://PHEAA.org/ProgramReview) for more details.

### i. Program Review

Below are examples of Program Review Findings for FosterEd:

- POC not designated or POC contact information incorrect or missing from institution's public website
- Student not certified on the Waiver Listing (PageSet FCFSXGZ210) by the deadline
- Institution did not refund student payment within the required time frame
- Waiver amount credited to student account is insufficient
- Required documentation not on file for the student who declines the waiver
- Institution did not follow published institutional policy with regard to SAP and unmet cost
- Waiver amount credited to the student account does not match what was reported to PHEAA
Appendix A

PageCenter Reports
FosterEd PageCenter Reports

PageCenter Reports

The following PA Fostering Independence Tuition Waiver (FosterEd) Program reports are placed in the institution’s PageCenter mailbox:

- **FosterEd Waiver Listing (PageSet FCFSXGZ210)** – The Waiver Listing (PageSet FCFSXGZ210) provides certification data for those students who have been identified by PHEAA as FosterEd Eligible. The Waiver Listing (PageSet FCFSXGZ210) is placed in the PageCenter mailbox of the institution, and it will include those students who listed the institution on their Chafee Education and Training Grant (Chafee ETG) application. The Waiver Listing (PageSet FCFSXGZ210) serves as the school’s certification roster and must be returned to PHEAA to complete the FosterEd certification process.
  - The Waiver Listing (PageSet FCFSXGZ210) is accessed in PageCenter via the secure school portal at PHEAA.org.
  - The most recent version of the Waiver Listing (PageSet FCFSXGZ210) is automatically placed on PageCenter biweekly. The following are student status change indicators:
    - A pound sign (#) next to a student’s name indicates the student was not on the previous Waiver Listing (PageSet FCFSXGZ210).
    - An asterisk (*) next to the student’s name indicates that there has been a status change from the previous Waiver Listing (PageSet FCFSXGZ210).
  - Once a Waiver Listing (PageSet FCFSXGZ210) has been certified and returned, the institution does not need to return subsequent Waiver Listings (PageSet FCFSXGZ210) for the same academic year to PHEAA if there are no status changes needed.

- **FosterEd Denial Listing (PageSet FCFSXH310)** – The Denial Listing (PageSet FCFSXH310) is generated on a biweekly basis, listing all students who have been identified by PHEAA as FosterEd ineligible. The Denial Listing (PageSet FCFSXH310) is placed in the PageCenter mailbox of the institution, and it will include those students who listed the institution on their Chafee ETG application. The Denial Listing (PageSet FCFSXH310) serves to help identify those students who are attending the institution that may need assistance in completing documentation to become FosterEd eligible. Correctable denial reasons include:
  - No FAFSA® or FAFSA Incomplete
  - No PA State Grant Application
  - Student Loan in Default
  - Student is not a PA Resident

- **FosterEd Reconciliation Waiver Listing (PageSet FCFSXH510)** – The annual Reconciliation Waiver Listing (PageSet FCFSXH510) provides the school with a final opportunity to report ineligible students or changes to a student status and reports a student’s final eligibility status for FosterEd in accordance with the school’s records. The Reconciliation Waiver Listing (PageSet FCFSXH510) must be returned within 30 days of receipt; if there are no changes to the Reconciliation Waiver Listing (PageSet FCFSXH510), the institution is only required to sign and return the Certification Page.

- **Institution Outstanding Items Report** – The Outstanding Items Report provides schools and employers with a list of outstanding rosters, reports, and refunds due to PHEAA across most PHEAA-administered programs. The report generates nightly, using PageSet LW41LWT41R3 in the institutions Grants application folder.

- **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. 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.
Appendix B

FosterEd Waiver Listing
**Legend 1 – Waiver Listing Codes**

# Indicates the student was not on the previous PA Fostering Independence Tuition Waiver (FosterEd) Listing

* Indicates that there has been a status or award change since the previous FosterEd Waiver Listing

**NOTE:** Bold codes and definitions are required fields.

- Institution’s OE code
- Student’s SSN
- Student’s name
- **Expected/actual student graduation date; in MMDDCCYY format; if the exact graduation day is unknown, use the last day of the month**
- Number of terms student has received the waiver out of 5 years, defined as 10 semesters or the equivalent
- Indicates if a student has filed a PA State Grant Form
- Provides specific fall, winter, or spring term enrollment status from Legend 3
- Student must maintain Title IV satisfactory academic progress; circle “Y” if Yes, “N” if No (“Y” for a freshman)
- **Student must be enrolled in an approved Federal Title IV certificate, diploma, or degree program of study; circle “Y” if Yes, “N” if No**

---

<table>
<thead>
<tr>
<th>TERM</th>
<th>ENROLLMENT STATUS</th>
<th>ACADEMIC PROGRESS</th>
<th>DEGREE PROGRAM</th>
<th>WAIVER VALUE</th>
<th>ADDITIONAL COMMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>FALL</td>
<td>FULL</td>
<td>Y/N</td>
<td>Y/N</td>
<td>$0</td>
<td>INELIGIBLE</td>
</tr>
<tr>
<td>SPRING</td>
<td>FULL</td>
<td>Y/N</td>
<td>Y/N</td>
<td>$0</td>
<td>INELIGIBLE</td>
</tr>
</tbody>
</table>

Number of students receiving a PA Chafee Education and Training Grant: 0(12)
Number of students who completed a PA Chafee Education and Training Grant Application: 0(13)
Number of students who received the Fostering Independence Tuition Waiver: 0(14)
Total amount of fees waived: $0(15)
• This waiver amount is populated by the institution and is the total amount of tuition and fees remaining after all gift aid has been applied. The waiver amount should include any institutional aid awarded on the sole basis of FosterEd eligibility.

• **Comments populated by the school, explaining zero dollar waiver amount**

• Number of students who received PA Chafee Education and Training Grant (Chafee ETG) for the current academic year.

• Number of students who applied for the Chafee ETG for the current academic year (equivalent to number of FosterEd applicants).

• Number of students who received the FosterEd waiver for the current academic year.

• Total amount of tuition and fees waived.

**Legend 2 – Ineligible Reason Codes**

**NOTE:** The list below indicates all reasons a student may be ineligible for FosterEd. It is important to understand that not all reasons will appear on your Waiver Listing, but they will appear on student status letters.

- 01 Student does not meet the age requirement
- 02 Student does not meet residency requirement
- 03 No FAFSA® or FAFSA is incomplete
- 06 No PA State Grant application
- 05 Title IV Educational loan in default status or a refund on Title IV aid is due
- 08 No unmet cost for tuition or fees
- 09 School is not an eligible Federal Title IV postsecondary institution
- 13 Student refusal of waiver
- 14 Eligibility pending DHS review
- 18 Student is not enrolled
- 20 Maximum eligibility
- 22 Student is not eligible per DHS or County Children & Youth Agency
- 24 Student is not enrolled in an approved Federal Title IV certificate, diploma, or degree (associate or bachelor’s degree) program of study
- 25 Student did not make academic progress
- 26 Student is enrolled less than half time

**Legend 3 – Enrollment Status**

- 1 Full time (a minimum of 12 credit hours or 450 clock hours)
- 2 Half time (at least 6 credit hours but less than 12 credit hours or the equivalent)
- E Less than half time
- C Not enrolled/withdrawn (no charges)
Appendix C

FosterEd Student Certification Best Practices
FosterEd Student Certification
Best Practices

The PA Fostering Independence Tuition Waiver (FosterEd) Listing is a biweekly report generated to the STEP application of an institution’s PageCenter mailbox. This report provides a list of students who have submitted a Chafee ETG application, listed the institution as first choice when filing the FAFSA®, have been identified by the Pennsylvania Department of Human Services (DHS) as eligible foster youth, and are eligible for FosterEd according to the waiver determination process outlined in the program guidelines.

Best Practices

Waiver Listings are printed, completed, and returned via fax to 717-720-3786 by the institution, to be manually processed by PHEAA staff. Follow the best practices below to facilitate efficient student certification.

**DO**

- Provide information in these fields:
  - Graduation Date
  - Waiver Amount
- Correct Enrollment Status information
- Indicate if a student declines the waiver or does not have unmet need for the waiver in the “Additional Comments”
- Send one completed signed and dated Waiver Listing
- Only send subsequent program year Waiver Listings if there are changes/updates (pages with changes and Certification Page only)
- Leave fields blank for students not yet certified but expected to be certified during the program year
- Review the FosterEd Program Guidelines for field definitions, descriptions, and additional certification information
- Allow 7-10 business days for processing

**Don’t**

- Leave Blank fields for students who are being certified
  - Degree Program (circle “Y” or “N”)
  - Academic Progress (circle “Y” or “N”)
  - Certified Amount
- Leave blank the comments field if the Waiver Amount is zero
- Indicate “$0” in the certified amount if intending to certify
- Send Waiver Listings with no changes
- Send duplicate Waiver Listings or duplicate information
- Leave blank fields for students who are being certified
- Certify for terms a student has not yet started

These materials have been developed and paid for by the Pennsylvania Higher Education Assistance Agency (PHEAA). The information contained in this document is believed to be accurate at the time of printing. Copyright © PHEAA, 2021. ALL RIGHTS RESERVED.
Appendix D

FosterEd Denial Listing
The following students are not eligible for the FOSTERING INDEPENDENCE TUITION WAIVER PROGRAM for the 2021-22 academic year.

The students and their denial reason are listed below.

<table>
<thead>
<tr>
<th>SSN</th>
<th>STUDENT NAME</th>
<th>DOB</th>
<th>COUNTY</th>
<th>DENIAL REASON</th>
</tr>
</thead>
<tbody>
<tr>
<td>123456789</td>
<td>STUDENT A</td>
<td>12/15/2020</td>
<td>DAUPHIN</td>
<td>PENDING DHS REVIEW</td>
</tr>
<tr>
<td>234567890</td>
<td>STUDENT B</td>
<td>1/8/2001</td>
<td>BERKS</td>
<td>NO FAFSA</td>
</tr>
</tbody>
</table>

Denial Reasons

**NOTE:** The list below indicates all reasons a student may be ineligible for the PA Fostering Independence Tuition Waiver (FosterEd) Program. It is important to understand that not all reasons will appear on your Denial Listing (PageSet FCFSXH3210), but they will appear on student status letters.

- Application was not signed
- Does not meet the age requirement
- Does not meet residency requirement
- No FAFSA® or FAFSA is incomplete
- Title IV Educational loan in default status or a refund on Title IV aid is due
- School is not an eligible Federal Title IV postsecondary institution
- Eligibility pending DHS review
- Maximum eligibility
- Student is not eligible per DHS
- No financial need for the grant
- Complete address was not provided
- No academic progress
- County of placement was not provided
- Student not enrolled
- Enrolled less than half time
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.

<table>
<thead>
<tr>
<th>Board of Directors</th>
</tr>
</thead>
</table>
| **Representative Michael Peifer**  
Chairman, Pike/Wayne |
| **Senator Wayne D. Fontana**  
Vice Chairman, Allegheny |
| **Senator Ryan Aument**  
Lancaster |
| **Representative Mike Carroll**  
Lackawanna/Luzerne |
| **Representative Maureen E. Madden**  
Monroe |
| **Representative Sheryl M. Delozier**  
Cumberland |
| **Senator Arthur Haywood**  
Montgomery/Philadelphia |
| **Senator Vincent J. Hughes**  
Montgomery/Philadelphia |
| **Representative Mark Longietti**  
Mercer |
| **Representative Steven C. Mentzer**  
Lancaster |
| **Representative Jennifer O’Mara**  
Delaware |
| **Senator Kristin Phillips-Hill**  
York |
| **Senator Mario M. Scavello**  
Monroe/Northampton |
| **Representative Curtis G. Sonney**  
Erie |
| **Chancellor Timothy R. Thyreen**  
Waynesburg |
| **Senate Democratic Appointee**  
Vacant |
| **Senate Republican Appointee**  
Vacant |
| **Gubernatorial Appointment**  
Vacant |
| **Gubernatorial Appointment**  
Vacant |
| **Secretary of Education**  
PA Dept. of Education – Vacant |

Pennsylvania Higher Education Assistance Agency

1200 North Seventh Street, Harrisburg, PA 17102-1444 • 1-800-692-7392