Pennsylvania State Grant Program Workshops

Counseling Students on PA State Grant Incomplete and Review Statuses

2021-22 Academic Year & 2022 Summer Term

June – July 2021
The content included in this presentation is intended to provide supplemental instruction on the PA State Grant Program and does not supersede program policy as written in the current PA State Grant Program Handbook.

**Agenda**

**Housekeeping**
PA State Grant and Special Programs (SGSP) staff welcome attendees, review the agenda, and explain how attendees should access event materials.

**Presentation**
Attendees receive an overview of program policy as set forth by the 2021-22 PA State Grant Handbook.

**Wrap Up**
Panelists will issue reminders, provide additional resources and share responses to questions posed during the session.
Objectives

Completion of the PA State Grant application is key in determining your students’ grant eligibility. Topics for this session will include:

- Review of the application and awarding process for the PA State Grant Program
- Explanation of which application statuses may require students to submit additional information for further PA State Grant eligibility processing
- Details of resources designed to assist institutions in identifying students in these statuses
- Reminders for institutions, including the deadlines and due dates for eligibility processing
Background

• Created in 1965 by the PA General Assembly
  – Inaugural year awarded 6,500 students
  – 2020-21 Academic Year currently has over 479K applicants and more than 112K awarded students

• Students must meet eligibility requirements:
  – Examples: Pennsylvania resident, high school graduate, meets need criteria, undergraduate status, enrolled at least half-time at an approved institution, in an approved program of study, meeting academic progress, not in default, met the appropriate application deadline, etc.

On PHEAA.org/grant students can find information (e.g., requirements, deadlines, etc.) on the PA State Grant application process.
2021-22 Application Process

Estimated

Application

October 2020: Students begin submitting the 2021-22 Free Application for Federal Student Aid (FAFSA®) and PA State Grant Form (SGF)

Eligibility

October 2020: PHEAA begins student eligibility processing (e.g., citizenship, PA domicile, Need, etc.) and provides eligibility information to schools

November 2020: Schools begin supplemental eligibility reporting (e.g., program of study, enrollment, etc.) via Partner Interface

Certification

February 2021: Estimated awards refreshed due to Pell

March 2021: PHEAA collects institutional costs

April 2021: Award formula is decided

May 2021: Conditional awards are announced

Final

Disbursement

July 2021: Passage of the Commonwealth Budget and announcement of allocation and final awards

August 2021: Final 2021-22 student application deadline

2021 Summer student application deadline

Predisbursement and disbursement rosters begin
Application Process

**FAFSA**

- Required **annually**, by the appropriate deadline for review of PA State Grant Eligibility
- Collects student data used for PA State Grant eligibility determination
  - Examples: SSN, DOB, financial data, signatures, parental data, etc.

**SGF**

- Generally only needed for first-time applications
  - Summer term requires a separate, different application
- Can be accessed via link from FAFSA On The Web or via PHEAA Account Access log in
- Collects additional details on FAFSA-reported data needed to process PA State Grant eligibility
  - Examples: high school, college selection, Veteran status, domicile, etc.
- Confirms the PA State Grant **Rights & Responsibilities**

The majority of incomplete records require the completion of application items that are collected online. Some additional information may be collected using the paper Status Notice.
PHEAA reaches out to students with incomplete records via Account Access, email, and mail to inform them of their record status and provide an opportunity to respond

- Students with incomplete records are either directed to complete required items online (via FAFSA or SGF) or to return paper documentation
- Not all students will meet eligibility requirements

Some students with incomplete records are also **ineligible** for other reasons (e.g., late application, not an undergraduate, etc.)

- Ineligible applicants will only respond to the questionnaire when providing corrections or contesting the ineligibility reason(s)
Record Statuses

- **Complete-Active** – Records where eligibility has been determined (e.g., awarded, need-based reject statuses E, M, or Y, cancelled, adjusted to zero [Reject M], etc.)
- **Incomplete-Active** – Records where eligibility cannot be determined due to missing data (e.g., require completion of the SGF items, under PHEAA Review, or have need-based reject reason E - but no other ineligibility reasons, etc.)
- **Complete-Reject** – Complete records where eligibility has been determined and at least one term is ineligible for a non need-based reason (e.g., PA domicile, late filing, less-than-half-time enrollment, etc.)
- **Incomplete-Reject** – Includes records where eligibility cannot be determined due to missing data, plus a non need-based reject reason exists for at least one term, or a combination of need-based reason E and non need-based ineligibility reasons for at least one term
- **Complete and Incomplete Inactive** – Records that are inactivated for a variety of reasons (e.g., non-deliverable postal mail, etc.)

Use the Primary School Change functionality to report attending students who do not display in PHEAA reporting.
Record Statuses

• Institutions may now report not enrolled or reinstate not enrolled students, regardless of record status
  – Functionality updated (effective 2020 Summer) to prevent institutions from needing to submit additional corrections
  – Reporting is submitted via Single Student Update, Mass Update, and Certification Transmissions
  – Students in Not Enrolled category will not appear in All Statuses on the dashboard or on the Status Listing in PageCenter

Other not enrolled functionality updates include: term filtering, inclusion on exported lists, and removal of student not enrolled reporting functionality.
Students may have incomplete PA State Grant records for a variety of reasons, including being under PHEAA review.

Direct students with incomplete records to complete the missing items online, unless PHEAA has instructed otherwise or the student is homeless or has another extenuating circumstance.
Partner Interface

- Grants Dashboard contains section with categorized record lists (e.g., Complete Active, Complete Reject, etc.)
  - Record is categorized as a reject if at least one term is in a reject status, unless reject reason is E, M, or Y
  - A list of all student records (with the exception of Not Enrolled) is found in All Statuses
  - Record- and term-level filtering can be performed from one of the student lists and may be combined
    - Record Level Filters allow selection of records by origin/date of update, record statuses, and other special conditions
    - Term Level Filters allow selection of records by term status (e.g., Eligibility Date, Eligibility Status, Reject Reason, etc.)

Filtering Tips document provides explanations, tips, and tricks for Partner Interface filtering.
Partner Interface

Student Messaging

- Informational box above the tabs in the Single Student display indicates incomplete items and PHEAA reviews
  - May also indicate if a student has received a letter from PHEAA requesting information

Activity Log

- Includes communications sent from PHEAA to the student, and vice versa
  - Contains similar information as FCSS in OC/WebConnect

PHEAA – Providing affordable access to higher education. (Public Information)
### Partner Interface

#### Application Info Tab
- Available only in single student update
- Red dot indicates missing info
- Highlighted sections indicate which info needs to be provided

<table>
<thead>
<tr>
<th>Field</th>
<th>Student</th>
<th>Parent(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Date of Birth</td>
<td>01/20/2001</td>
<td></td>
</tr>
<tr>
<td>2. State of Legal Residence</td>
<td>PA</td>
<td>PA</td>
</tr>
<tr>
<td>3. Residency Established</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Current Marital Status</td>
<td>Unmarried</td>
<td>Never Married</td>
</tr>
<tr>
<td>5. Bachelor's Degree Before 7/1 of Application Year</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>6. High School Diploma or GED Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. High School State or GED</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8A. Veteran of the U.S. Armed Forces</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>8B. Month/Year of Discharge</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Number of Family Members</td>
<td>0</td>
<td>2</td>
</tr>
<tr>
<td>10. Number of College Students</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>
Grant Application Status (GAPS) Report

- Grant Applicant Status (GAPS) Reports
  - PageCenter reports that display the students’ application statuses
  - Reports are broken down by status category

<table>
<thead>
<tr>
<th>Student ID</th>
<th>Student Name</th>
<th>Parent ID</th>
<th>Status Notice Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>999-99-9999</td>
<td>Miguel C.</td>
<td>(1538) 37</td>
<td>(401)7, (410)24, (436)6</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(1549) 37</td>
<td>(411)25, (412)26</td>
</tr>
<tr>
<td>999-99-9999</td>
<td>Naseem</td>
<td>(1538) 37</td>
<td>(401)7, (410)24, (436)6</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(1549) 37</td>
<td>(411)25, (412)26</td>
</tr>
<tr>
<td>999-99-9999</td>
<td>Grace S.</td>
<td>(1538) 37</td>
<td>(401)7, (413)27, (436)6</td>
</tr>
</tbody>
</table>

The status of students listed is as of 05/15/2021. Both the incomplete Grant item number (number in parenthesis) and the corresponding Status Notice number are displayed. An asterisk (*) to the left of student name indicates updated records. The listing does not include nonstate Grant applicants or those undergoing PHEAA staff review.
Validation/Other Review

- Report in PageCenter contains students under review for Income Validation
  - Determined by whether the financial data reported on state tax returns would significantly change the student’s PA State Grant eligibility
- Sub-reports provide additional information
  - Other Cases Under Review sub-report includes a wide variety of audit cases (e.g., financial independence, number enrolled, domicile, asset, etc.)
  - Students with Cost Overrides and Ready to Succeed Scholarship Income Validation

Students with questionable eligibility, including those under review must not be credited the PA State Grant award until all eligibility determinations have been made.
• Explains to institutions which PA State Grant Program communications are sent to students with incomplete records, provides Q&A materials regarding the SGF process, and includes:
  – Activity type, description, and additional details for incomplete notifications
    • Examples: Incomplete SGF items, Dependency Mismatch, Professional Judgement processing, parental data, etc.
  – Samples of Account Access, email, and print messaging sent to students
  – Action codes, letter IDs, descriptions, and other information for letters sent in lieu of notification of missing information needed to determine eligibility
    • Examples: Lives with clarification, Invalid SSN, Family Size, etc.
• Does not include explanation of PHEAA eligibility audit letters (such as Pennsylvania Domicile, Income Validation, etc.)
Student Resources

• Account Access is a student portal used to manage the PA State Grant Program (and other programs)
  – Students can log in to submit the SGF, view eligibility messaging, and make updates to enrollment and eligibility
  – Postsecondary institutions can view student information in Account Access
    • Updates must only be submitted by the student

• PHEAA.org/forms houses documents that provide additional information and forms that may be needed to request reconsideration of PA State Grant eligibility
  – Examples: Status Notice PDFs, Academic Progress Exception Form, Program Manual, Reduced Income Forms, etc.
The FAO at PHEAA College of the Arts sends a reminder email out to students who were identified as needing information for further review of PA State Grant eligibility.

First-year students, Claire and Jamie received the email and stopped in to ask about the messaging.

Questions:

- What status list(s) could the FAO have chosen to message?
- Where could the FAO find information on what items Claire and Jamie need for additional processing of PA State Grant eligibility?
Determining Statuses

Answers:

• PHEAA College of the Arts could choose to send messaging to any PA State Grant applicant.
  – For instance, the Complete-Reject category can be filtered to find students rejected for progress so that they can be informed of the Academic Progress Exception Form.

• The FAO can find information on what could be missing on the students’ Activity Log, Partner Interface, Account Access, the GAPS Report, and correspondence to the student.
Reconsideration Deadlines

• Incomplete Notification and other letters provide students with 30 days to respond
• Students may continue to submit information that may affect their eligibility until the reconsideration deadlines
  - 2021-22 AY = **April 1, 2022**
  - 2022 Summer = **October 31, 2022**

PHEAA accepts information after these deadlines if the student has responded to the request within 30 days
Reminders

• Report students who are not enrolled to reduce the number of students requiring additional review
• Update enrolled students not listed on PHEAA reporting via the Primary School Change function
  – Primary School Change Report in PageCenter assists in tracking the requests
• Withhold crediting for students whose eligibility is in question
  – Contact PHEAA with eligibility questions
• Review student listings to determine whether to reach out
Reminders

• Direct enrolled students to:
  – Maintain updated contact information for both federal and state processing
  – Review Account Access for PA State Grant eligibility messaging
  – Direct students with Professional Judgement to report special conditions to PHEAA
  – Consult the SGF and Summer Application User Guides
  – Submit all requested documentation
  – Contact PHEAA with questions on completion of missing items
Reminders

2021-22 AY Announcements

- 2021-22 Academic Year Conditional Awards Announced
  - Award maximum increased to $4,679
  - 2021-22 Estimator is available in the Document Library

2020-21 AY and Summer Reconciliation

- 2020-21 Academic Year and 2021 Summer awarding, disbursement and reconciliation underway

Event Materials

- Order the 2021-22 Handbook and other print materials via Online Ordering
- This Fall look for the Post-workshop Q&A available on SGSP Resources

General Reminders

- Review the Institutional Contacts Report in PageCenter
- Confirm appropriate user access in BPAMS
Resources

Web
- PHEAA.org
- Alec

SGSP Staff
- Email: SGHelp@pheaa.org
- Phone: 800-443-0646

Events
- Webinar Series
- Conferences
- Workshops

Print Materials
- Brochures
- Calendars
- FAQs
Thank You!