Pennsylvania National Guard
Military Family Education Program
Certification Procedures

2021-22 Program Year

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

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>11/10/2020</td>
<td>2020-21 Initial Publication</td>
</tr>
<tr>
<td>2.0</td>
<td>TBD</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>Throughout</td>
<td>Updated references to specific year to reflect 2021-22</td>
</tr>
<tr>
<td>II and III</td>
<td>Updated to reflect online application process</td>
</tr>
<tr>
<td>Appendices</td>
<td>• Added report description</td>
</tr>
<tr>
<td></td>
<td>• Removed BPAMS, PageCenter, and My File Gateway detailed instructions</td>
</tr>
<tr>
<td></td>
<td>• Links and report names retained</td>
</tr>
</tbody>
</table>
# Table of Contents

## Introduction ................................................................................................................. 5

### Access to PHEAA Documents & Reports ................................................................. 5

1. Institution Eligibility ................................................................................................. 5
2. Member Application .................................................................................................. 6
3. Student Application .................................................................................................. 6
4. Student Eligibility Requirements ........................................................................... 6
5. Eligibility Notification ............................................................................................... 7
   A. Student Notification ............................................................................................... 7
   B. Award Listings ....................................................................................................... 7
6. Award Determination ................................................................................................. 7
   A. Undergraduates ...................................................................................................... 7
   B. Post-Baccalaureate & Graduate Students ............................................................. 8
7. Student Eligibility Verification ................................................................................ 9
   A. Enrollment Status .................................................................................................. 9
   B. Program of Study .................................................................................................. 11
   C. Academic Progress ............................................................................................... 11
   D. Other Aid ............................................................................................................... 11
   E. Different Educational Costs .................................................................................. 12
   F. Student Withdrawal ............................................................................................... 12
8. Reporting Student Eligibility Changes .................................................................. 12
   A. Reporting a Change in Tuition ............................................................................ 12
   B. Reporting a Change in Credits ........................................................................... 12
   C. Refusing an Award ............................................................................................... 12
   D. Adding MFEP Funding for a Semester or Term That Does Not Show an Award ... 12
   E. How to Contact the DMVA ................................................................................... 13
   F. How to Contact PHEAA ....................................................................................... 13
9. Summer Term ............................................................................................................ 13
10. Handing of Funds .................................................................................................... 13
    A. Crediting Funds .................................................................................................... 13
    B. Disbursement Process ....................................................................................... 13
    C. Reconciliation ..................................................................................................... 15
    D. Refunds .............................................................................................................. 16
11. Retention of Records & Program Review ............................................................. 16
12. Mobilization to Active Duty ................................................................................... 17
Pennsylvania National Guard Military Family Education Program Certification Procedures

2021-22 Program Year

Introduction

The Pennsylvania Higher Education Assistance Agency (PHEAA) and the Pennsylvania Department of Military and Veteran Affairs (DMVA) jointly administer the PA National Guard Military Family Education Program (MFEP) for members of the Pennsylvania National Guard and their families. First launched in the 2020-21 academic year, this program provides financial assistance for eligible dependents of eligible Pennsylvania National Guard members. MFEP is offered as an incentive to PA National Guard members who have completed an initial term of service and enlist for an additional 6-year term.

The grant shall be treated as a benefit earned by an eligible member for honorable service to the country and Commonwealth.

Access to PHEAA Documents & Reports

Business Partner Access Management System

The 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 mfep@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 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. MFEP reports will be in the “NGEAP” application.

- **Document Library** – Document Library is an online repository, storing and organizing documents such as program guidelines, memoranda, and more.

- **My File Gateway** – My File Gateway is an easy-to-use process requiring no advanced technical skill or knowledge and offering a secure web portal for schools to send and receive data.

For information on using BPAMS, PageCenter, and My File Gateway, see “Appendix D” on Page 27 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.”

I. Institution Eligibility

To be eligible for MFEP 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 either accredited by a regionally or nationally recognized accreditation agency, or approval is granted by PHEAA/DMVA.

II. Member Application

Service members may apply to participate in MFEP after completing an initial term of service and enlisting for an additional term. To apply, members must complete an electronic application through PHEAA.org that includes the following items:

- **MFEP Master Promissory Note** – This is an agreement to repay any funds awarded under the program if the member fails to meet their service obligations. It details the terms that would apply when the awards convert to loans.
- **MFEP Statement of Understanding** – This form details the service obligations the member must meet to prevent any awards from converting to loans.
- **Supporting Documentation** – Depending on the member's branch of service and rank, additional supporting documentation is required.

In addition, the service member must assign benefits to a dependent beneficiary before they can be used. This can be done at the time of initial application, or any time thereafter, through the member's account at PHEAA.org. The benefits are assigned as semester credits out of a total benefit of 120 credits (equivalent to 10 semesters, or 5 years of full-time enrollment).

Applications are reviewed by the PA National Guard Education Services Office for approval.

III. Student Application

Eligible family members wishing to use their assigned MFEP benefits must apply electronically through PHEAA.org. In addition, first-time MFEP recipients must complete a Master Promissory Note (MPN) which commits recipients to repaying any MFEP awards received if the service member who assigned the benefit to the student dies before completing their service commitment and would not have otherwise been eligible for an Honorable or General, Under Honorable Conditions characterization of service at the time of their death. Applications are reviewed by the PA National Guard Education Services Office for approval.

A new application is required for each school year. The MFEP 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.
- Applications will be accepted until January 15, 2022, as funding allows. Applications received after January 15 will not be accepted unless granted an exception by the DMVA.
- Applicants are not required to complete the Free Application for Federal Student Aid (FAFSA®) or PA State Grant application to be eligible for MFEP benefits.

IV. Student Eligibility Requirements

Basic student eligibility requirements for MFEP include the following:

- 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
- Have benefits assigned to them by an eligible family member, as determined by the DMVA, currently or previously serving in an additional 6-year service obligation with the PA National Guard
• The service member who assigned those benefits is meeting or has met all other criteria set by the PA National Guard.

Additional eligibility requirements are reviewed by the Education Services Office prior to approval.

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. Students who are determined by the DMVA to be ineligible will receive a denial notice via email and should have their sponsoring member contact their unit of assignment with any questions or concerns.

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

B. Award Listings

Schools are provided with enrollment and award eligibility for each MFEP recipient enrolled at the institution via an Award Listing. The Award Listing will be placed on PageCenter and labeled “M21AWDLST,” with a description of the report to the right of it that is “MFEP Award Listing.” After the initial Award Listing is placed on PageCenter, institutions will receive an updated Award Listing every week.

The listing will also be a means for schools to notify PHEAA of changes to student records, including demographic information. Award Listings can be sent to PHEAA via fax at 717-720-3786, or via email at mfep@pheaa.org.

New recipients or those with an updated eligibility status will be displayed at the top of the Award Listing. 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 lisa.a.moyer6.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 who is enrolled in an undergraduate program of study.

i. Full-Time Students

A full-time award is the lesser of:

• The actual tuition charged for the number of credits in which the student is enrolled plus technology fee (technology fee not to exceed $239 per semester), 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).

The per-credit maximum is capped at $342 per credit. See “MFEP Award Chart” on Page 9 for term equivalents.
ii. Part-Time (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.

- The actual tuition charged for the number of credits in which the student is enrolled plus technology fee (technology fee not to exceed $20 per credit), or
- The per-credit tuition rate charged to a student at a PASSHE member institution ($342 per credit with a maximum of 11 credits per semester)

See “MFEP Award Chart” on Page 9 for term equivalents.

B. Post-Baccalaureate & Graduate Students

A graduate student is a student who already possesses a bachelor's degree or its equivalent, or a student who is enrolled in graduate study.

A graduate student can receive the same maximum award as an undergraduate student.

**NOTE:** MFEP student award amount should be calculated using the flat-tuition rate charged, plus technology fee to a Pennsylvania resident even if the student is not a PA resident. Awards must be calculated per term. If tuition charged varies between terms in the same year, total tuition cannot be combined to calculate a total award for the year. Awards for each term must be calculated individually.

MFEP students attending a community college shall be charged the local sponsoring rate.
**MFEP 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><strong>Full Time</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Semester (using semester credits)</td>
<td>12 or more (or the equivalent)</td>
<td>Actual tuition charged (plus technology fee*) OR $4,097;** whichever is LESS</td>
</tr>
<tr>
<td>Semester (using quarter credits)</td>
<td>18 or more (or the equivalent)</td>
<td></td>
</tr>
<tr>
<td>Semester (using clock hours)</td>
<td>450 or more (or the equivalent)</td>
<td></td>
</tr>
<tr>
<td>Quarter (using semester credits)</td>
<td>12 or more (or the equivalent)</td>
<td>Actual tuition charged (plus technology fee*) OR $2,731;** whichever is LESS</td>
</tr>
<tr>
<td>Quarter (using quarter credits)</td>
<td>8 or more (or the equivalent)</td>
<td></td>
</tr>
<tr>
<td>Quarter (using clock credits)</td>
<td>300 or more (or the equivalent)</td>
<td></td>
</tr>
<tr>
<td><strong>Part Time</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Semester (using semester credits)</td>
<td>11 or less (or the equivalent)</td>
<td>Actual per-credit tuition charged (plus technology fee*) OR $342 per credit;** whichever is LESS</td>
</tr>
<tr>
<td>Semester (using quarter credits)</td>
<td>16.5 or less (or the equivalent)</td>
<td></td>
</tr>
<tr>
<td>Semester (using clock hours)</td>
<td>412.5 or less (or the equivalent)</td>
<td></td>
</tr>
<tr>
<td>Quarter (using semester credits)</td>
<td>11 or less (or the equivalent)</td>
<td>Actual per-credit tuition charged (plus technology fee*) OR $228 per credit;** whichever is LESS</td>
</tr>
<tr>
<td>Quarter (using quarter credits)</td>
<td>7.32 or less (or the equivalent)</td>
<td></td>
</tr>
<tr>
<td>Quarter (using clock credits)</td>
<td>275 or less (or the equivalent)</td>
<td></td>
</tr>
</tbody>
</table>

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

**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 MFEP application, the school is required to report changes to the enrollment status on which awards have been based.

**i. Undergraduate & Graduate Students**

A student must be enrolled for at least 12 semester credits (or the equivalent) to receive a full-time MFEP award. See “MFEP Award Chart” 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 student’s enrollment, the school must report the new number of credits and tuition costs. For example, if a student listed with a full-time award on the Award Listing or Disbursement Roster but is enrolled on a less-than-full-time basis, the school must withhold crediting.

---

* 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.
and report the recipient’s correct number of credits and tuition. Reported costs should be rounded up to the next whole dollar amount (no cents).

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 Services Office to verify eligibility before adding the award. See “VIII. Reporting Student Eligibility Changes” on Page 12 for the different ways changes can be reported.

ii. Non-Standard Enrollment Schedules

When certifying eligibility for a student enrolled in a program of study that follows a nonstandard academic schedule, it is important to verify whether the student is eligible for a full-time award or a part-time award. MFEP utilizes the PA State Grant criteria when determining if students in nonstandard 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 and a minimum of 12 credits to be considered enrolled full-time for a semester.

Students falling below this minimum are processed as part-time. To determine if an MFEP 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). The result is the minimum number of credits needed for full-time status during the term.

Example: 1

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 x .706 = 19).

If the calculation results in less-than-full-time status, contact PHEAA at mfep@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 = .076 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 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>8 credits minimum/11 weeks = .727 factor</td>
<td>13 weeks</td>
<td>.727 x 13 weeks = 9.451 or 9 credits</td>
</tr>
</tbody>
</table>

MFEP-approved programs that are less than one term in length, using the calculation above, 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: 2

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

iii. Interim or Intersession Terms

MFEP cannot fund the “winter” session at a semester school for full-time students. Winter session credits at a semester school for less-than-full-time students may be applied to the fall or spring term MFEP benefit calculation. Winter credits can only be added to a less-than-full-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 less-than-full-time winter session enrollment to the spring semester.
Example 3
Student enrolled in 6 credits/$150 per credit during winter session at a school and 3 credits/$150 per credit in spring semester; Institution would report 9 credits/$1,350 tuition in the spring semester

Award calculation and caps remain as stated in the Award Determination section of the procedures (see “IV. Student Eligibility Requirements” on Page 6).

B. Program of Study

The student must 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.

C. Academic Progress

Although there is no academic progress requirement for a student to receive an MFEP award, a student who routinely receives MFEP aid for courses not successfully completed will utilize all MFEP eligibility prior to completing their program of study.

D. Other Aid

PHEAA is prohibited from reducing any aid it awards due to the student's receipt of an MFEP award. For example, the student's PA State Grant (if any) shall not be reduced or adjusted as a result of the student receiving an MFEP award.

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

MFEP awards are capped by law at the actual cost of tuition and technology fee for the approved program of study in which the beneficiary is enrolled or the resident annual tuition rate plus technology fee charged at a PASSHE school, whichever is less. Thus, under no circumstances may the amount of an MFEP award exceed these tuition amounts.

However, the provisions setting the maximum amount of MFEP awards do not specifically designate those awards for the sole purpose of defraying tuition and fees. MFEP awards can be used for other costs of pursuing approved programs of study, such as those 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 exclude all other aid, including military aid, when calculating the MFEP award. Students receiving an MFEP award who have received other aid that partially or completely funds their tuition may use any overage received through MFEP to pay for other educational expenses.

NOTE: Only the tuition costs can be used to calculate the amount of the MFEP award. The above allowable cost of attendance is used by institutions to calculate the processing of MFEP awards. See “Appendix C” on Page 25 for more information and examples explaining how to calculate the MFEP award.

* Reference the 2020-21 PA State Grant Handbook: Allowable Cost of Attendance,
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. Be certain to indicate the student's revised tuition and number of credits.

NOTE: MFEP awards are made in whole dollars only.

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 student changes from full-time to part-time status, or their number of credits enrolled decreases, they are only eligible for the tuition amount charged or the maximum MFEP award for the number of credits completed, 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 student is still eligible for the MFEP award 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 MFEP award for the student that exceeds the tuition amount charged or the maximum MFEP 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.

B. Reporting a Change in Credits

Any increase or decrease in the number of credits in which a student is enrolled should be reported on the Award Listing or Disbursement Roster. This includes canceling a term for which a student is no longer enrolled.

C. Refusing an Award

If a student wishes to refuse an MFEP award, the student must contact their benefactor's unit of assignment or the PA National Guard Education Service Office for assistance.

D. Adding MFEP Funding for a Semester or Term That Does Not Show an Award

If a student is enrolled for a term at your school and an MFEP award is not shown on the Award Listing or the Disbursement Roster for that term, you MUST contact the DMVA to verify eligibility before an MFEP award can
be granted. If the student is eligible, verification will be forwarded to PHEAA for processing. If the request to add a semester/term is sent directly to PHEAA, it will not be processed, and the school will be notified.

E. How to Contact the DMVA

Email Lisa Moyer at lisa.a.moyer6.nfg@mail.mil. The Pennsylvania National Guard Education Service Office can also be reached via phone at 717-861-9959. This contact information is only to be provided to the financial aid office to assist in awarding MFEP benefits. Students should not be provided this contact information.

**NOTE:** If students have questions regarding eligibility, the service member who assigned the MFEP benefit should be advised to contact the PA National Guard Individual unit of assignment. If the member is no longer active with the PA National Guard, students may contact The Pennsylvania National Guard Education Service Office student line at 717-861-9959.

F. How to Contact PHEAA

Rosters and Award Listings can be sent to PHEAA via fax at 717-720-3786, via email at mfep@pheaa.org, or by upload to My File Gateway. If sent to My File Gateway, you must also email mfep@pheaa.org to alert staff that the document is available for download. Mailing instructions are noted on the roster. MFEP 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 awards 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).

2022 summer term awards are based on the 2021-22 tuition costs and full-time and part-time award amounts.

X. Handing of Funds

A. Crediting Funds

Upon review of the Award Listing, institutions are encouraged to post a preliminary credit of the MFEP 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. MFEP awards should be clearly marked as such on the student’s account.

Questions regarding verification of a recipient’s eligibility should be addressed to the DMVA via email at lisa.a.moyer6.nfg@mail.mil.

B. Disbursement Process

i. Payment of MFEP Funds

PHEAA transfers MFEP funds to institutions electronically through the Automated Clearing House (ACH).

If your institution has not already completed an ACH Form, or you want the MFEP 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 MFEP funds transferred to the same account listed on that ACH Form, send an
email to fmeptadmin@pheaa.org to confirm that MFEP funds can be transferred to the bank account information currently on file with PHEAA.

PHEAA and DMVA, jointly, reserve the right to determine continued MFEP eligibility of the institutions for reasons to include but not limited to: closing, restriction, or oversight by the United States Department of Education (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 mfep@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 also 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 instructions on how to navigate through PageCenter, see “Appendix D” on Page 27.

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 MFEP 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.

Detailed information for each MFEP 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 Roster, see “Appendix B” on Page 20.

iv. Reporting Changes

In all cases where the school determines a student may not be eligible for an MFEP award or an award should be increased or added, the school should see “VIII. Reporting Student Eligibility Changes” on Page 12 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 MFEP award amount will be automatically calculated once PHEAA enters the updated tuition or credits. Indicate in the “Comments” section the 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 MFEP 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 guidelines or completing the Disbursement Roster should be directed to PHEAA via email to mfep@pheaa.org, or by calling 800-443-0646. 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 the PA National Guard unit of assignment of their family member or the Pennsylvania National Guard Education Service Office student line at 717-861-9959.

v. Returning the Roster

All certified rosters must be returned to PHEAA. Before returning a certified roster to PHEAA, verify that the tuition amount and the number of credits are correct; also, review the institutional information reflected on that roster, and indicate any changes.

**NOTE:** 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. Attached to these Certification Procedures are instructions on transmitting rosters through My File Gateway (see “Appendix B” on Page 20). Schools that are not currently set up to participate in My File Gateway should contact PHEAA staff at pheaa@pheaa.org, and PHEAA staff 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, or
- The roster can be returned by faxing the completed roster and signed certification page directly to PHEAA at 717-720-3786, or
- The roster can be mailed to:
  
  PA Higher Education Assistance Agency
  
  Military Family Education Program
  
  P.O. Box 8157
  
  Harrisburg, PA 17105-8157

C. Reconciliation

The final MFEP roster for the program year is the Reconciliation Roster. This roster is a summary of all enrollment changes, disbursements, and refunds from the entire program year. All schools with MFEP students will receive a Reconciliation Roster whether or not they are 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 mfep@pheaa.org. The Reconciliation Roster is the last MFEP 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 for MFEP recipients who did not enroll or who have had their awards reduced due to enrolling for a lesser number of credit/clock hours and credit the funds to subsequent recipients. 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 to your institution on the next roster. For more information, see “Appendix B” on Page 20 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

Refunds may also be sent via ACH or wire transfer. See the Special Programs Refund Instructions document in Document Library for more information or contact PHEAA staff at mfep@pheaa.org for assistance.

Refunds should be clearly identified as “Military Family Education Program (MFEP)” funds and include a brief description of the payment reason. For ACH or wire transfer payments, an email indicating the refund is related to MFEP, 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 MFEP funds for at least 5 years from the date 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 MFEP 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 MFEP findings:

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

For additional details on the PA State Grant and Special Programs Program Review process, visit PHEAA.org/Program-Review.

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.”

MFEP beneficiaries who are also activated soldiers must provide the school with a copy of the mobilization order for MFEP awards 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 section (see “ii. Returning Funds” on Page 16). 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.

In addition, when an eligible member is ordered to serve on active duty for more than 30 consecutive days, including active duty for training and state active duty, the family member who is the spouse and receiving the MFEP award may withdraw from a program of education and shall be granted an education leave of absence; as provided under Title 51, Section 7313 (Relating to Educational Leave of Absence).

**NOTE:** This only applies to the spouse and does not apply to family members who are dependent children.

Per Title 51, Section 7313 (Relating to Educational Leave of Absence), it shall be the duty of the institution of higher learning to refund tuition or fees paid or to credit the tuition and fees to the next semester or term after the termination of the educational military leave of absence at the option of the eligible member or spouse.
Appendix A

Award Listing
### Award Listing

**Directions for Award Listing Updates**

**Other Awards** – Only update with reduced MFEP award if other awards have been applied; at no other time should this field be updated.

**Tuition per Term** – Update actual tuition charged plus technology fee, on the line provided; do not include additional fees other than the allowed technology fee.

**Enrollment Cred/Clk Hrs** – Update only credits or clock hour on the line provided.

**NOTE:** Award Listings are generated weekly to provide up-to-date 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 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.

For example, Student 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 of a Disbursement Roster. This column displays NONE if PHEAA is not paying out any funds for a student as a result of the offset of funds, even if the student is eligible for another term award.

As another example, Student 2 also has 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. This will be 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 mfep@pheaa.org.
20XX-XX PENNSYLVANIA NATIONAL GUARD MILITARY FAMILY EDUCATION PROGRAM (MFEP)

NOVEMBER XX, 20XX

FED TAX ID ATTN: FINANCIAL AID ADMINISTRATOR FALL DISBURSEMENT
XX-XXXXXX COLLEGE UNIV
1200 TEST RD
XXXXX HARRISBURG, PA 07011

TOTAL MFEP FUNDS DUE STUDENTS (AS OF THIS ROSTER) $12,291

ACTUAL DISBURSEMENT $12,291

TOTAL NUMBER OF RECIPIENTS ON ROSTER 3

THE PRODUCTION OF THIS ROSTER SHOWS THE ACCURACY OF THE AWARDS THAT HAVE BEEN PROCESSED AND THE SCHOOL IS DUE PAYMENT FOR MILITARY FAMILY EDUCATION PROGRAM (MFEP) RECIPIENTS FOR WHICH PAYMENT HAS NOT BEEN PREVIOUSLY MADE.

MICHAEL F. JANZE
CPT, AG, PAARMG
PA ARMY NATIONAL GUARD

ELIZABETH K. MCCLOUD
VICE-PRESIDENT
STATE GRANT AND SPECIAL PROGRAMS
Financial Aid Offices – For your convenience, the MFEP Certification Procedures are located on PHEAA’s Document Library. If you have questions, contact Lisa Moyer at lisa.a.moyer6.nfg@mail.mil or 717-861-9959.

NOTE: The above phone number and email address are provided to assist schools. This information should not be provided to students.
Explanation of Disbursement Roster Terminology

MFEP Disbursement Roster

Total Grant – The student’s MFEP 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 MFEP funds disbursed for the student to date

MFEP 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 MFEP 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.

MFEP Summary Page

The 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 MFEP 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 Calculate 2021-22 MFEP Awards
How to Determine 2021-22 MFEP Awards

Steps to Apply

Step 1: Determine the total Tuition and Fees (including Technology Fees) charged to the student. This is the amount billed by the school for educational expenses. As mentioned earlier, MFEP award amounts should be calculated using the actual tuition rate plus technology fee, charged to a Pennsylvania resident even if the student is not a PA resident. For students attending a community college, the local sponsoring rate should be used.

Step 2: Determine the maximum MFEP benefit amount based on the student's enrollment status, number and type of credits enrolled, and the PASSHE annual tuition rate (see “MFEP Award Chart” on Page 9).

Step 3: Calculate the actual MFEP award by comparing the figures from Step 2 and 3. The lesser of the two is the actual MFEP award amount.

Examples

Example 1
Full-time Tuition, Less Than Maximum Award

Step 1: Student is enrolled full time for 12 semester credits at a school with a semester schedule. The tuition plus technology fee charged by the institution is $2,500 per term.

Step 2: The maximum award per term for a full-time student at a semester school is $4,097.

Step 3: The actual MFEP award is $2,500, the lesser of the two amounts.

Example 2
Part-Time Tuition, More Than Maximum Award

Step 1: Student is enrolled part time for 9 semester credits at a school with a semester schedule. The tuition plus technology fee charged by the institution is $500 per credit, for a total of $4,500 for the term.

Step 2: PASSHE annual part-time tuition is $342 per credit, or $3,078 for 9 credits.

Step 3: The actual MFEP award is $3,078, the lesser of the two amounts.
BPAMS

The Business Partner Access Management System (BPAMS) is available through ccc.aesSuccess.org/apps/bpams.nsf/home.

PageCenter

Reports & Descriptions

The following reports are available in your school's PageCenter mailbox. The report names are provided below, along with a brief description of the information provided on each report.

National Guard Reports (NGEAP)

- **MFEP Disbursement Rosters (MYYDSBRST)** – 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 MFEP 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.

- **MFEP Disbursement EFT Letter (MYYDSBEFT)** – This Pageset is a letter to provide an institution the amount and date on which MFEP funds are transferred to the institution’s designated bank account.

- **MFEP Award Listing (MYYAWDLST)** – Schools are provided with enrollment and award eligibility for each MFEP 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 Award Listing. Award Listings are generated weekly for the most recent 2 years.

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.

### Board of Directors

<table>
<thead>
<tr>
<th>Representative Michael Peifer</th>
<th>Representative Mark Longietti</th>
<th>Representative Maureen E. Madden</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chairman, Pike/Wayne</td>
<td>Mercer</td>
<td>Monroe</td>
</tr>
<tr>
<td>Senator Wayne D. Fontana</td>
<td>Representative Steven C. Mentzer</td>
<td></td>
</tr>
<tr>
<td>Vice Chairman, Allegheny</td>
<td>Lancaster</td>
<td></td>
</tr>
<tr>
<td>Senator Ryan Aument</td>
<td>Representative Jennifer O’Mara</td>
<td></td>
</tr>
<tr>
<td>Lancaster</td>
<td>Delaware</td>
<td></td>
</tr>
<tr>
<td>Representative Mike Carroll</td>
<td>Savior</td>
<td></td>
</tr>
<tr>
<td>Lackawanna/Luzerne</td>
<td>York</td>
<td></td>
</tr>
<tr>
<td>Representative Sheryl M. Delozier</td>
<td>Representa</td>
<td></td>
</tr>
<tr>
<td>Cumberland</td>
<td>Representative Curtis G. Sonney</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Erie</td>
<td></td>
</tr>
</tbody>
</table>

| Senator Arthur Haywood        | Chancellor Timothy R. Thyreen  |
| Montgomery/Philadelphia       | Waynesburg                     |
|                               | Noe Ortega                     |
|                               | PA Secretary of Education      |

| Representative Steven Mentzer |
| Representative Caroleen Madden|
| Secretary of Education        |

| Governor Appointee            |
| Vacant                        |

| Governor Appointee            |
| Vacant                        |

| Governor Appointee            |
| Vacant                        |

**Pennsylvania Higher Education Assistance Agency**

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