Pennsylvania State Grant Program Workshops

PA State Grant Certification Part 2 of 2
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.
Objective

Conclusion of our two-part series on certifying PA State Grant awards

During this session, presenters will:

- Provide approved program of study requirements for students
- Review enrollment requirements including minimums, repeated coursework, remedial credits, and enrollment mode reporting
- Examine reporting requirements associated with student adds, drops, and withdrawals
Overarching 2- or 4-year program under which student is initially admitted or is currently enrolled

- Students’ programs of study may be collected from the FAFSA®, historical PA State Grant record data, Account Access or via institutional reporting
- An institution’s Headquartered and Domiciled (HQB) status may have an impact on student eligibility
# Approved Program of Study

- Students must be enrolled in an approved program of study that meets minimum length and program structure requirements

### Minimum Length
- At least 2 academic years comprised ≥60 weeks of instruction
- Minimum of 60 semester credits (90 quarter credits or 1,500 clock hours)

### Program Structure
- HQD Institutions – programs are eligible regardless of the percentage of distance education instruction
- Non-HQD Institutions – programs must contain at least 50 percent classroom instruction (“DE” program of study = Reject G)

- Programs cannot be eligible for both PA State Grant and PA Targeted Industry Program (PA-TIP)
  - Use a Program of Study Code 00-Other to report students in non-approved programs

PHEAA – Providing affordable access to higher education. (Public Information)
Reporting New or Changed Programs

- Program of study is a factor in determining PA State Grant eligibility
  - 2- and 4-year institutions do not need to report changes to program of study
  - Hospital Schools of Nursing (HSONs) must keep PHEAA up-to-date with program structure changes
  - Business, Trade, and Technical (BTT) Institutions report new and changed programs
    - Changes must be confirmed via the Educational Cost Collection and approval finalized by May 1 (summer term) or August 1 (academic year)
    - Approval by the PDE or the PA State Board of Private Licensed Schools is required
    - AST/ASB must use either clock hours or credits
• Programs also must meet minimum term start date and term length requirements
  – Refer to Chapter 1, Section IV for complete guidance on term start dates and term length
  – Term Lengths:
    • Semester: 15-18 weeks
    • Quarter: 10-12 weeks
    • Summer: ≥ 5 weeks at non-year round curriculum schools
  – Module: Period of enrollment that does not span the entire term length
    • Final crediting must be withheld until the start of the final module when enrollment and eligibility can be confirmed
# Changes in a Student’s Program

- Students are limited to 4.0 years of PA State Grant, unless in a bona fide 5-year program
  - Program length and program of study impacts the maximum award counter
  - Institutions must report students’ Program of Study accurately

## 2-Year Terminal

- Assigned when student selects an “Associate degree (occupational or technical)” or “Certificate or diploma (occupational, technical or educational of at least 2 years)” on the FAFSA
- PHEAA limits students to a 2.0 counter (Reject Y)
- Report Reject Y students that have re-enrolled in a different program via Special Request

## 2-Year Transferrable

- Assigned when student selects “Associate degree (general education or transfer)” on the FAFSA
- PHEAA limits students to 2.0 counter (Reject Y) at community colleges
- 2-year private and 4-year institutions must report by Special Request when the student has reached 2.0
- Institutions must report student transfers to the 4-year program

## BTT

- Programs (e.g., length, cost, etc.) are evaluated and approved annually
- PA State Grant counter is limited to the number of approved terms

When students in a Reject Y status meet the exception criteria and have not reached a 4.0 counter, counsel the students, document the discussion, and submit an Additional Terms of Aid form.
# Changes in a Student’s Program

- Eligibility is dependent upon the timing of the program change and **start of the term**
  - Program of study changes before the end of the term may require re-review of eligibility

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<th>Program Change</th>
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<tbody>
<tr>
<td>From an approved to a non-approved program <strong>after the start of the term</strong></td>
<td>The student may be eligible for PA State Grant aid in accordance with the school’s refund policy and PHEAA’s withdrawal procedures</td>
<td>From a non-approved to an approved program <strong>after the start of the term</strong></td>
<td>The student is not eligible until the next term; report the new program in the next term and withhold crediting until processed</td>
<td>From a non-approved to an approved program <strong>on or before the start of the term</strong></td>
<td>The student is eligible for PA State Grant aid</td>
<td>Occurs <strong>between approved programs</strong> at a BTT school</td>
<td>Submit a correction to the program and withhold funds until PHEAA has reprocessed the student using the corrected program</td>
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PHEAA – Providing affordable access to higher education. (Public Information)
Approved Program of Study

• David Rose is enrolled in a 2-year Transferrable program at PHEAA State U., a 4-year institution.
• Stevie Budd is enrolled in a 2-year Transferrable program at PHEAA Community College.
• Each student has already received 2.0 PA State Grants and is re-enrolled for the next semester.

Questions:
• Will David need to be reported to limit additional awarded terms since David has met the maximum program counter?
  – Will Stevie?
• Would David be eligible for more terms of aid at PHEAA State U.?
  – Would Stevie?
Approved Program of Study

Answers:

• PHEAA State U. would need to report Davd by Special Request after the 2.0 counter was met, unless additional eligibility is determined.
  – PHEAA Community College would not need to report once Stevie met the 2.0 counter.

• David is likely to have continued eligibility while taking courses that lead to a 4-year degree. Once the 2.0 counter has been met, if David takes more coursework, the program of study may be updated to the 4-year program.
  – If Stevie met one of the exception conditions, then the FAO could explain the situation to Stevie, document, and submit an Additional Terms of Aid Form. Stevie could also be eligible under a different program of study.
Enrollment

• Definitions and requirements established by Regulation 22 Pa. Code §121.1 and §121.5

• Four enrollment statuses recognized
  – Full-time, half-time, less than half-time, and not enrolled
    • Full-time ≥12 semester credits (.50 counter)
    • Half-time ≥ 6 semester credits (.25 counter)
    • Final Year Exception may be applicable

• Students must be enrolled in courses applicable towards degree or program objectives
  – Unless a remedial exception is used

Refer to Chapter 2 for credit and clock hour term and yearly enrollment minimums
### Remedial Credits

**Not PHEAA defined**

- Not used toward enrollment unless:
  - Insufficient regular credits; **and**
  - An exception is reported

- \( \leq 6 \) remedial credits can be used toward full-time enrollment; \( \leq 3 \) for half-time

- Include only credits used for eligibility determination toward enrollment mode

- Re-evaluate if drop or withdrawal prevents the student from meeting enrollment requirement

**Remedial Exception**

- Is limited to **1.00** counter

- Must be reported by the last day of the academic period

- Report **only** for awarded terms

  - Remove if unawarded or if student already meets the enrollment minimum

- Must be considered during the review for Academic Progress

- **Example:** A student with 7 regular and 11 remedial credits would meet the full-time semester (.50) enrollment requirements, if an exception was available and used. Whereas, a student with 6 remedial credits and 2 regular credits would be ineligible and should be reported as less than half-time.
Visiting students may be awarded at your school, if:

- All PA State Grant requirements are met
  - Examples: approved program of study, Academic Progress, etc.
  - Credits taken can apply toward the credential at the home school
- Students may combine degree credits at two schools to meet eligibility requirements
- Study abroad students may be eligible
  - “Home” institutions use their academic calendar
  - Study abroad students “visiting” your school may have additional considerations

Review Cost Override policies in Chapter 2 for visiting, combined enrollment and study abroad students.
Enrollment Reporting

- Submit a **Primary School Change** request for students enrolled at your institution, but not showing your institution as first choice
- Compare enrollment used in award calculation to actual enrollment
  - Correct any discrepancies prior to crediting funds
  - Do not credit awards based upon ineligible enrollment types
- Cancel not enrolled students and those who do not plan to enroll
  - Investigate students with all “F” grades
    - “No show” = Not enrolled; Initiated the term = withdrawal procedures
  - Use “Student Graduated” only when student receives Bachelor’s
- Repeat courses count toward enrollment status and enrollment mode (except if credits are excess remedial credits)
  - Includes repeat courses from prior modules in the same term
  - Cost Override reporting and satisfactory Academic Progress may be considerations for repeated credits
Instruction Delivery & Enrollment Mode

• Report percentage of online credits on a term-by-term basis
  – Must match the student’s final enrollment used for eligibility determination
  – Required for all schools
  – Used to determine eligibility at Non-HQD institutions

Mode 1
100% Classroom (system default)

Mode 2
Up to 50% distance education

Mode 3
Greater than 50%, but less than 100% distance education

Mode 4
100% distance education
Eligibility for students enrolled in modes 3 and 4 depends on whether or not the student attends a HQD school

- **Non-HQD Schools:** Students must meet the \( \geq 50\% \) classroom instruction requirement
  - Americans with Disabilities Act (ADA) Notice sent once enrollment mode 3 or 4 is reported
  - 30-day window for response to ADA letter
  - Students granted the ADA exception may be awarded
Award Adjustments

- A student’s term award may require a change (e.g., adjustment, cancellation, enrollment status or mode update) when the student initially enrolls but adds, drops, or withdraws from one or more courses prior to the end of the term.

**Adds**
- Student registers for a course or courses after the start of the term which will appear on the transcript.

**Drops**
- Student was registered for a course or courses, but later removes them from the schedule and thus no attempted course exists on the transcript.
  - May or may not incur charges.

**Withdrawals**
- Student registers for a course or courses, but later removes them from the schedule and attempted credits exist on the transcript; charges are also incurred.
Evaluating Adds & Drops

• Monitor and report changes due to adds and drops
  – Report enrollment mode changes even when eligibility is not impacted

Could occur at any point within the academic period

Must be reviewed for adjustments

May require re-evaluation of remedial exceptions

May impact final enrollment status and mode used for eligibility determination

Refunds may be required due to adds and drops that occur after disbursement
Withdrawals

- Withdrawal situations include full or partial withdrawals; leaves of absence; changes to a non-approved program of study; or situations when a student is terminated, expelled, suspended, dismissed, or deceased.

- Only apply withdrawal procedures when:
  - Awards are final (after the Commonwealth budget passage)
  - Student was certified as eligible
  - Award was disbursed by the school and credited to the student’s account

  • Crediting (and award counter) is based on enrollment and eligibility prior to withdrawal

For unofficial withdrawals, only use the withdrawal procedures when a date of last attendance or a date of last activity can be determined.
Adjustment Steps

- When students withdraw after disbursement, a refund to PHEAA may be required depending upon: 1) the date of the withdrawal; and 2) the institutional tuition refund policy

Step 1
Determine the portion (percent) of tuition refund.

Step 2
Check the award amount retained does not exceed the portion permitted under school’s tuition refund policy.

Step 3
Advise the student to pay when the award amount is small to save counter and avoid Academic Progress issues.

Step 4
Report award adjustments via Partner Interface.

When applying the adjustment steps, the enrollment status and mode are generally not re-reported.
Withdrawals

Withdrawals in Modular Terms

• In modular terms, payment may only be made:
  – At the beginning of the last module
  – Based on the number of enrolled credits minus any withdrawn credits that occurred prior to crediting

Withdrawal to At Least Half-time

• Institutions may elect to either:
  – Follow the withdrawal procedures and adjust the full-time award
    • May result in a higher award amount
  – Report the student as half-time
    • Saves an award counter and avoids Academic Progress issues

Adjustment steps may be used only once the award has been credited after the start of the final module.
Addrs, Drops, & Withdrawals

• Patrick Brewer registered for 12 regular classroom credits and 3 online remedial credits.
• Twyla Sands registered for 6 classroom credits and 3 online credits for courses that span the full term length. No remedial credits.

Questions:
• What should the FAO report as Patrick’s enrollment status and mode?
  – What would the enrollment status and mode be if Patrick dropped 3 of the regular credits? What if Patrick withdrew from the 3 regular credits?
• What should the FAO report as Twyla’s enrollment status and mode?
  – If Twyla withdrew from a 3-credit classroom course, then later added the online version during a module offered later in the term, what would be the updated enrollment status and mode?
Add the explanations provided:

**Answers:**

- Patrick would initially be reported as full-time with an enrollment mode of 1. No remedial credits would be included.
  - If Patrick were to drop from 3 regular credits, then the FAO could submit a remedial exception (if available) so that Patrick could meet the full-time requirement.
  - If Patrick withdrew, depending on the timing of the withdrawal and the availability of a remedial counter, the options could be to 1) follow the adjustment procedures (no enrollment mode change), 2) report Patrick as half-time (enrollment mode 1), or 3) report a remedial exception to utilize the 3 remedial credits toward the full-time requirement (enrollment mode 2).

- Twyla would initially be reported as half-time, with an enrollment mode 2.
  - At the beginning of the final module, the FAO would review the enrollment and report Twyla as half-time, with an enrollment mode 3. Enrollment status and mode would be based on the 6 online and 3 classroom credits. Twyla would be ineligible at a Non-HQD institution.
Reminders

• Report program changes (e.g., term start dates, term length, etc.)
  – Handbook details deadlines for reporting

• To avoid program findings
  – Regularly review student eligibility and make necessary adjustments
  – Contact PHEAA with questions regarding policy and student eligibility
  – Submit eligibility changes promptly
    • Late changes impact other schools, PHEAA, and the general student population

• Retain documentation that supports student eligibility, and crediting decisions for five (5) years from the date of the last reconciliation roster
**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

PHEAA – Providing affordable access to higher education.  (Public Information)
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
Join Us Next Time

- **June 10th**: 2021-22 PA State Grant Handbook Update
- **June 17th**: Counseling Students on PA State Grant Incomplete and Review Statuses
- **June 24th**: PA State Grant Certification (Part 1 of 2)
- **July 1st**: PA State Grant Certification (Part 2 of 2)
- **July 15th**: PA State Grant... Meet Modules
- **July 22nd**: Are You Reconciled?
- **July 29th**: 2021-22 PA State Grant Handbook Update
Thank You!