Slide 1 – Instructions
This presentation contains audio and closed caption features.
Use the navigation bar to manage the audio/mute options; launch/hide closed captions; and advance through the presentation.

Slide 2 - PATH Overview Title Slide
Hello and thank you for joining us for an overview of the Partnerships for Access to Higher Education, or PATH Program.

Slide 3 - Purpose
The purpose of this training, is to provide a high level overview, of the Partnerships for Access to Higher Education Program also referred to as PATH. We will begin our review with some background information on the program. Then we will touch upon how community organizations can partner with PHEAA to provide financial aid to eligible students and what requirements students must meet to receive a PATH grant. Before we conclude, we will discuss some of the chief components of the disbursement process. Finally we will provide you with some additional resources you can use to manage the PATH program.

You should note that this presentation serves as an overview of the printed material, and should be used in conjunction with the written guidelines to ensure your full understanding of, and compliance with all PATH program policies. A copy of the program guidelines can be found on our resources and training website. We will provide the web address at the end of the presentation. Let’s begin our overview with some background information.

Slide 4 - Background
The PATH Program offers non-profit community-based Pennsylvania organizations and foundations the opportunity to leverage private donations and contributions as a means and an incentive to provide additional need-based educational grants to eligible students. These grants then have the potential to be matched by PHEAA on a dollar-for-dollar basis.

This means that with the PATH Program, qualifying students who have already been awarded a scholarship or grant by one of our community Partners may also be eligible for additional grant money. Currently, over 30 foundations and other community organizations are approved to participate as PATH Partners. Our partners nominate potentially eligible students to receive awards funded by the Pennsylvania general assembly.

Slide 5 – Partner Eligibility
To become a PATH Partner, an organization must apply after meeting a number of criteria. All organizations applying for participation in the program must operate separately from PHEAA, and offer scholarships with student eligibility requirements and funding sources independent from both the agency and the Commonwealth. Potential partners must also have offered scholarships to Pennsylvania residents for a minimum of two years, and have provided aid to at least 15 Pennsylvania students. Scholarships must be available to individuals within the greater community, regardless of organizational membership or PHEAA affiliation.
Partnerships for Access to Higher Education
PATH Program Overview

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Pennsylvania Higher Education Assistance Agency

Additionally, PATH will only match partner scholarships that disburse funds directly to institutions. Any scholarship funds sent to the student will not be matched by PHEAA. The program also prohibits matching for tuition waivers, or scholarships awarded by the student’s post-secondary institution. Organizations applying for participation will need to list all of the scholarships that meet PATH requirements on their application, and submit an updated list annually by September 1st of the program year.

Additional organizational requirements are available in the program guidelines, which you can find in the Resources and Training section of PHEAA.org. Organizations interested in becoming a PATH partner should contact PHEAA. We will provide contact details at the end of the presentation.

Slide 6 - Student Eligibility

Now that we have covered the partner participation criteria, let’s review some student requirements to receive a PATH award. Aside from the partner’s original scholarship requirements, there is no additional student application for the PATH program. To receive a PATH award, students will be nominated by the partners who have awarded them eligible scholarships.

Nominated students must also meet State Grant eligibility criteria, including being enrolled at least half-time at an approved institution in an approved program of study, and not be in default on a federal student loan. In addition, PATH students must demonstrate financial need as certified by the institution. Once the student meets all eligibility requirements, PHEAA will match the scholarship funds for the lesser of: the total academic year PATH Partner Award; the total academic year State Grant award, or the PATH academic year maximum amount of $2,500. The PATH minimum academic year award amount is $200.

More information on the student eligibility criteria is available on PHEAA.org under Funding Opportunities.

Slide 7 - PATH Disbursement Model

To better your understanding of how students can receive these matching funds, let’s review the PATH disbursement model.

To begin, a community based organization offers scholarships to students in order to assist them with paying the costs of higher education. Next the organization applies to become a partner, meets the program criteria, and is approved.

During the approval process, a list of PATH eligible scholarships is provided. As previously mentioned, this list is then updated annually. Then participating PATH Partners send a list of nominees who have been awarded their scholarships, along with the students’ full academic year scholarship award amount. Again, PHEAA will only match partner scholarships that are disbursed directly from the partnering organization or foundation, to the students’ postsecondary institutions.

Once the nominees are received, PHEAA’s PATH Program staff verifies that the nominees have Pennsylvania State Grant awards for each of the terms for which the nominee would receive PATH funds. For this reason, we encourage PATH Partners to advise potential recipients of the
State Grant award deadlines, and that PATH Grant eligibility is predicated on receiving a State Grant.

The PATH Grants are initially determined by PHEAA, who establishes total academic year award amounts and then divides those amounts per term. After PHEAA determines initial eligibility, PATH Grant nominees and potential award amounts are provided to institutions on the Applicant Certification and Status Listing or ACSL. ACSLs are provided biweekly to institutions via the PageCenter mailbox, every other Tuesday.

Institutions will review all eligibility criteria, complete, and sign the ACSL, before returning it to PHEAA by email or fax.

Funds are disbursed to the institution for the certified student awards on a monthly basis throughout the academic year.

Let’s go over some additional details of the ACSL and disbursement rosters on the next few slides.

**Slide 8 - Certification**

The image on this slide is an example of an institution’s ACSL. The ACSL provides student detail and summary information, as well as a certification page. Institutions are required to certify PATH Grant eligibility, and sign the certification page as a condition of disbursement.

Institutions should certify a student on the ACSL once the matching scholarship or grant has been received and verified using the PATH Scholarship List in the Document Library.

To complete the ACSL, either a Y for yes, or an N for No, must be added to the Degree Program, Unmet Cost Need, and Academic Progress fields. The Enrollment Status, Grad Date, and EFC fields should be reviewed, and updated if the school is providing corrections to these fields. The Certified Amount should then be added. Keep in mind that the award amount provided on the ACSL is considered an estimate until an amount is provided and certified by the institution.

Only the students for whom all required fields have been completed will be certified. Students with blank certification fields are not considered certified and will not have funds disbursed with the next PATH roster. Finally, the certification page should be signed and dated before the ACSL is returned to PHEAA by email or by fax.

Please refer to the Program Guidelines or contact PHEAA staff if you have questions regarding certification of the ACSLs.

Once the first ACSL has been certified and returned, institutions do not need to return an additional ACSL unless there are changes or additions to the certified students.

**Slide 9 - Certification Best Practices**

It is also recommended that institutions only certify student awards for terms which have already begun. All eligible students must be certified by July 1 of the program year or 30 days after the term has begun, whichever is later. Awards uncertified after this time may be cancelled by PHEAA. Additional information on the certification process including definitions for the data fields is included in the PATH program guidelines. Once ACSLs are printed, completed, and
returned by the institution, they are then manually processed by PHEAA staff. Incomplete or incorrect certification, could delay or prevent funds transfer. We have outlined a number of best practices on this slide, to help schools avoid any processing issues that could delay PATH funds disbursement.

First, when confirming certification for a student award, an institution must place a, Y, in each of the Academic Progress, Degree Program, and Unmet Need/Cost fields. According to the program guidelines, these fields can only contain either: Y, meaning yes the student has met the requirement, or, N, meaning no the student has not, and is, therefore, ineligible for the award. Writing any other information in these fields, will result in an incomplete certification for the student, which can delay the award disbursement.

Next the school must write in the certified amount and graduation date in the appropriate fields. Schools should confirm, and then correct erroneous information printed in these fields, as well as in the EFC and enrollment status fields.

It is important to note that fields for students whose awards are not being certified, at the time the ACSL is completed should be left blank. This includes those students whose partner funds are expected but have not been received. Writing “$0” for the award amount, or that the funds have not been received is an indication that the student is ineligible, and therefore the school is cancelling the award for the term. Again, to avoid confusion, if the funds are expected, simply leave the certification fields blank, and complete them once the funds have been received and eligibility is confirmed.

After all eligible students have been certified, the last page of the report must be signed and dated, and the complete ACSL should be returned to PHEAA. While this report is generated biweekly in PageCenter, only one ACSL is required to be returned. Once one ACSL has been certified, only submit additional ACSL pages that contain changes to student awards along with the signed certification page. Sending duplicate ACSLS or duplicate pages can produce additional manual reviews for PHEAA staff, and extend the processing time.

**Slide 10 - Disbursement**

The image presented here is a sample of a disbursement roster. All PATH disbursement rosters are placed in the STEP application of the institution’s PageCenter mailbox; once during each term of the academic year. An email regarding the disbursement is also sent to the school contact listed.

The disbursement roster includes all students that the school has certified as eligible on the PATH ACSL. Once eligibility is certified and funds are credited to each recipient’s student account, a signed copy of the roster must be returned to PHEAA.

Changes to student eligibility and awarding may be submitted on the roster; however, if there are no changes or adjustments, only the signed certification page, should be returned. For questions on PATH roster certification, refer to the program guidelines or contact PHEAA for assistance.

Funds are only disbursed through ACH and deposited directly into the designated bank account of the school at which the student is enrolled. Institutions should allow at least 14 business days for the transfer to occur.
In conclusion, we would like to refer you to some resources that will assist you in managing the PATH Program. On PHEAA.org, you will find the most recent version of the Program Guidelines, in addition to student eligibility information and the lists of approved partners and scholarships. You will also find information on the Pennsylvania State Grant Program and the most recent State Grant Handbook.

In Alec, you will find links to the Document Library and PageCenter. PageCenter is our reporting repository, and contains student and institutional reporting for your school. Copies of correspondence that was sent to schools throughout the year, as well as program related information applicable to previous years, and the PageCenter User Guide are available in the Document Library.

If you would like to contact us, PHEAA staff is available at 1-800-443-0646. You may also outreach to us via email at path@pheaa.org to share your questions and concerns, or to express your feedback. Your feedback in writing will help us to share your input with the appropriate staff.