

STATE GRANT AND SPECIAL PROGRAMS RECORD RETENTION POLICY



In accordance with program guidelines, participating institutions are required to create and maintain records documenting certification steps. PHEAA requires such records to be retained for the time period indicated in the program policy guidelines for each program, as outlined below.

Records include but are not limited to:

- Documentation that supports the institution's and/or student's ability to meet all eligibility requirements
- Documentation of compliance with program guidelines including the appropriate application of program funds (i.e., Act 101 Program administration)
- The date and amount of the crediting of program funds to student accounts
- The repayment or return of any overpayment of program funds

PROGRAM	RECORD RETENTION POLICY*
Act 101 Program	5 academic years
Blind or Deaf Beneficiary Grant (BDBG) Program	5 years from the date the institution completes certification of the award disbursement roster
National Guard Educational Assistance Program (EAP)	3 years from the date of certification of the final reconciliation roster
Chafee Education and Training Grant Program (Chafee/ETG)	5 years from the date of certification of the final reconciliation roster
Gaining Early Awareness and Readiness for Undergraduate Programs (GEAR UP)	5 years from the date of certification of the award disbursement roster
Institutional Assistance Grants (IAG) Program	5 years from June 30 of the fiscal year and State Grant records for 5 years from the date of the date of certification of the final reconciliation roster
Matching Funds Employment Programs (includes SWS, FWSP-Community Service and FWSP - On Campus)	5 years from the date of the final term roster
New Economy Technology Scholarship (NETS) Program	6 years from the date of certification of the reconciliation roster
Partnerships for Access to Higher Education (PATH) Program	5 years from the date of certification of the disbursement roster
Pennsylvania Targeted Industry Program (PA-TIP)	5 years from the date of the certification of the disbursement roster
Postsecondary Educational Gratuity Program (PEGP) and Act 105	5 years from the date the school completes the tuition waiver listing
Ready to Succeed Scholarship (RTSS) Program	5 years from the date of certification of the final reconciliation roster
Robert C. Byrd Honors Scholarship	5 years from the date of certification of the award disbursement roster
State Grant Distance Education Pilot Program (SGDEPP)	5 years from the date of the certification of the final reconciliation roster
State Grant Program	5 years from the date of the certification of the final reconciliation roster
Technology Work Experience Internship Program (TWEIP)	5 years from the date of the final term roster

*Records include all school records relating to certification of student eligibility for that year.

Example: Final roster for 2015-16 dated 7/16/2016: Retain 2015-16 records until 7/16/2021.