Verifying Award Eligibility
Pennsylvania Targeted Industry Program
PA State Grant & Special Programs
September 2021
The content included in this presentation is intended to provide supplemental instruction on the PA Targeted Industry Program and does not supersede program policy as written in the current PA Targeted Industry Program Guidelines.

Agenda

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

**Certification and Awarding Review**
Presenters examine the recent changes made to the Applicant Certification and Status Listing (ACSL) and discuss the new award calculation process.

**Background & Eligibility Basics**
PHEAA staff provides high level information on the history of the program, as well as institutional and student eligibility requirements.

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

• Enacted into law under PA Act 82 of 2012
• Legislatively designed to:
  1. Target programs of study that train individuals for areas of immediate employment needs
  2. Provide need-based grants to eligible students
• Program focuses on specific occupations in Energy, Health, Advanced Materials and Diversified Manufacturing, and Agriculture and Food Production
• Administered in conjunction with PA Department of Education (PDE) and the PA Department of Labor and Industry (L&I)
• Funded by a Commonwealth Appropriation
Background

- Program policies have evolved to align with legislative intentions and remain responsive to overall needs
  - Examples: inclusion of health programs, realignment of eligible programs of study, term standardization, etc.

- Program highlights (as of September 2020) include:
  - 19,778 unique applicants
  - 53 schools with recipients
  - $43,027,497 in grants awarded
  - 91% of graduates gained employment
Institution Eligibility

• Institutions must annually apply to participate
• To participate, institutions must:
  – Be located in PA and have federal Title IV eligibility
  – Have completed an application by the deadline
  – Have, and submitted to PHEAA, a current approved Eligibility and Certification Approval Report (ECAR)
  – Have an eligible program of study that is:
    • Federal Title IV eligible
    • Not structured to be completed via 100% distance education
    • At least 10 weeks but less than 2 academic years in length
    • Corresponds to the PHEAA-approved 2021-22 approved Classification of Instructional Program Code (CIP code) list

2021-22 Institution Applications are due by October 31!
Student Eligibility

To be considered, students must:

- Be a U.S. Citizen or eligible non-citizen
- Be a PA resident and not incarcerated
- Have received a high school diploma or equivalent credential
- Have an EFC of 12,000 or less
- Maintain federal Title IV Satisfactory Academic Progress
- Complete the PA-TIP application and file the Free Application for Federal Student Aid (FAFSA®) by the deadline
  - Application available on PHEAA.org/PATIP
  - Veteran students must supply a copy of their DD214 to PHEAA
- Be enrolled on a full-time basis
  - Part-time enrollment permissible at non-profit institutions
- Not be in default on an educational loan or owe a PA State Grant refund
- Attend an approved school and be enrolled in an approved program of study
- Have unmet need, as determined by the institution
- Have not exhausted their PA-TIP award counter (defined as 1.0 effective 2021-22)

The ECAR will be used to verify that the approved programs permit students to meet the full-time enrollment requirement.
Student Applications

- Auto-renewal process introduced effective with 2021-22 Award Year
  - Institutions will see auto-renewal students on ACSL (no indicator will be used)
  - Students notified of auto-renewal status via postal mail

<table>
<thead>
<tr>
<th>If the student</th>
<th>Then the student</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received a PA-TIP award during the prior year and has remaining eligibility</td>
<td>Will be automatically renewed and only required to submit the FAFSA</td>
</tr>
<tr>
<td>Applied during the prior year but was determined ineligible or not awarded</td>
<td>Must submit both the PA-TIP application and FAFSA</td>
</tr>
<tr>
<td>Is a first-time applicant</td>
<td>Must submit both the PA-TIP application and FAFSA</td>
</tr>
<tr>
<td>Had prior year PA-TIP eligibility but changed institutions</td>
<td>Must submit both the PA-TIP application and FAFSA</td>
</tr>
<tr>
<td>Will continue enrollment at your school but changed their program of study</td>
<td>Will be automatically renewed and only required to submit the FAFSA; Your school must report the changed program of study via the ACSL</td>
</tr>
</tbody>
</table>
Disbursement Overview

- Both PHEAA and the institution are responsible for confirming the student’s eligibility
  - PHEAA performs initial check
  - Awards issued on first-come, first-served basis
    - **Maximum award for 2021-22 Award Year is $5,000**
  - Students notified of eligibility via postal mail
    - Student eligibility determination appeals should be sent to PHEAA
ACSL Review

• Institutions conduct the second and final eligibility determination on the PHEAA-approved students

• Using the most recent ACSL, schools must review student eligibility, calculate amounts, and certify awards
  – ACSL generates to PageCenter biweekly (on Tuesdays)
    • Use the pound (#) or asterisk (*) to identify new students or student eligibility changes since the last ACSL
    • Submit ACSL only when reporting changes/updates
  – Awards must be certified within 30 days of eligibility notification or term start date, whichever is later
    • Awards not certified within 30 days will be cancelled by PHEAA
      – Contact PHEAA if additional time is needed to certify an award
      – Reinstatement is not guaranteed for cancelled awards
    • Final deadline for award certification is July 1
All students initially determined eligible will be listed with the maximum award amount ($5,000).

- Pell and Gift Aid fields have been removed from ACSL.
  - Pell Grant and other gift aid are still considered when calculating the award.

- Exclude GI Bill benefits, PA National Guard Educational Assistance Program (EAP) awards, PA Fostering Independence Tuition Waiver (FosterEd) waivers, and PA National Guard Military Family Education Program (MFEP) awards.
- Exclude all gift aid and resources when calculating awards for Veteran recipients.
  - Use the **PA-TIP Award Estimator** to capture these items during award calculation process.
1. **Student Information:**
   Features the student’s program start date, length, EFC, and veterans status

2. **Term & Status:**
   Lists the student’s current enrollment and status for each eligible terms (i.e., fall, spring, or summer)

3. **Total:**
   Identifies the student’s award counter (capped at 1.0 for all new PA-TIP applicants but may display up to 1.99 for grandfathered students)

4. **Academic Progress:**
   Term level Academic Progress indicator. Must enter Y or No for each term

5. **Max Amount:**
   Displays the estimated maximum term amount

6. **Certified Amount:**
   Features the estimated term award amount, as determined by your school

---

### ACSL Review

<table>
<thead>
<tr>
<th>PHEAA TECHNICAL COLLEGE</th>
<th>2021-22 APPLICANT CERTIFICATION AND STATUS LISTING</th>
<th>09/06/2021</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STUDENT INFORMATION</strong></td>
<td><strong>AWARD CNTR</strong></td>
<td><strong>TERM AND CURRENT STATUS</strong></td>
</tr>
<tr>
<td>#BLUTH, GEORGE MICHAEL</td>
<td>0.500 FALL PENDING</td>
<td>1-FULL</td>
</tr>
<tr>
<td>999-99-9999 PROGRAM START DATE 10/01/2021</td>
<td>0.500 SPRING PENDING</td>
<td>1-FULL</td>
</tr>
<tr>
<td>TOTAL WEEKS 0036</td>
<td>0.500 SPRING PENDING</td>
<td>1-FULL</td>
</tr>
<tr>
<td>VETERAN N NO</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>EFC</td>
<td>$11,000</td>
<td></td>
</tr>
<tr>
<td>EXPECTED GRAD DATE: 05/30/2022</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL: 1.000</strong></td>
<td><strong>TOTAL NET AWRD DISBURSED: $ 0</strong></td>
<td></td>
</tr>
</tbody>
</table>

| #FUNK, TOBIAS | 0.166 FALL CERTIFIED | 3-HALF | 51,071-00 | $ 833 | $ 833 |
| 999-99-9991 PROGRAM START DATE 03/01/2021 | 0.166 SPRING PENDING | 3-HALF | 51,071-00 | $ 833 | $ 833 |
| VETERAN N NO | 0 | | | | | | | |
| EFC | $5,230 | | | | | | | |
| TOTAL: 0.340 SUMMER PENDING | 0.340 SUMMER PENDING | 3-HALF | 51,071-00 | $ 833 | $ 833 |
| EXPECTED GRAD DATE: 06/30/2022 | | | | | | | | |
| **TOTAL: 0.672** | **TOTAL NET AWRD DISBURSED: $ 0** | | | | | | | |
ACSL Review

- To certify, must submit term-level Academic Progress confirmation, certified term amounts, and certification page (signed and dated)
- If eligibility is questionable (e.g., domicile discrepancy, citizenship status, etc.), do not certify the award
  - Report discrepancy to PHEAA via email
- Update Expected Graduation date if necessary
- Only certify awards for terms that have already begun
- *Applicants Not Selected Report* in PageCenter can be used to determine an ineligibility reason
Award Calculation

- Student must have unmet need to be considered for an award
- Award calculation process simplified to remove 75% adjustment factor
  - Maximum full-time award is the lesser of:
    - Net program costs (tuition, fees, $4,000 living expense allowance, books, and supplies) minus resources (e.g., Pell, other gift aid, etc.); or
    - Annually announced PA-TIP maximum ($5,000)
  - Half-time awards are the lesser of the full-time net costs or the PA-TIP maximum, then divided in half
  - Veterans will receive the maximum PA-TIP amount or 100 percent of program costs, whichever is less

Refer to the PA-TIP Guidelines for the enrollment definitions.
Award Calculation

- Awards are calculated at a program level and equally divided and disbursed between terms throughout the length of the program
  - Eligible terms are fall, spring, and summer only
    - Summer awards now part of the award year calculation
    - Student’s initial term of eligibility is based on their actual start date

<table>
<thead>
<tr>
<th>Term</th>
<th>Start Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall</td>
<td>July 1 – November 15</td>
</tr>
<tr>
<td>Spring</td>
<td>November 16 – March 15</td>
</tr>
<tr>
<td>Summer</td>
<td>March 16 – June 30</td>
</tr>
</tbody>
</table>

- If the student’s eligibility spans over two award years and a new award maximum is announced, term awards in the second year may be adjusted to meet the new calculation
## Award Calculation

- Half-time students will receive payments until they complete the program or exhaust eligibility, whichever comes sooner
- Determine subsequent payment periods/dates based on the length of the term/payment period
  - Does not need to fall within the start date ranges listed
  - If your payment periods do not divide evenly (e.g., 14.5 weeks between payments), round up
  - Contact PHEAA if you have payment periods with start dates that fall within the same term start date range

<table>
<thead>
<tr>
<th>Program Length</th>
<th>Number of Payments</th>
<th>Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>10-18 Weeks</td>
<td>1 payment</td>
<td>Entire award amount is sent in one payment</td>
</tr>
<tr>
<td>19-36 Weeks</td>
<td>2 payments for all schools</td>
<td>Annual award amount is divided between terms (fall, spring, and summer, as applicable, based on term start date)</td>
</tr>
<tr>
<td>37-59 Weeks</td>
<td>3 payments for all schools</td>
<td></td>
</tr>
</tbody>
</table>
Award Calculation

- Lindsay Bluth is enrolled full-time in a 32-week long Pathology program at PHEAA Technical
- After identifying the program costs and resources, the school calculates that Lindsay is eligible for the maximum PA-TIP award
  - Lindsay’s award will be issued in two payments ($2,500 each)
  - The second payment should be certified and paid after 16 weeks (32 weeks ÷ 2 payments)

<table>
<thead>
<tr>
<th>Program Costs</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition</td>
<td>$12,800</td>
</tr>
<tr>
<td>Fees</td>
<td>$495</td>
</tr>
<tr>
<td>Living Expense</td>
<td>$4,000</td>
</tr>
<tr>
<td>Allowance</td>
<td></td>
</tr>
<tr>
<td>Books</td>
<td>$1,000</td>
</tr>
<tr>
<td>Supplies</td>
<td>$1,100</td>
</tr>
<tr>
<td>Total Program Costs</td>
<td>$19,395</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Resources</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Pell Grant</td>
<td>$3,315</td>
</tr>
<tr>
<td>Employer Tuition</td>
<td></td>
</tr>
<tr>
<td>Reimbursement</td>
<td>$3,000</td>
</tr>
<tr>
<td>Other Gift Aid</td>
<td>$1,000</td>
</tr>
<tr>
<td>Total Resources</td>
<td>$7,315</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Award Calculation</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Cost</td>
<td>$19,395 - $7,315 = $12,080</td>
</tr>
<tr>
<td>Award Amount (Lesser of)</td>
<td>$12,080 or</td>
</tr>
<tr>
<td></td>
<td>PA-TIP Maximum of $5,000</td>
</tr>
<tr>
<td>PA-TIP Award</td>
<td>$5,000</td>
</tr>
</tbody>
</table>
• PHEAA Technical Institute, a for-profit institution, assesses PA-TIP eligibility for students Michael Bluth and Buster Bluth for the 2021-22 Award Year

<table>
<thead>
<tr>
<th>Student</th>
<th>Total Program Costs</th>
<th>Resources</th>
<th>Number of Payments</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Michael</td>
<td>$12,567</td>
<td>$9,945</td>
<td>2</td>
<td>Enrolled full time in a 31-week program</td>
</tr>
<tr>
<td>Buster</td>
<td>$9,612</td>
<td>$6,120</td>
<td>3</td>
<td>A full-time veteran in a 42-week program</td>
</tr>
</tbody>
</table>

Questions:
• For Michael, what will the PA-TIP award be? If Michael is eligible for subsequent payments, when can they be posted and how much is each payment? For Buster?
• If Michael’s enrollment were half-time, does this impact the award?
• If Buster is eligible for a FosterEd waiver, should the school apply the waiver before determining PA-TIP eligibility?
Award Calculation

Answers:

- **For Michael**: The PA-TIP award will be lesser of the award year maximum ($5,000) or the remaining need ($12,567 - $9,945 = $2,622). Michael’s award will be $2,622
  - Since the length of Michael’s program of study qualifies for two payments, the school should post the subsequent award in 16 weeks (31 weeks ÷ 2 payments)
  - Each term/pay period award will be $1,311 ($2,622 award year amount ÷ 2 payments)

- **For Buster**: The PA-TIP award will be lesser of the award year maximum ($5,000) or 100 percent of program costs ($9,612) since Buster is a veteran. Buster’s award will be $5,000
  - Since the length of Buster’s program of study qualifies for three payments, the school should post the subsequent award in 14 weeks (42 weeks ÷ 3 payments)
  - Each term/pay period award will be $1,666 ($5,000 award year amount ÷ 3 payments)

- Yes. If Michael’s enrollment were half time, the student would not be eligible for a PA-TIP award since the school is considered a for-profit institution. Any funds that were disbursed, would need to be refunded to PHEAA

- No. Schools should first calculate the PA-TIP award without consideration of the FosterEd waiver
  - The school could then apply the PA-TIP award (or other gift aid) for expenses outside of mandatory fees and tuition
Crediting

• Credit (pay) awards on a term-by-term basis
  – Crediting means your institution:
    1. Performed all eligibility checks
    2. Certified the student’s eligibility in advance
  – Record as “PA-TIP Award” and include the term, date of crediting, and amount
  – Do not issue awards for incarcerated students

• Remit credit balances to the student within 30 days
Enrollment Updates

• Students not returning to your school should be cancelled
• Cancel awards for students who withdraw prior to certification
• If modular enrollment changes enrollment status, adjust enrollment and eligibility accordingly

When a student is no longer enrolled (e.g., leave of absence, termination, withdrawal, etc.), follow the withdrawal procedures
- Full withdrawals that occur after crediting may require a refund if 60 percent or more of the term has not been completed
- Partial withdrawals to half-time will result in half-time consideration
  • Schools ineligible for half-time awards must refund the student’s entire term award
Disbursements

• Disbursements run monthly and generate a roster to PageCenter
  – Only includes funds for students with certified awards
  – Certify and return each disbursement roster within 30 days of receipt or within 30 days of the first day of the term (whichever is later)
  – Request PageCenter notifications to know when a roster has been generated

• Awards are term-specific and intended to assist students with costs incurred during that term
  – Outstanding items and noncompliance with policies result in holds which prohibit students from receiving awards in a timely manner
  – Develop cash management and accounting procedures to ensure proper PA-TIP fund management
    • Maintain records to reflect PA-TIP transactions
Refunds

- Refunds created as a result of enrollment and eligibility changes or award refusals
  - Report ineligible students and reason via disbursement roster or ACSL
  - Remit by the deadline (45 days after reporting) to prevent disbursement holds and administrative findings
  - Guidance on where and how to remit refunds available in the Program Guidelines

Outstanding Refunds Report in PageCenter lists the refunds due for each student per term.
Reminders

• 2020-21 Award Year
  – Report (or update) student separation dates to aid in outcomes reporting
    • Separation Date Report available in PageCenter
  – Complete reconciliation and remit any refunds due PHEAA as soon as possible

• Retain records for 5 years from the date on which the reconciliation roster is certified

• Update contacts and report institutional changes that may occur (e.g., status, start dates, demographic information, ownership, etc.)

• Perform periodic reviews to maintain user access requests
Join Us Next Time!

Session descriptions and registration information is available on PHEAA.org/SGSPtraining.

• Thursday October 21, 2021
  – Chafee Education & Training Grant (Chafee ETG) Program
    • Calculating Unmet Need

• Thursday November 18, 2021
  – PA Fostering Independence Tuition Waiver (FosterEd) Program
    • The Role of the FosterEd POC
Resources

Web
- PHEAA.org
- Alec

Events
- Webinar Series
- Conferences
- Workshops

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

Print Materials
- Brochures
- Calendars
- FAQs

Connect with PHEAA socially!
Thank You!