

PHEAA TRAINING

Credit Reporting Requirement
Pennsylvania State Grant Program

Goal of this Webinar

Explain changes made to the requirement effective with **Fall 2014**

- **Why** is the information needed?
- **Who** is required to report?
- **What** are the new requirements?
- **When** is reporting due?
- **How** do I report?
- **Where** can I find supporting documentation?

Summary of August 2014 Changes

- Limit the credit reporting information to a snapshot of the student's enrollment at the time of the census date or enrollment freeze date for each student.
- Eliminate the tie between credit reporting and withdrawal enrollment changes so that all students are treated consistently for academic schedule adjustments.
- Withdrawal from distance education courses will be treated the same as withdrawal from classroom courses.

Purpose of Credit Reporting



- Gain a full picture of State Grant funding and identify enrollment patterns and trends
 - ★ Answer legislative inquiries
 - ★ Consider State Grant Program changes
 - ★ State Grant Program sustainability
- Unable to collect from other sources

Requirement



- **ALL** schools are required to report credits
 - ★ Online
 - ★ Classroom
 - ★ Each Awarded Term
 - ★ State Grant Recipients
- Lack of distance education offerings **does not** change the requirement

Requirement



- Statistical ONLY – NO PHEAA assumptions on enrollment or Less Than 50% classroom attendance reporting
- Does NOT impact student's status
- Remedial Credits

Example

Classroom Credits		Online Credits		Remedial Exception	Credit Reporting	
Regular Credits	Remedial Credits	Regular	Remedial		Classroom Credits	Online Credits
12	3	0	0	None needed – student meets full-time minimum	15	0
6	3	0	0	None needed – student meets half-time minimum	9	0

- Two-School Enrollment/Visiting
- 'Winterim' Enrollment
- Maximum Credits = 30 per term

Requirement



● Clock Hour Programs

- ★ Required to convert to credits
- ★ Conversion Chart – Certification Procedures
- ★ Conversion Spreadsheet – Document Library

Clock Hour to Credit Hour Conversion Formula	
37.5 Clock Hours	1 Semester Credit
25 Clock Hours	1 Quarter Credit

Requirement



- **NEW** Guidance
- Effective with **Fall 2014**
- Use **FREEZE DATE** or **CENSUS DATE**
 - ★ Snapshot of online and classroom credits
 - ★ Typically end of drop/add period

Requirement Change



2013-14 and Summer 2014	2014-15 and Summer 2015
Schools are required to report the breakdown of online and classroom credits for each awarded term.	No change.
Credits reported are those for which the student is registered at the time the State Grant award is credited to the student's account.	Credits reported are those for which the student is registered at the time of the institutional census date or enrollment freeze date.
Ratio changes, at any point, of the term's online and classroom must be re-reported.	Ratio changes of the term's online and classroom do not have to be re-reported after the census date.
After crediting, a withdrawal from class(es) which impacts the student's ability to comply with the 50% classroom requirement must be reported as 'Less than 50% classroom'. Funds must be returned to PHEAA.	After crediting, a withdrawal from class(es) which impacts the student's ability to comply with the 50% classroom requirement does not require 'Less than 50% classroom' reporting. However, withdrawal procedures must be followed.
After crediting, ratio changes from 'Drops' or 'Adds' resulting in less than 50% classroom impact eligibility and must be reported as 'Less than 50% classroom'. Funds must be returned to PHEAA.	No change.



Credit Reporting Examples

STUDENT	ENROLLMENT STATUS (AT FREEZE DATE)	EXPECTED CREDIT REPORTING
Student A	15 Classroom/ 0 Online	15 Classroom/ 0 Online
Student B	12 Classroom/ 3 Online	12 Classroom/ 3 Online
Student C	6 Classroom/ 6 Online	6 Classroom/ 6 Online
Student D	3 Classroom/ 3 Online	3 Classroom/ 3 Online

Requirement



Enrollment Change Examples

STUDENT	ENROLLMENT STATUS (AT FREEZE DATE)	EXPECTED CREDIT REPORTING	ENROLLMENT CHANGE SINCE FREEZE DATE	ELIGIBILITY REPORTING
Student A	15 Classroom/ 0 Online	15 Classroom/ 0 Online	15 Classroom/ 3 Online	None
Student B	12 Classroom/ 3 Online	12 Classroom/ 3 Online	6 (W)/6 Classroom/9 Online	Report 'Less than 50% Classroom'
Student C	6 Classroom/ 6 Online	6 Classroom/ 6 Online	6 Classroom – Dropped; 6 Online	Report as 'Less than 50% Classroom'
Student D	3 Classroom/ 3 Online	3 Classroom/ 3 Online	3 Classroom/6 Online	Report as 'Less than 50% Classroom'

Requirement



- Deadlines

- ★ 2014-15 Academic Year = **July 31, 2015**

- ★ 2015 Summer = **December 31, 2015**

- Report

- ★ Term by Term

- ★ Reconciliation

- ★ No later than deadlines



- Unreported = Disbursement Hold



When will PHEAA audit for compliance?

- During Program Reviews



How do I know what was already reported?

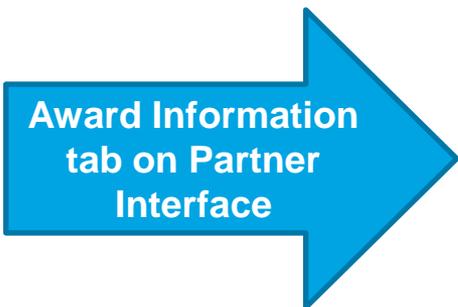
- Displays
- Reports

Viewing Data Displays



Individual Student Basis

```
FG59 I XXXXXXXXX;2014;A;STUDENT; STATE GRANT APPLICANT DISPLAY
SOURCE _ CHG RELEASE _ APPLICATION YEAR 2014-15 PAGE 06 OF 13
SSN XXX-XX-XXXX JASMINE I STUDENT ACCT # XX XXXX XXXX
*****CREDIT REPORTING AND DISTANCE EDUCATION DATA*****
<50% CLSRM STATUS/DTE - - (S110/S111) REPORTED F W S (S112ABC)
COLLEGE -K- 99999999 01 ( ) (232) -L- 99999999 01 (332)
ATT CLSRM -I- 015.00 (192) - - (193)
ATT ONLNE -I- 003.00 (195) - - (196)
TOTAL ATT 18.00 00 0.00
PRTICLRNT - - ( ) (203) - - (204)
```



 Classroom Credits:	15.0
 Online Credits:	0.0

Viewing Data Reports



● PageCenter Report

LINE [LWS88LWS88R2.PHEAA](#) ATTEMPTED CREDITS FOR 2014 ACADEMIC YEAR

- ★ *Attempted Credit Report* – Training Site
- ★ Identify records where credit reporting is outstanding
- ★ INFORMATIONAL ONLY – do not use to report information to PHEAA

Viewing Data Displays



Record Level Filters

Updated By: Updated When:

Record Status: Complete - Active Incomplete - Active Incomplete - Reject
 Complete - Reject Complete - Inactive Incomplete - Inactive

Special Conditions:

Term Level Filters Fall Winter Spring

Eligibility Date: From: To: Reject Types:

Eligibility Status: Credit Info: Housing Status:

Enrollment Status:

Cancel

Program of Study:

Filtering in Partner Interface

★ *Reported or Not reported*

Reporting to PHEAA Options



● Transmissions

- ★ No limit
- ★ Varied criteria

● Partner Interface

- ★ Limited to 100 records
- ★ Same criteria

Reporting Options

Transmissions



- Receive weekly Status Transmissions
 - ★ Sent to State Grant PageCenter mailbox
 - ★ Pre-designated flat file layout
- Review students with awards and unreported credits
- Report back credits via Partner Interface or Certification Transmissions
 - ★ Can be done with other reporting updates
 - ★ File layout in Document Library

Reporting Option 2

Partner Interface



How

Partner Interface Training

Want to learn more about Partner Interface? Check out the resources we have to offer to help you navigate through our new web products.

Training Tutorials	Run Time
Sign In and Search	00:02:45
View Student Record Award information School Notes Activity Log Application Information	00:10:49
View Eligibility Summary	00:01:04
State Grants Dashboard Export to Excel/CSV Filter and Cycle Through Listings	00:06:41
Request Primary School Change	00:02:43
Update Single Record	00:03:21
Special Request	00:01:26
Print	00:00:45
Creating a Mass Update Queue Exporting to Excel in Mass Update Queue	00:07:35
Credit Reporting	00:02:56

www.PHEAA.org/training

Tutorial Available

Under 5 Minutes

Single Update

Award Information tab

Mass Update

Up to 100 records at a time

Reporting Option 2

Partner Interface



● Mass Update

- ★ Up to 100 records
- ★ Group common components together
- ★ Useful to report students with no distance education

Step 3 of 4 - Choose the Updates for Your Queue

Mass Update Queue: Fall Credits

 [Edit Queue Name](#)

Period: 2014 - 2015 ACADEMIC

Campus: Pheaa University Of
Harrisburg

Term(s): Fall

Update Type: Update Records

School Information

Select the changes you want to make to the student records. Leave a field blank if it does not apply for all students added to the mass queue.

Branch Campus Change:

Program of Study:

Housing Status:

Enrollment Status:

<50% Classroom Attendance: Select if less than 50%

Credit Information

Enter the credit information you want to change on the student records. Leave a field blank if it does not apply for all students added to the mass queue. Total can not exceed 30 credits and can only be changed within the active dates.

Classroom Credits:

Online Credits:



Reporting Options

Activity



- Logged for each credit reporting submission

★ Partner Interface

▼	Miscellaneous	2014-2015	CLASSROOM/ONLINE CREDITS UPDATE BY SCHOOL-PARTNER INTERFACE	12/15/2014	12/15/2014	To Grants	SCHOOL USER
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★ Certification Transmissions

```
TYPE: ET CONTACT: 00 FROM FAA
ACTION CODE: SGDECRAT CREDITS ATTEMPTED UPDATE
ACTIVITY DATE: 10152014 CLOSE DATE: 10152014
CREATE DT/TIME: 10152014 21:37
TRACKING USERID: FGXK4
TRACKING DATE: __/__/____ TRACKING INDICATOR:
ACADEMIC YEAR: 2014 PERIOD: A

COMMENTS
99999999-01
FALL - 015.00 (CR) 000.00 (OL)
WINTER -
SPRING - 012.00 (CR) 006.00 (OL)
```

Recap



- Report via **Partner Interface** or **Certification Transmissions**
- Report for **ALL** State Grant recipients
- Use the **CENSUS** or **FREEZE** date
- Blank ~~=~~ Zero
- Check displays, Partner Interface, or PageCenter to confirm data was received
- Deadlines:
 - ★ **July 31, 2015** = Academic Year
 - ★ **December 31, 2015** = Summer



Resources

● Contact State Grant and Special Programs Staff:

- ★ Email sghelp@pheaa.org or Call 1-800-443-0646, Option 3, Option 1
- ★ Call 1-800-443-0646, Option 4 To Discuss Transmissions



● Resources

- ★ www.PHEAA.org/training
 - Tutorials, *Certification Procedures*, *Credit Reporting Tips*, etc
- ★ Document Library

» Partner Interface Training

Let us help you keep current with the latest tools for postsecondary schools to report and verify key components used in evaluating eligibility and disbursement for State Grant awards.

» State Grant Training

View and download a wide range of resources that will provide you with program-specific information that are essential for your staff and students.