

PHEAA TRAINING

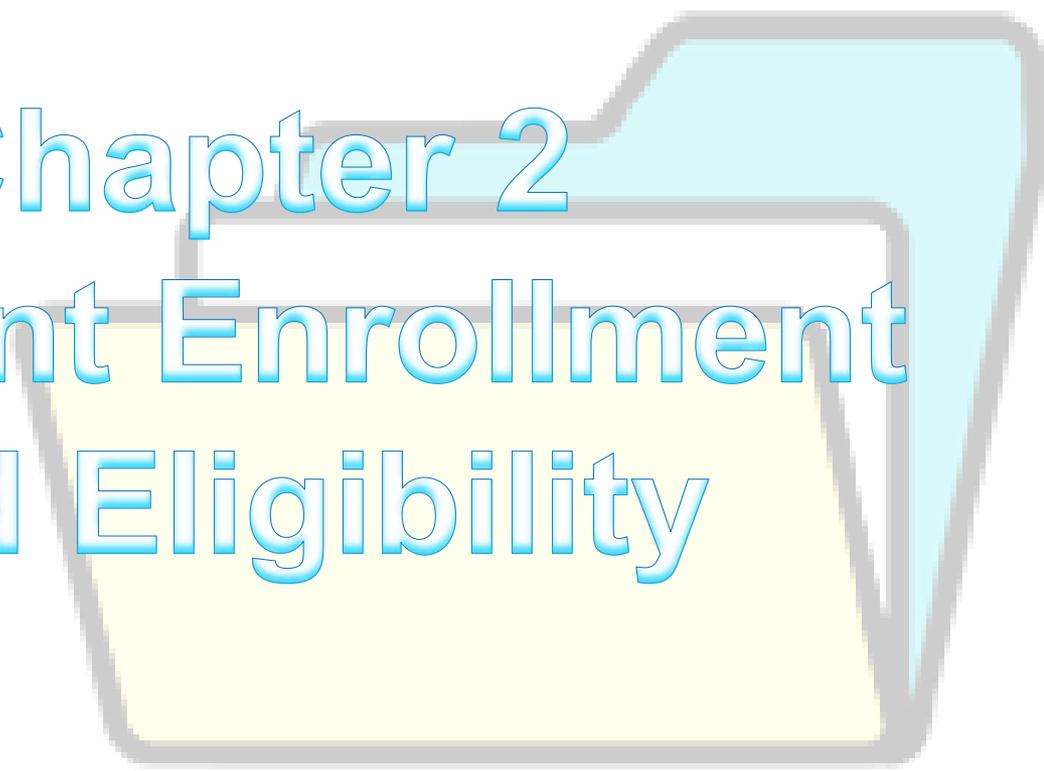
Academic Progress

Pennsylvania State Grant Program

Chapters

1. School and Program Eligibility
- 2. Student Enrollment and Eligibility Verification**
3. Attempted Credit Reporting
4. Costs and Adjustments
5. Disbursement and Cash Management





Chapter 2

Student Enrollment and Eligibility

Purpose of Webinar

Reviewing information on Academic Progress

- Definition
- Evaluation
- Prior Grants
- Repeat Work
- Transfer student
- Academic Year vs Summer
- Exceptions

Defining Academic Progress

Regulation § 121.58. Academic Progress

Definition

For each academic year (Fall, Winter, Spring; and/or Summer term) during which State Grant aid is received, a student must successfully complete the minimum number of credits (clock hours) appropriate to the student's enrollment status **starting with the terms for which State Grant aid was received.**

Evaluating Academic Progress

- There is no qualitative measure (GPA)
- Quantitative measure
- School's standards do not apply
- Required to verify:
 - ★ FOR THE LAST ACADEMIC YEAR DURING WHICH THE STUDENT **RECEIVED STATE GRANT AID**, the student completed the required minimum number of credits or clock hours for the terms' award
 - ★ Within last 10 years (If last grant was 2004-05 or before – not required; designated as “HST” for history)
 - ★ Credits earned in terms retroactive to the receipt of the State Grant award(s) being reviewed **do not count** towards academic progress.

Evaluating Academic Progress

Yearly Cycle Options					School checks:
Option 1 Summer 'header'	Summer	Fall	Winter (if applicable)	Spring	All students after Spring
Option 2 Summer 'trailer'	Fall	Winter (if applicable)	Spring	Summer	All students after Summer

- Required to apply to ALL students at the same point annually
 - ★ After either Spring or Summer term

Evaluating Academic Progress

EXAMPLE: AFTER SUMMER

- Calvin attempted and earned **12** semester credits for **Fall 2013** and received a full-time State Grant award
- He attempted 12 semester credits in the **Spring 2014** and earned **9** and received a full-time State Grant award
- He attempted and earned **6** semester credits during **Summer 2014** and received a half-time State Grant award

Calvin **did not** make progress.

- Was awarded based on 30 credits
- Earned 27 credits (12 + 9 + 6)
- Reject for Lack of Progress with next term

Reporting Academic Progress

Cancellation or Reinstatement

	Fall	Spring
Cancellation:	<input type="radio"/> Student Graduated	<input type="radio"/> Student Graduated
Cancellation:	<input type="radio"/> Not Enrolled	<input type="radio"/> Not Enrolled
Reject :	<input checked="" type="radio"/> Academic Progress Reject	<input checked="" type="radio"/> Academic Progress Reject

To report ineligible:

- Partner Interface –Single/Mass Update
 - ★ Use ‘Academic Progress Reject’
(Cancellation/Reinstatement section)

- Certification Transmission – Code ‘1’ – Yes – Failed to Make Progress in the term Progress Indicator [*positions 62 (Full Year); 59 (Fall); 60 (Winter); and 61 (Spring)*]

Prior Grant Information

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XXX-XX-XXXX                                $580      $580
Name Removed                                OFF-CAMPUS  P/T      P/T
Sample                                       REMED. EXCEP. - .25
PHEAA ACTION - 06/06/2013
DEPENDENT
NON-SPONSORING
PRIOR GRANTS - .50
PRIOR TERM(S) - S13 (.25), F12 (.25)
    
```



The term is represented by a letter code –
 ‘F’- Fall; ‘W’ – Winter; ‘S’- Spring; ‘R’ –
 Summer

A two-position number indicates the
 calendar year. Examples:

S15	2014-15 Spring term
W09	2009-10 Winter term
R10	2010 Summer term
HST	Indicates that the student's most recent State Grant was for a term prior to the 2005-06 Academic Year.

Prior Grant Information

INFORMATION SOURCES

- **ELIGIBILITY RECORD** to view the student's history of enrollment and State Grant awards
- *Prior Award Terms and Prior Award Counters* on the ***Applicant Status Transmission or Listing***
- *Prior Grant Terms- Number One through Number Six* on the ***Disbursement Transmission***

Minimum Number of Credits for Schools

Minimum Number of Credits/Clock Hours That Must Be Successfully Completed

For each:	Award Counter	Student must complete a minimum of:
Full-time semester award	.50	12 semester credits/450 clock hours
Full-time quarter award	.33/.34	12 quarter or 8 semester credits/300 clock hours
Half-time semester award	.25	6 semester credits/225 clock hours
Half-time quarter award	.16/.17	6 quarter credits or 4 semester credits/150 clock hours

Repeat Work and Academic Progress

● Repeat Work

- ★ Successfully completed can only count once
 - ☆ **Successful** means that the student **earned/received credit** and the course does not have to be repeated
 - ☆ For example, if a student earns credit for a course where a 'D' was received and repeats that course and earns a 'B', the credits may only be counted ONCE (when the 'D' was earned)

Academic Progress – Repeated Work Example 1

EXAMPLE – REPEAT COURSES – SCHOOL CHECKS AFTER SPRING

- Justin did not attend Summer 2013
- He attempted 12 semester credits in the **Fall 2013**, received a full-time State Grant award but earned only **9**
- He attempted and earned **15** semester credits during Spring 2014 and received a full-time State Grant award; **3 of those credits was a repeated failed class** from Fall 2013.

Justin **did** make progress.

- Was awarded based on 24 credits (minimum enrollment – 12 + 12)
- Earned 24 credits (9 + 15)

Academic Progress- Repeated Work Example 2

EXAMPLE – REPEAT COURSES – SCHOOL CHECKS AFTER SPRING

- Shelley did not attend Summer 2013
- She attempted 12 semester credits in the **Fall 2013**, received a full-time State Grant award and earned **12**
- She attempted 12 semester credits (9 new credits and 3 from repeated course from Fall) during Spring 2014, received a full-time State Grant award and earned **9 new credits**.

Shelley **did not** make progress.

- Was awarded based on 24 credits (minimum enrollment – 12 + 12)
- Earned 21 credits (repeat course credits only earned once)

Advance Standing and Non-Verified Credits

- Credits via Examination

 - ★ Do NOT count

- Inability to Verify

 - ★ Do not credit

 - ★ Reject

Cancellation or Reinstatement

	Fall	Spring
Cancellation:	<input type="radio"/> Student Graduated	<input type="radio"/> Student Graduated
Cancellation:	<input type="radio"/> Not Enrolled	<input type="radio"/> Not Enrolled
Reject :	<input checked="" type="radio"/> Academic Progress Reject	<input checked="" type="radio"/> Academic Progress Reject



Transfer Students and Academic Progress

- Credits at previous school:

- ★ Do NOT need to be transferable to your school
- ★ Must be earned at a State Grant approved OR Federal Title IV eligible postsecondary institution

- Documentation

- ★ Transcript in format that can be produced for compliance audit;
OR
- ★ Non-official transcript or grade report that documents:
 - ★ Classes attempted
 - ★ Period of enrollment (terms and year)
 - ★ Number of credits for each course
 - ★ Grade for each course

Mid-Year Transfers

State Grant award exists in a previous term of the current year	School Action	Notes
No	Your school should review academic progress immediately.	N/A
Yes	Your school should review academic progress with your regular cycle (after Spring or after Summer). Print a copy of the student's eligibility as proof of verification in the event that the student's award at the previous school is later removed.	PHEAA permits your school to assume the school previously attended applied the State Grant academic progress test after each academic year (12-month) period of aid received before crediting additional (subsequent) State Grant payments when there is an award at that school (i.e. Fall or Winter term).

Transfer Students Checklist

Checklist:

- ✓ When (if ever) did student last receive a State Grant award?
- ✓ Where did they attend at the time?
- ✓ Do you have a copy of the transcripts that cover that period to present?
- ✓ How many credits have successfully been completed since that time?

Transfer - Example 1

EXAMPLE - TRANSFER

- Leeann had awards for 2013-14 at PHEAA University; she attended PHEAA University for **Fall 2014** but **did not receive** a State Grant award
- She transfers to your school during Spring 2015 and your school normally checks progress after Spring

**CHECK PROGRESS PRIOR TO
CREDITING SPRING 2015**

Transfer- Example 2

EXAMPLE - TRANSFER

- Leeann **had awards** for 2013-14 and **Fall 2014** at PHEAA University
- She transfers to your school during Spring 2015 and your school normally checks progress after Spring

CHECK PROGRESS AFTER SPRING 2015

Summer Transfers

- Summer is first term of attendance at your school (not visiting), check:
 - ★ Immediately if the last year of aid was not during previous academic year
 - ★ After Summer if the last year of aid was during previous year and your school checks after Summer
- Visiting my school for Summer:
 - ★ Verify when 'home' school checks (if after Spring – verify now; if after Summer – provide information to 'home' school)
- Two School Enrollment:
 - ★ 'Home' school verifies since must process aid

Summer Transfer- Example 1

EXAMPLE: SUMMER TRANSFER

- Travis had an **award for Fall 2013** at PHEAA University; he attended PHEAA University for the Spring 2014 and 2014-15 academic year but did not have a State Grant during those terms
- He transfers to your school during Summer 2015 and your school normally checks progress after Summer

CHECK PROGRESS NOW

Transfer- Example 2

EXAMPLE: SUMMER TRANSFER

- Travis had an award for Fall 2013 at PHEAA University; he attended PHEAA University for the Spring 2014 but did not have a State Grant award
- Travis also attended PHEAA University during **2014-15** and had a **State Grant award** for both terms
- He transfers to your school during Summer 2015 and your school normally checks progress after Summer

**CHECK PROGRESS AFTER SUMMER 2015
(NORMAL CYCLE)**

Remedial Credits

- Can use the remedial credits only when:
 - ★ Those same credits were used for a remedial exception to enrollment
 - ★ Part-time 3/3 remedial exception (only 3 remedial can be used)
 - ★ Full-time 6/6 remedial exception (only 6 remedial can be used)
 - ★ The student received a State Grant during the exception term
- *In other words* - remedial credits taken during a term when not receiving a State Grant may not be counted

Remedial Example

- Brenda enrolled in **15 credits (12 regular and 3 remedial)** for **Fall 2013**, **12 regular** credits for **Spring 2014**, and **6 regular** credits for **Summer 2014**. She had State Grant awards commensurate with those enrollment statuses.
- She didn't need remedial credits for 2013-14 or Summer 2014
- She earns **12 credits** in the Fall, **9 regular** and **3 remedial**; she **earns the credits** for which she was enrolled for **Spring and Summer** as well.

Brenda **did not** make progress.

- 3 remedial from Fall did not count toward State Grant enrollment (attempted 12, earned 9)
- Earned 27 credits (9 + 12 + 6; but needed 30)

Exceptions

● Progress Exception Form – pheaa.org/forms

★ Must be completed by both the student and **the school of record where progress failed**

★ Accompanying documentation (copies not originals) supporting the student's request must accompany the appeal

● All information submitted by the school is confidential



State Grant and Special Programs
Phone: 1-800-422-7292 Fax: 717-720-3786
P.O. Box 8157 Harrisburg, PA 17105-8157

PENNSYLVANIA STATE GRANT PROGRAM 2013-14 ACADEMIC PROGRESS EXCEPTION FORM

Print Student's Full Name _____

Social Security Number _____

This form must be completed by you and the financial aid administrator at the school you attended during the terms identified below. It must be returned to PHEAA, P.O. Box 8157, Harrisburg, PA 17105-8157 within 30 days. No data will be accepted after April 1, 2014.

STUDENT: PLEASE COMPLETE ALL OF THE FOLLOWING REQUESTED INFORMATION.

Indicate all terms included in the most recent academic year for which you received State Grant aid:

TERM	DATES OF ENROLLMENT	CREDITS PASSED
_____	_____	_____
_____	_____	_____
_____	_____	_____

Did you withdraw before completing a term? Yes _____ No _____ Term: _____

Indicate the reason(s) for the withdrawal or failure to pass courses. Appropriate supporting documentation must be attached or this request will not be processed.

I UNDERSTAND THAT THE PENALTY FOR SUBMITTING FRAUDULENT INFORMATION ON THIS FORM MAY BE REPAYMENT OF TRIPLE ANY AMOUNT OF MONEY RECEIVED PLUS A FINE AND/OR IMPRISONMENT.

SIGN HERE _____
Student's Signature _____ Date _____

FINANCIAL AID ADMINISTRATOR: PLEASE COMPLETE ALL OF THE FOLLOWING ITEMS.

- (1) Do you agree with the information provided above? YES _____ NO _____
- (2) Date of student's withdrawal according to school records: _____
- (3) Is the student enrolled full-time for the current term? YES _____ NO _____
- (4) Explain on the reverse side your knowledge of the condition(s) of the student's withdrawal and academic standing.

Financial Aid Administrator's Signature _____ School Name _____ Date _____

SS-13-14SGProgAcadProgressExceptForm-0513

PHEAA conducts its student loan servicing operations commercially as American Education Services and for federally-owned loans as FedLoan Servicing.



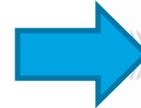
Resources

Resources

- ★ www.PHEAA.org/training
 - ★ Tutorials, Webinars, User Guides, etc.
- ★ PageCenter Reports
- ★ Document Library

Contact State Grant and Special Programs Staff:

- ★ Email sghelp@pheaa.org or
Call [1-800-443-0646](tel:1-800-443-0646), Option 3, Option 1
 - ★ Reserved for Financial Aid Administrators
- ★ Call [1-800-443-0646](tel:1-800-443-0646), Option 4
 - ★ Discuss Transmissions



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.



PA-TIP 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.



Training Events

View our training events, including those sponsored by Pennsylvania Financial Aid Training (PFAT), Pennsylvania School Services, and Pennsylvania State Grant and Special Programs.



K-12 Counselor Workshops

To ensure you have the tools students need to reach their educational goals, we offer free workshops for high school counselors and teachers.

Thank you!

If you have additional questions after reviewing the Certification Procedures, please contact State Grant and Special Programs staff.