

PHEAA TRAINING

Pennsylvania State Grant
**2013-14 CERTIFICATION PROCEDURE
WORKSHOP Q&A**

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INTRODUCTION

The purpose of this document is to provide the financial aid community responses to questions that were addressed during the 2013-14 (and 2014 Summer Term) State Grant Program Certification Procedure workshops. Information is being shared for clarification purposes only. This document does not supplant the official 2013-14 and 2014 Summer Term State Grant Certification Procedures by which compliance will be reviewed.

The organization of questions presented in this document follow the order of the Procedures. Sections and page numbers of the Procedures are noted for cross-referencing purposes.

CERTIFICATION PROCEDURES, SECTION I – STUDENT ELIGIBILITY VERIFICATION

ENROLLMENT (Section I.A, beginning on page 1)

LESS THAN 50% CLASSROOM ENROLLMENT (Section I.A, beginning on page 1)

If a student is enrolled in 6 classroom credits and 6 online at the time of crediting the State Grant and subsequently adds a 3 credit online class, do we need to report?

The additional 3 online credits has made the student less than 50% classroom for the term. Report the revised credits and report as '< 50 % classroom'.

If a student initially enrolls in 6 credits online and 3 classroom and subsequently drops an online course worth 3 credits, can the student be considered for a part-time State Grant?

If the student's final enrollment is 3 credits classroom and 3 online, the student is considered part-time (6 semester credits) and is not less than 50% classroom. Therefore, the student can be considered for a part-time State Grant.

How do I know the Americans with Disabilities Act form was sent to the student?

This letter, as with all correspondence to students, is logged on the student activity page. The description is 'Initial Distance Education Info, Policy & ADA Form'. You can check Activity by using FC5S or on the Activity tab in Partner Interface.

Is the Americans with Disabilities Act letter sent to the student for every term that is reported?

The letter, which is marked 'Initial Distance Education Info, Policy & ADA form' on the student's activity, is only sent once per academic year and trailing summer. For example, if a student is reported as less than 50% classroom for the Fall 2013 term, the letter will not be resent for a subsequently reported Spring and/or Summer 2014 term.

How do I know the status of an ADA review?

If the student submits a request, an Activity notation is logged (FC5S or Activity tab in Partner Interface). A PageCenter report named '<50% Attending Status Report' is produced each weekend. When a student is approved, your school receives a copy of the approval letter by mail.

My school's hybrid classes are all structured to be 60% classroom and 40% online. Can we publish this once to cover this requirement?

"For hybrid or blended classes, the course description must contain the percentage of classroom hours and the percent of online hours so that expectations are clear to students."

Schools may choose to publish this once to cover all hybrid courses. However, PHEAA Program Review staff and/or State Grant & Special Programs staff may randomly request documentation from the institution and/or professor to confirm classroom and online attendance requirements for a specific course.

Would information in the comments field in the school's online student registration application satisfy the publishing requirement?

This is acceptable as long as an auditable record can be produced for Program Review and/or State Grant & Special Programs staff at a later date that clearly showing the hybrid percentage that was presented to the student at the time of registration.

My school's hybrid courses range from 30 to 79% and there is no way for me to know if it meets the 50% hybrid definition to be considered classroom. What can I do?

When a school is unable to drill down and state with certainty that the hybrid course is at least 50% classroom, then the school should report the hybrid course as online.

Can my school publish a blanket statement in the catalog for all or does it have to be at the course level?

It must be published at the course registration or section level.

If a hybrid course meets the classroom definition, does this need to be published?

If the course satisfies the State Grant definition of classroom as per the State Grant Certification procedures, then it does not need to be published.

Does a course management system (e.g. blackboard tool) meet the definition of synchronous learning?

Synchronous (classroom) learning must be real-time, two-way audio and visual interaction as defined in the State Grant Certification Procedures. If the mode of delivery does not meet these criteria, it is online.

Does PHEAA.org explain the requirement to the student and enrollment options?

Our public website, PHEAA.org, does list the Eligibility Requirements under State Grant Program/Prepare. PHEAA does not currently give the level of detail to the student that is provided to the Financial Aid Offices. We will consider this for future website development.

Am I Eligible?

You may be eligible if you demonstrate financial need and meet specific requirements.

⊖ [Hide Eligibility Requirements](#)

- Are a high school graduate as stipulated in the Pennsylvania State Grant law
- Attend a postsecondary school approved by PHEAA for Pennsylvania State Grant purposes
- Are enrolled at least half-time (defined as at least six semester credits but less than 12 semester credits per semester, or the equivalent)
- Are enrolled in an approved program of study of at least 2 academic years in length
- Are enrolled in a program of study where at least 50% of the total credit or clock hours needed for completion of the program are earned through classroom instruction:
 - The program itself must be structured to allow you to complete at least 50% of your credits or clock hours in the classroom.
 - Your enrollment pattern must also consist of at least 50% classroom instruction (unless you have a [medical disability](#) (PDF)).
- Have made satisfactory academic progress (as defined by PHEAA)
- Not have already earned a bachelor's degree or its equivalent
- Are a Pennsylvania resident, as stipulated in the Pennsylvania State Grant law
- Are of satisfactory character (for example, not be incarcerated)
- Not have received the maximum number of Pennsylvania State Grants permitted
- Not be in default or pending default on an educational loan. This also applies to any program where the award has been converted to a loan and the loan is in a default status.
- File and complete the application process by the [appropriate deadlines](#)

For more detail, read the [Rights and Responsibilities Certification Document](#) (PDF).

REMEDIAL (Section I.A, beginning on page 5)

If a student is enrolled in all remedial classes, how should this be reported?

Report the student as 'Less than Half-Time' in the Enrollment field.

If a student is enrolled in a 4 credit remedial course and a 3 credit regular course, are they eligible?

The State Grant Certification procedures page 6 outlines the maximum distribution of credits. No more than half the enrolled credits needed to meet the minimum enrollment may be remedial. This means that for half-time enrollment, the student must have a least 3 regular credits and for full-time enrollment the student must have at least 6 regular credits. A student who is enrolled 4 remedial credits and 3 regular credits meets the minimum State Grant enrollment requirement by using all 3 regular credits and 3 of the 4 remedial credits.

EVENING STUDENTS (Section I.A, beginning on page 7)

If there is no cost difference do we need to change enrollment for a student who reported themselves as 'full-time evening'?

When a school does not differentiate costs between day and evening programs, then all students are calculated on the same costs that were submitted on the annual Educational Cost Form. This means that students who report 'full-time evening' use the same costs as 'full-time day'. Therefore, there is no need to correct the data since it has no impact on the student's eligibility determination.

ADVANCED STANDING (Section I.A, beginning on page 8)

I know credits taken by exam cannot count toward enrollment but I thought they could count toward Academic Progress?

Effective with the 2013-14 academic year, credits earned by examination and others considered 'advanced standing' cannot be counted toward meeting the State Grant Academic Progress requirement.

PENNSYLVANIA DOMICILE (Section I.C, beginning on page 11)

If a 17 year-old student's parents move out of Pennsylvania but the student remains behind living with guardians to finish high school and continue on to college, are they eligible?

PHEAA would need to review all the information. According to statute, the guardian must be both supporting the student and must be a bona fide domiciliary of the Commonwealth for at least twelve months immediately preceding the date of the application.

Does PHEAA review the driver's license?

PHEAA does review the state provided on the Free Application for Federal Student Aid (FAFSA) as part of automated checks.

If a student's address is Pennsylvania and Home of Record is Pennsylvania but completed the Free Application for Federal Student Aid (FAFSA) with Texas as legal state of residence, what needs to be done to correct?

The student needs to correct the legal state of residence on their Student Aid Report (SAR) if Texas is not correct and an error was made completing the form. PHEAA will likely identify this record as requiring a domicile review.

How does PHEAA handle students who reside in Pennsylvania but attend high school in a bordering state such as New Jersey?

PHEAA does have a list of bordering state high schools that Pennsylvania residents attend and considers this information when questioning a student's residency.

How does PHEAA handle students who have two different parents residing in different states?

PHEAA must look at the 'big picture' including whose financial data was required to be provided on the FAFSA and with whom the student truly resides. This review may include where the student returns when not enrolled, state taxes, driver's license, etc.

APPROVED PROGRAM OF STUDY (Section I.D, beginning on page 13)

Since first-time applicants at Community Colleges have an application deadline of August 1, is there a need to differentiate between 2-year terminal and 2-year transferrable programs?

Community Colleges do not have to differentiate between 2-year terminal and 2-year transferrable programs since it no longer has a filing deadline impact for that school type.

MAXIMUM NUMBER OF PAYMENTS (Section I.D.5, beginning on page 14)

How does a student know what State Grant payments (award counters) they have used?

Students may now retrieve a copy of their full eligibility notice in their Paperless Inbox in Account Access. That document lists award counter information as well as other detail on the data used to calculate the State Grant eligibility. Students should NOT submit corrections using that document and should be directed to PHEAA.org/corrections to locate the appropriate form.

The screenshot shows the PHEAA Account Access interface. At the top, there is a navigation bar with "Account #:" followed by a redacted field, and links for "Contact Us", "About Us", "Privacy", and "Sign Out". Below this, a user is greeted as "Welcome, JAMES BROWN" with a dropdown menu containing "Paperless Inbox" (with a download icon), "Account Profile", "Account Related Letters", and "Billing Statements".

Below the navigation bar, the "Education Services" section is visible. On the right, there is a "Need Help?" button with a photo of a customer service representative and the text "We're here to assist you."

The main content area is titled "Paperless Inbox" and contains a section for "Account Related Letters". This section features a table with the following data:

Date	Subject	Delivery Method
05/09/2013	2013-14 Eligibility Notice	Electronic

Below the table, there is a link to "View Billing Statements". At the bottom left, a note states: "Adobe Reader is required for PDF documents."

If a student is enrolled at a Business, Trade, and Technical (BTT) School then transfers to another school later to pursue a bachelor's degree, can they request more than 4.0 worth of award counters?

The State Grant is limited to the equivalent of 4 academic years' worth of aid (4.0 award counter). Some students may reach the maximum number of payments before earning a degree of any kind. The only exceptions are programs that are bona fide five year programs.

ACADEMIC PROGRESS (Section I.F, beginning on page 16)

If a student did not have a State Grant the first time a repeated class was taken, can the credits count toward Academic Progress?

If the student did not receive a State Grant during the term in which they initially enrolled in the course, the credits earned may be counted toward meeting the Academic Progress requirement.

However, if the student earned credits and received a State Grant when the course was initially taken, those credits cannot be counted toward Academic Progress.

If a student is enrolled for the Fall 2012 term but not paid until the Spring 2013 for that term and the school notices that the student will be a progress issue for the Fall 2013 due to lack of credits earned in Fall 2012, must the Fall 2012 State Grant be paid?

If all other requirements are met, the student must be paid for the Fall 2012 term since Academic Progress is reviewed on an annual basis and impacts the 2013-14 eligibility and not the current term. The school may advise the student to repay the State Grant in order to avoid the future Academic Progress reject. In these cases, the school must have a refusal in writing in the student's file and must inform PHEAA of such so that the State Grant can be appropriately cancelled for student refusal.

If a student is enrolled in 12 semester credits and 3 remedial credits, receives a full-time grant and drops a regular class, would Academic Progress be met?

In this example, the student was not reported as needing a remedial exception to meet the 12 semester credit minimum for State Grant enrollment. If the school has not reconciled for the current award year in which the student took the remedial credits AND the student has not already used the maximum allowable remedial terms of enrollment, then the remedial exception indicator could be added. This would allow the student to achieve academic progress for the most recent academic year.

A remedial indicator cannot be added retroactively for prior award years.

With regard to the Jessie example provided in the workshops, can a school change enrollment from full-time to part-time so that the student meets Academic Progress?

Workshop Example:

- Jessie took 12 semester credits in the Fall 2012; full-time grant
- She passed all her classes, receiving 12 credits, but received a 'D' in one 3 credit course

Questions: What if Jessie enrolled in 12 credits during the Spring 2013 repeating that course to better her grade? Would Jessie be eligible even if she passed all 12 credits in the Spring 2013?

Answer: No. Jessie would be short only earning 21 credits for the year.

Academic Progress is based on enrollment and the State Grant received commensurate with that enrollment. When a student qualifies for a full-time State Grant, they must successfully complete the number of credits commensurate with that status. You may not change the enrollment status to accommodate Academic Progress. For this specific example, Jessie may not be reported as part-time and reduced to a part-time grant to accommodate the shortage in credits earned.

If a student fails during the Spring 2013, does not attend during Summer 2013 but makes up the lack of credits during the Fall 2013 term, will they be eligible for Spring 2014?

A student must be denied for lack of Academic Progress until the credits are made up. In this case, since the credits were made up during the Fall 2013 term, the Spring term may be reinstated.

If a student did not receive a State Grant for the Fall term and does not make progress during the Spring term, can they still receive their subsequent Fall grant since they did not attend for a whole 'year'?

The State Grant Academic Progress is based upon a yearly cycle as follows:

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

During the yearly cycle, the student must complete the minimum number of credits commensurate with State Grant enrollment and award received during each term. Lack of enrollment or ineligibility during the Fall term does not negate the student's obligation to progress and earn the minimum number of credits commensurate with his/her Spring term award.

Can you provide additional progress examples?

Example 1: Check Progress after Spring and student enrolled for Summer 2013 (semester)

Summer 2012	Fall 2012	Spring 2013
Attempted 6	Attempted 12	Attempted 12
Received part-time State Grant	Received full-time State Grant	Received full-time State Grant
Earned 6	Earned 9	Earned 12
Student needed 30 credits (6 Summer plus 24 Academic Year); Student earned 27.		
Action: Report Summer 2013 as 'Academic Progress Reject' under the Cancellation/Reinstatement section in Partner Interface.		

Example 2: Check Progress after Spring

Summer 2012	Fall 2012	Spring 2013
Not enrolled	Attempted 12	Attempted 15
No grant	Received full-time State Grant	Received full-time State Grant
	Earned 9	Earned 15; repeated failed class from Fall 2012
Student needed 24 minimum semester credits for 2012-13. The student earned 24.		
Action: No action needed; the student made up for the failed Fall credits in the Spring term.		

Example 3: Check Progress after Spring

Summer 2012	Fall 2012	Spring 2013
Not enrolled	Attempted 12	Attempted 12
No grant	Received full-time State Grant	Received full-time State Grant
	Earned 12 with one class graded as a 'D'	Earned 9; repeated 'D' class from Fall to better grade to 'C'
Student needed 24 minimum semester credits for 2012-13. The student earned 21 credits since a course where credits were already earned was repeated and needed to meet the minimum State Grant enrollment criteria.		
Action: Report the next term of enrollment (Summer 2013, Fall 2013, etc.) as a Progress Reject.		

Can you please clarify the changes for 2013-14?

The original publication of the 2013-14 Certification Procedures indicated some changes for Academic Progress that required clarification. The procedures were republished and attendees at the workshops dated July 30 and after received the corrected version.

The corrected change is noted as #4 in the memo and states:

First, credits must be earned from an approved Pennsylvania State-Grant institution or Federal Title IV eligible institution in order to count toward Academic Progress. Second, effective with 2013-14, PHEAA will not allow credits earned through examination or life experiences to count toward the Academic Progress requirement. Refer to page 17 of the procedures.

If a student takes 3 online credits in the Summer at a different school to make up credits needed for Academic Progress, does my school have to accept the credits?

As with the case with students transferring into an institution, it is not necessary that a successfully completed course at one school be accepted for academic credit at the current institution.

Is the school required to keep a hard copy of the transcript? My school can view credits from the Registrar's Office on-line.

The school is not required to keep a hard copy. However, the school must be able to produce the document by which the State Grant Academic Progress requirement was reviewed for auditing purposes. If you have doubts about the ability to retrieve any electronic information used to certify the State Grant, then you should keep a copy in the student's file.

Since PHEAA indicates the transcript for Academic Progress can be unofficial, are grades and/or report cards acceptable?

The student must provide a document from the institution that indicates the class taken, the period of the enrollment (term and year), the number of credits for the course, and the grade earned for the class. This may be a document that is not an official transcript.

Do we need transcripts of all prior schools or just those where the last State Grant award was received?

For purposes of Academic Progress, your school only needs to review the credits earned commensurate with the last year of State Grant aid. That may involve acquiring records from one or more institutions if the student was enrolled in more than one during that period.

Last year of State Grant aid means:

Summer/Fall/Winter/Spring when your institution checks Academic Progress after the Spring term; or Fall/Winter/Spring/Summer when your institution checks after the Summer term

If a student was granted a medical exception for Academic Progress and fails progress again in the subsequent year due to the ongoing medical condition, can another exception be granted?

PHEAA will not grant another exception for Academic Progress for an ongoing medical condition. For example, a student:

- Does not receive a Fall 2012 State Grant
- Receives full-time grant for Spring 2013; attempts 12 credits but earns only 6
- Is rejected for Progress for 2013-14 until the 6 credits are made up
- Is subsequently approved for Fall 2013 due to being granted a medical exception for a condition that impacted the Spring 2013 term
- After completion of the 2013-14 academic year, for which the student received 2 – full-time semester grants and attempts 24 credits, earns only 21 credits
- Appeals due to the same medical condition that impacted the Spring 2013. This appeal would not be approved.

EDUCATIONAL EXPENSE ALLOWANCE (HOUSING) (Section I.G, beginning on page 20)

Are schools required to update housing if it doesn't match the roster?

Schools are not required to update housing choices since PHEAA implemented the standard Educational Expense Allowance (EEA) in 2012-13. A school may choose to provide corrected data for statistical purposes. For example, if the school wants the corrected housing on file with the State Grant Reconciliation roster for school use.

STUDENTS IN DEFAULT (Section I.M, beginning on page 22)

How does PHEAA identify default rejects when the ISIR appears clean?

PHEAA identifies students who fail to discharge their responsibility in borrowing through a Federal or State Educational Loan Program. These students who have a default claim pending are ineligible to receive the Pennsylvania State Grant until they bring their account current. This may be through approval of an in-school deferment. Additionally, students may be in default on a grant which converted to a loan from failing to meet the obligations of the Pennsylvania National Guard (EAP) Program or New Economy Technology Scholarship (NETS) Program. These are not identified on the ISIR.

Contacts:

Agency/Department	Number	Information
Default Prevention	800.328.0355	To find out how to bring the account current
AES-Graduate and Professional Services	800.233.0557	To find out the status of an EAP or NETS converted loan
Pennsylvania National Guard	717.861.8894	To find out the reason(s) the EAP grant converted to a loan

CERTIFICATION PROCEDURES, SECTION II – PENNSYLVANIA STATE GRANT ADJUSTMENTS

ADJUSTMENTS (Section II.A, beginning on page 23)

School A has a Summer term begins April 1 and ends July 18. A student at School A dropped out on June 9 during the 60% refund period for the school. The term's first roster was received on July 2, what amount has to be returned?

Since the Summer term roster and funds were not disbursed until after the student dropped out, the school must return 100% of the funds. A school may have applied a 'preliminary credit' (deferment of a bill) prior to the student's withdrawal from school. However, a school cannot apply a final credit of funds prior to the receipt of the term's first roster.

School B received a roster and funds on April 15 and credited a student. On April 20, the FAA was notified that the student unofficially withdrew on April 10. Can School B adjust and keep a portion of the State Grant award?

School B must use the last date of the student's attendance and apply the State Grant withdrawal procedure accordingly. Therefore, the school must return the 100% of the funds.

If a student withdraws unofficially what date do I use to determine if any funds need to be returned?

Use the last date of attendance on record to make this determination.

If a student receives all 'F' grades due to unofficial withdrawal, attendance was not taken and the Financial Aid Office finds out in October, after drop/add, can they keep the grant?

The school should attempt to determine the last date of attendance. If the student is incurring 100% of their charges because the school is assuming this occurred after the institutional refund date due to the lack of an attendance, the credit may stand. However, the student should be advised that this will cause an issue with Academic Progress for future State Grant aid.

Why was the Gift Aid policy eliminated?

PHEAA understands that there will be a small minority of students who will benefit from the elimination of the Gift Aid Policy, however, the vast majority of students impacted by this were low-income students who were being denied grant assistance and had to turn to increased borrowing to fill the gap. The State Grant Advisory Committee was unanimous in their support for eliminating this test and it was one of the biggest complaints that we received from schools and students over the years. There will always be a few outliers who will benefit from policy changes but the vast majority of low income students who were hurt by this test will be held harmless.

DIFFERENT EDUCATIONAL COSTS (Section II.B, beginning on page 25)

If a student is receiving other aid above the cost of attendance, should the State Grant be refused?

The student may be offered the option to cancel the State Grant award for the current year in order to utilize this eligibility in other enrollment periods such as a summer or extended enrollment for degree completion. This refusal of the current year award must be obtained in writing from the student in order to cancel the award.

I understand that PHEAA is no longer using the Gift Aid test. If a student is over the cost of attendance (COA), how do we treat the PHEAA State Grant, should we reduce the State Grant to meet our budget?

First, reducing the State Grant to meet the budget is NOT correct since that would essentially mean reinstating the gift aid policy which was eliminated. Effective 2013-14, a student is eligible to receive PHEAA State Grants even if he/she is over the COA, providing that he/she is not receiving any federal aid (excluding Pell). If the student has federal aid such as SEOG, Work Study, Perkins, or subsidized Direct Loans and are over need/costs, an adjustment will need to be made to other student aid programs to eliminate the overaward per federal financial regulation while including the State Grant as a resource.

The procedures indicate, “Tuition Waivers-Schools must use the actual costs of students who are receiving a tuition waiver.” In the past this provision was only for students who were receiving a waiver for repeated work. Is this new procedure saying that if any student receives a tuition waiver, we cannot use the cost of their tuition pre-waiver application in their educational costs?

In order to use the tuition charges in the Cost of Attendance for State Grants, the student account must show that charges for the full amount were applied and then a credit was also applied in the amount of the tuition waiver (all or part). If this is not able to be shown on the student’s account, then the costs cannot be used. This may then mean that reporting reduced costs (more than 25% lower) is required for recalculation of State Grant eligibility.

My school uses ‘tuition remission’ thereby not reducing tuition but providing a financial aid scholarship. In the past, this was used in the gift aid formula. Do we have to report as reduced educational costs now that gift aid is eliminated?

This question has to do with costs not gift aid. The institutional accounting records should indicate the full amount of tuition and fees charged to the student. Any amounts awarded to the student awarded through “tuition remission” should likewise be indicated on the account. An institutional scholarship covers this charge so it is not the elimination of the charge.

When does a school need to report differential costs for a program of study?

Business, Trade and Technical schools (BTTS) must report individual program costs each year.

For other types of institutions, unique programs of study that have tuition and fee charges that are less than 25% of the standard institutional charges must be reported to PHEAA on a case-by-case basis using Partner Interface.

CERTIFICATION PROCEDURES, SECTION III – GENERAL INFORMATION CONCERNING THE HANDLING OF PENNSYLVANIA STATE GRANT FUNDS

RECONCILIATION (Section III.A.3, beginning on page 29)

Can my school opt for the Fall Offset instead of submitting a refund?

PHEAA recovers outstanding funds from the prior year once during the Fall Offset process. It is a last resort method of collection and is not recommended to use this instead of remitting payment. Remember, PHEAA currently disburses uses a netting process so allowing the Fall Offset process to occur can make it more difficult for your school to reconcile. Also, the deadline for remitting payment to PHEAA is June 1st (i.e. June 1, 2013 for the 2012-13 academic year) so the Fall Offset process is used when a school is not adhering to the deadlines set forth in the Certification Procedures.

TERM LENGTH (Section III.A.4, beginning on page 30)

Can Summer modules overlap and still count to meet the 8-week minimum term length at a school that does not use year-round curriculum?

The Summer sessions may overlap as long as from the beginning of the first session to the conclusion of the last session there is a minimum total of 8 weeks and there is no overlap with the Spring or Fall terms.

Example:

In this example, Session 2 and Session 3 overlap for one week. A student enrolled in all 3 sessions for the minimum number of credits would meet the State Grant Summer term length definition since the start of the first session June 3, 2013 through the end of the last session on August 2, 2013 totals 9 weeks.

Session 1	Begins June 3, 2013	Ends June 21, 2013	3 weeks
Session 2	Begins June 24, 2013	Ends July 19, 2013	3 weeks (no classes week of July 1)
Session 3	Begins July 15, 2013	Ends August 2, 2013	3 weeks

If my semester school offers three 5-week Summer sessions and the student enrolls in Session 1 and 3 for a total of 6 credits, are they eligible?

The student would be eligible since State Grants does allow non-consecutive modules for the Summer term only. In this case, the term length would be 10 and the student is enrolled in the minimum number of credits to qualify for part-time eligibility. The State Grant would not be permitted to be credited until the student is confirmed as enrolled in the last module that comprises the 'term'.

Does the Summer application explain the minimum term length requirement to the students?

Our website informs the student of the requirement as follows:

You must be enrolled at least half-time (defined as at least six credits per semester, or the equivalent). If you are enrolled in a school or program that does not operate on a year round curricula, the summer term may be as short as eight weeks of instruction and no less than six semester credits (or the equivalent). Non-consecutive 'mini' terms may be combined to meet the eight week abbreviated term length requirement for the summer term only.

For the Summer, my school offers a program that meets 1 Saturday every week for two 5-week sessions. If a student enrolls in 12 credits in the first 5-week session, can I credit a State Grant?

Although the student may be enrolled in the minimum number of credits required, the student is not enrolled in the minimum number of weeks and therefore, not eligible for the State Grant. A student must be enrolled in BOTH 5-week sessions and must meet the minimum number of credits commensurate with a full or part-time grant. You may not credit the grant until enrollment in the last session is confirmed.

Is the Summer term length requirement a change? I have two, 6 week Summer sessions and want to confirm if they are eligible.

There has been no change regarding term length for 2013-14. Combining two, 6 week long Summer sessions to make a 12-week long Summer term is acceptable. The student must be confirmed as enrolled in the second 6 week session and in the minimum number of credits commensurate with the State Grant award before crediting can occur. If a student enrolls in only one of those two sessions, the student would not be eligible regardless of the number of credits since the minimum Summer term length is eight weeks.

For the Academic Year, if we combine two, 7 ½ week, consecutive modules to make a 15 week semester and the student is enrolled in 6 credits for only one of the two, are they eligible?

The student would not be eligible since they are only enrolled 7 ½ weeks. When combining modules to meet the minimum term length requirement for the academic year, the student must be enrolled in all modules and crediting may not occur until enrollment is confirmed in the final module. Modules must be consecutive and the weeks used to comprise the term may not overlap with another term. For example, the last week of a module that comprises the Fall term may not be the same week that is used as the Spring term start.

How do we notify PHEAA of a Program of Study that is longer than a normal semester; for example 20 weeks?

Schools should notify PHEAA of any programs that fall outside of the term length definitions. Send an email to sghelp@pheaa.org with the subject line of 'Program of Study review – Attention: Program Integrity staff'. Programs that do not meet the term length definitions are reviewed and schools are notified of any special crediting instructions that must be applied. For example, PHEAA could not permit a 20 week semester without specifying special crediting since that length changes the number of credits required by students to meet the minimum enrollment requirements.

REIMBURSEMENT TO STATE GRANT RECIPIENTS (Section III.D, beginning on page 34)

If a student was determined eligible for 2012-13, the funds were not credited to the student's account, and the school has written permission from the student, can those funds be applied to the 2013-14 year on top of any State Grant award the student is already receiving for 2013-14?

The State Grant must be credited for the 2012-13 academic year and the student account must clearly indicate that the award was paid for the proper academic period. If written permission is obtained from the student to forego this refund of 2012-13 State Grant funds so that it may be applied to the 2013-14 award year bill, then this may be done.

OTHER QUESTIONS/MISCELLANEOUS

Does a student have to register for selective service?

Selective service registration is not a requirement for the State Grant Program.

Since the School Notes in Partner Interface are only readily viewable by my school, are the entries auditable?

Since this data is for institution use and is not readily visible by PHEAA staff, those entries would not be subject to a PHEAA audit. However, if a school auditor viewed the information while at the institution and found an irregularity, your school could have an internal audit finding.

My school has a copy of the applicant's tax return information and notice that it will impact the Expected Family Contribution (EFC), should we submit them to PHEAA?

Since PHEAA begins disbursing funds in August for the Fall term, updates are not automatically accepted from the Federal Central Processing System (CPS) on complete records after August 1 of the academic year. If you have a copy of the student's tax information, please forward to PHEAA along with a note indicating whether any State Grant funds were credited and the amount credited.

The following statement exists on FG5T: "TO REQUEST A CHANGE IN A STUDENT'S STATE GRANT RECORD FOR YOUR SCHOOL PRIOR TO THE TERM START DATE, YOU ARE REQUIRED TO MAINTAIN A SIGNED FAFSA OR SAR OR AN OFFICIAL AUTHORIZATION STATEMENT SIGNED BY THE STUDENT. (NO SIGNED FORM IS NEEDED ONCE THE TERM OF ENROLLMENT BEGINS)."

We store our ISIR data electronically. Does the 'Signed FAFSA' include an electronic version of a completed FAFSA/ISIR which includes my college?

Prior to the term beginning and prior to disbursements:

- If the student does not list your school on the FAFSA, then a signed statement is required
- If the student lists your school as a 2-10 choice and it is prior to the first State Grant disbursement (use 8/1 as a guideline) and is accepted for admission and/or registered, then the electronic signature on the FAFSA will satisfy the signed statement requirement.

After term start:

- The student's enrollment at your institution serves as intent to attend and therefore negates the need for the signed statement; however, PHEAA may not immediately make the update dependent upon the status of the student's record if funds were already disbursed to another institution.

STATE GRANT FORM (SGF)

Do students still have to wet sign this?

Students who complete the SGF, generally first time applicants, must print and sign the signature page and mail to PHEAA. The ability to e-sign continues to be evaluated by the Agency.

When would a student not be able to access the Certification Signature page for the State Grant Form (SGF)?

Students must print the Certification Signature page within 180 days of completing the SGF or they will no longer be able to access it. If that occurs, advise the student to contact us at **800.692.7392**.

REPORTS AND REPORTING

I know the PHEAA Collectable students are sorted at the top of the State Grant rosters. Can rosters be sorted by transfer students or customized by the school?

The manner in which State Grant rosters print is not customizable by school. Exporting the PageCenter report into Excel does not result in a user-friendly spreadsheet. Schools that are interested in sorting on any of the data that is on the roster are encouraged to use Disbursement Transmissions. This is the electronic version of the Disbursement Roster. Technical layouts are available in the Document Library under State Grant Program/Technical and Processing Information. Please call 800.443.0646, option 4 to get started or send an email inquiry to sghelp@pheaa.org with the subject line 'disbursement transmissions'.

If my school signs up to receive Disbursement Transmissions, will I lose access to the PageCenter roster?

Schools using Disbursement Transmissions still have the ability to access the 'paper' version of the disbursement roster in the PageCenter Report Repository. Disbursement transmissions allow the school to upload the data into Microsoft Access or Excel and sort the data in a manner that expedites processing.

Can the online Certification Page be more printer-friendly?

Despite its antiquated design, the online Certification page is the most expeditious way to submit roster certification. Please remember to print the page using your web browser before clicking the submit button. PHEAA is aware of the issues and is working toward improvements.

Besides my reconciliation roster, what tools can I use to help reconcile?

If you are unable to identify the student or students through use of your reconciliation roster, the best way is to use the weekly Status transmission. You can also review your GPAD report in the PageCenter report repository.

Notes about GPAD:

- GPAD is "turned on" to pick up those changes after the initial awarding.
- Summer GPAD is released in mid-May.
- This lists all students whose State Grant status has changed within the last 30 days (records with an eligibility change since the previous "Add Date.")
- The listing is displayed in alphabetical order by the student's last name. If award information changes for the same student from one week to the next, a separate entry is provided on the file, i.e., the information from last week is not updated on last week's list but is a new entry on the current week's list.
- Schools can continue to access it until mid-August of the following year. The GPAD listing is then suspended after August 1st. For example, August 1, 2013, 2011-12 GPAD should stop running since no more 2011-12 disbursements are permitted.

What are the available GPAD listings and what is the difference between 'Normal' and 'All'?

Available GPAD breakdowns include:

- normal processing – this subset would not include validation, late or summer
- validation processing– this subset includes validation records only
- summer processing– this subset includes summer only
- special processing – this subset is generally not used
- late processing – this subset includes those processed if PHEAA extends the filing deadline
- all – would include all listings; this is the most comprehensive listing

Are the College Displays such as FG3S available in Partner Interface?

Not currently. The available information on the Interface is student-level data only.

How can I tell if I have an outstanding roster?

Use the FG3S display. There is a navigational tutorial for this transaction available on PHEAA.org/training under 'State Grant Training'.

Notes: There is no audio. Also, to enlarge your view, use the zoom feature in your internet browser.

Created in 1963 by the Pennsylvania General Assembly, the Pennsylvania Higher Education Assistance Agency (PHEAA) has evolved into one of the nation's leading student aid organizations. Today, PHEAA is a national provider of student financial aid services, serving millions of students and thousands of schools through its loan guaranty, loan servicing, financial aid processing, outreach, and other student aid programs.

PHEAA's earnings are used to support its public service mission and to pay its operating costs, including administration of the Pennsylvania State Grant and other state-funded student aid programs. PHEAA continues to devote its energy, resources and imagination to developing innovative ways to ease the financial burden of higher education for students, families, schools, and taxpayers.

PHEAA conducts its student loan servicing activities nationally as American Education Services (AES) and FedLoan Servicing.

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