

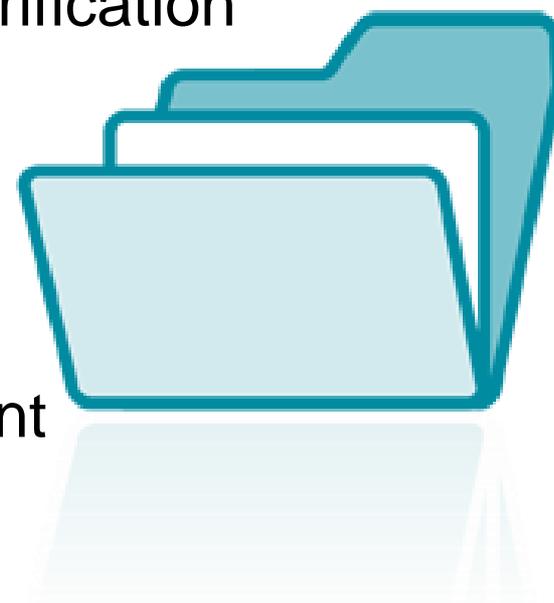
PHEAA TRAINING

Costs and Award Adjustments *Pennsylvania State Grant Program*

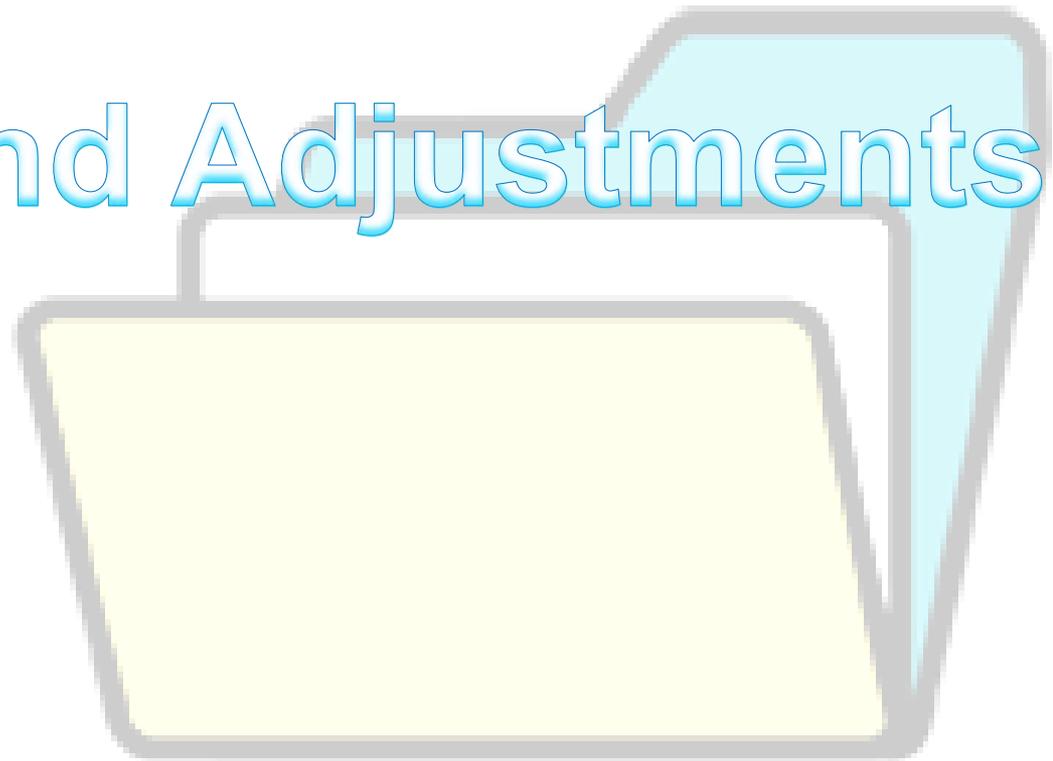
2014-15 Academic Year and 2015 Summer

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



Costs and Adjustments



Chapter 4

Section A -

Educational Costs Used in Calculating State Grant

- ★ Tuition and Fees
- ★ Educational Expense Allowance (\$4,000)
 - ★ PHEAA still requests room and board costs during annual cost collection – statistical
- ★ Books and Supplies (\$1,000)

State Grants

- ▶ View State Grants Dashboard
Standard Lists and Worklists
- ▶ Create Mass Update Queue
Create Mass Update Queue
- ▶ View Weekly Update and Roster
Download from PageCenter
- ▶ State Grant Disbursement Certification
Disbursement Certification Form
- ▶ View My Exports
View Exported Student Lists
- ▶ Access State Grant & Special Programs
OC/Webconnect
- ▶ State Grant Education Costs
Education Cost Form
- ▶ Request Primary School Change
Change Primary School in Student Record



Annually in
March-April

Chapter 4

Section B – Award Status & Crediting Definitions

- Conditional Awards

- ★ Announced in May
- ★ Prior to passage of Commonwealth budget

- Final Awards

- ★ Early July
- ★ After passage of Commonwealth budget

- Credit/Crediting – when referenced means ‘final’
(will be discussed further with Chapter 5)

Chapter 4

Section C.1 – Withdrawal Definitions

- Withdrawal Definition - Withdraws from course/courses and:
 1. Was charged for the course/s
 2. Will receive attempted credits for course/s on transcript

- Student:
 - ★ Fully or Partially withdraws
 - ★ Changes from an approved to a non-approved program of study
 - ★ Is terminated, expelled, suspended, or dismissed
 - ★ Takes a leave of absence

Chapter 4

Section C.1 – Drop Definitions

- Drop Definition:
 - ★ Was registered but course/s then removed from schedule
 - ★ Was not charged for the course/s
 - ★ Course/s not on transcript
- Drops:
 - ★ Do not count toward State Grant enrollment
 - ★ May not apply withdrawal procedures
 - ★ Must adjust State Grant enrollment accordingly

Chapter 4

Section C.1

EXAMPLE: DROPPED COURSE

- Joshua enrolls in 6 credits, is paid for a half-time State Grant on September 2nd and subsequently drops one 3-credit course on September 4th during the institutional 'Drop-Add' period.
- According to the school's policy, Joshua will only be charged for the 3 remaining credits and will not see the dropped course on his transcript.

The FAO:

- Must update Joshua's State Grant to 'Less than Half-Time'

Chapter 4

Section C.1 – Award Adjustments for Withdrawals

REQUIREMENT

A student's term award is subject to an adjustment when the student initially enrolls for the term but withdraws **prior to the end of the term/disbursement period.**

- Schools without set terms must use the student's disbursement period. For more information, refer to 'term length' in *Chapter 5*

Chapter 4

Section C.2 – Evaluating Withdrawals for Adjustment

CRITERIA BEFORE ADJUSTING

- State Grant awards must be FINAL
- Award was disbursed
- Award was paid to the student's account after certification of eligibility
- Crediting was based on enrollment status prior to withdrawal

Note: Adjusted grant payments, for any reason, although reduced, equal an appropriate term award counter (full or half-time) for State Grant purposes.

Chapter 4

Section C.2 – Evaluating Withdrawals for Adjustment

EXAMPLE: FUNDS NOT DISBURSED

- PHEAA University's Summer session began May 15th and ends July 18th. The first roster was received on July 2nd.
- Jenna withdrew from of Summer school at PHEAA University on June 1st and is refunded 40%
- Funds were not received for the Summer term until after Jenna withdrew

The FAO:

- Must cancel Jenna's State Grant for 'not enrolled'

Chapter 4

Section C.3 – Evaluating Withdrawals for Adjustment

EXAMPLE: CONDITIONAL AWARDS

- The State Grant program announces conditional awards in May.
- The state budget has not passed when classes begin on August 28th.
- The school defers a portion of Claire's bill for the conditional award amount
- Claire withdraws prior to the budget passing and the announcement and disbursement of the final award

The FAO:

- Must cancel Claire's State Grant for 'Not Enrolled'

Chapter 4

Section C.3 – Evaluating Drop/Adds for Adjustments

- Total Withdrawals from School
 - ★ Follow the Adjustments Procedure in Section C
- Partial Withdrawals that alter ratio <50% classroom
 - ★ No adjustment after initial reporting at the census date
 - ★ Refer to Chapter 3 of *Certification Procedures*
- Drops or Adds that alter ratio <50% classroom
 - ★ **Report** '< 50% Classroom' (unless now less than half-time)
 - ★ **Monitor** the student's status
 - ★ **Refund** the award amount that has been cancelled

Chapter 4

Section C.3 – Evaluating Drops for Adjustments

EXAMPLE: DROPPED COURSE

- Fall 2014: Erin was enrolled in 6 classroom credits and 6 online credits
- Spring 2015: Transcript shows one 3-credit classroom course dropped from Fall 2014 and added to Spring

The FAO:

- Must report 9 credits for Fall 2014 term
- Adjust the enrollment for Fall to part-time
- Adjust the Fall State Grant from full-time to part-time
- Report as 'Less than 50% classroom'

Chapter 4

Section C.3 – Evaluating Adds for Adjustments

EXAMPLE: ADDED COURSE

Students	Enrollment				Enrollment Reported		Date Credits Reported (census)	Enrollment Change		
	Classroom	Online	Term	Date Student Paid	Classroom	Online		Date Change	Classroom	Online
Student A	6	6	Fall	1-Sept	6	6	8-Sept	9-Sept	9	6
Student B	6	6	Fall	1-Sept	6	6	8-Sept	9-Sept	6	9

Chapter 4

Section C.4 – Evaluating if Refund is due to PHEAA

CRITERIA

- Date of withdrawal
- Standard tuition refund policy of your institution

Chapter 4

Section C.4 – Evaluating if Refund is due to PHEAA

EXAMPLE: UNOFFICIAL WITHDRAWAL/NO ATTENDANCE RECORD

- Sue's State Grant award was certified and credited
- Sue receives all 'F' grades at PHEAA Private School
- Attendance is not taken at PHEAA Private School
- School review indicates Sue 'unofficially withdrew' in November after drop/add
- Sue incurs 100% of charges

The FAO:

- May allow Sue to keep her grant
- Should counsel Sue on academic progress

Chapter 4

Section C.4 – Evaluating if Refund is due to PHEAA

EXAMPLE: UNOFFICIAL WITHDRAWAL/LAST DATE OF ATTENDANCE RECORDED

- PHEAA Private School receives a roster on January 15th
- Mark's State Grant award was certified and credited
- On February 20th, the FAO was notified Mark withdrew on January 10th

The FAO:

- Must mark Mark's record as 'not enrolled'
- Must return Mark's award to PHEAA

Chapter 4

Section C.5 – Withdrawal after Term Completion

REQUIREMENT

- Student retroactively withdraws
- State Grant paid for term
- Follow the standard tuition refund policy
- Apply the Adjustment Steps

Chapter 4

Section C.6 – Award Increases after Crediting

REQUIREMENT

- Award amount increased after initial crediting
- Student withdrew/dropped less than half time before the end of term
- Award increase cannot be credited
- Apply the Adjustment Steps

Chapter 4

Section C.6 – Award Increases after Crediting

EXAMPLE: AWARD INCREASES AFTER CREDITING

- Phillip was awarded \$1,000 in Fall State Grant funds
- The award was credited on September 4th
- Phillip's award increased to \$1,500 on September 16th
- Phillip withdrew from school on September 15th
- The withdrawal had not been reported prior to the increase

The FAO:

- Must return the \$500 increase
- Apply the withdrawal policy to the original amount

Chapter 4

Section C.7 – Partial Withdrawals to Half-Time

- At least half-time
- After funds credited
- During school's refund period

Options	Action	Pros	Cons
Option 1	Apply the withdrawal policy on the full-time enrollment and award	Award may be higher than the half-time award	Full-time award counter is used
Option 2	Report the student as half-time	Reduces issues with successful academic progress (<i>Chapter 2, Section D</i>) since half-time award counter is used	Award may be less than the adjusted full-time award

Chapter 4

Section C.7 – Partial Withdrawals to Half-Time

EXAMPLE: PARTIAL WITHDRAWALS TO HALF-TIME

- Jose enrolls for 15 credits and is charged \$1500
- Jose receives a \$900 State Grant
- Jose withdraws from 6 credits and is refunded \$300 (20%) by the institution

Options	Action	Student Award	Grant Counter
Option 1	Apply the withdrawal policy and return \$180 or 20% to PHEAA	\$720	Full-time award counter is used (.50/.33)
Option 2	Report Jose as half-time and return \$450 to PHEAA	\$450	Half-time award counter is used (.25/.16)

Chapter 4

Section C.8 – Withdrawal Summary

Treatment of Enrollment Changes			
Status Change (prior to the end of the term/disbursement period)	Have funds been credited?	Should funds be returned?	Does withdrawal date matter?
Withdraws or Changes to Non-Approved Program	No	Yes	No
	Yes	Depends – Refer to ADJUSTMENT STEPS	Yes
Drops to Less than Half-time	No	Yes	No
	Yes	Yes	No
Partially Withdraws - Half-time to Less than Half-time	No	Yes	No
	Yes	Depends – Refer to ADJUSTMENT STEPS	Yes
Status Change	Have funds been credited?	Report as half-time?	Report adjusted amount?
	No	Yes	No
Partially Withdraws - Full-time to Half-time	Yes	School must choose to: 1) report as half-time; or 2) adjust	

Chapter 4

Section C.9 – Adjustment Steps

- **Determine** portion (%) of tuition refund.
- **Check** the amount of State Grant retained does not exceed that portion permitted under school's tuition refund policy.
- **Advise** the student to pay the school when amount is small to save award counter/avoid academic progress issue.
- **Report** Adjustment via Partner Interface.

Award Adjustments

	Fall	Spring
Adjustment Amount:	<input type="text"/>	<input type="text"/>
	<input type="text" value="- Select Reason -"/>	<input type="text" value="- Select Reason -"/>
Current Award:	\$533	
	<input type="checkbox"/> Remove Adjustments	<input type="checkbox"/> Remove Adjustments

School Notes (Will not be reviewed by PHEAA)

Chapter 4

Section C.9 – Adjustment Steps

EXAMPLE: WITHDRAWAL FROM SCHOOL DURING THE REFUND PERIOD

- Katie was awarded a \$600 fall semester grant
- She withdraws at the end of the second week of classes
- According to school policy, she receives a 75% tuition refund

The FAO:

- Must return 75% of the award (\$450) to PHEAA

Chapter 4

Section C.9 – Adjustment Steps

EXAMPLE: CHANGE TO A NON-APPROVED PROGRAM OF STUDY

- Michael is a student at a business school
- He is awarded a \$750 State Grant
- He changes from an approved to a non-approved program after the term has begun

The FAO:

- Adjust the award as if the student withdrew on the date of the program change
- Return the remainder of the award to PHEAA

Chapter 4

Section D – Non-Sponsoring Costs

- Community Colleges only
- Verify students incurring non-sponsoring district costs

School Information

	Fall	Spring
Branch Campus:	00000000-05 Pheaa Col	99999999-01 Pheaa Uni
Program of Study:	Q - Non-Spon 2 Yr Term	C - Bachelor's Degree (A
Housing Status:		
Enrollment Status:		
<50% Classroom Attendance:		

The Enrollment Status dropdown menu is open, showing the following options:

- Select -
- I - College Transferrable Program
- J - 2 Year Terminal Prog-Credits Non Transferrable
- K - Prog of Less Than 2 Academic Years
- P - Non-Spon Clg Transferrable
- Q - Non-Spon 2 Yr Terminal Program
- DE - Distance Education
- 00 - OTHER

Chapter 4

Section E - Different Educational Costs

- Review actual costs (tuition/fees) for a specific term
- If costs used by PHEAA exceed student's actual tuition and fees by **more than 25%**
 - ★ **REQUIRED:** Withhold crediting; report reduced costs
 - ★ Note: If actual annualized costs still above 2014-15 cap of \$32,000, reporting unnecessary
- If costs used by PHEAA are lower than student's actual tuition and fees by **more than 25%**
 - ★ May report, not required

Chapter 4

Section E - Different Educational Costs

Reported Tuition & Fees for Full-Time, Full-Year Equivalent	School's Schedule	Term Cost	Full-Time Threshold*	Part-Time Threshold*
X	<i>Semester</i>	$X/2 = Y$	$Y*.75 = Z$	$Z/2$
X	<i>Quarter</i>	$X/3 = Y$	$Y*.75 = Z$	$Z/2$
\$12,568	Semester	\$6,284	\$4,713	\$2,357
\$29,304	Quarter	\$9,768	\$7,326	\$3,663
\$8,000	Semester	\$4,000	\$3,000	\$1,500
\$36,660 (but costs capped at \$32,000)	Semester	\$16,000	\$12,000	\$6,000

***Term costs that are less than the threshold must be reported. Please note that input into the Partner Interface is a term amount. The PHEAA system annualizes the entered amount.**

Chapter 4

Section E - Different Educational Costs

- Tuition Waivers - to use costs, the student's account must show:
 - ★ Charges for the full amount were applied
 - ★ Credit (full or partial – amount of waiver) was applied
- Tuition Remission – scholarship to offset charges
 - ★ Charges for the full amount (tuition & fees) were applied
 - ★ Amount awarded through 'tuition remission' indicated on the account

Chapter 4

Section E.2 - Reporting

Cost Override

	Fall	Spring
? Amount:	<input type="text"/>	<input type="text"/>
Enrollment Status:	Full-Time	Full-Time
Tuition & Fee:	\$15,500	\$15,500
Full-time Threshold:	\$5,812	\$5,812
Part-time Threshold:		
	<input type="checkbox"/> Remove Cost Override	<input type="checkbox"/> Remove Cost Override

- **Conduct** all eligibility tests and submit necessary changes first (enrollment)
- **Withhold** all crediting until changes are processed and award recalculated
- **Report** lower costs via Partner Interface – Single Update

Resources

● 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

- ★ Call [1-717-720-2740](tel:1-717-720-2740)

- ★ Institution Eligibility

● Resources

- ★ www.PHEAA.org/training

- ★ Tutorials, Webinars, User Guides, etc.



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 2014-15 State Grant Certification Procedures, please contact State Grant and Special Programs staff.