

PHEAA TRAINING

Pennsylvania State Grant
2013-14 CREDIT REPORTING Q & A

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INTRODUCTION

The purpose of this document is to provide the financial aid community responses to questions that have been asked regarding the new credit reporting requirement effective with the 2013-14 Academic Year. 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.

POLICY BACKGROUND

Why does PHEAA need this information?

In order to understand the entire picture of what is actually being funded by the State Grant Program, PHEAA needs better per student reporting. This will allow us to measure enrollment patterns and understand on a per student basis how many credits are being paid for with State Grant funds. Because we need to understand enrollment patterns overall for the State Grant Program, the information is needed from all participating schools regardless of whether the school has little or no distance education offerings.

The Pennsylvania legislature, as an advocate of the Commonwealth-funded State Grant Program, often requests data on performance measures from PHEAA. With the increase in distance education offerings, understanding enrollment patterns and the manner in which a State Grant recipient receives instruction are important considerations. Data is necessary to support decisions that will sustain a viable program in the long term. Collecting the number of credits for each State Grant recipient helps to meet this informational need.

Why require this for schools that do not offer any online courses?

Credit data isn't solely about analysis of online courses. This data helps identify enrollment patterns and student behavior.

What does PHEAA plan to do with this information?

PHEAA plans to analyze the impact of distance education on the State Grant population and gain a better awareness of State Grant recipients' enrollment patterns.

Why can't PHEAA get this information elsewhere?

Other sources of information were researched, for example, the National Student Clearinghouse. Although, the National Student Clearinghouse does collect enrollment data, it does not specify online vs. classroom instruction. Aggregate data at a school level does not provide the detail necessary to correctly understand the impact to the State Grant population.

POLICY-PROCEDURE SPECIFIC QUESTIONS

Section I.A - Effective with the 2013-14 academic year, schools must report all credits for which the student was registered at the time that the State Grant award was posted as a valid credit to the student's account. Credits must be differentiated between online and classroom and a value must be provided for each field even if it is a zero. THIS APPLIES TO ALL STATE GRANT RECIPIENTS. Report electronically through the Partner Interface or with a transmission – Reference [Appendix A](#).

What do you mean by 'time of crediting'?

'Time of crediting' means that you have paid the student's account. Therefore, report the credits in which the student was enrolled on the date that you posted the payment to the student's account.

If a student enrolls in 12 semester credits and withdraws from 3 credits before the State Grant is credited to the student's account, do we report 9 credits and part-time even though 12 credits will appear on the transcript?

Since funds have not been paid to the student's account, report the credits on which you are certifying and paying. This means you are paying a part-time grant based upon 9 semester credits.

If we have only one set program where all students have the same number of credits each term they are enrolled, can PHEAA set up the system to assume the credit count since it never changes?

PHEAA cannot make any school and/or program-specific assumptions. Certification of this data by term ensures accuracy of the data being reported at a student-level.

If a student was awarded the State Grant for a prior term and, therefore, funds were received with a current roster, what do I have to report?

For any term that is awarded, awards must be certified and the credits must be reported. Timing of receipt of the funds does not change the requirement.

If I can report all credits at the time of reconciliation, can I credit the academic year terms prior to reporting?

You may certify and pay State Grant awards during each term and report credits at reconciliation time. Remember credit reporting is a reporting requirement not a student disbursement requirement.

[Section I.A.5.b - TREATMENT OF CREDITS THAT DO NOT COUNT TOWARD STATE GRANT ENROLLMENT – Schools are required to report the student's entire enrollment record for purposes of online vs. in-classroom reporting. For example, report remedial credits even if those credits do not count toward the State Grant enrollment definition.](#)

Our full-time credits taken can range from 12 to 18. Do I need to report exactly what they are taking or can I report the 12 needed for State Grant enrollment?

If a full-time student is enrolled in 18 credits in the classroom and zero online, you need to report 18 classroom and 0 online. The State Grant Program needs to collect the actual number and type of credits in which the student is enrolled in order to have valid statistical data.

Can you please explain what you mean by 'winterim'?

A 'winterim' is a mini term in between a Fall and Spring semester that is not eligible for a separate disbursement. A quarter term is a period of approximately 11 weeks normally comprising 1/3 of the academic year. These would be true Fall, Winter and Spring terms eligible for separate disbursements.

Do we count credits taken in a 'winterim' term that occurs between the regular Fall and Spring terms?

The State Grant Program doesn't use the "winterim" term in any of our programs so we cannot collect this data as a separate item. Therefore, if the credits are not used for State Grant purposes and added to either fall or spring, then these 'winterim' credits would remain unreported.

Do satellite credits count when reporting online and classroom statistics?

Report all credits that are counting toward the student's enrollment. The online and classroom credits should reflect the true picture of the student's term enrollment.

Do we need to report remedial?

Credit reporting means all credits in which the student is enrolled even if not all those credits are used to meet the State Grant enrollment requirements. The student may not need a remedial exception indicator for State Grant purposes; however, credit reporting must reflect that the student was enrolled in remedial credits in order to provide the true statistical picture of enrollment.

Example: (Using a Semester Schedule)

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

[Section I.A.5.c - TWO SCHOOL ENROLLMENT/VISITING STUDENT – Report credits taken at another school during the term that are accepted by the enrolled school to meet the degree or program objective.](#)

With regard to credits being transferred in from other schools. It is my understanding that credits being taken concurrently at other schools will need to be included in our credit reporting requirements. In order to report this information, we would need to be able to somehow determine if a class was taken online or in classroom. If the other school lists it on their transcripts, it is easy to track and report. However, if this information is not on the transcript, how are we to track?

Since you are certifying State Grant eligibility for the student, you are required to obtain the information from the other institution before paying the student. It may be too early to have an academic transcript and you may have to rely on information from another source.

[Section I.A.5.d - CHANGES TO ENROLLMENT AFTER CREDITING – If the ratio of online versus in-classroom credits changes after initial crediting of the State Grant award, then this new credit information must be reported. Additionally, if this new ratio violates the 50 percent limitation on distance education credits, this may render the student ineligible for the previously paid State Grant award which now must be reported as “less than 50% in classroom” and will likely result in cancellation of the award. Refer to \[Section I.A.2.b.iii\]\(#\).](#)

For example, a student who initially registers for 6 classroom credits and 6 online credits is paid a State Grant on September 10. On October 4, the student adds an additional 3 online credits for the same term. This is now out of compliance with the distance education limitation on term enrollment and must be reported.

Can you please provide the examples charted in the Certification Workshop presentation?

Enrollment at time of crediting	After Crediting	Expected Credit Reporting	Notes
15 classroom/0 online	Student drops a class	15 classroom/0 online	No action necessary. Ratio of online to classroom instruction has not changed.
15 classroom/0 online	Student adds 3 online credits	15 classroom/3 online	Ratio has changed even though does not impact eligibility. Report new credit distribution.
12 classroom/3 online	Student withdraws	12 classroom/3 online	No action necessary. Academic Progress affected in future. Depending on time of withdrawal, a partial refund may be due.
6 classroom/6 online	Student adds 3 online credits	6 classroom/9 online	Ratio has changed; Impacts eligibility, must also report less than 50% classroom attendance. State Grant cancelled in 30 days unless ADA approval

If a student is taking 12 credits, 6 classroom and 6 online, and then adds 3 online midterm credits and loses their grant, can the grant be reprocessed at part-time?

The student is a full-time student and is not eligible for a part-time State Grant.

If after crediting the State Grant, the student drops an online class, does this need to be reported?

The State Grant Program defines 'drop' as a course for which the student was registered but where the course was removed from the student's schedule and thus no transcript or charges remain on the student's account. Drops normally occur during a defined period at the beginning of a term but this administrative action may occur at a later date on an exception basis.

Any dropped credits that change the ratio of online and classroom must be reported. Additionally, if those changes result in the student no longer being compliant with the 50% classroom enrollment requirement for the term, then 'Less Than 50% Classroom' must also be reported. This will result in loss of eligibility to the State Grant even if it had been previously paid to the student's account.

Example:

A student was enrolled in 12 credits during the Fall 2013. During the Spring 2014 term, he has one 3-credit course completely dropped from the Fall 2013 on his transcript. In this case, the school is responsible for reporting 9 credits, adjusting the enrollment for the Fall term to part-time, adjusting the State Grant from full-time to part-time and/or reporting less than 50% classroom, if appropriate.

This is not a change to past procedures.

If a student withdraws from classes, how does this impact credit reporting?

The State Grant Program defines 'withdrawal' as a course or courses for which the student was charged and will receive attempted credits that appear on the transcript; however, zero credits were earned. A student may withdraw from one or all of their courses within a particular term.

Example 1:

A student registered for 12 credits for the Fall term and a State Grant award was paid to the student's account on September 15. On November 3, the student withdraws from one 3-credit course. In this case, no adjustments are necessary to the State Grant award or to the credit reporting that was submitted for this student.

Example 2:

A student registered for 12 credits for the Fall term and a State Grant award was paid to the student's account on October 30. On November 3, information is received that the student withdrew from one 3-credit course on October 28. In this case, the student's State Grant award must be adjusted to part-time since the student only had 9 credits at the point of State Grant crediting. The enrollment reported for this student for the Fall term would be 9 credits.

Example 3:

A student registered for 12 credits for the Fall term and a State Grant award was paid to the student's account on September 3. On October 4, the student totally withdraws from school. No additional changes are necessary to the State Grant award unless institutional charges are being adjusted and a refund is forthcoming. (Refer to State Grant Certification Procedures, page 24). The reported term credits are 12.

If a student is taking 12 credits, 6 classroom and 6 online, and then added an online course, making the ratio 9 online and 6 classroom, I understand that I have to report the credit change and less than 50% classroom. Will this be a PHEAA Collectable?

The refund is expected from the school since this is part of the school's certification responsibility. This is NOT a PHEAA Collectable and is NOT a new practice.

Would it hurt to report all changes even if the ratio does not change? That would be a lot easier to do.

PHEAA is interested in the credits for which the student was paid for the State Grant.

[Section I.A.5.e - CLOCK HOUR CONVERSIONS – For schools measuring enrollment in clock hours, use the conversion formula below to convert clock hours to credits hours.](#)

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

Please provide an example for the clock hour school which would include the conversion.

A student is enrolled in a clock hour program for 450 clock hours in the first enrollment period. Dividing 450 clock hours by 37.5 results in a conversion of 12 semester credits.

[Section I.A.5.g - DEADLINE AND PENALTY FOR NON-COMPLIANCE – Report the 2013-14 academic year data by July 31, 2014 and 2014 summer data by December 31, 2014. Schools that have missing information after reconciliation are subject to disbursement holds on the next academic year's or summer's funds.](#)

What happens if credits are unreported past deadline?

In cases where the required credit information remains unreported beyond the deadlines, the State Grant disbursement for the Spring 2015 may be delayed until there is compliance with the requirement.

Can we report the credits at the end of the year?

Credits may be reported either term-by-term or at the time of reconciliation but they must be reported by the deadline of July 31, 2014 (for the 2013-14 academic year). Otherwise, Spring 2015 disbursements may be held until the information is received. Credits are those at the point in time of crediting the State Grant.

When will PHEAA review this requirement for compliance?

Information reported for the 2013-14 award year will be reviewed as part of Compliance Program Reviews. Program review staff will begin reviewing records for the 2013-2014 award year for reviews occurring after July 1, 2014.

For compliance purposes, are we able to have students submit an “Off-Campus Course Approval Form” where they self-report if a class is online or in classroom? If this is a signed document from the student, will that be sufficient for PHEAA’s audit purposes?

No, a self-certification form would not satisfy compliance. It is the school’s responsibility to confirm and document the number of distance education credits and the number of classroom credits taken by the student each term.

Do Summer 2013 credits have to be reported?

No, this reporting requirement begins with the Fall 2013 term. Certification Procedures for the 2013-14 academic year include the 2014 Summer term the first time that summer data will be collected.

REPORTING SPECIFIC

If we change credits for a particular student, will there be a history?

Each time you report credits through Partner Interface, an activity is logged on the student record. These notations serve as your ‘history’ on a student-by-student level.

▼	Miscellaneous	CLASSROOM/ONLINE CREDITS UPDATE BY SCHOOL-PARTNER INTERFACE	06/10/2013	06/10/2013	To Grants
	9999997	FALL - 12.00 (CR) 0.00 (OL)			

Likewise, each time you report credits through FG5Y, an activity is logged on the student record.

```
FG5Y 1 [REDACTED] GRUSCRDT 09032013 STUDENT ACTIVITY DETAIL
PAGE 1 OF 2

SSN [REDACTED] CHYVONNE L STUDENT ACCT: [REDACTED]
INST ID - DPT:
PROGRAM:

TYPE: MS CONTACT: 63 TO GRANTS LAST USER ID: FGXDV
ACTION CODE: GRUSCRDT ONLINE AND/OR CLASSROOM CREDITS
ACTIVITY DATE: 09032013 CLOSE DATE: 09032013
CREATE DT/TIME: 09032013 12:06
TRACKING USERID: [REDACTED] DOCUMENT ID:
TRACKING DATE: ___/___/___ TRACKING INDICATOR:
ACADEMIC YEAR: 2013 PERIOD: A

COMMENTS
99999999 01

SPN CLSRM 00600 SPN ONLINE 00600
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Do we have to use the transmission process?

You do not have to use the transmission process. However, transmissions provide an opportunity for you to expedite your processing.

Can you please explain more about State Grant transmissions?

Please remember that there are 3 different types: 1) Status Transmissions; 2) Disbursement Transmissions; and 3) Certification Transmissions. Status and Disbursement are from PHEAA to you and, if your school has a resource that is Microsoft Excel or Access compatible, you could download the data into Excel, sort and then submit changes via Partner Interface. You do not necessarily have to participate in Certification transmissions (from your school to PHEAA) or have the data put into your FAMS system to take advantage of expediting your work using Status and Disbursement transmissions. We encourage the use of Certification transmissions but understand that takes a bit more IT involvement on your end.

Why can't we submit an excel sheet, instead of reporting name by name?

Excel spreadsheets require manual entries, logging of activities and imaging of changes. PHEAA will not accept these since the use of the Partner Interface and/or transmission tools provide a more efficient means of data reporting.

As an out-of-state University, we submit our reports via hardcopy faxed report. Will we no longer have that option?

PHEAA will NOT accept credit reporting from a paper roster or other report that is printed from the PageCenter repository. You are encouraged to log into Partner Interface to make all student-related changes required for certification of eligibility as well as reporting credit distribution.

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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.

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