



2019-20 PROGRAM GUIDELINES

PARTNERSHIPS FOR ACCESS TO HIGHER EDUCATION (PATH)



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Memo

To: Financial Aid Administrators and PATH Partners

From: Elizabeth K. McCloud
Vice President, State Grant
and Special Programs

Date: July 2019

Subject: 2019–20 Partnerships for Access to Higher Education (PATH) Program Guidelines

Through the Matching Funds appropriation, the Pennsylvania Higher Education Assistance Agency (PHEAA) partners with non-profit, community-based Pennsylvania organizations and foundations to provide Pennsylvania students attending eligible Pennsylvania postsecondary institutions with matching funds through the PATH Grant Program.

The PATH Program Guidelines provide student eligibility criteria, related certification steps, disbursement, and refund information. These guidelines also provide partner eligibility criteria, reporting requirements, and partner contact information. It is suggested that a copy of the *2019–20 PATH Program Guidelines* be provided to those campus offices that post and credit PATH funds once student eligibility has been certified. An electronic copy of the *2019–20 PATH Program Guidelines* is available on the Document Library.

Please note that the Partner policies listed below are bolded throughout the *Program Guidelines*. PHEAA is requesting that schools and partners assist in ensuring compliance with these policies and guidelines:

- PATH Partners allocations are only available for academic year awards, not summer.
- PATH can only match partner scholarship funds that are directly disbursed to institutions; they are not for matching tuition waivers or institutional scholarships.
- PATH Partners must send their scholarships directly to institutions; they must not send them to the recipient. This includes any scholarships made in both the institution and student's name. Any funds sent directly to the student will not be matched by PHEAA.
- PATH Partners must send their nominee lists through My File Gateway.

The *2019–20 PATH Program Guidelines* include the following revisions and clarifications:

- The PATH Applicant Certification and Status Listing (ACSL) has been enhanced to provide a more user friendly layout. The Degree Program and Progress 'questions' have been broken out into their own column, and where there were just dashes under them (_), there will now be Y/N for schools to circle (see Appendix A).
- Institutions should only certify PATH awards for students who verifiably received a scholarship from a PATH Partner. Unverifiable scholarships cannot be matched by PHEAA and should be cancelled by the institution.
- Institutions should only certify PATH awards after the institution has received the applicable Partner funds. If the Partner funds are received after a PATH award has been cancelled, the institution may reinstate the PATH award.
- All PATH Partners must submit a complete Scholarship List annually by September 1.
- Only students awarded funds directly from a PHEAA-approved PATH Partner are eligible for PATH nomination, awarding, and certification. PATH Partners may not submit nominations on behalf of outside organizations that award separate scholarships to students.

If there are any questions regarding the *2019–20 PATH Program Guidelines*, please contact us by email at path@pheaa.org or by calling **800-443-0646**, option 3, option 2. We look forward to continuing to work together in order to provide additional grant assistance to Pennsylvania students through the PATH Program.

2019–20 Combined PATH Prog Guidelines. 2019–20.Program Guidelines.PATH

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THE PROGRAM

I. PROGRAM AUTHORIZATION

The Pennsylvania Higher Education Assistance Agency (PHEAA) Partnerships for Access to Higher Education (PATH) Program operates under the provisions of "AN ACT"; Amending the act of January 25, 1966 (1965 P.L. 1546, No, 541. See House Bill No. 689 Session of 1989.) The Act authorizes PHEAA to conduct a Matching Funds program for the purpose of assisting Pennsylvania students attending an approved Pennsylvania institution of higher learning, and distributing Federal or other funds to be used as aid to students in meeting their cost of attendance. The Pennsylvania General Assembly authorizes the Matching Funds appropriation which supports four individual Matching Funds Programs. The PATH Program is an outgrowth of the PHEAA Match Grant Program initiated for the 1989-90 Academic Year.

II. PROGRAM PURPOSE

The PATH Program offers non-profit, community-based Pennsylvania organizations or foundations the opportunity to leverage private donations and contributions as both a means and incentive to provide additional need-based educational grants to Pennsylvania residents. These grants have the potential to be matched by PHEAA on a dollar-for-dollar basis.

INSTITUTION GUIDELINES

III. STUDENT ELIGIBILITY

To receive a PATH Grant, the student must meet the following criteria:

- A. Be nominated by and receive an academic year scholarship from a participating PATH Partner. Partner scholarship funds awarded for a summer term will not be matched by PHEAA.
- B. Be a resident of Pennsylvania as defined by the domiciliary requirements outlined in the *2019–20 PA State Grant Program Handbook*.
- C. Be a PA State Grant recipient for the term (fall, winter, or spring) in which PATH funds are received. There is no summer PATH Program.
- D. Demonstrate financial need.

Unmet need = Cost of Attendance (COA) - Expected Family Contribution (EFC) - all other grants and scholarships

- E. Be enrolled:
 - As an undergraduate student
 - On at least a half-time basis
 - In a degree-seeking program of study at a PA State Grant-approved postsecondary institution located in Pennsylvania
- F. Maintain academic progress as outlined in the *2019–20 PA State Grant Program Handbook*.
- G. Not be in default or pending default on any educational loan or owe a PA State Grant refund.
- H. Not be considered an incarcerated student, which is consistent with the guidelines associated with the PA State Grant Program.

IV. AWARD DETERMINATION PROCESS

- A. Potential PATH Grant recipients are nominated by participating PATH Partners, who provide PHEAA with a list of their nominees and their full academic year grant/scholarship award amount. PHEAA can only match partner scholarships that are disbursed directly from the partnering organization or foundation to the postsecondary institution. **This means that funds must be sent directly from the approved partnering organization to the postsecondary institution and cashed by that institution.** Matching of tuition waivers or institutional scholarships provided by the nominee's postsecondary institution is prohibited. **Partners providing payment directly to students is also prohibited. PHEAA will match Partner scholarships that are made payable to only the postsecondary institution as well as Partner scholarships that are made payable to both the institution and the student, so long as the funds are sent directly to the institution.** Partners have been advised to only include the dollar amount of scholarship funds that they will be sending directly to the institution when they submit their nominees to PHEAA.
- B. PATH Program staff verify that the nominee has a PA State Grant for each of the terms or quarters for which the nominee would receive PATH funds. PHEAA encourages PATH Partners to advise potential recipients of the PA State Grant award deadlines and that PATH Grant eligibility is predicated on receiving a PA State Grant.

V. MINIMUM/MAXIMUM AWARDS

- A. The PATH Grants are initially determined by PHEAA, who establishes total academic year awards using the lesser of the following:
 - Total academic year PATH Partner Award
 - Total academic year PA State Grant Award
 - Maximum amount of \$2,500 for the academic year

- B. The total academic year award determined for PATH is divided per term.
- C. The minimum amount a recipient can receive for the year is \$200.

If a student receives a partial year PA State Grant award (i.e., only an award in the fall, winter, or spring) the recipient is only eligible to receive a partial year PATH Grant (i.e., only an award in the same term that the PA State Grant funds were received). If the partial award amount is below \$200, the student is not eligible to receive the PATH Grant.

These maximum and minimum amounts are subject to change at the discretion of PHEAA based on available funding.

VI. CERTIFICATION PROCESS

- A. PATH Grant nominees are provided to institutions on the Applicant Certification and Status Listing (ACSL) (see [Appendix A](#)), which is made available via the PageCenter mailbox on a biweekly basis (every other Tuesday). Institutions are required to certify PATH Grant eligibility as a condition of disbursement. All pending students must be certified by July 1, 2020. PHEAA retains the right to cancel awards for any students who remain pending after this time. The ACSL provides student detail and summary information as well as a certification page to be signed. Once completed, the report should be returned to PHEAA via fax at 717-720-3786. The recommended PATH Grant provided by PHEAA on the ACSL has no official standing and is considered an estimate until an amount is provided and certified by the institution.

Institutions should not certify a student on the ACSL until the matching scholarship or grant is known to the institution. The PATH Scholarship List, which can be found on the Document Library, may aid institutions in identifying the corresponding scholarship.

The following fields must be completed or updated on the ACSL:

- Graduation Date (expected/actual college graduation date)
- Degree Program/Approved Program of Study
- Academic Progress
- Enrollment Status
- Expected Family Contribution (EFC) - optional
- Unmet Cost/Need
- Certified Award Amount
- Signature and Date

Specific data entry requirements for each of these items is as follows:

1. **Graduation Date:** Must be submitted in MMDDCCYY format. If the exact date of the student's graduation cannot be determined, a reference to month and year is sufficient.
2. **Approved Program of Study:** Eligible PATH Grant recipients are required to be enrolled in a PA State Grant-approved, degree-seeking program of study for each term or quarter during which a PATH Grant is received. **Circle Y (for yes) or N (for no) in the ACSL degree program field.**
3. **Academic Progress:** In order to receive a PATH Grant, recipients are required to be making satisfactory academic progress as outlined in the *2019–20 PA State Grant Program Handbook*. **Circle Y (for yes) or N (for did not maintain academic progress) in the ACSL academic progress field.**
4. **Enrollment Status:** PATH Grant recipients must be enrolled at least half-time (as defined by the *2019–20 PA State Grant Program Handbook*) for each term or quarter PATH funds are received. The ACSL enrollment status field must be populated with one of the following numeric or alpha codes:
 - 1 - Full-time
 - 2 - At least half-time
 - C - Not enrolled
 - E - Enrolled Less-Than-Half-Time

5. **Expected Family Contribution (EFC):** Please provide or update the federal EFC in the appropriate field (this is optional for PATH).
6. **Unmet Cost/Need:** Indicates the student has unmet need after all other grants and scholarships have been awarded. The formula to determine unmet need is: Unmet need = Cost of Attendance (COA) - Expected Family Contribution (EFC) - all other grants and scholarships. **Circle Y (for yes) or N (for no) in the ACSL unmet cost/need field.**
7. **Certified Award Amount:** The award amount the PATH recipient is eligible to receive based on federal need guidelines.
8. **Signature and Date:** Required to certify that all information provided on the ACSL is accurate.

NOTE: When certifying a record, always remember to circle Y or N for Program of Study, Academic Progress, and Unmet Cost/Need.

NOTE: Once an ACSL has been certified and returned, the institution does not need to return subsequent ACSLs for the same academic year to PHEAA if there are no status changes needed. (See [Appendix C](#).)

VII. CREDITING PATH GRANT FUNDS

- A. If the student does not meet all eligibility requirements as outlined in these Program Guidelines for the term or quarter being reviewed, the student's account should not be credited nor should a preliminary credit be allowed to stand. The ineligible reasons should be noted on the ACSL. If there is a questionable situation, funds should not be credited and PATH staff should be contacted.
- B. PATH partnering organizations and foundations are required to send their scholarship and grant funds that serve as the basis for the PATH match directly to the institutions. The institution may not finalize the PATH Grant credit to the student's account prior to receipt of the PATH Partner funds BUT may retain those funds for a period of 90 days. If the PATH Partner funds are not received at the end of the 90 day period, the school is required to return the PATH funds to PHEAA.
- C. PATH funds should be credited on a term-by-term basis. Crediting a student's account indicates that the institution has met the following requirements:
 - Performed all eligibility checks for the student as set forth in these Program Guidelines (including enrollment).
 - Provided PHEAA with certification of the student's PATH Grant eligibility for the terms or quarters.

For auditing purposes, PATH funds must be identified as a credit on the student's account, ledger card, or auditable record. Crediting should include the date the funds were posted, the amount and term to which the funds were applied, and clearly identified as a PATH Grant. In addition, schools should maintain a record of when the matching partner funds were received by keeping a copy of the check that was sent to the institution.

- D. If the final credit to the student's account creates a credit balance, a refund may be made to the student.
- E. If the student loses PA State Grant eligibility after the PATH Grant has been certified, the following guidelines should be followed:
 - If the PATH funds were fully credited (the institution has received the PATH Partner's matching funds) and disbursed to the student's account for the term or quarter the student lost PA State Grant eligibility, the PATH funds may remain as a credit to the student's account but the PATH Grant should be cancelled for any remaining terms or quarters.
 - If the PATH funds were not fully credited (the institution has not received the PATH Partner's matching funds) to the student's account for the term or quarter the student lost PA State Grant eligibility, the PATH funds must be returned to PHEAA and the PATH Grant cancelled for any remaining terms or quarters if the student remains ineligible for a PA State Grant.

NOTE: If PHEAA has not disbursed the PATH funds for the term or quarter the student lost PA State Grant eligibility, the institution should notify PHEAA that the PATH Grant should be cancelled by returning the most recent ACSL indicating the change.

VIII. DISBURSEMENT PROCESS

A. Disbursement Schedules

PATH funds are disbursed on one of two disbursement schedules:

1. Semester (twice per academic year – fall and spring) for institutions that operate on a semester or quarter calendar.
 - a. Fall semester disbursements typically run in September.
 - b. Spring semester disbursements typically run in January.
2. Trimester (three times per academic year – fall, winter, and spring) for schools that operate on a trimester calendar. In cases where schools have continuous enrollment or terms of irregular length, disbursements are made on the schedule that coincides as closely as possible to the school's calendar.
 - a. Fall quarter disbursements typically run in September.
 - b. Winter quarter disbursements typically run in December.
 - c. Spring quarter disbursements typically run in January.

B. Disbursement Roster Processing

1. All PATH disbursement rosters are placed in the institution's PageCenter mailbox (see [Appendix B](#)); notification regarding the disbursement is sent to schools via email. Schools can also choose to be automatically notified through PageCenter when a roster has been placed in their PageCenter mailbox by sending an email to path@pheaa.org.
2. PHEAA reserves the right to hold disbursement to an institution that is closing or is on a restriction or oversight by the United States Department of Education (USDE) for participation in any Title IV program. We also reserve the right to hold disbursements to an institution if the accrediting agency suspends or cancel approval for the school. Any questions regarding holding disbursement should be directed to PHEAA via email at path@pheaa.org. PHEAA will exercise this right to determine the eligibility of the institution or recipients to receive further funding.
 - a. The roster or certification page should be returned to PHEAA by fax at **717-720-3786** or by mailing to PHEAA, State Grant and Special Programs, PATH, P.O. Box 8157, Harrisburg, PA 17105-8157.
 - b. Schools are required to certify and return each disbursement roster within 30 calendar days of receipt of the roster or within 30 days of the first day of the term (whichever is later) and no later than November 10 in the case of the fall term roster. Failure to return the roster in a timely manner may result in an audit finding. Subsequent disbursements will be withheld until the certified roster or certification page is returned. (See [Appendix C](#).)

C. Disbursement of Funds

1. Funds are only disbursed through the Automated Clearing House (ACH). These funds are deposited directly into the designated bank account of the school at which the student is enrolled; institutions are notified of the disbursement via email and should allow at least 14 business days for the transfer to occur. When funds are transferred from the Agency to the school's bank account, the entry description associated with the transfer is "PATH." If the entry description does not appear when the funds are transferred to the school, the bank may have removed this information.
2. PHEAA reserves the right to hold disbursement to an institution that is closing or is on a restriction or oversight by the USDE for participation in any Title IV program. We also reserve the right to hold disburse-

ments to an institution if the accrediting agency suspends or cancel approval for the school.

Any questions regarding holding disbursement should be directed to PHEAA via email at path@pheaa.org. PHEAA will exercise this right to determine the eligibility of the institution or recipients to receive further funding.

III. RECONCILIATION PROCESS

- A. The annual Reconciliation Roster provides the school with a final opportunity to report ineligible students or changes to a student's status. The reconciliation roster must indicate the student's final status for the PATH Program, in accordance with the school's records, and must be returned to PHEAA within 30 days of receipt. Subsequent disbursements will be withheld until the certified roster, certification page, or outstanding refunds are returned.
- B. If the school determines that there are changes to a student's eligibility status after reconciliation, the school should contact PATH staff to request another reconciliation roster.

IV. REFUND PROCESS

- A. If, after complete review of the student's status according to these Program Guidelines, the student is not eligible for all or any portion of the PATH funds for the term being reviewed, or if the school questions the student's PATH eligibility for any reason, the student's account should not be credited nor should a preliminary credit be allowed to stand until the outstanding issues are resolved and eligibility is confirmed. If the PATH funds have been disbursed, the school should indicate on the disbursement roster the reason that the student is ineligible and the PATH funds must be returned.
- B. If a student withdraws or drops to a less-than-half-time enrollment status during a term in which PATH funds have been disbursed and credited to the student's account, a refund to PHEAA for all or a portion of the PATH Grant may be required. The *2019–20 PA State Grant Program Handbook* provides additional details on how these adjustments should be calculated.
- C. Refunds returned via ACH or wire transfer should be transferred to M&T Bank, PHEAA Operations with a brief description of the payment reason and identifying the funds as "PATH Grant Award." Specific account information can be found on the PATH disbursement roster. All PATH Grant refund payments being made by check should be addressed to PHEAA, P.O. Box 64849, Baltimore, MD 21264-4849.

V. PROGRAM REVIEW

As part of the Program Review process of PA State Grant and Special Programs, the Agency may conduct further examinations of student aid and related records as it deems necessary to protect the financial interests of the Agency or its student aid recipients (§ 121.59 b). A list of common administrative issues that could be cited in a Program Review can be found in Chapter 5 of the *PA State Grant Program Handbook for 2019–20*, which is available on PHEAA.org.

VI. RETENTION OF RECORDS

In accordance with these Program Guidelines, institutions are required to retain, for possible review by PHEAA, all records necessary for the certification of student eligibility and the crediting of PATH Grant funds to student accounts. Such records must be retained for at least 5 years from the date the institution completes certification of the disbursement roster.

VII. APPLICATION

To determine eligibility, each organization or foundation interested in participating in the PATH Program must submit an application **by June 30th for the upcoming academic year in which they wish to participate**. The completion of a PHEAA PATH Program application does not guarantee acceptance in the Program; it allows PHEAA to more accurately evaluate organization/foundation eligibility relative to participation. Each organization or foundation is required to submit (including but not limited to) an Annual Report, proof of federal tax exempt status, and any information that further describes its programs and services. Information on the PATH Program can be accessed on the partner website at [PHEAA.org/partner-access/community-partners/path-welcome.shtml](https://phea.org/partner-access/community-partners/path-welcome.shtml).

ELIGIBILITY CRITERIA

Organizations or foundations are potentially eligible to participate in the PHEAA PATH Program if they meet the following criteria:

- A. Are Pennsylvania non-profit or public charity organizations with a tax-exempt status under Section 501 (C) 3 of the Internal United States Revenue Code.
- B. Have provided scholarships to Pennsylvania residents for a minimum of 2 academic years.
- C. Award scholarships to at least 15 Pennsylvania students (per academic year) attending a postsecondary institution in Pennsylvania.
- D. Involvement in motivating, counseling, mentoring, or encouraging students to pursue higher education.
- E. Conduct scholarship fundraising or methods of funding based on private sector contributions and donations.
- F. Disburse scholarship funds directly to postsecondary institutions.
- G. Render scholarship services to students in the community-at-large throughout the region, county, or city without requirement of affiliation or membership with the organization or foundation or enrollment in an associated postsecondary institution.
- H. Submit a list of scholarships or scholarship funds that your organization will administer for the upcoming academic year.

Organizations or foundations are not eligible to participate in the PHEAA PATH Program if they require scholarship recipients to attend specific postsecondary institutions.

AS ADMINISTRATOR OF THE PATH PROGRAM, PHEAA RESERVES THE RIGHT TO:

Discontinue the active participation of an approved organization or foundation if they fail to maintain the requirements as set forth in the *PATH Program Guidelines*. To be reconsidered for active status, the organization or foundation must submit a new application and be approved. A Participation Agreement must be fully executed in advance of any PATH Program activity.

THE ORGANIZATION OR FOUNDATION (PATH PARTNER) HAS THE OPTION TO:

Discontinue active participation in the PATH Program. To become officially inactive, a participating PATH Partner must notify PHEAA in writing. Upon becoming officially inactive, a PATH Partner can be reconsidered for active status by submitting a new application, and if approved, execute a Participation Agreement.

VIII. ALLOCATION PROCESS

A PATH Match allocation is the funding assigned by PHEAA to approved PATH Partners for the purpose of leveraging individual PATH Partner grants or scholarships awarded to Commonwealth students for educational expenses.

The PATH Program is funded by an annual Matching Funds appropriation provided by the Pennsylvania General Assembly. The funds approved for the PATH Program are allocated among the approved PATH Partners. **The**

minimum allocation per Partner is \$5,000. The distribution of available funds to participating Partners is based on (but not limited to):

- PHEAA receiving a Matching Funds appropriation through the Commonwealth Budget process
- Approval of Matching Funds allocations by PHEAA Board of Directors
- A review of prior year participation and fund utilization
- Number of PATH Partners

These allocations are sent annually to the PATH Partners through an allocation letter after the Commonwealth budget has been finalized; allocations are generally mailed to PATH Partners in August. PATH funds are allocated to a PATH Partner for use during an academic year; therefore, PHEAA can only match partner scholarships awarded during the academic year. Partner scholarship funds awarded during summer terms will not be matched. PHEAA reserves the right to revise the allocation to the amount that the Partner actually provided through the matching process.

IX. ALLOCATION ADJUSTMENTS

To request an adjustment to a PATH allocation, a PATH Partner must submit such request in writing to PATH Program staff, outlining the circumstances related to the requested allocation adjustment.

A PATH allocation may also be adjusted by PHEAA in accordance to the reallocation process. PATH partners will be contacted regarding allocation changes.

X. MINIMUM/MAXIMUM PATH GRANTS

PHEAA's PATH Grant match will not exceed the total amount the PATH Partner awards to the student. **For the current academic year, the maximum PATH Grant is \$2,500 and the minimum is \$200.** These maximum and minimum amounts are subject to change at the discretion of PHEAA.

XI. PATH MATCH OF INSTITUTIONAL FUNDS

PHEAA can only match partner funds that are disbursed directly from the partnering organization or foundation to the institution. PHEAA will not match any funds disbursed directly to the student. **PHEAA will match funds awarded co-payable in both the student's and the institution's names, as long as the funds are sent directly to the institution.** Matching of tuition waivers or institutional scholarships provided by the nominees postsecondary institution is prohibited.

Example: A Partner has entered into an agreement with a college or university to provide \$1,000 in scholarship aid to a student. The Partner provides a \$500 scholarship and the school will 'match' the \$500 Partner scholarship by awarding the student a tuition waiver, or an institutional scholarship for \$500. PHEAA can only provide a match for the \$500 Partner scholarship. **The Partner should only include the portion of scholarship funds that they provided on the nominee list.**

XII. SUBMITTING SCHOLARSHIP LISTS AND NOMINATIONS

Once PATH Partners are notified of their annual allocations, each Partner must submit a list of all scholarships the Partner administers (Scholarship List) and a nomination list of potential PATH Grant recipients.

SCHOLARSHIP LIST

Annually, each PATH Partner must provide PHEAA with a complete list of all scholarships funded, administered, awarded, and disbursed by that Partner. Each Partner's Scholarship List must be received by PHEAA on or before September 1.

PHEAA compiles individual Partner Scholarship Lists on a master *PATH Partner Scholarship* List and provides this list to schools for award certification purposes. Unlisted and unverifiable scholarships cannot be matched by PHEAA, and may be cancelled by the postsecondary institution.

NOMINEE LIST

Annually, each PATH Partner must also provide PHEAA with a complete list of PATH Grant nominees and the amount of their **full academic year Partner grant or scholarship award**. This nominee listing must be received by PHEAA on or before September 30.

NOTE: Each PATH Partner may only nominate students who were awarded funds directly by that Partner. PATH Partners may not submit nominations on behalf of outside organizations that award separate scholarships to students. A separate scholarship is one that is not funded, administered, awarded, and disbursed by the PATH-approved Partner.

In order to keep all nominee information secure, PATH Partners must use the nominee template (see [Appendix D](#)). The nominee template is available on the PATH Partner website. Once all nominees are entered on this template, the listing can be sent electronically through a process called **My File Gateway**. My File Gateway is an easy-to-use process which requires no advanced technical skill or knowledge and offers a secure web portal for PATH Partners to send nominee listings to PHEAA and to receive data back (see [Appendix E](#) for My File Gateway instructions and [Appendix G](#) for instructions on requesting and maintaining access to PHEAA's online resources). **All PATH nominees must be submitted via My File Gateway using this Excel spreadsheet template. In addition, any changes to the original nominee listing must be submitted using the My File Gateway process and nominee template; changes or additions to the nominee listings will not be accepted over the phone or via email.**

The nominee list requires the student's Social Security number (SSN), as it serves as the primary means of student identification. Accuracy is essential. Whenever PHEAA records indicate an SSN is different from that on the nominee list, the PATH Partner must verify the correct SSN with the student and report such to PHEAA.

XIII. PARTNER CORRESPONDENCE

If Partners send out any type of correspondence to their constituency, including potential or actual scholarship recipients that references the PHEAA PATH Program or provides a status or an amount of the PATH match, Partners are required to send a draft to PATH staff at PHEAA for review to ensure that PATH Program information is accurately reflected. PHEAA will not be held responsible for erroneous information provided to your PATH nominees or their families that was not reviewed and approved by PHEAA. Materials can be sent to path@pheaa.org.

XIV. STUDENT ELIGIBILITY REQUIREMENTS

CRITERIA

To receive a PATH Grant, the student must meet the following criteria:

- A. Be nominated (have his/her name submitted) by a participating PATH Partner and receive a scholarship from that PATH Partner.
- B. Be a PA State Grant recipient for the term (fall, winter, or spring) in which PATH funds are received.
- C. Demonstrate financial need:
Unmet need = Cost of Attendance (COA) - Expected Family Contribution (EFC) - all other grants and scholarships
- D. Be enrolled for at least six credits per term in a PA State Grant-approved institution located in Pennsylvania.
- E. Maintain satisfactory academic progress as determined by the institution.

NOTE: Students or parents calling PHEAA to inquire how they can receive a PHEAA PATH Grant are referred to a PATH Partner in the region where the student attended high school.

ELIGIBILITY BASED ON NEED

Once PATH Program staff receives the nomination list, the nominees will go through an evaluation process that will determine if the student is eligible to receive a PA State Grant and is attending a school in Pennsylvania. Students who pass these edits successfully have their unmet need calculated as follows:

THE FORMULA ASSOCIATED WITH DETERMINING UNMET NEED IS AS FOLLOWS:

COA – EFC = Need

Need – All other grants and scholarships = Unmet Need

FORMULA DEFINITIONS:

COA Tuition + Fees + Books + Supplies + Room + Board

EFC is an index of the family's ability to contribute to the student's education costs.

Nominees will then be processed in descending order based on the greatest unmet need and will be awarded an estimated PATH Match Grant based on the maximum and minimum award amounts (outlined below). **The total amount of nominations may exceed the Partner's allocation; PHEAA staff will determine the estimated number of recipients that will meet the Partner's allocation. It is important to note that once a student is nominated, the institution will determine final eligibility (see XV. PATH School Certification Process).**

AWARD AMOUNTS

The amount of the annual PHEAA PATH Grant is ultimately determined by the postsecondary institution and is the lesser of the following:

- PATH Partner Award
- PA State Grant Award
- Maximum amount of \$2,500

The minimum PATH Grant is \$200.

If a student receives a partial year PA State Grant award (i.e., only an award in the fall, winter, or spring) the recipient is only eligible to receive a partial year PATH Grant (i.e., only an award in the same term that the PA State Grant funds were received). If a PA State Grant is cancelled for any term, the school is required to return the PATH Match funds to PHEAA for that term(s). PATH staff will monitor the PATH Partner allocations to determine if there is enough funding to award the next student on the nomination listing.

XV. PATH SCHOOL CERTIFICATION PROCESS

Institutions are provided a listing of potential PATH Grant recipients and their estimated PATH Match Grants through an **"Applicant Certification and Status Listing (ACSL)."** This listing is used by institutions to certify student eligibility and adjust the estimated awards based on all other financial aid the nominees may have received. Once this listing has been certified by the institution, PATH Match funds are disbursed.

NOTE: Institutions will not receive a disbursement if there is an outstanding refund due from a prior year or an outstanding roster from a prior term.

A Partner Award Applicant Status Listing is also available biweekly for Partners and is accessed on PageCenter via an email link (see [Appendix B](#)). This provides Partners a list of their nominees being processed by PHEAA and their status.

XVI. PATH GRANT DISBURSEMENTS

All payment of funds (both Partner and PHEAA disbursements) must go directly to the institution which the PATH recipient is attending; no funds can be sent directly to the recipient. Once PHEAA disburses PATH Match funds to an institution, the institution may not release the funds to the student's account until the PATH Partner funds are received; institutions may retain the PHEAA PATH Grant funds for 90 days. If the PATH Partner funds are not received by the end of the 90-day period, schools are required to return the PATH Match funds to PHEAA. **Therefore, it is critical that PATH Partners disburse their funds to the institutions as soon as possible to ensure that a student's account is settled and they will not be prohibited from registering for the following term.**

APPENDIX A

XVII. 2019–20 APPLICANT CERTIFICATION AND STATUS LISTING (ACSL)

00123456 (1)

2019–20 APPLICANT CERTIFICATION AND STATUS LISTING (ACSL)
 APPLICANT/RECIPIENT DATA
 PATH

7/1/2019
 DOC ID TCEL
 PAGE 1

PENNSYLVANIA INSTITUTION NAME

STUDENT INFORMATION	TERM AND CURRENT STATUS (6)	DGR	ENRLLMNT	UNMET	EST. MAX	CETIFIED			
INELIGIBLE REASON (7)	PRGM (8)	PROGRESS (9)	STATUS (10)	NEED/ COST (11)	EFC (12)	AWRD AMNT (13)	AMOUNT (14)		
SMITH, ABCDEFGH (2) 123-45-6789 (3) PARTNER: LMNOPQR (4)	FALL	DISBURSED	Y	Y	1-FULL	Y	0	\$1,250	(15)
GRAD DATE: _____ (5)	SPRING	CERTIFIED	Y	Y	1-FULL	Y	0	\$1,250	\$1,250
TOTAL AWARDS DISBURSED (16):									\$1,250

INDICATES THAT THE STUDENT WAS NOT ON THE PREVIOUS ACSL

* INDICATES THAT THERE HAS BEEN A STATUS OR AWARD CHANGE SINCE THE PREVIOUS ACSL.

CODE DEFINITIONS (NOTE: Bolded codes/definitions are required fields.)

1. Institution's OE Code
2. Student's Name
3. Student's SSN
4. PATH Partner
5. Expected/Actual student graduation date; in MMDDCCYY format; if the exact graduation day is unknown, use the last day of the month.
6. Provides specific fall, winter, or spring term award status from [Legend 1](#).
7. If applicable, this field indicates the reason the student is ineligible (see [Legend 2](#)).
8. Student must be enrolled in a PA State Grant-approved, associate or bachelor's degree program of study; circle "Y" if Yes, "N" if No.
9. Student must maintain PA State Grant satisfactory academic progress; circle "Y" if yes, "N" if No (if student is a freshman enter "Y").
10. This field will be pre-populated with information from the FAFSA®/PA State Grant record; if incorrect, use the appropriate code from [Legend 3](#).
11. Indicates if the student has unmet cost. Circle "Y" for Yes and an "N" for No.
12. Lists the student's federal EFC.
13. This award amount is determined by PHEAA and is the lesser of the PATH Partner award, PA State Grant award and maximum award amount of \$2,500.
14. The institution is required to enter the certified award amount in this field; maximum award amount for 2019–20 is \$2,500.
15. Once funds have been disbursed, the "Certified Amount" will be blank.
16. Total Award Disbursed will reflect net disbursed, i.e., refunds are deducted from the total disbursed.

LEGEND 1 AWARD STATUS

CERTIFIED	School has certified the student's eligibility
DISBURSED	PATH funds have been disbursed to the institution of record for the specific term
INELIGIBLE	Ineligible code will be listed (see Legend 2)
PENDING	Awaiting school certification
REFUND DUE	PATH funds need to be returned to PHEAA due to student ineligibility
REFUNDED	PATH funds have been returned to PHEAA due to student ineligibility

LEGEND 2 INELIGIBLE REASONS CODES

02	Student does not meet residency requirement
03	No FAFSA or FAFSA is incomplete
05	Title IV Educational loan in default status or a refund on Title IV aid is due
08	No unmet cost as it relates to PATH
07	Student is not approved for a PA State Grant
09	School is not an eligible PA State Grant postsecondary institution.
12	School is out-of-state
18	Student is not enrolled
23	Student's address does not comply with the Patriot Act
24	Student is not enrolled in a PA State Grant-approved, associate or bachelor's degree program of study
25	Student did not make academic progress
26	Student is enrolled less than half time
27	Award has been cancelled by the school
28	Total award for the year is less than \$200, which is the program minimum

LEGEND 3 ENROLLMENT STATUS

1	Full time (a minimum of 12 credit hours or 450 clock hours)
2	Half time (at least 6 credit hours but less than 12 credit hours or the equivalent)
E	Less Than Half Time
C	Not enrolled

XVII. PAGECENTER REPORTS

PageCenter is a tool that provides schools with student status and disbursement roster reports/information via the internet in a secure environment. PageCenter is used for accessing information only and cannot be used to make changes electronically. The following are three PATH reports that are placed in the institution's PageCenter mailbox:

INSTITUTION PAGECENTER REPORTS

The following are three PATH reports that are placed in the institution's PageCenter mailbox:

1. **Applicant Certification and Status Listing (ACSL):** The ACSL provides certification data and award information for those students who have been nominated by a PATH partner and have been identified by PHEAA as potential recipients. The ACSL is placed in the PageCenter mailbox of the institution and will include those applicants who listed the institution as first choice when filing the FAFSA®. The ACSL serves as the school's certification roster and must be returned to PHEAA to complete the PATH certification process.
 - a. The ACSL is accessed on PageCenter via the secure school portal at [PHEAA.org](https://www.pheaa.org).
 - b. The most recent version of the ACSL is automatically placed on PageCenter biweekly (every other Tuesday). The following are student status change indicators:
 - A pound sign (#) next to the student's name indicates that the student was not on the previous ACSL.
 - An asterisk (*) next to the student's name indicates that there has been a status or award change from the previous ACSL.
 - c. Once an ACSL has been certified and returned, the institution does not need to return subsequent ACSLs for the same academic year to PHEAA if there are no status changes needed.
2. **PATH Disbursement Roster:** The Disbursement Roster provides detailed information related to each student the institution has certified as a PATH Grant recipient. The Roster will include the total of PATH funds students received for each term and the total amount that was disbursed to the school on the student's behalf. If there is an error related to the student's eligibility or disbursement, the institution is required to provide the correct information on the roster and return it to PHEAA along with the signed certification page.
 - a. The Disbursement Roster is accessed on PageCenter via the secure school portal at [PHEAA.org](https://www.pheaa.org).
 - b. The Disbursement Roster must be returned within 30 days of receipt; if there are no changes to the roster, the institution is only required to sign and return the certification page. Subsequent disbursements will be withheld until the certified roster and/or the certification page is returned.
3. **PATH Reconciliation Roster:** The annual Reconciliation Roster provides the school with a final opportunity to report ineligible students or changes to a student status and reports the student's final eligibility status for PATH in accordance with the school's records. The roster must be returned within thirty 30 days of receipt; if there are no changes to the roster, the institution is only required to sign and return the certification page. Subsequent disbursements will be withheld until the certified roster or the certification page or outstanding refunds are returned.

If the school determines that there are additional funds to be disbursed after reconciliation, the school should contact PATH staff to request another reconciliation roster.

PARTNER PAGECENTER REPORTS

The following are two PATH reports that are placed in the Partner's PageCenter mailbox. Partner reports are for informational purposes only and require no follow-up action from the Partner

1. **Partner Award Applicant Status Listing:** The Award Applicant Status Listing provides term status, award, and college information for all students who have been nominated by the PATH Partner and have been identified by PHEAA as potential recipients. The Award Applicant Status Listing is placed in the PageCenter mailbox of the nominating Partner.
 - a. The Award Applicant Status Listing is accessed on PageCenter via the secure school portal at [PHEAA.org](https://www.pheaa.org).
 - b. The most recent version of the Award Applicant Status Listing is automatically placed on PageCenter biweekly (every other Tuesday). The following are student status change indicators:
 - A pound sign (#) next to the student's name indicates that the student was not on the previous Award Applicant Status Listing.
 - An asterisk (*) next to the student's name indicates that there has been a status or award change from the previous Award Applicant Status Listing.
2. **PATH Denials List:** The PATH Denials List provides a list of those students who have been nominated by the PATH Partner but are not eligible to receive a PATH award.
 - a. The most recent version of the PATH Denials List is automatically placed on PageCenter biweekly (every other Tuesday).
 - b. Denial Reasons:

DENIAL REASON	DENIAL DESCRIPTION
LESS THAN MIN AWARD	The PATH nominee is not eligible because the PATH award would be less than the minimum award allowed per program policy.
MAX ALLOCATION	The PATH Partner nominated more students than its allocation could support. The PATH nominee is not eligible because funds are not available.
NO STATE GRANT AWARD	The PATH nominee is not eligible to receive PATH funds due to not having a PA State Grant award.
OUT OF STATE SCHOOL	The PATH nominee is not eligible because they attend a postsecondary institution outside of Pennsylvania.

APPENDIX C

IV. PATH STUDENT CERTIFICATION BEST PRACTICES

The PATH Applicant Certification and Status Listings (ACSL) is a biweekly report generated to the STEP application of an institution's PageCenter mailbox. This report provides certification data and award information for those students who listed the institution as first choice when filing the FAFSA®, have been nominated by a PATH partner; and have been identified by PHEAA as potential recipients. As a prerequisite for disbursement, institutions must confirm eligibility and award amounts for students who are potentially eligible.

BEST PRACTICES

ACSLs are printed, completed and returned via fax to 717.720.3786 by the institution to be manually processed by PHEAA staff. Incomplete or incorrect certification could delay or prevent funds transfer. Follow the best practices below to facilitate efficient student certification.

DO:

- ✓ Work from the most recently generated ACSL
- ✓ Circle "Y" or "N" in all three fields
 - Degree Program
 - Academic Progress
 - Unmet Cost/Need
- ✓ Insert information in these fields
 - Graduation Date (optional)
 - Certified Amount
- ✓ Correct Enrollment Status information (if applicable)
- ✓ Indicate "\$0" in the Certified Amount field to cancel an award for the term
- ✓ Send one completed ACSL (signed and dated)
- ✓ **Only send subsequent program year ACSLs if there are changes/updates** (pages with changes and certification page only)
- ✓ Leave fields blank for students not yet certified but expected to be certified during the program year
- ✓ Review the PATH Program Guidelines for field definitions, descriptions and additional certification information
- ✓ Allow 7-10 business days for processing

DON'T:

- ✗ Leave blank fields for students to be certified
 - Degree Program (circle "Y" or "N")
 - Unmet Cost/Need (circle "Y" or "N")
 - Academic Progress (circle "Y" or "N")
 - Certified Amount
 - Graduation Date (optional)
- ✗ Write an amount in the Unmet Need/Cost field (circle "Y" or "N" only)
- ✗ Certify if partner funds have not been received
- ✗ Write "partner funds not received" or "\$0" if partner funds are expected (leave blank)
- ✗ Send ACSL pages with no changes
- ✗ Send duplicate ACSLs or duplicate information
- ✗ Certify for terms the student has not yet started

2018-19 APPLICANT CERTIFICATION AND STATUS LISTING									
APPLICANT/RECIPIENT DATA									
PHEAA STATE UNIVERSITY									
STUDENT INFORMATION	TERM AND CURRENT STATUS	ENROLLMENT REASONS	DEGREE PROGRAM	PROGRESS	ENROLLMENT STATUS	UNMET NEED/COST	EST. MAX. AWARD	CERTIFIED AMOUNT	
#STUDENT, SARAH T 999-99-9999 PARTNER: PHEAA FNDTN GRAD DATE: _____	FALL PENDING CERT	Y	Y	Y	1-FULL	Y/N	0 \$ 2,500	\$ 2,500	
	SPRING PENDING CERT	Y/N	Y/N	Y/N	1-FULL	Y/N	0 \$ 2,500	\$ _____	
TOTAL AWARD DISBURSED: \$ 0									
#STUDENT, BRANDI H 999-99-9999 PARTNER: PHEAA FNDTN GRAD DATE: _____	FALL PENDING CERT	Y/N	Y/N	Y/N	1-FULL	Y/N	5912 \$ 2,500	\$ _____	Scholarship not received yet
	SPRING PENDING CERT	Y/N	Y/N	Y/N	1-FULL	Y/N	5912 \$ 2,500	\$ _____	
TOTAL AWARD DISBURSED: \$ 0									

2018-19 APPLICANT CERTIFICATION AND STATUS LISTING									
APPLICANT/RECIPIENT DATA									
PHEAA STATE UNIVERSITY									
STUDENT INFORMATION	TERM AND CURRENT STATUS	ENROLLMENT REASONS	DEGREE PROGRAM	PROGRESS	ENROLLMENT STATUS	UNMET NEED/COST	EST. MAX. AWARD	CERTIFIED AMOUNT	
#STUDENT, SARAH T 999-99-9999 PARTNER: PHEAA FNDTN GRAD DATE: _____	FALL PENDING CERT	Y	Y	Y	1-FULL	Y/N	0 \$ 2,500	\$ 2,500	
	SPRING PENDING CERT	Y/N	Y/N	Y/N	1-FULL	Y/N	0 \$ 2,500	\$ _____	
TOTAL AWARD DISBURSED: \$ 0									
#STUDENT, BRANDI H 999-99-9999 PARTNER: PHEAA FNDTN GRAD DATE: _____	FALL PENDING CERT	Y/N	Y/N	Y/N	1-FULL	Y/N	5912 \$ 2,500	\$ _____	
	SPRING PENDING CERT	Y/N	Y/N	Y/N	1-FULL	Y/N	5912 \$ 2,500	\$ _____	
TOTAL AWARD DISBURSED: \$ 0									

GUIDELINES FOR MY FILE GATEWAY PATH NOMINEE TEMPLATE POSTING:

- SSNs are to be **posted with no dashes** (ex., 111223333).
- First name, last name, address, city (must be spelled out), state, (can be abbreviated) **must all be upper case**. PO Boxes must have a street address.
- Zip codes with extensions, if available, are to be **posted with no dashes** (ex., 123456666).
- School attending **must be upper case**.
- Partner scholarship name **must be upper case**.
- PATH Partner awards must be rounded to the nearest dollar and should **not** contain a dollar sign (\$) or commas (,).
- The partner code must not contain any dashes.

NOTE: The use of formulas or calculations on the template will result in students not being nominated.

If you have questions about using My File Gateway, please contact State Grant and Special Programs staff at **800-443-0646, option 3, option 2**, a private number reserved for the use of PATH Partners or by sending an email to path@pheaa.org.

VI. PATH NOMINEE LIST & MY FILE GATEWAY INSTRUCTIONS

Guidelines for My File Gateway usage when Sending & Receiving data:

TO LOG IN:

1. Using your browser enter this exactly as given: <https://sfweb.pheaa.org> and press Enter.

You should see this screen:

Contact Us

Welcome Friday, January 31, 2014

Alec
THE FINANCIAL AID KNOW-IT-ALL

Login

In order to continue, please enter a valid User Id and Password.

* User Id:

* Password:

• [Forgot your password?](#)
• [Create an Account](#)

Contact Us | Privacy Policy | Terms of Use
Copyright © 2007-2013 Pennsylvania Higher Education Assistance Agency. All Rights Reserved.

Alec American Education Services

2. Enter your “User ID” and “Password”. Click on the Sign In button.

Contact Us Sign Out

Welcome, test shoop - Thursday, January 30, 2014

Alec
THE FINANCIAL AID KNOW-IT-ALL

Welcome

You are accessing this website in the Standard View. If you are using an assistive technology, such as screen reader, we recommend you switch to our Assistive Technology View for an improved experience. You can change your preferred view each time you sign in.

Disclaimer

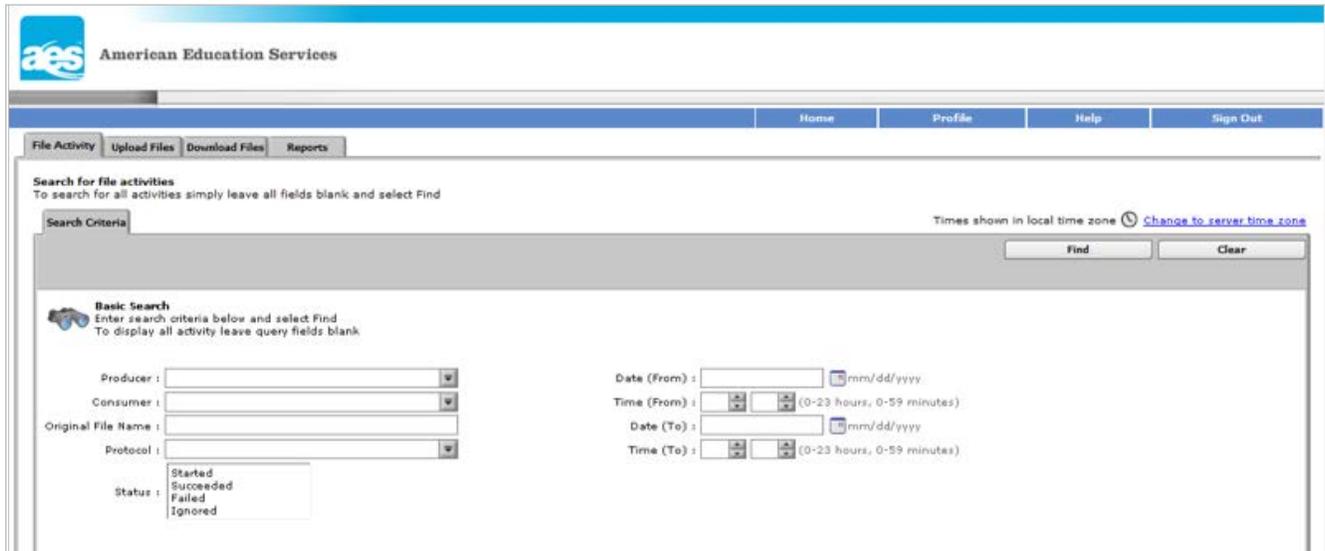
This computer is a U.S. Government computer system. It should be used for official U.S. Government work only. Use by unauthorized persons, or for personal business, is prohibited and constitutes a violation of 16 U.S.C. 1030 and other Federal laws. You have NO REASONABLE EXPECTATION OF PRIVACY while using this computer. All data contained herein may be monitored, intercepted, recorded, read, copied, or captured in any manner by authorized personnel. System personnel or supervisors may give law enforcement officials any potential evidence of crime, fraud, or employee misconduct found on this and all connected computer systems. Furthermore, law enforcement officials may be authorized to access and collect evidence from this system.

USE OF THIS SYSTEM BY ANY USER, AUTHORIZED OR UNAUTHORIZED, CONSTITUTES EXPRESS CONSENT TO THIS MONITORING. IF YOU DO NOT CONSENT, PLEASE CLOSE THE WINDOW TO EXIT THIS WEBSITE. IF YOU AGREE TO ALL THE CONDITIONS ABOVE, PLEASE PRESS YES, I AGREE.

3. Users are required to agree to the terms of use each time they sign in. Click **Yes, I Agree** to continue.

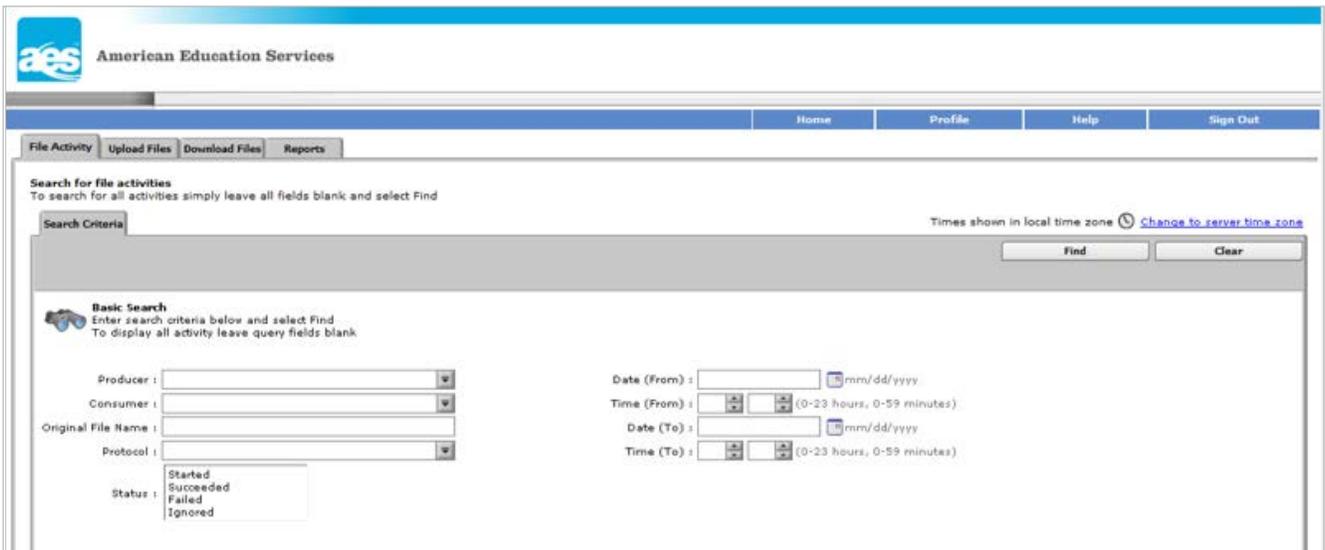
TO UPLOAD FILES:

1. Click on **Upload Files**.



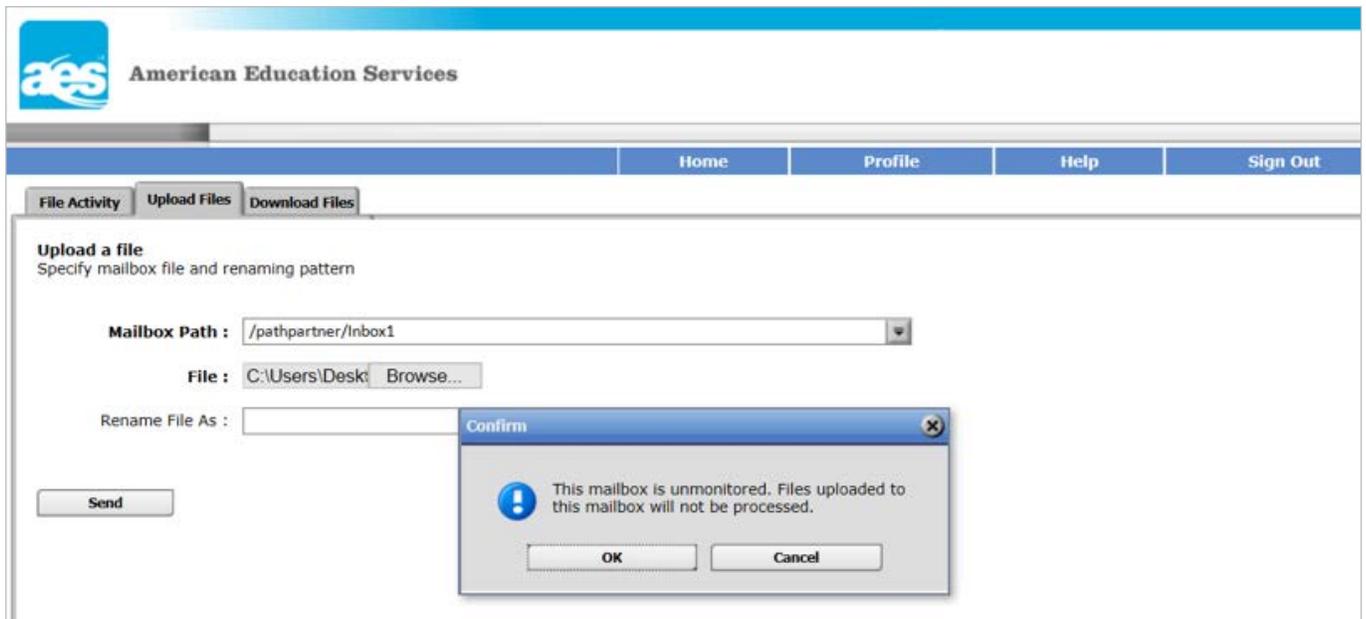
2. Click the down arrow in the **Mailbox Path** field and select the mailbox where the file should be uploaded. Only the mailboxes to which the user has access are available in the drop-down list.

NOTE: You must select your organization's Inbox1 mailbox when submitting nominations. If the Inbox1 mailbox is not selected, PHEAA will not receive the transmission.



3. In the File Field, enter the path to the file or click **Browse** to browse for the file on the user's local files directly.
4. Leave the **Rename File As** field, blank. Doing so will allow the nominee spreadsheet to remain in Excel format.
5. Click **Send**.

6. A dialog box displays confirming stating that the mailbox is **unmonitored**.



7. Click **OK**.

NOTE: You must click OK to complete the file transfer. The pop-up box message indicates that your file will not be automatically processed by PHEAA's system. Clicking OK will allow your file to be manually processed by PHEAA staff instead.

8. Send an email to path@pheaa.org indicating that your nominee spreadsheet has been sent.

Please call the PHEAA/AES Help Desk at **877-398-4237** if you have any questions or problems with the above instructions.

APPENDIX F

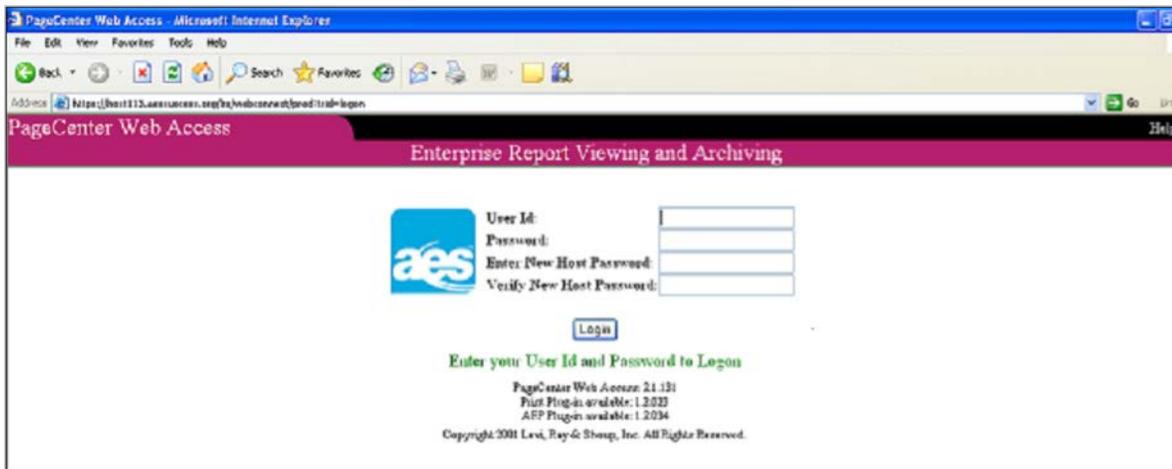
IX. PAGECENTER INSTRUCTIONS

TO LOG IN:

You will receive an email when a report is available for you in PageCenter. In order to access PageCenter, click on the link embedded in the email. You may also access PageCenter via the following URL address:

<https://host113.aessuccess.org/lrs/webconnect/prod?trid=logon>

When you click on the link, the following screen will appear:



Your 'Host User ID' is the 'PTXXXXX' ID provided to you via email. This user ID was established expressly for PHEAA partners, that is why it starts with a "PT."

Instructions for creating your password are:

The first time you log on, the password is up to the first eight letters of your last name. Once this has been entered, you will be asked to change your password. Enter your new password into the 'Enter New Host Password' and 'Verify New Host Password' fields using the following rules:

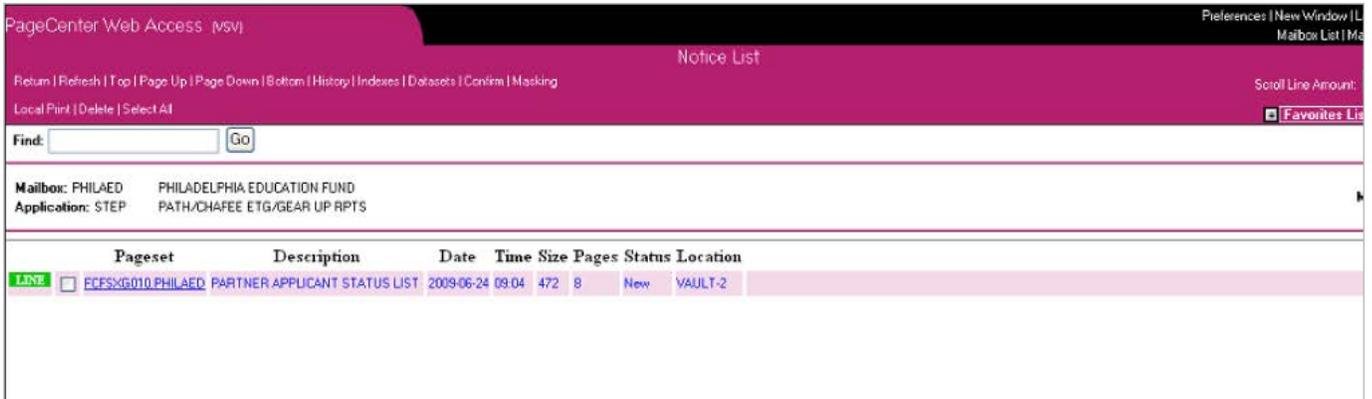
1. Passwords must be exactly eight characters in length.
2. The first character must be a letter; the second character must be a number; and the remaining six characters can be any combination of letters and numbers.

Passwords expire after 30 days and must be changed. You will be prompted when your password must be changed. In order to create a new password, use the following instructions:

1. Enter your PT ID in the "User ID" field.
2. Enter your current password in the "Password" field.
3. Enter your new password in the "Enter New Host Password" field
4. Re-enter your new password in the "Verify New Host Password" field, and click "Login." Please note that you cannot use any of your ten previous passwords.

If you forget your password, or if you are locked out, contact our helpdesk at **877-398-4237**, select option 1 for password resets, and follow the instructions. You must access the PageCenter system at least once every 30 days to keep the user ID active. If the ID becomes inactive because you have not logged into the system within 30 days, please contact our Help Desk at **877-398-4237**, select option 2 to have your user ID reinstated.

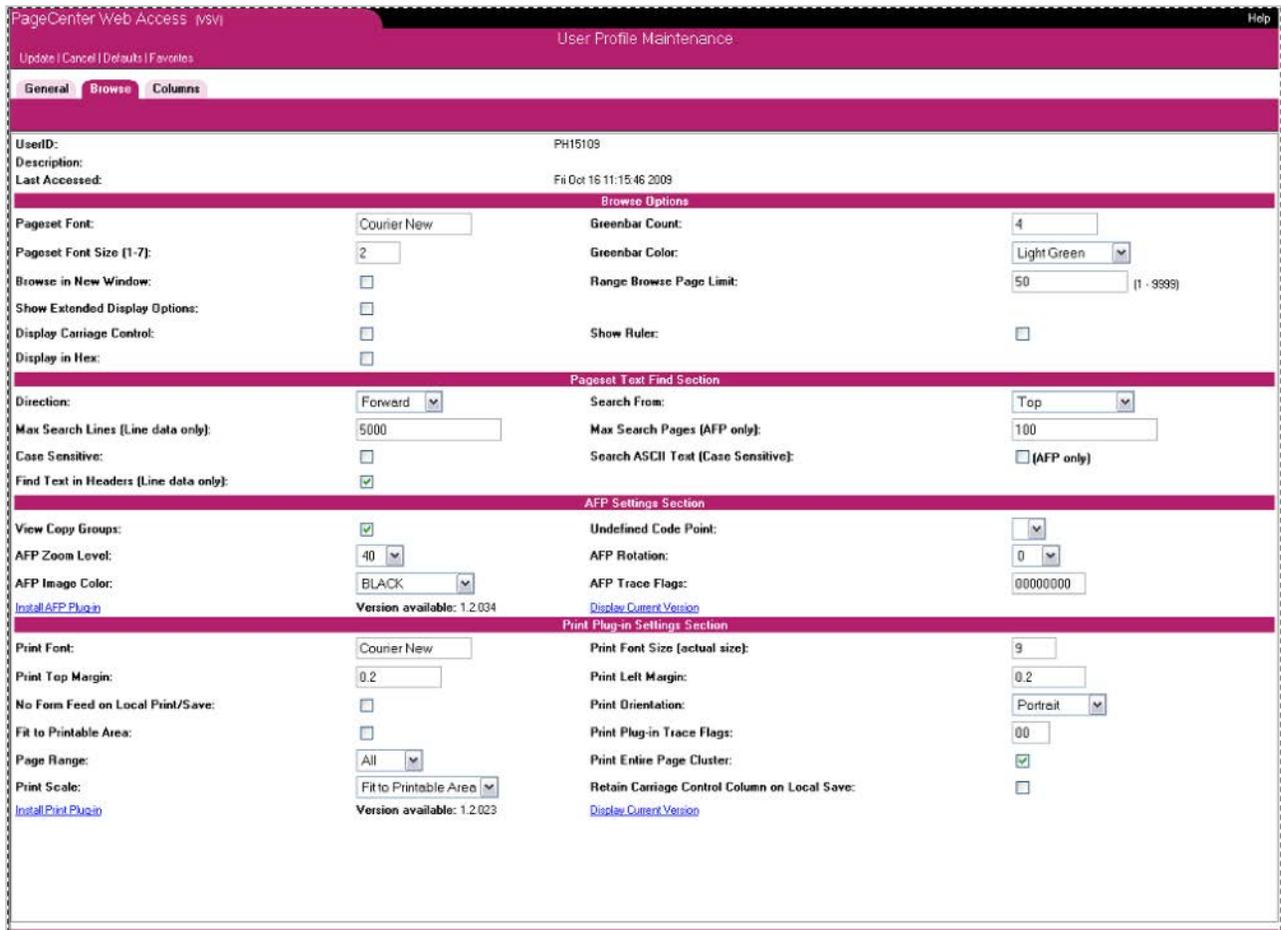
Once you have successfully logged on to PageCenter, you will see a screen similar to the example below that shows reports available to view. You will only be able to see the reports that pertain to your organization. The 'Help' key at the top will assist you in navigating the system.



PRINTING PAGECENTER PARTNER REPORTS

To set up your PC to print a report in PageCenter:

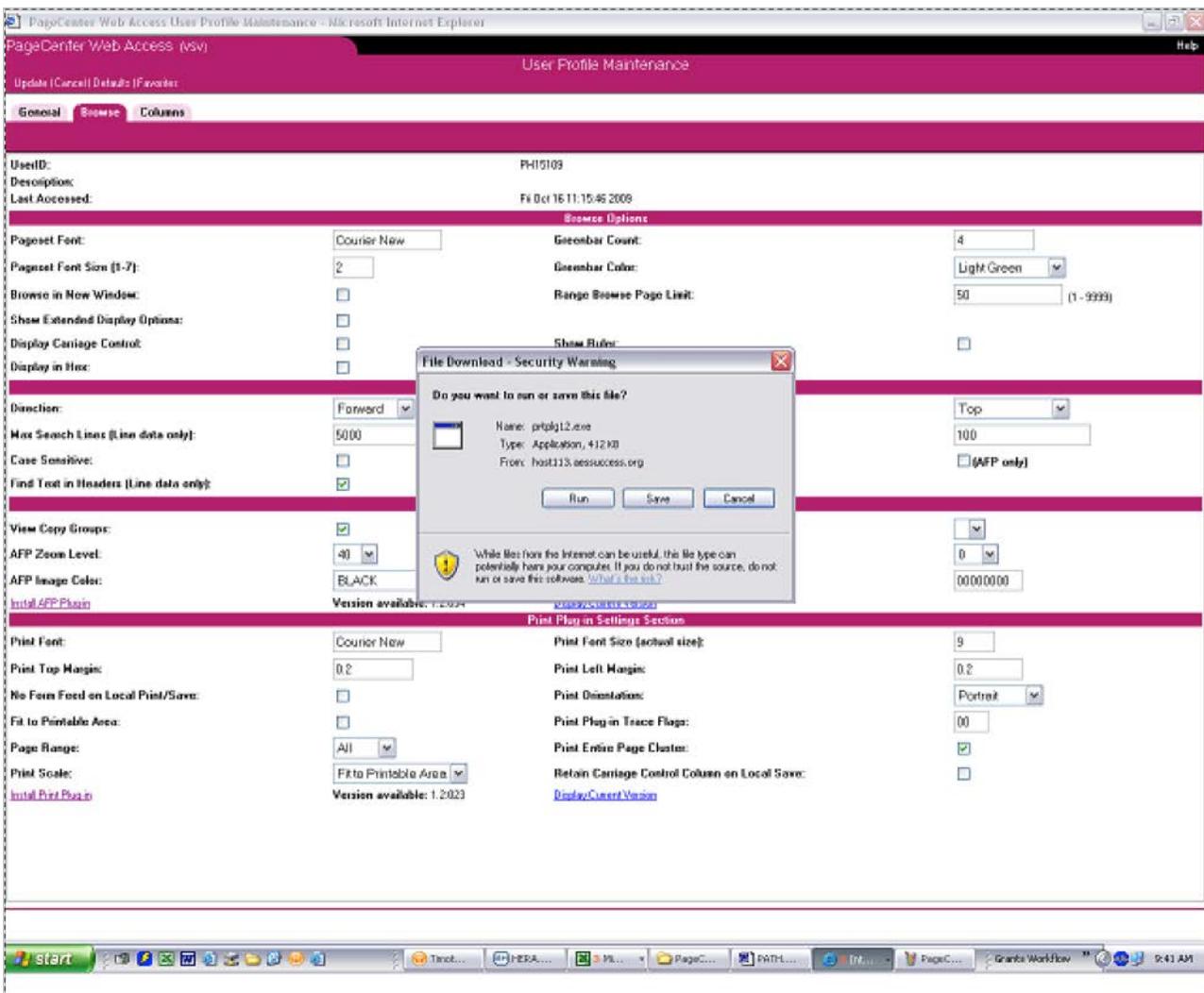
1. Log in to PageCenter using your assigned "PT ID" and password as described on [page 25](#).
2. Click on "Preferences" from the PageCenter Main Options Menu.
3. Click on the "Browse" tab.



4. Scroll down to the “AFP Settings” section.
5. Click on “Install AFP Plug-in.”
6. Save the plug-in to your desktop.



7. Click on “Install Print Plug-in.”
8. Save the plug-in to your desktop.

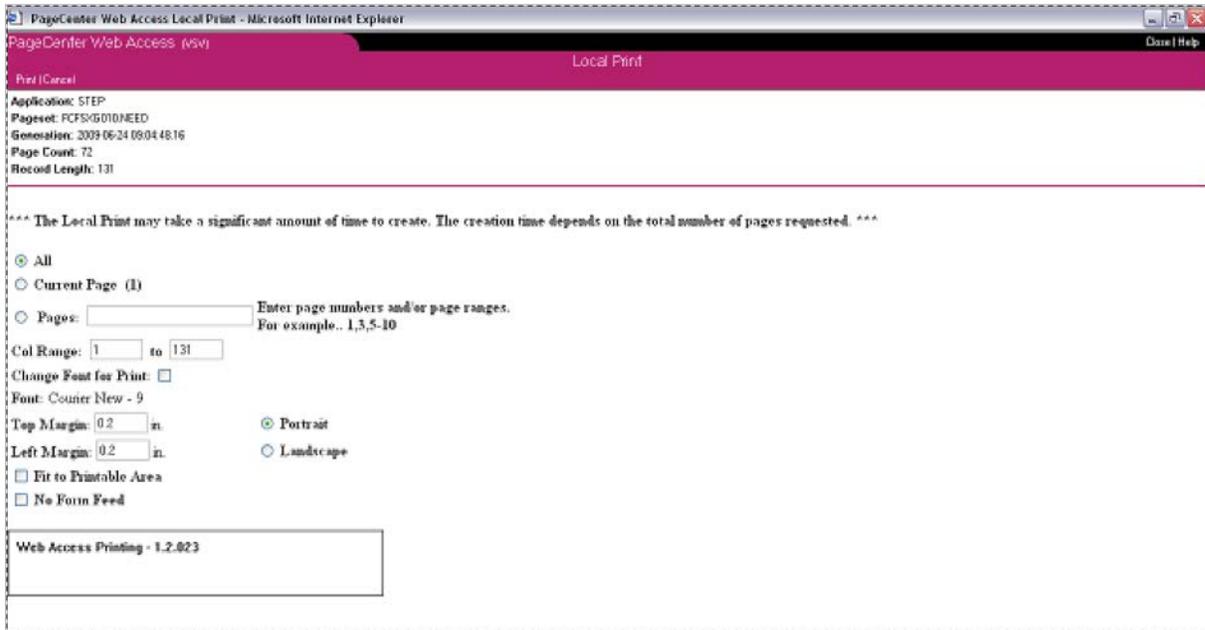


9. Log out of PageCenter by clicking “Logoff” at the upper right of the screen.
10. Close all of your browser windows by clicking on the “X” at the upper right corner of the window.

11. Go to your Desktop and click on the icon labeled “afpplg12.”
12. Follow the installation process. You will need to agree to the terms of use. (The plug-in will install automatically.)
13. You may get a message “File does not exist – Create it”; if so answer “Yes.”
14. Click on the icon labeled “prtplg12.”
15. Follow the installation process. You will need to agree to the terms of use. (The plug-in will install automatically.)

In order to confirm your PC is set up to print your report:

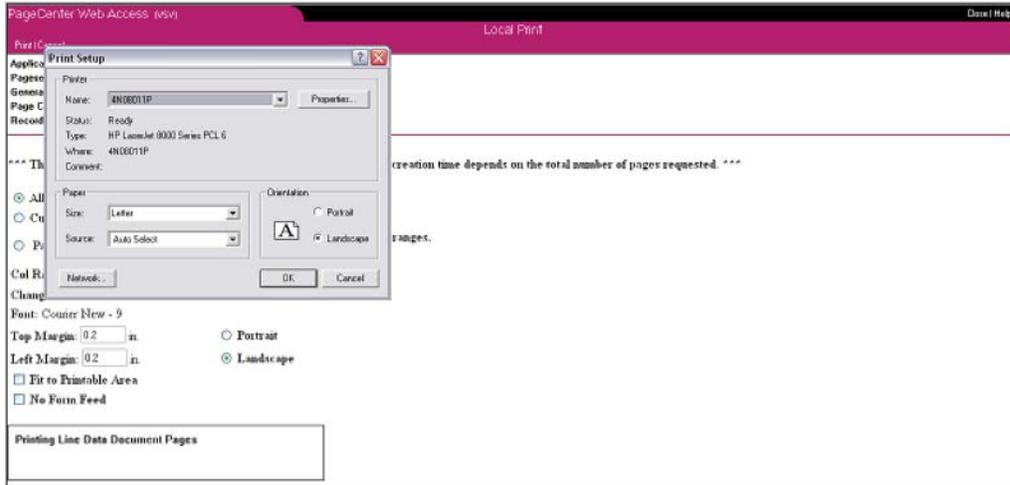
1. Log back into PageCenter, select your report and click on “Local Print” in the upper left corner of the screen.



2. Scroll to the bottom of the page; the black-outlined box at the bottom should say “Web Access Printing.” Once you see this message, your PC is now ready to print PageCenter reports.

To print PageCenter reports:

1. Click on “Local Print” in the upper left corner of the screen.
2. Select the pages you would like to print by clicking “All”, “Current Page” or “Pages.”
3. Select “Portrait” or “Landscape” print type.



4. Once you have selected all the required parameters, click on “Print” in the upper left corner of the screen.

NOTE: “Landscape” is recommended for printing your partner report.

V. PATH PARTNER INSTRUCTIONS FOR REQUESTING ACCESS TO PHEAA SYSTEMS

Before PATH Partners can access PHEAA tools such as PageCenter or My File Gateway, several access requests must be completed.

OVERVIEW

Your organization must have a signed *Remote Access Agreement (RAA)* and a designated Authoritative Source at all times. In addition, a Partner's Authoritative Source and all other approved users must have Business Partner Access Management System (BPAMS) access to STEP (CHAFEE, GEAR UP, PATH), Web File Transmission – Secure File Transfer, and PageCenter – STEP (CHAFEE, GEAR UP, PATH) in order to access PHEAA's online tools. Finally, all users, including your organization's Authoritative Source, must maintain their access by logging into PHEAA's online tools at least once a year. Inactive accounts will be terminated after a year of non-use. Please note that PHEAA may not prompt or know to prompt Partners to take all the necessary steps to maintain their access. It is the Partner's responsibility to request and maintain user access and to reach out to PHEAA in the event that a new user or new Authoritative Source is needed.

REMOTE ACCESS AGREEMENT (RAA) AND AUTHORITATIVE SOURCE FORMS

All new Partners are required to complete and return a RAA and designate an Authoritative Source via an Authoritative Source Form. Both the RAA and the Authoritative Source Form are required in order to access PHEAA's online tools. The RAA and Authoritative Source Form will be provided upon the new Partner's approval and must be returned to PHEAA with a wet signature.

Partners whose Authoritative Source has changed or lapsed should email path@pheaa.org to request a new Authoritative Source Form. You will receive a form entitled Request for Authoritative Source Status. Complete the document and return it via any of the methods listed at the bottom of the form. Once this form is returned to PHEAA and processed, it will give the designated individual the authority to request access to PHEAA resources for themselves and for other users in their organization.

BPAMS ACCESS REQUESTS

Access the BPAMS system by following this link: <https://ccc.aessuccess.org/apps/bpams.nsf/home>.

1. Log into BPAMS.
 - a. If it is your first time accessing BPAMS, select New Profile.



- 1) Answer the questions that appear.
 - 2) When prompted to enter an Access Code, enter your nine-digit tax identification code (EIN).
 - 3) Click the Next button.
 2. Request access to STEP (CHAFEE, GEAR UP, PATH), Web File Transmissions – Secure File Transfer, and PageCenter – STEP (CHAFEE, GEAR UP, PATH).
 - a. For new users:
 - 1) Continue to the Access Level section of your New Profile creation.

b. For returning users who already have a username and password:

1) Click My Profile.



2) Click the triangle icon next to Access Options at the bottom of your screen.



c. To request access, complete the following steps:

1) Indicate which type of access you need by clicking the Update button next to the access items you desire.



2) A pop-up window related to the access item will display with the user's current access level.

3) Click the radio button in each pop-up corresponding to the level of access the user requests, and then click OK.



4) Repeat as needed until all necessary access items have been requested.

- 5) Submit your request.
 - i. New users must click the “Submit Request to Create User” button at the bottom of the page.
 - ii. Returning users must click the “Submit Request” button at the bottom of the page.
- 6) The Verification pop-up window will display. Review your request for accuracy, and then click “Submit Changes.”

3. Please note:

- a. For new users, a username and password will be created for you within 1-3 business days.
 - 1) Your username and password may be used to log into all of PHEAA’s online tools once you have been granted access (BPAMS, My File Gateway, and PageCenter).
- b. Access requests submitted by users other than the Authoritative Source will move to the Authoritative Source for approval.
- c. Users should log into PHEAA’s online tools regularly to maintain their access. User profiles (including user names and passwords) will be terminated after a year of inactivity.

RESOURCES

PHEAA’s BPAMS tutorials offer step-by-step guides for most BPAMS processes. Users can access these tutorials once they have obtained a username and password and have successfully logged into BPAMS.



If you have difficulty logging into or using a PHEAA online tool, please contact the PHEAA Helpdesk at 877-398-4237 or email path@pheaa.org.

APPENDIX H

IV. PATH PARTNERS

CENTRAL PARTNERS

<p>Adams County Community Foundation 68 East Middle Street Gettysburg, PA 17325 717-337-0060 bev@adamscountycf.org</p>	<p>The Foundation for Enhancing Communities PO Box 678 200 N. Third Street, 8th Floor Harrisburg, PA 17108 717-236-5040 felmes@tfec.org</p>	<p>South East Dollars for Scholars 377 Main Street Fawn Grove, PA 17321 717-382-4843 bowmanj@sesd.k12.pa.us</p>
<p>Centre County Community Foundation PO Box 648 2601 Gateway Drive Bristol II Suite 175 State College, PA 16804 814-237-6229 ashley@centre-foundation.org</p>	<p>Gettysburg Area Dollars for Scholars PO Box 3245 Gettysburg, PA 17325 717-334-6741 matt.sheads@hnoins.com</p>	<p>Southern York County School District Foundation 3280 Fissels Church Road Glen Rock, PA 17327 717-235-4811 sycsdfoundation@sycsd.org</p>
<p>Dallastown Area Educational Foundation 700 New School Lane Dallastown, PA 17313 717-244-4021 daef@dallastown.net</p>	<p>The Lancaster County Community Foundation 24 W. King Street Suite 201 Lancaster, PA 17603 717-397-1629 AMaslandSarani@lancfound.org</p>	<p>Spring Grove Area Scholarship Fund 100 East College Avenue Spring Grove, PA 17362 717-578-5862 amasenheimer@wellspan.org</p>
<p>Degenstein Foundation 228 Arch Street Sunbury, PA 17801 570-286-1582 office@degensteinfoundations.org</p>	<p>Martin Luther King Scholarship Fund PO Box 6303 Lancaster, PA 17607 717-358-2856 awhopkin@hacc.edu</p>	<p>York City Dollars for Scholars 31 North Pershing Street York, PA 17401 717-424-1094 ycdfsf1@gmail.com</p>
<p>Eastern York Dollars for Scholars P.O. Box 95 Wrightsville, PA 17368 717-843-3804 aanstine@rklcpa.com</p>	<p>Merakey Pennsylvania Foundation 4391 Sturbridge Dr. Harrisburg, PA 17110 717-441-9525 jbreaith@merakey.org</p>	<p>York County Community Foundation 14 W. Market Street York, PA 17401 717-848-3733 LBoyce@yccf.org</p>
<p>First Community Foundation of PA 201 W. Fourth Street Williamsport, PA 17701 570-321-1500 bettyg@fcfpartnership.org</p>	<p>PA State Resource Family Association PO Box 60216 Harrisburg, PA 17106 800-951-5151 dkinard@psrfa.org</p>	<p>York County Hispanic Coalition PO Box 722 York, PA 17405 717-846-5300 barajelo@ycs.k12.pa.us</p>

EASTERN PARTNERS

<p>ASPIRA Inc of PA 4322 N 5th Street 3rd Floor Philadelphia, PA 19140 215-455-1300 vdelarosa@aspirapa.org</p>	<p>The Community's Foundation 900 West Sproul Road, Suite 101 Springfield, PA 19064 610-461-6571 heather@tcfhelps.org</p>	<p>Police Athletic League of Philadelphia 3068 Belgrade Street Philadelphia, PA 19134 215-291-9000 scholarships@phillypal.com</p>
<p>Berks County Community Foundation 237 Court Street Reading, PA 19601 610-685-2223 letad@bccf.org</p>	<p>Kids Chance of PA 2000 Market Street 13th Floor Philadelphia, PA 19103 610-850-0150 info@kidschanceofpa.org</p>	<p>Schuylkill Area Community Foundation 216 South Centre Street Pottsville, PA 17901 570-624-7223 skoszyk@verizon.net</p>
<p>Central Susquehanna Community Foundation 725 W. Front Street Berwick, PA 18603 570-752-3930 cpangelinan@csgiving.org</p>	<p>Philadelphia Academies, Inc. 1401 Walnut Street 9th Floor Philadelphia, PA 19102 215-546-6300 igmerlino@academiesinc.org</p>	<p>Scranton Area Foundation 615 Jefferson Avenue Suite 102 Scranton, PA 18510 570-347-6203 cathyf@safdn.org</p>
<p>Chester County Community Foundation The Lincoln Building 28 W. Market Street West Chester, PA 19382 610-696-8211 kevin@chescofcf.org</p>	<p>The Philadelphia Education Fund 1709 Benjamin Franklin Parkway Suite 700 Philadelphia, PA 19103 215-665-1400 mcliett@philaedfund.org</p>	
<p>Community Foundation of the Endless Mountains 270 Lake Avenue Montrose, PA 18801 570-278-3800 info@community-foundation.org</p>	<p>Philadelphia Futures 230 S. Broad Street 7th Floor Philadelphia, PA 19102 215-790-1666 amyperez@philadelphiafutures.org</p>	

WESTERN PARTNERS

<p>Armstrong County Community Foundation 220 South Jefferson Street Kittanning, PA 16201 724-548-5897 jodi@servingtheheart.org</p>	<p>Community Foundation of Greene County PO Box 768 108 E. High Street Waynesburg, PA 15370 724-627-2010 cfgcpa@gmail.com</p>	<p>Erie Community Foundation 459 W. Sixth Street Erie, PA 16507 814-454-0843 mobrien@eriecommunityfoundation.org</p>
<p>Bethlehem-Center Community Education Foundation 1605 Morey Road Fredericktown, PA 15333 724-377-0463 valcaprini@gmail.com</p>	<p>Community Foundation of the Northern Alleghenies P.O. Box 934 32 South Mary's Street, Suite 4 St. Mary's, PA 15857 814-834-2125 eccf@windstream.net</p>	<p>NEED The Law and Finance Building 429 4th Avenue 20th Floor Pittsburgh, PA 15219 412-566-2760 rbrooks@needld.org</p>
<p>Bridge Builders Foundations PO Box 374 206 Seneca Street Oil City, PA 16301 814-677-8687 lauren@bbcf.org</p>	<p>Community Foundation of Warren County PO Box 691 310 Second Avenue Warren, PA 16365 814-726-9553 cfwc@westpa.net</p>	<p>The Pittsburgh Foundation Five PPG Place Suite 250 Pittsburgh, PA 15222 412-394-2626 hezela@pghfdn.org</p>
<p>Community Foundation for the Alleghenies 116 Market Street Suite 4 Johnstown, PA 15901 814-536-7741 kperkosky@cfalleghenies.org</p>	<p>Community Foundation of Western PA 7 W. State Street Suite 301 Sharon, PA 16146 724-981-5882 linda@comm-foundation.org</p>	<p>The Pittsburgh Promise Foundation 1901 Centre Avenue Suite 204 Pittsburgh, PA 15219 412-745-2220 saleem@pittsburghpromise.org</p>
<p>Community Foundation of Fayette County 2 W. Main Street Suite 101 Uniontown, PA 15401 724-437-8600 rcouser@cffayettepa.org</p>	<p>Crawford Heritage Foundation P.O Box 933 415 Chestnut Street Meadville, PA 16335 814-336-5206 executive@crawfordheritage.org</p>	<p>Washington County Community Foundation PO Box 308 1253 Route 519 Eighty Four, PA 15330 724-222-6330 brtrew@wccf.net</p>

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, grant administration, outreach, and other student aid programs.

PHEAA's earnings are used to support its public service mission and to pay its operating costs, including the 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 FedLoan Servicing and American Education Services (AES). For more information, visit PHEAA.org.

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