



Chapter 1: School and Program Eligibility

Term and Module Example							
Term A – 15 Weeks							
Term B – 7 ½ Weeks				Term C – 7 ½ Weeks			
Term D – 5 Weeks		Term E – 5 Weeks			Term F – 5 Weeks		
Term G – 3 Weeks		Term H – 3 Weeks	Term I – 3 Weeks		Term J – 3 Weeks	Term K – 3 Weeks	
Term L – 2 Weeks	Term M – 2 Weeks	Term N – 2 Weeks	Term O – 2 Weeks	Term P – 2 Weeks	Term Q – 2 Weeks	Term R – 2 Weeks	Term S – 1 Week

Assumes a semester schedule, a non-year round curriculum, and an approved Program of Study.

Situation: Peter P. is awarded a half-time PA State Grant and enrolled in Term A for 9 credits when the fall term disbursement roster is sent on August 18. School records indicate that he is registered for an additional 3 credits in Term J.

Question: Can the half-time award be credited when the disbursement roster is received (assuming all other eligibility requirements are met)? Explain why or why not?

Answer: No. The half-time award should not be credited when the Fall Disbursement Roster is issued in August. Since institutional records indicate that Peter is pending enrollment in a later module, crediting should be delayed until the start of Term J.

Question: Does the pending enrollment in Term J impact his eligibility? Explain why or why not.

Answer: Yes. Enrollment in Term J will make him a full-time student. The full-time award should be credited at the start of Term J (assuming Peter still meets the eligibility requirements).

Bonus Question: If he withdraws from 3 credits during Term A, how is his eligibility impacted when the award is credited?

Answer: When the award is credited at the start of Term J, Peter's enrollment status will be based on the total number of credits from both modules (12), minus the withdrawn credits (3). Due to Peter's withdrawal, he would now be considered for a half-time award.



Chapter 2: Student Certification of Eligibility*

Situation: During the fall term, Carol D. enrolls in 3 remedial credits and 3 regular credits. The FAO updates her fall enrollment to “Half-time Remedial 1-3” in Partner Interface. Her half-time enrollment update results in a Reject M status for the fall term. She is enrolled full-time and awarded for the spring.

Question: Will Carol receive a remedial exception for the fall term?

Answer: Since Carol is ineligible for a fall award, she cannot include the remedial credits in her PA State Grant enrollment. Therefore, Carol should not have a remedial exception reported.

Question: Should any changes be made to her record?

Answer: Yes. The FAO at her institution should correct Carol’s record to less than half-time enrollment (no remedial credits). Her record will now reflect a Reject I status.

Bonus Question: When Carol was a Reject M for the fall term, under which Partner Interface student record status listing(s) would her record have appeared?

Answer: Carol’s record would have been included in the “Complete Active” listing. Although Carol’s award is rejected for the fall term, all records with reject reason related to the need calculation (i.e. Reject E, Reject M, and Reject Y) will be listed with the “Complete Active” records. You will also find these records in the “All Statuses” and any filtered listings.

***This scenario was corrected after the 2019-20 PA State Grant Workshops.**

Situation: PHEAA U. checks progress after the spring term. Wanda M. starts at PHEAA U. in Spring 2020. Her prior grant information lists a half-time award in Summer 2018 and full-time awards in Fall 2018, Spring 2019, and Fall 2019. Wanda’s transcripts say she earned 6 credits for Summer 2018, 14 credits for Fall 2018 and 11 credits in Spring 2019.

Question: Does Wanda require a full Satisfactory Academic Progress review? Explain why or why not?

Answer: Since Wanda is awarded in a prior term of the current academic year, then the FAO has the option to either:

- Assume the prior institution confirmed SAP prior to crediting for Fall 2019 and credit Wanda's Spring 2020 award. Point-in-time documentation of the Fall 2019 award is required; or
- Check progress prior to crediting the Spring 2020 award.

Question: Can Wanda be awarded the Spring 2020 PA State Grant?

Answer: Yes! Whether or not the FAO decides to check progress, Wanda's award should be credited as she meets the SAP requirement (30 credits needed/31 credits earned).



Chapter 3: Costs and Award Adjustments

Situation: Natasha R. enrolled in 6 classroom credits and 6 online credits for the term. She dropped both 3-credit classroom courses, for which she will not be charged by her school. Natasha finishes the term with 6 online credits, which will be reflected on her transcript.

Question: What is Natasha's enrollment status and mode before she dropped the class?

Answer: Natasha's original enrollment status was full-time ($6 + 6 = 12$ credits) and her enrollment mode was "Up to 50% distance education" (enrollment mode 2).

Question: What changes to her enrollment status and mode, if any, should her school make?

Answer: After dropping the courses, her enrollment status would be updated to half-time (6 credits) and her enrollment mode would change to "100% distance education" (enrollment mode 4).

Question: How does this change impact Natasha's eligibility (award status or cancellation code) if she attends an HQD school? A Non-HQD school?

Answer: If Natasha attended a HQD school, she could be reconsidered for a distance education award under the half-time status. If she attended a Non-HQD school, an ADA letter would be sent and her award may be cancelled for reason "L."

Situation: Tony S. was awarded and credited a \$600 full-time fall term grant. He withdraws at the end of the second week of classes. According to the school policy, he receives a 75 percent tuition refund.

Question: What was Tony's final PA State Grant enrollment status after his withdrawal?

Answer: Tony will likely retain his full-time award counter after he withdraws.

Question: Will Tony's enrollment mode need to be re-evaluated and updated?

Answer: No re-evaluation of enrollment mode will be required.

Question: Was a refund to PHEAA created? If so, for how much?

Answer: Since Tony was refunded 75 percent of his tuition the same percentage of PA State Grant funds (\$450) is due back to PHEAA. Tony has the option to refuse his fall term PA State Grant and pay his school the \$150 in order to avoid Satisfactory Academic Progress issues.

Situation: Bruce B. enrolled at a HQD institution with 6 online credits and 6 classroom credits. He withdrew from a 3-credit classroom course after the add/drop period and final crediting. According to the tuition refund policy of his school, Bruce will not be refunded any of his tuition for the term. Bruce finishes with 6 online and 3 classroom credits.

Question: What was Bruce's enrollment status and mode before he partially withdrew?

Answer: Before he partially withdrew from 3 classroom credits, Bruce's enrollment status was full-time (6 + 6 =12 credits) and enrollment mode was "Up to 50% distance education" (enrollment mode 2).

Question: What options does Bruce’s school have for reporting the withdrawal? What, if any, would be the impact to his PA State Grant eligibility for each option?

Answer: After the change, Bruce’s school could either:

Option 1: Apply the withdrawal policy on the full-time award and not re-report the enrollment mode; or

Option 2: Report him as half-time and re-report the enrollment mode as “Greater than 50%, but less than 100% distance education” (mode 3). Bruce would then be reconsidered for a half-time “DE” award.



Chapter 4: Disbursements and Cash Management

Situation: PHEAA Technical has submitted all enrollment and eligibility updates before the 2019-20 Academic Year reconciliation period begins. The 2019-20 Academic Year Reconciliation Roster is generated to the school on March 24. On April 2, three additional students are issued PA State Grant awards for the Fall 2019 and Spring 2020 terms.

Question: What is the deadline to return the reconciliation roster?

Answer: The deadline for PHEAA Technical to certify their academic year reconciliation roster is June 1.

Question: When can the additional awards be credited to the three students’ accounts?

Answer: The newly awarded students can be credited after the school verifies that all enrollment/eligibility requirements have been met. Report any enrollment/eligibility changes before crediting. Use excess cash or institutional funds to issue payment. If excess cash or institutional funds are not available, a new reconciliation roster must be requested to receive the funds.

Bonus Question: Should a new reconciliation roster be requested? If yes, when is the new roster due?

Answer: Yes! A new reconciliation roster should be requested so that the institution has an accurate record of all awarded and ineligible students. Once generated, the new reconciliation roster would be due within 30 days of the print date.



Chapter 5: Program Reviews and Audits

Situation: PHEAA College is scheduled for a Routine Program Review in September 2019. After the review, the PA State Grant error rate was calculated at 2.4% and 4 administrative findings were identified.

Question: If there is a scheduling conflict, can the review be rescheduled?

Answer: Yes! The school should contact PHEAA to reschedule.

Question: What is the classification of the error rate? Are the administrative findings included in this error rate?

Answer: Error rates do not take into consideration any administrative findings that may be discovered during the review. A 2.4% error rate is classified as "Acceptable."

Question: What should the school expect next based upon the error rate and the 4 administrative findings?

Answer: Based upon the error rate alone, no follow-up action would have been planned. However, since the school has 4 administrative findings, a Follow-up Review will be scheduled for the following year and the school will need to complete a Program Improvement Plan (PIP).

Bonus Question: If misplaced documentation is discovered after the review, can this information be later submitted to PHEAA?

Answer: Yes! If misplaced documentation is located after the exit interview, it should be submitted as soon as possible. The final opportunity to submit missing information is when the official findings report is sent to the institution. In the institution's response, this documentation may be included.

DISCLAIMER: This information does not supplant the PA State Grant Handbook, nor should it be used to reference adherence to PA State Grant policy. Please review the entire PA State Grant Program Handbook thoroughly to ensure your full understanding and compliance with all program policies.