

2020-21 PROGRAM GUIDELINES

# PA Fostering Independence Tuition Waiver Program (FosterEd)

# Table of Contents

---

|  |    |
|--|----|
| <b>Introduction</b>                                  | 3  |
| <b>I. Institution Participation</b>                  | 3  |
| A. Point of Contact (POC)                            | 3  |
| B. Access to PHEAA Documents & Reports               | 4  |
| <b>II. Student Eligibility Requirements</b>          | 5  |
| <b>III. Waiver Determination Process</b>             | 6  |
| A. PHEAA Responsibilities                            | 6  |
| B. Institution Responsibilities                      | 6  |
| <b>IV. Waiver Certification Process</b>              | 7  |
| A. Waiver Listing                                    | 7  |
| <b>V. Year End Reporting</b>                         | 8  |
| A. How to Report                                     | 9  |
| <b>VI. Retention of Records &amp; Program Review</b> | 9  |
| <b>Appendix A</b>                                    |    |
| Business Partner Access Management System (BPAMS)    | 10 |
| <b>Appendix B</b>                                    |    |
| PageCenter Instructions                              | 14 |
| <b>Appendix C</b>                                    |    |
| FosterEd Waiver Listing                              | 20 |
| <b>Appendix D</b>                                    |    |
| FosterEd Student Certification Best Practices        | 23 |
| <b>Appendix E</b>                                    |    |
| FosterEd Denial Listing                              | 25 |

# PA Fostering Independence Tuition Waiver Program (FosterEd)

## Introduction

In 2019, the Commonwealth of Pennsylvania passed Act 16, creating the Fostering Independence Tuition Waiver Program (FosterEd), amended by Act 91. The Fostering Independence Tuition Waiver Program provides tuition waivers at postsecondary institutions for eligible youth who are or have been in foster care. The program is being administered collaboratively by the Pennsylvania Higher Education Assistance Agency (PHEAA) in conjunction with the PA Departments of Education (PDE), Human Services (DHS), and Labor & Industry (L&I).

Under this program, postsecondary institutions in Pennsylvania are required to designate a Point of Contact (POC) and waive all institutional charges for tuition and mandatory fees, which remain after all federal or state grants or other scholarships and grants have been applied for eligible students.

The 2020-21 Program Guidelines provide postsecondary institutions with the requirements for participation and administration of FosterEd for this program year. PHEAA will publish updates to this document if additional changes become necessary.

## I. Institution Participation

Postsecondary institutions in Pennsylvania approved by the U.S. Department of Education for Title IV funding must provide the waiver to all eligible students.

- Eligible students are those who self-identify to the school and are subsequently determined as eligible or those students identified by PHEAA via a Waiver Listing.

To administer the FosterEd Program, institutions need the following:

### A. Point of Contact (POC)

Each institution shall designate one or more staff as a POC for individuals eligible for FosterEd. It is the responsibility of the institution to determine who is most qualified for this responsibility.

#### i. POC Responsibilities

The POC shall have or ensure the delegation of the following duties:

- Serve as the primary contact for all eligible individuals applying to or attending the institution.
- Provide all applicants with information and referrals for on-campus support services and resources, including but not limited to:
  - Admissions
  - Housing
  - Financial Aid
  - Health
  - Mental health
  - Academic advising

- Tutoring
- Career services
- Provide all applicants or students with information and referrals as available for off-campus support services, including transitional housing and medical insurance/services.
- Assist students in obtaining verification of foster care status on or after age 16, as specified below in Section III, Student Eligibility. There are four possible sources of verification:
  - A copy of a court order that verifies that the youth was in foster care from the local Court of Common Pleas; or
  - A statement (verbal or written) from the County of Placement Office (County Children and Youth Agency) or Department of Human Services (a list of County Children and Youth Agencies can be found in the [PA Department of Human Services Provider Directory](#)); or
  - The statement of a private provider agency that delivers child welfare services that the youth was in foster care; or
  - The statement from an attorney, guardian ad litem, or court-appointed special advocate verifying the person's relationship to the student and that the youth was in foster care.
- The POC will be responsible for documenting that eligibility was obtained, or the reason that eligibility was denied, and the source of this verification.
  - Eligibility may be verified via documentation, email, or phone call.
  - Eligibility verified by any method should be documented by the POC in the student's file.
  - The student is not required to obtain verification, but may provide a form of acceptable documentation.
  - Verification of eligibility must be shared with PHEAA, if not already on file, by submitting an email to [FosterEd@pheaa.org](mailto:FosterEd@pheaa.org).
- Assist students in accessing available Federal and State financial aid resources, and in identifying further scholarship and grant opportunities.
  - Resources to support students in applying for additional aid can be found at [PHEAA.org](http://PHEAA.org).

## ii. POC Contact Information

- Must be posted on the publicly accessible website of the institution.
- Should be shared with PHEAA for the purposes of FosterEd administration via [FosterEd@pheaa.org](mailto:FosterEd@pheaa.org).

## B. Access to PHEAA Documents & Reports

### i. Business Partner Access Management System (BPAMS)

BPAMS (refer to Appendix A) is the Web interface designed to manage requests for access to PHEAA systems. With this application, business partners—their users, requestors and their Authoritative Source(s)—can submit requests for access to PHEAA systems.

All institutions must have a signed and executed Remote Access Agreement (RAA) and Authoritative Source Form on file. Questions regarding the RAA can be directed to [FosterEd@pheaa.org](mailto:FosterEd@pheaa.org).

All institutions are required to review and maintain access requests for their users.

Once processed, the forms grant access to the following PHEAA systems and School Portal (ALEC) to include:

### a. PageCenter

PageCenter is a secure reporting repository. Each institution will have their own mailbox within PageCenter to which all reports and listings will be delivered and divided into separate applications. FosterEd reports will be in the “STEP” application.

### b. Document Library

Document Library is an online repository, storing and organizing documents such as Program Guidelines, memoranda, and more.

For information on using BPAMS and PageCenter, please refer to Appendices A and B; for additional resources on how to access and use PHEAA systems, please visit [PHEAA.org/training](https://pheaa.org/training). Specific documents can be found by selecting ‘State Grant and Special Program Resources,’ then ‘General SGSP Resources.’

## II. Student Eligibility Requirements

To be eligible for a FosterEd waiver, the student must:

- Be a current resident of Pennsylvania at the start and during the term for which the waiver is awarded.
- Have not reached the age of 26 by July 1 of the upcoming academic year for which the FosterEd waiver is received.
- Have graduated from high school or have received a Commonwealth Secondary School Diploma.
- Be eligible for services under Pennsylvania’s John H. Chafee Foster Care Program for Successful Transition to Adulthood.
- Be identified as a youth who is in foster care, or was discharged from foster care on or after attaining age 16, OR has exited foster care on or after age 16 to adoption or permanent legal guardianship.
- Be enrolled as an undergraduate, at least half-time, in a postsecondary institution that is approved by the U.S. Department of Education for Title IV student assistance programs in PA.
- Have unmet cost for the PA Chafee Education and Training Grant (Chafee ETG), as determined by the postsecondary institution.
- Maintain satisfactory academic progress as determined by the institution.
- Not be in default on a federal student loan or owe a refund on other Title IV aid.
- File a Free Application for Federal Student Aid (FAFSA®) for the academic year for which the waiver is being requested.
- File an application for Chafee ETG.
- Have not previously received a waiver for five (5) years (consecutive or not), defined as ten (10) semesters or the equivalent, for undergraduate study.

**Note:** The student may be eligible for Chafee ETG but not receive an award for reasons including, but not limited to, missing the application deadline, funding limitations, or reaching the maximum Chafee ETG award counter; the student is still eligible for FosterEd in these situations.

The eligible student who transfers to another institution should contact PHEAA immediately via email at [FosterEd@pheaa.org](mailto:FosterEd@pheaa.org); the student also should communicate with the POC at the transfer institution.

### III. Waiver Determination Process

#### A. PHEAA Responsibilities

PHEAA is responsible for the initial FosterEd eligibility checks and confirming that the student:

- Is a resident of Pennsylvania.
- Has not reached the age of 26 by July 1 of the upcoming academic year for which the FosterEd waiver would be received.
- Has graduated from high school or, received a Commonwealth Secondary School Diploma
- Is eligible for services under the Pennsylvania's John H. Chafee Foster Care Program for Successful Transition to Adulthood.
- Is not in default on a federal student loan or does not owe a refund on other Title IV aid.
- Has filed the required academic year FAFSA.
- Has submitted a complete Chafee ETG application.
- Has not previously received a waiver for five (5) academic years (consecutive or not), defined as ten (10) semesters or the equivalent.

Once it is determined that the student meets the above criteria, the student will appear on the FosterEd Waiver Listing (see Appendix A) of the institution the student is attending. The Waiver Listing is made available to postsecondary institutions via their PageCenter mailbox and is updated on a biweekly basis. The student who does not meet the eligibility criteria will appear on the FosterEd Denial Listing, with the reason(s) for that status (see Appendix E).

#### B. Institution Responsibilities

Upon receipt of the Waiver Listing from PHEAA, the institution must confirm that the student:

- Is enrolled at least half-time in undergraduate courses in an approved program of study.
- Has "unmet cost" as determined by the postsecondary institution. "Unmet cost" is the difference between the student's cost of attendance (as defined by the Federal Student Aid Handbook) and all federal or federally supported gift aid the student is receiving. The federal Expected Family Contribution (EFC) is not used when determining eligibility.
  - It is not required that the waiver value exceed the total cost of tuition and mandatory fees; however, an institution may waive additional costs.
  - The calculation of unmet cost may exceed the waiver amount.
- Has made satisfactory academic progress, as determined by the postsecondary institution.

Upon receipt of the Waiver Listing from PHEAA for FosterEd, the institution must confirm if the student should complete additional applications for state or federal grants, including the PA State Grant Program.

- The Waiver Listing provided by PHEAA will indicate whether a student has applied for the PA State Grant.
- The POC shall assist students in identifying further scholarship and grant opportunities, in consultation with the institution's financial aid department, but inclusion on the Waiver Listing is not contingent upon applying for additional sources of aid.

Once the institution determines that the student meets the requirements in the Student Eligibility section, the institution must then:

- Waive or apply a credit for all institutional charges for tuition and mandatory fees which remain after all other scholarships and grants have been applied on a term-by-term basis, effective with the

current academic year or summer term for which eligibility has been announced. Other scholarships include all gift aid, defined as student aid that is not required to be earned or repaid.

- Refund any payments received on the student's account from the student for tuition or mandatory fees within 30 days of receipt of eligibility notification on the Waiver Listing from PHEAA.

**Note:** An institution should not delay conditional aid packaging or preliminary crediting of the student account for tuition and mandatory fees for the student who meets all institutional eligibility checks when the institution has verification of the student's foster care eligibility.

An institution may not withhold a FosterEd waiver if the student meets all requirements listed in the Student Eligibility section, unless the student declines the waiver. It is not an eligibility requirement that the student be PA State Grant eligible.

An institution may not reduce the waiver by the amount of gift aid the student might have received but did not, regardless of the reason.

## IV. Waiver Certification Process

### A. Waiver Listing

Institutions with FosterEd eligible students are required to certify student eligibility and waiver amounts for tuition and mandatory fees each term.

Institutions are also required to return a Reconciliation Waiver Listing at the end of each academic year.

#### i. Mandatory Fees

Mandatory fees are defined as either charges that are typically assessed to all students at the beginning of a term or fees that are required as a part of a student's academic program or credential completion. The following categories of fees must be waived, notwithstanding the particular labels institutions may assign:

- Fees for student activities, any health services, technology, facilities and capital improvements, or orientation.
- Fees specific to an academic program or any of its required elements, such as lab, software, or materials fees. "Materials" includes uniforms or other required items.
- Other fees such as College or Comprehensive fees, should be waived if they are assessed to students at the institution at the beginning of the term or as part of the institutional bill.

**Note:** Institutions must waive or apply a credit for any other fee(s) not listed above that meet the definition of mandatory.

Eligible FosterEd recipients are provided to institutions on the Waiver Listing, which is made available via PageCenter on a biweekly basis.

Institutions are required to certify FosterEd eligibility within 30 days of a student appearing on a Waiver Listing or within 30 days of the term starting, whichever comes later. The Waiver Listing provides student detail and summary information as well as a certification page to be signed by an authorized school official.

**Note:** Once the Waiver Listing has been certified and returned, the institution only needs to return subsequent Waiver Listings for the same academic term to PHEAA if there are status changes or additional students included.

## ii. Certification

The institution must complete the following fields for each student:

- Enrollment status
- Satisfactory academic progress
- Approved undergraduate program of study
- Waiver amount (tuition and fees waived)
- Reason(s) for waiver value of zero (if applicable)

**Note:** Signed and dated documentation should be obtained for any eligible student opting to decline FosterEd. Institutions should establish their own internal documentation process, and retain these records as part of ongoing program administration.

## iii. Withdrawals or Enrollment Changes

Student status adjustments should be handled as follows:

- If a student withdraws or drops to less than half-time status prior to charges being applied to the student account and eligibility being certified by the institution, the student is ineligible for the waiver for that term.
- Students who withdraw, transfer, or become ineligible should be immediately identified to PHEAA via the FosterEd mailbox at [FosterEd@pheaa.org](mailto:FosterEd@pheaa.org).
- If the student ceases at least half-time enrollment or becomes ineligible after the waiver for the term has been applied, the waiver should remain in place.
- If the student's change in status results in adjustments to charges and financial aid, the amount of the waiver would be increased or decreased to cover all remaining charges.

## V. Year End Reporting

Annually, all institutions of higher education must report the following information directly to the Pennsylvania Department of Education (PDE):

- Number of students receiving a Pennsylvania Chafee Education and Training Grant (Chafee ETG).
- Number of students who apply for the FosterEd Program (equivalent to number who applied for Chafee ETG).
- Number of students participating in the program (received a FosterEd waiver).
- Retention rate of students participating in the program (not applicable for 2020-21 Academic Year).
- The number of participating students with remaining unmet financial need.
- Recommendations on how to improve outreach to the students who are or may potentially be eligible for participation.
- Recommendations on how to improve delivery of services to eligible students.
- Impediments to retaining eligible students.

## A. How to Report

To report the required information to PDE the data must be submitted to [collab.pde.pa.gov/OPHE/HigherEdReporting/SitePages/Home.aspx](http://collab.pde.pa.gov/OPHE/HigherEdReporting/SitePages/Home.aspx)

### i. Login Directions

Institutions should use their PA Login information to access the report. (A user's Keystone Login will NOT work.)

An institution that is not registered with a PA Login from the previous year should:

- Register for a new user name and password at [palogin.state.pa.us/Login/User/RegisterNew](http://palogin.state.pa.us/Login/User/RegisterNew)
- Once a new username is established, access must be granted. Send the username and email address to [pa-collunivseminfo@pa.gov](mailto:pa-collunivseminfo@pa.gov) with the subject line "Request Access." Please DO NOT send your password.

### ii. Deadline

The deadline for reporting required information is March 1, 2021.

Institutions will report information as of March 1. Any updates for the academic year after March 1 should be included in the following year's report.

## VI. Retention of Records & Program Review

In accordance with these guidelines, institutions are required to retain, for possible review and audit by PHEAA, all records necessary for the certification of student waiver eligibility and the crediting of FosterEd waivers to student accounts. Such records must be retained for at least five (5) years from the date the award year is closed in which FosterEd was applied.

Below are examples of Program Review Findings for FosterEd:

- POC not designated or POC contact information incorrect or missing from institution's public website
- Student not certified on the Waiver Listing by the deadline
- Institution did not refund student payment on time
- Waiver amount credited to student account is insufficient
- Required documentation not on file for the student who declines the waiver

As part of the Program Review process, PHEAA may conduct further examinations of student accounts and records as it deems necessary. Findings in the Program Review may result in adjustments to the waiver applied or be considered in combination with other PHEAA-administered program findings to determine if four or more administrative findings have been identified. Four or more administrative findings indicate a high error rate, and a follow-up Program Review will be scheduled for the next academic year. Please review [PHEAA.org/ProgramReview](http://PHEAA.org/ProgramReview) for more details.

# **Appendix A**

---

**Business Partner Access Management System (BPAMS)**

# Business Partner Access Management System (BPAMS)

Before a postsecondary institution can access PHEAA tools such as PageCenter or Document Library, several access requests must be completed.

## Overview

Your institution must have a signed Remote Access Agreement (RAA) and a designated Authoritative Source on record. In addition, an institution's Authoritative Source and all other approved users must have Business Partner Access Management System (BPAMS) access to STEP (CHAFEE, GEAR UP, PATH, FOSTERED) and PageCenter – STEP (CHAFEE, GEAR UP, PATH, FOSTERED) in order to access PHEAA's online tools. Finally, all users, including the organization's Authoritative Source, must maintain 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 institutions to take all the necessary steps to maintain their access. It is the institution'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 & Authoritative Source Forms

All new institutions are required to complete and return a Remote Access Agreement (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.

Institutions whose Authoritative Source has changed or lapsed should email [FosterEd@pheaa.org](mailto:FosterEd@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

To access the BPAMS system, visit [ccc.aessuccess.org/apps/bpams.nsf/home](http://ccc.aessuccess.org/apps/bpams.nsf/home).

1. Log into BPAMS.

### NEW USERS

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 eight-digit OE Code.
3. Click the Next button.

2. Request access to STEP (CHAFEE, GEAR UP, PATH, FOSTERED) and PageCenter – STEP (CHAFEE, GEAR UP, PATH, FOSTERED).

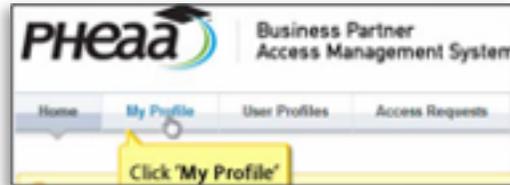
## NEW USERS

Continue to the Access Level section of your New Profile creation.

## EXISTING USERS

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.

A screenshot of the 'User Profile CG0PH99' form. The form contains fields for First Name (John), MI (A), Last Name (Doe), Direct Work Phone Number (717-234-5678), Ext., and Email (jdoe@pheaa.org). Below these fields are expandable sections: Institution Information, Security Question and Answer, Access Options, and Profile History. A yellow callout box with a pointer highlights the 'Access Options' section, with the text 'Click 'Access Options''.

## REQUEST ACCESS

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

A screenshot of the 'Partner: Programs' section of the access request form. It lists three items: PageCenter STEP (Chafee, GEAR UP, PATH), STEP (CHAFEE, GEAR UP, PATH), and Web File Transmission Secure File Transfer. Each item has an 'Update' button and a 'No Access' label.

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.

A screenshot of a pop-up window titled 'PageCenter - STEP (Chafee, GEAR UP, PATH)'. It shows two radio buttons: 'No Access' (selected) and 'Access'. A red arrow points to the 'Access' radio button. At the bottom are 'OK' and 'Cancel' buttons.

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

Submit your request.

New users must click the "Submit Request to Create User" button at the bottom of the page.

Returning users must click the "Submit Request" button at the bottom of the page.

The Verification pop-up window will display. Review your request for accuracy, and then click "Submit Changes."

## Additional Notes

- For new users, a username and password will be created for you within 1-3 business days.
  - Your username and password may be used to log into all of PHEAA's online tools once you have been granted access (BPAMS, Document Library, and PageCenter).
    - Access requests submitted by users other than the Authoritative Source will move to the Authoritative Source for approval.
- 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

If you have difficulty logging into or using a PHEAA online tool, please contact PHEAA at 1-800-443-0646, option 2, or email [sgsp\\_bpams\\_processing@pheaa.org](mailto:sgsp_bpams_processing@pheaa.org).

# Appendix B



PageCenter Instructions

# PageCenter Instructions

PageCenter is a tool that provides institutions with student information and Waiver Listing reports via the internet in a secure environment. PageCenter is used for accessing information only and cannot be used to make changes electronically.

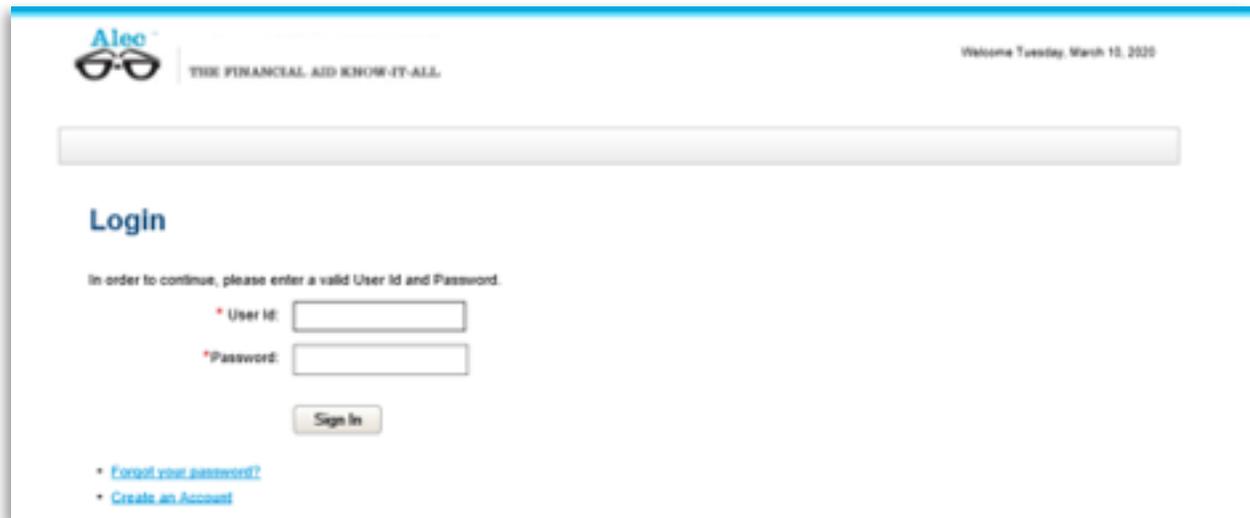
## Instructions

### Logging 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:

[partners.aessuccess.org/B2BAuth/login.htm?brandID=pa&resourceID=AESAWEB&reason=INITIAL\\_LOGIN](https://partners.aessuccess.org/B2BAuth/login.htm?brandID=pa&resourceID=AESAWEB&reason=INITIAL_LOGIN)

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



Your "User ID" is the ID provided to you via email. User IDs established for postsecondary institutions, start with a "CG."

### Passwords

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 Password" and "Verify New Password" fields using the following rules:

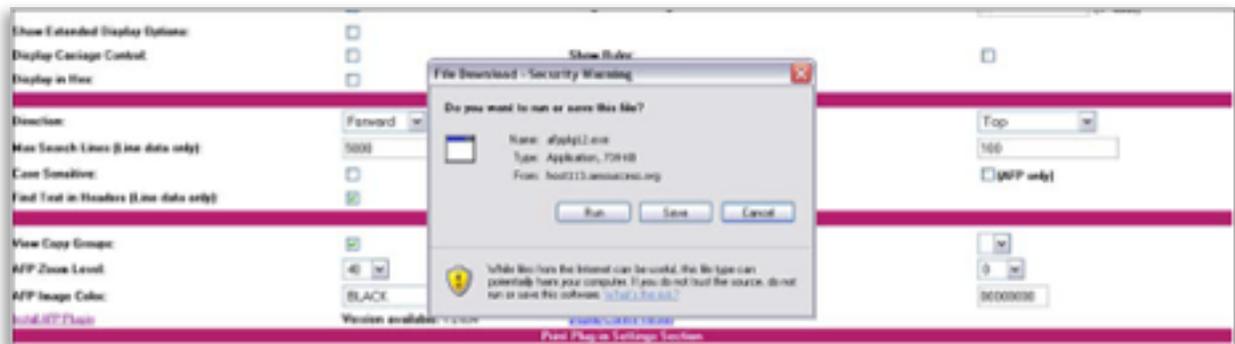
- Passwords must be exactly eight characters in length.
- The first character must be a letter; the second character must be a number; and the remaining six characters can be any combination of letters and numbers.

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 CG ID in the "User ID" field.
2. Enter your current password in the "Password" field.
3. Enter your new password in the "Enter New Password" field.

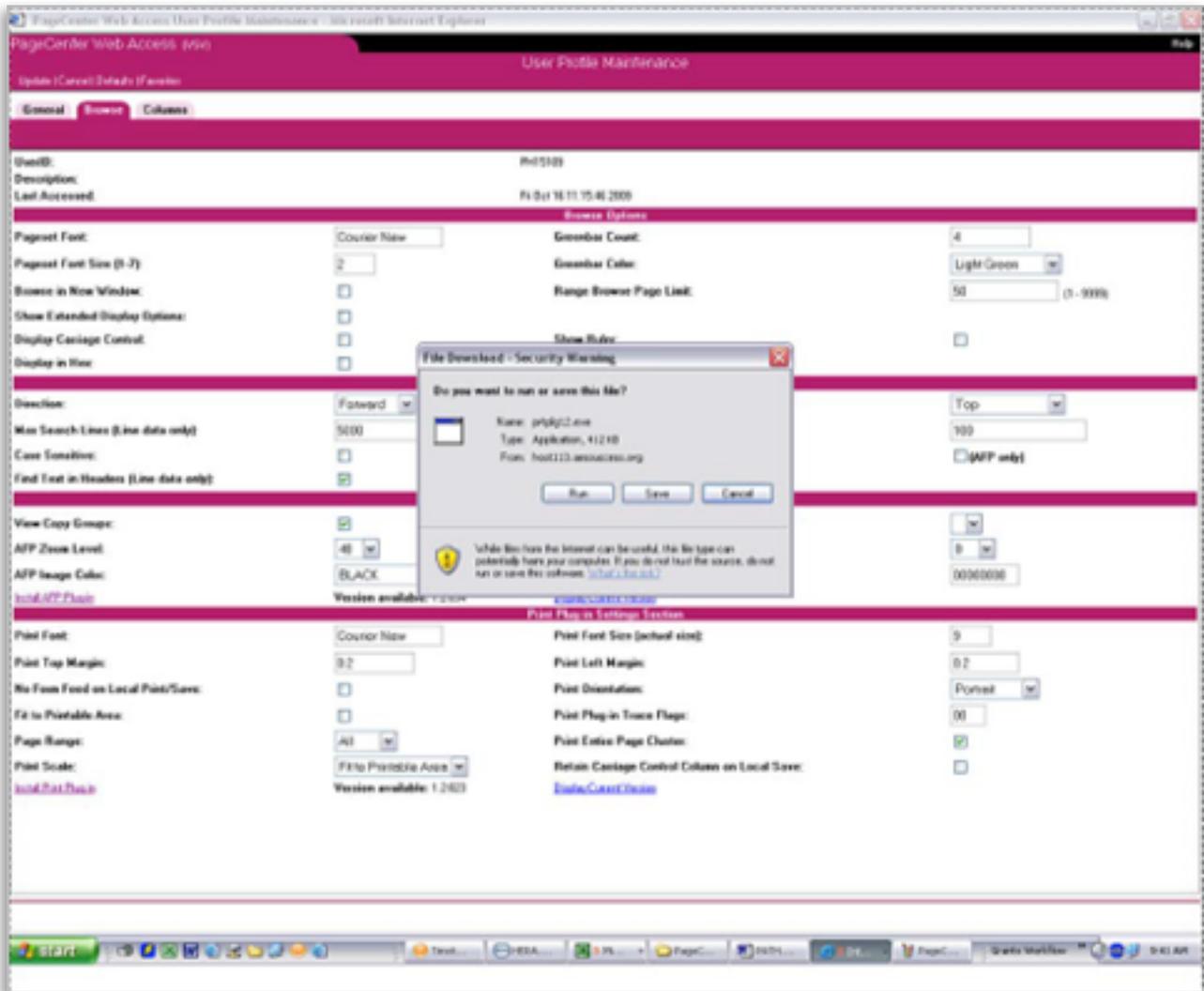


6. Save the plug-in to your desktop.



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."

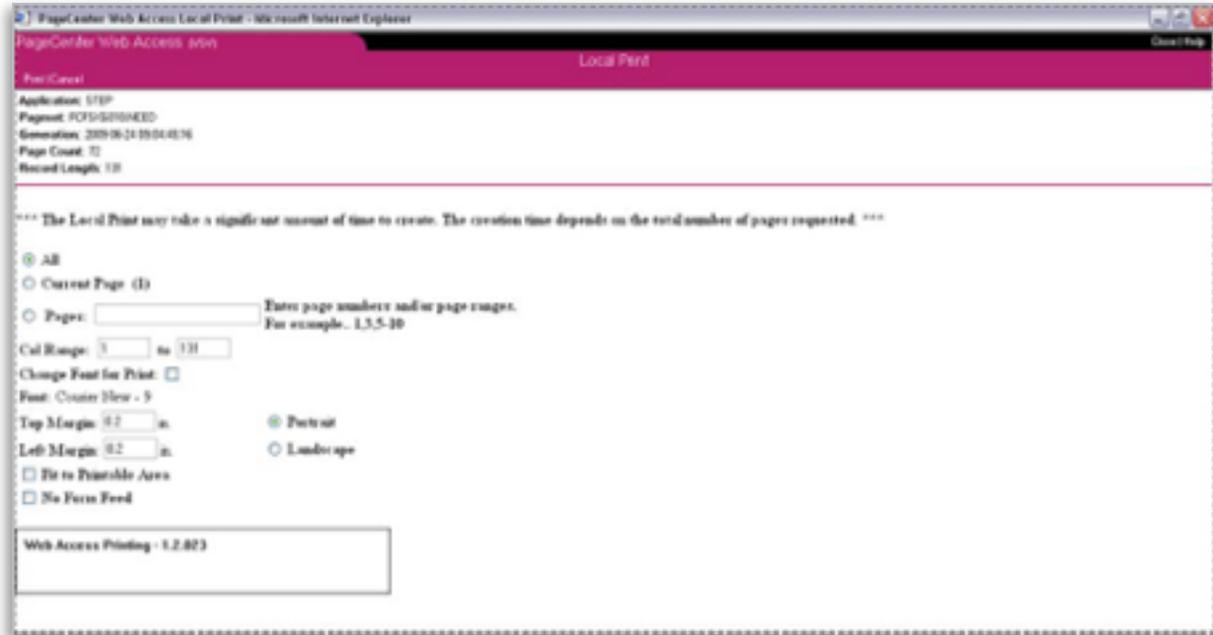
14. Click on the icon labeled "prtplg12."

15. Follow the installation process. You will need to agree to the terms of use. (The plug-in will install automatically.)

## Printing Reports

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.

## Institution PageCenter Reports

The following FosterEd reports are placed in the institution’s PageCenter mailbox:

**FosterEd Waiver Listing** – The Waiver Listing provides certification data for those students who have been identified by PHEAA as FosterEd Eligible. The Waiver Listing is placed in the PageCenter mailbox of the institution and will include those students who listed the institution on their Chafee Education and Training Grant (Chafee ETG) application. The Waiver Listing serves as the school’s certification roster and must be returned to PHEAA to complete the FosterEd certification process.

- The Waiver Listing is accessed on PageCenter via the secure school portal at PHEAA.org.
- The most recent version of the Waiver Listing is automatically placed on PageCenter biweekly. 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 Waiver Listing.
  - An asterisk (\*) next to the student’s name indicates that there has been a status change from the previous Waiver Listing.

- Once a Waiver Listing has been certified and returned, the institution does not need to return subsequent Waiver Listings for the same academic year to PHEAA if there are no status changes needed.

**FosterEd Reconciliation Waiver Listing** – The annual Reconciliation Waiver Listing 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 FosterEd in accordance with the school's records. The Waiver Listing must be returned within thirty 30 days of receipt; if there are no changes to the Waiver Listing, the institution is only required to sign and return the certification page.

# Appendix C



FosterEd Waiver Listing

# FosterEd Waiver Listing

00123400 (1)

FOSTERING INDEPENDENCE WAIVER PROGRAM 2020-21 WAIVER LISTING

DOC ID TFWL

Attn: Financial Aid Admin. & Point-of-Contact

PENNSYLVANIA INSTITUTION NAME

## STUDENT LISTING

123-45-6789 (2)

ABCDEFG SMITH (3)

EXPECTED GRADUATION DATE: \_\_\_\_\_ (4)

WAIVER COUNTER: 0.500/5.000 (5)

FILED PA STATE GRANT FORM: Y (6)

| TERM   | ENROLLMENT STATUS (7) | ACADEMIC PROGRESS (8) | DEGREE PROGRAM (9) | WAIVER VALUE (10) | ADDITIONAL COMMENT (11) |
|--------|-----------------------|-----------------------|--------------------|-------------------|-------------------------|
| FALL   | FULL                  | Y/N                   | Y/N                | \$0               | INELIGIBLE              |
| SPRING | FULL                  | Y/N                   | Y/N                | \$0               | INELIGIBLE              |

Number of students receiving a PA Chafee Education and Training Grant: 0 (12)

Number of students who completed a PA Chafee Education and Training Grant Application: 0 (13)

Number of students who received the Fostering Independence Tuition Waiver: 0 (14)

Total amount of fees waived: \$0 (15)

## Legend 1 – Waiver Listing Codes

# Indicates that the student was not on the previous Waiver Listing.

\* Indicates that there has been a status or award change since the previous Waiver Listing.

Note: Bold codes/definitions are required fields.)

1. Institution's OE Code
2. Student's SSN
3. Student's Name
4. **Expected/Actual student graduation date; in MMDDCCYY format; if the exact graduation day is unknown, use the last day of the month.**
5. Number of terms student has received the waiver out of 5 years defined as 10 semesters or the equivalent.
6. Indicates if the student has filed a PA State Grant Form.
7. Provides specific fall, winter or spring term enrollment status from Legend 3.
8. Student must maintain Title IV satisfactory academic progress; circle "Y" if Yes, "N" if No (if student is a freshman circle "Y").
9. **Student must be enrolled in an approved Federal Title IV certificate, diploma, or degree program of study; circle "Y" if Yes, "N" if No.**
10. **This waiver amount is populated by the institution and is the amount total of tuition and fees remaining after all gift aid has been applied.**

11. Comments populated by the school, explaining zero dollar waiver amount.
12. Number of students who received PA Chafee Education and Training Grant (ETG) for the current academic year.
13. Number of students who applied for the Chafee ETG for the current academic year. This number is equivalent to the number FosterEd applicants.
14. Number of students who received the FosterEd waiver for the current academic year.
15. Total amount of tuition and fees waived.

## Legend 2 – Ineligible Reason Codes

Note: The list below indicates all reasons a student may be ineligible for Chafee ETG and FosterEd. It is important to understand that not all reasons will appear on your Waiver Listing, but will appear on student status letters.

- 01 Student does not meet the age requirement
- 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 Chafee
- 09 School is not an eligible Federal Title IV postsecondary institution
- 13 Student refusal of waiver
- 14 Eligibility pending DHS review
- 18 Student is not enrolled
- 20 Maximum Eligibility
- 22 Student is not eligible per DHS or County Children & Youth Agency
- 24 Student is not enrolled in an approved Federal Title IV certificate, diploma, or degree (associate or bachelor's degree) program of study
- 25 Student did not make academic progress
- 26 Student is enrolled less-than-half-time

## 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

# Appendix D

---

FosterEd Student Certification Best Practices

# FosterEd Student Certification

## Best Practices

The FosterEd Waiver Listing is a biweekly report generated to the STEP application of an institution's PageCenter mailbox. This report provides a list of students who have submitted a Chafee ETG application, listed the institution as first choice when filing the FAFSA®, have been identified by the Pennsylvania Department of Human Services (DHS) as an eligible foster youth, and are eligible for FosterEd according to the Waiver Determination process outlined in the program guidelines.

### Best Practices

Waiver Listings are printed, completed, and returned via fax to 717-720-3786 by the institution to be manually processed by PHEAA staff. Follow the best practices below to facilitate efficient student certification.

#### DO

- ✓ Provide information in these fields
- ✓ Graduation Date (optional)
- ✓ Waiver Amount
- ✓ Correct Enrollment Status information
- ✓ Indicate if the student declines the waiver or does not have unmet need for the waiver in the Additional Comments
- ✓ Send one completed signed and dated Waiver Listing
- ✓ Only send subsequent program year Waiver Listings 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 FosterEd Program Guidelines for field definitions, descriptions, and additional certification information
- ✓ Allow 7-10 business days for processing
- ✓ Degree Program (Circle "Y" or "N")
- ✓ Academic Progress (Circle "Y" or "N")
- ✓ Certified Amount

#### Don't

- ✓ Indicate "\$0" in the certified amount if intending to certify
- ✓ Send Waiver Listings with no changes
- ✓ Send duplicate Waiver Listings or duplicate information
- ✓ Leave blank fields for students who are being certified
- ✓ Certify for terms that the student has not yet started

STUDENT LISTING

123-45-6789  
ABCDEF SMITH

EXPECTED GRADUATION DATE: \_\_\_\_\_  
WAIVER COUNTER: 0.500/5.000  
FILED PA STATE GRANT FORM: Y

| TERM   | ENROLLMENT STATUS | ACADEMIC PROGRESS | DEGREE PROGRAM | WAIVER VALUE | ADDITIONAL COMMENT |
|--------|-------------------|-------------------|----------------|--------------|--------------------|
| FALL   | FULL              | (Y) N             | (Y) N          | \$0          |                    |
| SPRING | FULL              | Y (N)             | Y (N)          |              |                    |

Number of students receiving a PA Chafee Education and Training Grant: 0 (12)

STUDENT LISTING

123-45-6789  
ABCDEF SMITH

EXPECTED GRADUATION DATE: \_\_\_\_\_  
WAIVER COUNTER: 0.500/5.000  
FILED PA STATE GRANT FORM: Y

| TERM   | ENROLLMENT STATUS | ACADEMIC PROGRESS | DEGREE PROGRAM | WAIVER VALUE | ADDITIONAL COMMENT (11) |
|--------|-------------------|-------------------|----------------|--------------|-------------------------|
| FALL   | FULL              | (Y) N             | (Y) N          | \$0          |                         |
| SPRING | FULL              | Y (N)             | Y (N)          |              |                         |

Number of students receiving a PA Chafee Education and Training Grant: 0

# Appendix E



FosterEd Denial Listing

# FosterEd Denial Listing



00123400 - PHEAA UNIVERSITY

03/10/2020

The following students are not eligible for the FOSTERING INDEPENDENCE TUITION WAIVER Program for the 2020-21 academic year.

The students and their denial reason are listed below.

| SSN       | STUDENT NAME | DOB        | COUNTY  | DENIAL REASON                |
|-----------|--------------|------------|---------|------------------------------|
| 123456789 | STUDENT A    | 12/15/2000 | DAUPHIN | PENDING DHS APPROVAL         |
| 234567890 | STUDENT B    | 1/8/2001   | BERKS   | MAX FUNDING                  |
| 345678901 | STUDENT C    | 11/18/2001 | BERKS   | NO FAFSA OR FAFSA INCOMPLETE |

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 services, serving millions of students and thousands of schools through its loan guaranty, loan servicing, financial aid processing, outreach, and other student aid programs.

PHEAA's earnings are used to support its public service mission and to pay its operating costs, including administration of the Pennsylvania State Grant and other state-funded student aid programs. As the only major federal loan servicer with a nonprofit public service mission, PHEAA devotes its energy and resources to help ease the financial burden of higher education for its primary stakeholders – Pennsylvania students and families.

PHEAA conducts its student loan servicing operations nationally as FedLoan Servicing and American Education Services (AES). PHEAA operates its digital technology division as Avereo. For more information, visit [PHEAA.org](http://PHEAA.org).

## Board of Directors

**Representative Michael Peifer**  
Chairman, Greentown

**Senator Wayne D. Fontana**  
Vice Chairman, Pittsburgh

**Senator Ryan Aument**  
Landisville

**Senator John P. Blake**  
Lackawanna

**Representative Mike Carroll**  
Avoca

**Representative Angel Cruz**  
Philadelphia

**Representative Sheryl M. Delozier**  
Cumberland

**Senator Arthur Haywood**  
Philadelphia

**Senator Vincent J. Hughes**  
Philadelphia

**Representative Anita Kulik**  
Allegheny

**Representative Steven C. Mentzer**  
Lancaster

**Senator Kristin Phillips-Hill**  
York

**Honorable Roy Reinard**  
New Hope

**Representative James R. Roebuck, Jr.**  
Philadelphia

**Senator Mario M. Scavello**  
Monroe/Northampton

**Representative Curtis G. Sonney**  
Erie

**Chancellor Timothy R. Thyreen**  
Waynesburg

**Robin L. Wiessmann, Executive Director & CEO**  
PA Housing Finance Agency

**Secretary Pedro A. Rivera**  
Dept. of Education

---

**Senate Republican Appointee  
Vacant**

## Pennsylvania Higher Education Assistance Agency

1200 North Seventh Street, Harrisburg, PA 17102-1444 • 1-800-692-7392