



2020-21 PROGRAM GUIDELINES  
**Institutional Assistance  
Grant (IAG)**

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# 2020-21 Program Guidelines

# Institutional Assistance Grants (IAG)

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## Introduction

The Institutional Assistance Grants (IAG) Program, created by legislation from the Pennsylvania General Assembly in July 1974, serves as an integral part of the Commonwealth's commitment to the development and preservation of a planned system of postsecondary education. The program meets its objectives through formula grants to assist independent, non-profit postsecondary institutions in maintaining enrollments and stabilizing their educational costs to facilitate utilization of all postsecondary education resources in the Commonwealth.

The *2020-21 IAG Program Guidelines* provide institutions with eligibility criteria and requirements, in addition to disbursement and refund information. A calendar of program events and deadlines is also maintained for your reference ("**Appendix A**"). An electronic copy of the 2020-21 IAG Program Guidelines will be made available in the Document Library.

This document is valid only for the 2020-21 Academic Year, and should not be referenced for processing any prior years.

## I. Institutional Participation

### A. Institutional Eligibility

To be eligible to participate in the IAG Program, an institution must:

- Be a non-profit independent institution of higher education located in Pennsylvania
- Be approved for the PA State Grant Program by the Pennsylvania Higher Education Assistance Agency (PHEAA)
- Not receive a direct appropriation from the Commonwealth

Institutions are not eligible if they are community colleges, state-owned, state-related (as defined by law), seminaries or schools of theology, or sectarian and denominational institutions (see Regulation 121.122 - "**Appendix B**"). Additionally, hospital schools of nursing are not eligible because they are not chartered as independent institutions of higher education.

### B. Approval for Participation

New schools that would like to apply for IAG funding must submit the following:

#### i. IAG Eligibility Determination Application

This form is used to aid PHEAA in determining if an institution is eligible to participate in the IAG Program. The form is available in the Document Library, or can be requested via email at [iag@pheaa.org](mailto:iag@pheaa.org). This form is due by August 1, prior to the academic year for which the institution is requesting to begin participation (e.g., August 1, 2020 for the 2020-21 Academic Year).

#### ii. IAG Program Participation Agreement

Once approved to participate, PHEAA will provide the institution with the participation agreement. This agreement, signed by PHEAA and the participating institution, stipulates all terms and conditions for participation. The agreement will be completed one-time and must be returned to PHEAA.

### iii. ACH Authorization Agreement

All IAG disbursements are made via Automated Clearing House (ACH). Therefore, participating institutions must have an approved PHEAA ACH Authorization Agreement on file. The PHEAA ACH Authorization Agreement can be requested by contacting PHEAA's Financial Management Department at 717-720-2168 or via email at [fmeftadmin@pheaa.org](mailto:fmeftadmin@pheaa.org).

### iv. Remote Access Agreement

All schools must have a signed and executed Remote Access Agreement (RAA) on file and are required to maintain access requests for their users. Access requests are maintained through Business Partner Access Management System (BPAMS), a Web interface. With this application, business partners – their users, requestors, and their Authoritative Sources (AS) – can submit requests for access to PHEAA systems. Once processed, the RAA and AS grant access to the following PHEAA systems and School Portal (ALEC) to include:

#### a. PageCenter

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

Training and reference material are available on the PA State Grant and Special Programs Resources and Training webpage at [PHEAA.org/partner-access/training/state-grant-training.shtml](http://PHEAA.org/partner-access/training/state-grant-training.shtml)

Each institution will have its own mailbox within PageCenter, to which all reports and listings will be delivered. All IAG material will be available in the Grant application within that mailbox.

#### b. Document Library

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

Questions regarding the RAA can be directed to [iag@pheaa.org](mailto:iag@pheaa.org).

## C. Annual Requirements for Participating Institutions

Participating institutions are required to complete and submit several items throughout the program year. All communications are sent via email to the IAG contact in the Financial Aid Office. One copy of the required item must be returned by fax or email to PHEAA. The fax number is 717-720-3786 and the program email address is [iag@pheaa.org](mailto:iag@pheaa.org). No items are to be sent by U.S. mail unless otherwise specified. Annual items include:

### i. Eligibility Renewal Application

The Eligibility Renewal Application is sent out by PHEAA via email to all IAG institutions in August and due back by September 1 to determine if there are any changes in your school's status that might affect your eligibility. PHEAA reviews the application and follows up with the institution if further information is needed. The Application is available in the Document Library (Special Programs/ Institutional Assistance Grants Program/Eligibility Renewal Application).

### ii. Audit Report

The audit report format (see "Appendix C") is sent by PHEAA via email in November and due January 1 following the program year in question. For example, the 2020-21 Audit Report is due January 1, 2022. The Audit Report needs to be completed by an independent auditor and may not be completed by the school. The report must attest to the school's compliance with the terms of Act 174 and the

Participation Agreement, and include several required statements and a schedule of receipts and expenditures that account for every dollar of IAG funds disbursed to your institution. An outline of the required statements is provided in the Document Library (Special Programs/Institutional Assistance Grants Program/IAG Audit Report Format). Unspent funds must be returned to PHEAA.

### iii. Certification Listing

A Certification Listing is generated by PHEAA and sent to PageCenter on May 1 for all schools to certify students. The PageCenter name is "CCYY IAG Certification Listing" and the pageset is "IAGCERTYY. School Name." Schools need to review their listing and notate, by checkmark, any students who are no longer eligible. The entire Certification Listing must be returned to PHEAA since a certification signature is required, whether or not any changes are made. Since an original signature is not required, email or fax submissions are acceptable and preferred.

Institutions are encouraged to complete and return their PA State Grant reconciliation roster before the IAG certification listing is run on May 1. Enrollment status changes, such as a change from full-time to part-time, cannot be made on the listing. All PA State Grant updates must be made prior to May 1 to be reflected in the IAG Certification Listing.

### iv. Cancellation Refund Report

A Cancellation Refund Report (if applicable for an institution) is generated each October after the program year in question to identify institutions with students who no longer qualify as IAG eligible. This is mostly due to a change in their PA State Grant status reported after the May 1 Certification Listing deadline. A student may also appear as no longer qualifying if they did not complete an entire term while receiving a PA State Grant. The listing name is "IAG Cancellation Report" and the pageset is "GIAGCAN." This report shows each institution the specific students who are no longer eligible to receive funds, the reason, and the amount owed to PHEAA. A total amount of refunds due to PHEAA is at the bottom of the list. An institution will only receive this report if there are student cancellations. Institutions should email [iag@pheaa.org](mailto:iag@pheaa.org) for any questions on refunds on a per student basis.

The refunds are due 30 days after the memo is sent via email to the IAG contact in the Financial Aid Office. The refund can be sent by check (made payable to IAG) to:

PHEAA  
P.O. Box 64849  
Baltimore, MD 21264-4849

An email should be sent to [finmgtrecon@pheaa.org](mailto:finmgtrecon@pheaa.org) to identify the refund being sent as an IAG refund. It is important to identify funds as IAG because unidentified funds may be assigned to another account. Refund instructions are also available in the Document Library (Special Programs/Institutional Assistance Grants Program/Memoranda/Institutional Assistance Grants Program Refund Instructions).

## D. Institutional Disbursements

Two disbursements, Advance and Reconciliation, are sent to an institution annually providing that the institution has no outstanding items and is due to receive a disbursement from PHEAA. Notification of disbursements, or a refund if no reconciliation payment is due, is sent via email to the President and the IAG contact in the Financial Aid Office.

### i. Advance Payment

At the beginning of each program year, PHEAA estimates full-time and part-time IAG recipients at each institution based on the projected PA State Grant eligible recipients enrolled at IAG institutions. The total available resources are divided by the total number of estimated full-time equivalent (FTE) recipients to establish an estimated per capita amount. An Advance Payment typically represents

90 percent of the estimated per capita amount multiplied by estimated FTE recipients. The Advance Payment is sent in September to institutions that do not have any outstanding items or money due to PHEAA. The September payment allows the IAG funds to be a meaningful part of the institutions' budgets.

## **ii. Reconciliation Payment or Refund**

The total available resources are divided by the certified number of recipients, which is gathered from each institution's Certification Listing, to produce the final per capita grant. PHEAA then identifies institutions that are due a remaining payment for the program year. The final Reconciliation Payment is usually made during July or August. Institutions that have fewer recipients than anticipated may owe a refund instead of receiving additional money from PHEAA.

### **a. Withholding of Reconciliation Payment**

Since IAG payment is based on the numbers of students receiving assistance from the PA State Grant Program, the Reconciliation Payment will not be made to any institution that has not received any disbursement of PA State Grant funds for the year in question. Such institutions will be notified that they must refund the previously disbursed advance payment if the situation (for example, a delinquent PA State Grant roster for a prior period that is delaying disbursement for the current year) has not been resolved by the time the amount of the reconciliation payment is determined.

### **b. Withholding of Advance or Reconciliation Payment**

All disbursements are contingent upon passage of the annual Commonwealth Budget. If a Commonwealth Budget freeze occurs, the Reconciliation Payment to institutions could be non-existent. Additionally, a late passage of the budget could result in a delayed Advance Payment. PHEAA will provide email updates if the Advance Payment or Reconciliation Payment will not be sent out during the months listed above.

PHEAA reserves the right to hold disbursement to an institution if:

- The institution is closing or changing ownership.
- The institution is on a restriction or oversight by the U.S. Department of Education for participation in any Title IV program.
- The accrediting agency suspends or cancels approval for the institution.

Any questions regarding holding disbursement should be directed to PHEAA via email at [iag@pheaa.org](mailto:iag@pheaa.org). PHEAA will exercise this right to determine the eligibility of the institution to receive further funding.

Each disbursement sent to an institution will produce an electronic funds transfer (EFT) letter and a disbursement document. These documents will be located in the institution's PageCenter mailbox. The pageset names are "Disbursement Documents" and "Disbursement EFT Letters" and the listing names are IAGDISB and IAGEFT.

## **II. Student Eligibility**

### **A. Full-Time vs. Part-Time (Half-Time) Awards**

PHEAA only recognizes four enrollment statuses, not including evening variations: full-time, half-time, less than half-time, and not enrolled. IAG reports use the label 'part-time' instead of 'half-time.' The meaning is the same.

In order to be counted by an institution, a student must have enrolled in and completed at least one term during the academic year (summer term is excluded), and must have received a PA State Grant award in that same term.

To be counted as eligible for a full-time IAG payment, a student must meet the following requirements:

- Enroll full-time for at least one term,
- Receive a full-time PA State Grant award for that term,
- Be charged as a full-time student,
- Complete the term enrolled at least half-time.

If a student is not eligible to be counted for a full-time IAG payment, they may be counted for a part-time payment if they meet the following requirements:

- Enroll at least half-time for at least one term,
- Receive a half-time PA State Grant award for that term,
- Complete the term enrolled at least half-time.

Certifying a student as eligible when a student is ineligible or certifying a student as enrolled full-time when the student is enrolled half-time may result in the institution being required to refund the IAG payment that was made for that student.

Definitions of full-time and half-time enrollment are as follows:

### CREDIT ENROLLMENT MINIMUMS

Academic Period	Semester Schedule	Quarter Schedule using Semester Credits	Quarter Schedule using Quarter Credits
Full-Time Term	12 credits	8 credits	12 credits
Full-Time Year	24 credits	24 credits	36 credits
Half-Time Term	6 credits	4 credits	6 credits
Half-Time Year	12 credits	12 credits	18 credits

### CLOCK HOUR ENROLLMENT MINIMUMS

Academic Period	Semester Schedule	Quarter Schedule
Full-Time Term	450 clock hours of instruction	300 clock hours of instruction
Full-Time Year	900 clock hours of instruction	
Half-Time Term	225 clock hours of instruction	150 clock hours of instruction
Half-Time Year	450 clock hours of instruction	

**Note:** For clock hour programs that meet the minimum payment periods, at least 24 clock hours of instruction per week are required in a PHEAA-approved program of study for full-time enrollment and at least 12 clock hours of instruction per week are required for half-time enrollment. Even though the program may have 24 clock hours per week in order to be considered a full-time student, the payment period must have a minimum of at least 450 clock hours when two payment periods are used or at least 300 clock hours when three payment periods are used.

## **i. IAG Eligibility**

In order to be included in the IAG count, a student must meet both PA State Grant and IAG Program eligibility requirements during the same term, for at least one complete term of the 2020-21 Academic Year. Keeping a student status as eligible when a student is ineligible will result in the institution being required to refund the IAG payment made for that student.

## **ii. PA State Grant Eligibility**

The student must have received a grant for at least one term of the 2020-21 Academic Year. Students already determined by PHEAA to be ineligible for PA State Grant funds are identified on the Certification Listing as “Not Eligible.”

If the student received a grant and was later determined ineligible, the student cannot be counted for IAG purposes. If PA State Grant funds have not been credited to the student’s account for any term of the academic year because either the institution or PHEAA questioned the student’s eligibility, institutions should mark the student “Not Eligible” even if the student’s record shows a grant award. If a student appears on the Certification Listing and only had PA State Grant eligibility for a term that ended prior to September 2020 (e.g., for the 2020 Summer term), this student should be marked “Not Eligible.” If the student does not meet all PA State Grant eligibility requirements for the term in question, mark the student “Not Eligible.” To assist in this confirmation, schools are strongly encouraged to certify the 2020-21 PA State Grant reconciliation roster prior to May 1, 2021.

## **iii. Attendance**

The IAG Regulations require that an eligible student be in attendance at the institution to which IAG funds are being paid. Students enrolled at two institutions during the same year will not be included as “Eligible” at both institutions. Awards are based on the first term of the academic year that satisfied the requirements to be counted as eligible for any IAG award (full-time or part-time). The student will be included as “Eligible” on the Certification Listing for the primary institution only.

In general, students who complete a term during the 2020-21 Academic Year at another IAG eligible institution before enrolling at your institution cannot be counted at your institution for IAG purposes if the other institution is including the student in its count. A list of all IAG-eligible institutions is available in the Document Library under Institutional Assistance Grants Program (IAG) > Approved Schools. For your convenience, those students who have transferred between IAG-eligible institutions are identified on the Certification Listing as “Not Eligible - Transfer.” However, if a student identified as “Not Eligible - Transfer” did not receive a PA State Grant at the school attended for the fall term and is eligible for a grant at your school for the spring term, you should contact PHEAA Staff at [iag@pheaa.org](mailto:iag@pheaa.org) to determine if your school may count the student.

### **Example 1**

A student meets the requirements to be counted as full-time at University A in the Fall 2020 term (received full-time PA State Grant, completed term as full-time student). The student then transfers to College B in the Spring 2021 term, where they also meet all full-time eligible requirements. Both schools are IAG participants. The student will be counted for a full-time award for University A only, since this is the first term of the year that can be counted for IAG. College B cannot receive an IAG award, and the student will be marked as a Transfer on their Certification Listing.

### Example 2

A student is full-time at University C in the Fall 2020 term and College D in the Spring 2021 term. University C is not an IAG participant. The student will be counted as a full-time award for College D, since no award was granted to University C in the Fall 2020 term.

### Example 3

A student attends less-than half time in the Fall 2020 term at College E, then transfers to University F in the Spring 2021 term. Both schools are IAG participants. The student will be counted as a full-time award for University F only, since the student did not meet all eligibility requirements to be counted in the Fall 2020 term (the student did not attend at least half time).

## iv. Eligibility Related to Enrollment Status

In order to be counted as an IAG recipient, the student must:

- Have been enrolled at least half-time for at least one complete term during the 2020-21 Academic Year (not including the summer term), or;
- Be currently enrolled at least half-time as of the date the IAG Certification Listing is completed and signed.

A student is considered to have “completed” a term if they remained enrolled at least half-time through the end of the term. This is true whether they began the term as a full-time or half-time student.

### a. Enrollment Status Cut-Off Date

In order to give PHEAA time to process the listings and to disburse the final payment to eligible institutions a May 1 “cut-off” date has been established. This means that if, at a later date, the institution should identify a grant recipient who was not included on the listing, that student cannot be counted.

### b. Full-Time vs. Half-Time Enrollment Status

Complete definitions of full-time and half-time enrollment may be found in the 2020-21 PA State Grant Program Handbook under Student Certification of Eligibility. Students who receive a full-time grant under the “Remedial” and “Final Year Student” exceptions are regarded as meeting the full-time enrollment requirement and may be included as eligible for purposes of the IAG Program.

**Note:** The 2020-21 PA State Grant Program Handbook can be found in the Document Library under PA State Grant.

A student who received a full-time grant for at least one term of the 2020-21 Academic Year and completed that term should be counted as eligible on the Certification Listing. These students will be counted as one full recipient, even if they received a half-time grant for another term.

### c. Verification of Half-Time Status

A student receiving a half-time grant should be counted as eligible on the Certification Listing as long as they complete one term with at least half-time status, as defined above. Students will be counted as one-half of a full recipient due to their half-time status. An asterisk appears before the Social Security Number of students who, according to PA State Grant records are eligible for half-time grants.

## B. Acceptable Categories of Attendance

The requirement that the PA State Grant recipient be physically in attendance at the institution which is receiving IAG funds was changed effective the 2011-12 Academic Year to include students who spent the academic year in a study abroad program or were only participating in non-classroom activity, such as online classes, an internship, or student teaching. These activities no longer disqualify PA State Grant recipients from being counted as IAG-eligible.

## III. Retention of Records & Program Review

In accordance with these Program Guidelines, all schools are required to retain all records necessary for the certification and disbursement of the IAG funds for at least 5 years from the date on which the institution completes the certification listing.

These records may be requested and examined as part of the Program Review process of PA State Grant and Special Programs by PHEAA. Findings in the program review of the IAG Program may result in refunds to PHEAA and/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 for the next academic year will be scheduled.

Below are examples of the most common IAG program findings:

- Student is not eligible for PA State Grant during the academic year for which the institution received the IAG funds
- Student withdrew and did not complete any terms at least half-time during the academic year
- Student was not enrolled at least half-time during the academic year
- Student was incorrectly reported as a full-time student

For additional details on the PA State Grant and Special Programs program review process, please review [PHEAA.org/Program-Review](https://www.pheaa.org/Program-Review).

# Appendix A

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IAG Program Calendar

# IAG Program Calendar

Date	Milestone
September 1	Eligibility Renewal Application is due to PHEAA.
September 15-30	The Advance Payment (typically 90% of the estimated per capita multiplied by the estimated full-time equivalent students served) is disbursed between the middle and end of September. The school should check its PageCenter mailbox for disbursement documentation.
October 15-30	The prior year Cancellation Refund Reports are run and placed in the school's PageCenter mailbox only if the school owes a refund. The refund is due 30 days from receipt of the accompanying memo.
November 1	The school is sent the Audit Report memo which includes the sample format. The Audit Report is due January 1.
November 15-30	Cancellation Refund for the prior program year (if applicable) is due to PHEAA.
January 1	Audit Report for the prior program year is due to PHEAA.
May 1	PHEAA generates the Certification Listing. The school should obtain the listing from PageCenter, review and identify students no longer eligible, and return the listing to PHEAA.
June 1	Certification Listing is due to PHEAA.
August 1	The school is sent the Annual Eligibility Renewal Application. The application is due September 1.
August 1-15	The Reconciliation Payment (if applicable) is disbursed. The school should check its PageCenter mailbox for disbursement documentation. If no payment is due to the school and a Reconciliation Refund is due to PHEAA instead, the refund is due within 30 days from receipt of the notification. Reconciliation Refund (if applicable) is due to PHEAA.
September 1-15	Reconciliation Refund (if applicable) is due to PHEAA.

# **Appendix B**



## **Program Regulations**

# Program Regulations

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The following sections of the Pennsylvania Code govern the IAG Program and can be found in Title 22, Chapter 121 of the PA Code.

## Subchapter G - Institutional Assistance Grants Program

Application of Existing Agency Regulations .....	PA Code - Section 121.121
Eligible Institutions .....	PA Code - Section 121.122
Determination of Institutional Assistance Grants.....	PA Code - Section 121.123
Participation Agreement.....	PA Code - Section 121.124
(Reserved) .....	PA Code - Section 121.125

# **Appendix C**

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**Institutional Assistance Grants (IAG) Program - Audit Report Format**

# Institutional Assistance Grants (IAG) Program - Audit Report Format

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Audit Reports must be submitted annually by each institution by January 1 following each fiscal year and should include the following:

- The opinion of the Independent Auditor should include statements confirming the following:
  - That “Institutional Assistance Grants Program funds were used in compliance with Pennsylvania Act No. 174 and the Agreement between the Pennsylvania Higher Education Assistance Agency and (Name of Institution), and, the institution has not used the funds for the construction, maintenance or operations of facilities primarily used for worship or any other sectarian or denominational activity, or as financial aid directly to students enrolled in programs designed to prepare students for the active ministry or clergy,”
  - That “the institution was not a recipient of a direct appropriation from the Commonwealth of Pennsylvania for the fiscal year in question,” and;
  - That the institution has maintained its nonprofit status during the fiscal year in question.
- Contained within the body of the report should be a Schedule of Receipts and Expenditures, which should follow the format illustrated on the next page.

**Note:** Please refrain from sending the entire Financial Statement Audit Report from your institution.

It should be noted that IAG funds must be deposited into a separate bank account to prevent their commingling with other funds of the institution, and to provide for a clear audit trail of IAG receipts and expenditures, in accordance with the IAG Agreement. If no separate bank account is used, the institution must provide an explanation of measures taken to assure that IAG funds are tracked separately from other institutional funding.

Please also note that the IAG Program does not involve federal funds and therefore, a copy of the institution’s “A133” audit (an audit of all Federal funds received by the institution) will not fulfill this audit requirement. Likewise, a copy of the institution’s financial statements will not meet this requirement since they normally do not reflect the specific use of IAG funds.

Email or fax one copy of the Audit Report to:

**Email:** [iag@pheaa.org](mailto:iag@pheaa.org)

**Fax Number:** 717-720-3786

If you have any questions, you may contact PHEAA staff in PA State Grant and Special Programs at 800-443-0646, a private number reserved for the use of financial aid administrators.

# Institutional Assistance Grants (IAG) Program Receipts & Expenditures For the Year Ending

## RECEIPTS

Advanced Payment from PHEAA	\$
Reconciliation Payment from PHEAA	\$

<b>Total Receipts</b>	\$
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## EXPENDITURES FROM IAG FUNDS

### PERSONAL EXPENSES

#### SALARIES & BENEFITS

Professional	\$
Nonprofessional	\$

<b>Total Personal Expenses</b>	\$
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### OPERATING EXPENSES

#### ADMINISTRATIVE

Supplies	\$
Utilities	\$
Maintenance	\$
Equipment Rental	\$

Total Administrative	\$
----------------------	----

#### EDUCATIONAL

Supplies	\$
Utilities	\$
Maintenance	\$
Equipment Rental	\$

Total Educational	\$
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#### SERVICES

Student Services	\$
Security Services	\$
Leases & Debt Services	\$

Total Services	\$
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<b>Total Operating Expenses</b>	\$
---------------------------------	----

### FIXED ASSETS

Building & Real Estate	\$
Equipment & Machinery	\$
Furniture & Furnishings	\$

<b>Total Fixed Assets</b>	\$
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<b>Total Expenditures</b>	\$
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**Note:** If Total Receipts exceed Total Expenditures, the difference must be refunded to PHEAA.

# Appendix D



PageCenter Reports

# PageCenter Reports

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## Institution PageCenter Reports

The following are four IAG documents that are placed in the Grants application within an institution's PageCenter mailbox:

- **IAG Certification Listing (IAGCERT):** The IAG Certification Listing contains a list of students who appear to be IAG eligible or potentially eligible at participating institutions.
  - The IAG Certification Listing is accessed on PageCenter via the secure school portal at [PHEAA.org](https://www.pheaa.org).
  - An asterisk (\*) next to a student's name indicates that the student is considered to be a part-time student (at least 6 but less than 12 semester credits, or equivalent) for IAG purposes.
  - Institutions are required to review and return the Certification Listing each year. Listings are generated on May 1 and must be returned on or by June 1.
- **IAG Payment Document (FGXLT30):** The IAG Payment Document contains detailed information related to each disbursement (Advance/Reconciliation) and the estimated or actual FTEs used to determine the institution's award.
  - The IAG Payment Document is accessed on PageCenter via the secure school portal at [PHEAA.org](https://www.pheaa.org).
  - This document is routinely used by independent auditors when preparing the annual Audit Report.
- **IAG EFT Letter (FGXLT40):** The IAG EFT Letter contains the award amount, date, and bank where the Advance or Reconciliation Payment will be sent.
  - The IAG EFT Letter is accessed on PageCenter via the secure school portal at [PHEAA.org](https://www.pheaa.org).
  - This document is routinely used by independent auditors when preparing the annual Audit Report.
- **IAG Cancellation Report (GIAGCAN):** The IAG Cancellation Report lists any students with an eligibility change to their PA State Grant record which would cause a loss of IAG eligibility.
  - The IAG Payment Document is accessed on PageCenter via the secure school portal at [PHEAA.org](https://www.pheaa.org).
  - This report lists the student's SSN, name, reason for the award change, and the amount due PHEAA.
  - An asterisk (\*) next to the student's name indicates that the student is considered to be a part-time student (at least 6 but less than 12 semester credits, or equivalent) for IAG purposes.
  - Institutions are required to review and refund any students who no longer qualify as IAG eligible.

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).

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**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

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**Senate Republican Appointee**  
**Vacant**

## Pennsylvania Higher Education Assistance Agency

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