PHEAA Federal Work-Study Community Service Program
2022-23 Program Guidelines
## Summary of Changes

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Introduction

The PHEAA Federal Work-Study Community Service (FWS-CS) Program is administered by the Pennsylvania Higher Education Assistance Agency (PHEAA) as a component of the Commonwealth of Pennsylvania’s annual Matching Funds appropriation. FWS-CS funds are made available to eligible Pennsylvania postsecondary institutions that apply for and receive federal dollars through the Federal Work-Study (FWS) Program.

As a condition of FWS funds from the United States Department of Education (ED), institutions are required to spend at least seven percent of their FWS allocation to employ students in community service positions. The PHEAA-administered FWS-CS Program provides eligible institutions with funds to assist them in meeting their FWS community service requirement.

The 2022-23 Program Guidelines are designed to provide guidance for this program year. PHEAA will publish updates to this document if additional changes become necessary.

I. Institution Participation Requirements

A. Institution Eligibility

To be eligible to participate in the PHEAA-administered FWS-CS Program, an institution must:

- Be federally Title IV approved
- Be located in the Commonwealth of Pennsylvania
- Receive an FWS Program appropriation through ED
- Be approved for FWS-ON Program participation by PHEAA

New Institutions

New Institutions interested in participating must:

1. **Execute a PHEAA Master Program Participation Agreement (MPPA) and a Federal Work-Study On-Campus Program Schedule (Schedule)** the first year of participation. No FWS-CS funds can be disbursed by PHEAA until both the MPPA and Schedule have been executed. The MPPA and Schedule authorize the disbursement of FWS-CS funds and provide assurance that the institution will adhere to FWS-CS Program Guidelines. Questions regarding new or existing MPPA can be directed to matchingfunds@pheaa.org.

The MPPA and Schedule will be retained in PHEAA’s permanent files and renewal institutions will not be required to execute a new MPPA and Schedule each year, except in rare cases such as change in ownership. If there are any changes in status, such as a name change, a school is required to notify PHEAA by contacting sginstitutioneligibility@pheaa.org.
2. **Complete an Automated Clearing House (ACH) form** for electronic funds transfer. The PHEAA ACH Authorization Agreement can be requested by contacting PHEAA Financial Management at 717-720-2168 or via email at fmeftadmin@pheaa.org.

3. **Submit the Federal Work-Study Community Service Program Allocation Request form for approval by June 30** immediately prior to the academic year in which participation is to begin. New institutions may contact PHEAA staff at matchingfunds@pheaa.org to obtain this form or find it posted at PHEAA.org/FederalWorkStudy. The FWS-CS Allocation Request form is the institution’s official application for participation.

### Renewal Institutions

Renewal institutions (institutions that participated in 2021-22) must:

1. **Submit the Federal Work-Study Community Service Program Allocation Request form (MFJIW30) for approval by June 30**, which are available via PageCenter (see Program Participation Process).

2. **Submit a completed Federal Work-Study Community Service Program Year-End Report (MFGT150)** for the preceding academic year by August 1.

**NOTE:** Institutions no longer wishing to participate must notify PHEAA of their intent to withdraw in writing by sending an email to matchingfunds@pheaa.org. Withdrawing institutions are still required to submit the Year-End Report for the prior academic year.

### B. Program Participation Process

All institutions must have a signed and executed Remote Access Agreement (RAA) and Authoritative Source (AS) Form on file and are required to maintain access requests for their users. Questions regarding the RAA can be directed to SGSP_BPAMS_Processing@pheaa.org.

#### i. **Business Partner Access Management System**

Business Partner Access Management System (BPAMS) is the web interface designed to manage requests for access to PHEAA systems. With this application, business partners—their users, requesters, and their Authoritative Sources—can submit requests for access to PHEAA systems.

Once processed, the RAA and AS grant access to the School Portal (Alec℠), which includes several useful features.

- **PageCenter** is a secure report repository. Each institution will have its own mailbox within PageCenter through which all reports and listings will be delivered.

- **Document Library** is an online repository, storing and organizing documents such as program guidelines and memos.

- **MyFileGateway** is a web-based product that allows for the sharing and transferring of files between PHEAA and the institution through secure mailboxes. Users can upload to and download only from those mailboxes to which they have access.

For additional information on how to access and use PHEAA systems, visit PHEAA.org/SGSPResources. Specific documents can be found by clicking State Grant and Special Program Resources, then General SGSP Resources.
II. Program Administration & Funding

A. Program Dates

The FWS-CS Program will begin July 1 and will run through June 30 (e.g., July 1, 2022 – June 30, 2023). The program dates are aligned with the Commonwealth of Pennsylvania's fiscal year.

B. Institution Allocation

i. Determining Allocation Amount

PHEAA will determine the institution's FWS-CS allocation based on the following criteria:

- The Commonwealth's total Matching Funds appropriation
- PHEAA's total FWS-CS Program allocation
- The number of institutions participating in the FWS-CS Program
- The institution's FWS-CS Program net disbursement (total disbursements minus unused funds) for the previous year

As the administrator of the FWS-CS Program, PHEAA reserves the right to adjust the institution's FWS-CS allocation as it deems necessary. Failure to return the required reporting in a timely manner may result in forfeiture of allocated funds.

ii. Final Allocation Letter

Each participating institution will be sent its Federal Work-Study Community Service Final Allocation Letter via PageCenter (WORKSTDY application, PageSet MFJJ130) in September.

NOTE: Final FWS-CS allocations are contingent upon passage of the Commonwealth Budget.

C. Use of Program Funds

All FWS-CS funds disbursed by PHEAA to a participating institution must be used directly toward the funding of FWS awards to eligible students. No FWS-CS funds disbursed by PHEAA may go toward any administrative costs, transfer to the Federal Supplemental Educational Opportunity Grant (FSEOG) Program, or apply toward related expenses incurred by the institution during the administration of FWS.

D. Student Eligibility

Refer to ED's Federal Student Aid Handbook for more information concerning FWS employment eligibility.

E. Disbursement of Funds

Provided the institution has an executed MPPA with corresponding Schedule and has submitted a Federal Work-Study Community Service Program Allocation Request Form, the ACH Authorization Agreement ("A. Institution Eligibility" on Page 4), and has no outstanding program reports from previous years, PHEAA will disburse the institution's FWS-CS allocation on the following schedule:

- PHEAA will disburse 50 percent of the institution's FWS-CS allocation in September. PHEAA will continue to disburse FWS-CS funds on a monthly basis to any institution that submits these required items after the initial program disbursement in September.
PHEAA will disburse the remaining 50 percent of the institution’s FWS-CS allocation in January. If PHEAA has not yet disbursed the initial 50 percent of the institution’s FWS-CS allocation, PHEAA will disburse 100 percent of the allocation at this time, provided the institution has submitted the required items listed above.

**NOTE:** PHEAA will withhold disbursement of funds for all institutions that have not returned a complete copy of the required annual reporting (Allocation Request Form and Requirements and Year-End Reports) until all forms are returned.

All FWS-CS funds are disbursed via electronic fund transfer, which requires the institution to have an approved ACH on file with PHEAA (“A. Institution Eligibility” on Page 4). PHEAA reserves the right to hold disbursement to an institution that is closing or is on a restriction or oversight by ED for participating in any Title IV program. PHEAA also reserves the right to hold any disbursements to an institution if the accrediting agency suspends or cancels approval for the school. Any questions regarding withholding disbursements should be directed to PHEAA via email to matchingfunds@pheaa.org. PHEAA will exercise the right to determine the eligibility of the institution to receive funding in subsequent years.

PHEAA will withhold disbursement of funds for all institutions that have not returned a complete copy of the required annual reporting (Year-End Report and the Allocation Request Form) until both forms are returned.

**F. Institution Reporting: FWS-CS Year-End Report**

Institutions that receive an FWS-CS disbursement are required to complete and return a Federal Work-Study CS Year-End Report in order to receive an FWS-CS final allocation for the subsequent program year. This report will be provided via PageCenter (WORKSTDY application, PageSet MFJIQ70) to participating institutions in May and will require the institution to provide the following information:

- Number of students assisted by FWS-CS disbursements received from PHEAA during the program year
- Total FWS-CS funds provided to the institution by PHEAA that were used to assist students during the program year
- Unused FWS-CS allocation (total FWS-CS disbursements received from PHEAA minus total FWS-CS funds used by the institution to assist students during the program year)

The deadline to return the Federal Work-Study Community Service Year-End Report is August 1. Failure to submit the Year-End Report will result in a forfeiture of allocated funds for future program years and an administrative finding.

**G. Refund Information**

Participating institutions must refund any unused FWS-CS funds, as reported on the Year-End Report to PHEAA, by September 1. Future program year disbursements will be withheld until all unused funds reported on the Year-End Report are returned to PHEAA. PHEAA must be notified in writing of any additional unused funds to be refunded that are identified after the Year-End Report has been completed and returned.

Unused funds disbursed by PHEAA cannot be carried over from one program year to the next. Checks should be identified as “Matching Funds Community Service Program” and addressed to:

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

Contact PHEAA’s Financial Management division at 717-720-2168 for questions regarding ACH or wire transfers. In addition, send an email identifying the refund as “Matching Funds Community Service Program” to FMGrants@pheaa.org.
If your banking institution requires an address for ACH or wire transfers, you should use:

M&T Plaza
345 Main Street
Buffalo, NY 14203

H. Administrative Capability, Retention of Records & Program Review

All institutions must comply with all other administrative requirements promulgated by PHEAA. Institutions are expected to demonstrate administrative capability in regard to the program. Administrative capability includes maintaining an adequate number of staff, as well as ensuring proper internal training of staff managing the program. Resources that institutions can utilize as part of their internal training of new staff are available on PHEAA.org/training, as well as in the Document Library.

In accordance with these guidelines, all institutions are required to retain all records necessary for the certification of disbursement of the FWS-CS funds for at least 5 years from the date the institution submits the completed Year-End Report. 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 FWS-CS Program may result in refunds to PHEAA and 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 the applicable review will be scheduled for the next academic year.

Below are examples of Program Review findings for FWS-CS:

- Missing program reporting deadlines
- Mismatched program funds
- Failure to return unused funds by the deadline
Appendix A

PageCenter Reports
The following FWS-CS reports are placed in the institution's PageCenter mailbox:

- **FWS-CS Allocation Request Form** (PageSet MJIW30) – The Allocation Request Form is completed and submitted by institutions to request funds for the upcoming academic year. The report must be returned to PHEAA by June 30 directly preceding the academic year.

- **FWS-CS Final Allocation Letter** (PageSet MFJJ130) – The Allocation Letter is sent to institutions, usually in September, to notify officials of the amount of funds allocated to the FWS-CS Program at the institution.

- **FWS-CS Year-End Report** (PageSet MFJIQ70) – The Year-End Report is completed and submitted by institutions to verify the usage of the total FWS-CS disbursed funds for the academic year. Reports are generated to the institution's PageCenter mailbox in June and are due August 1.

- **SGSP Items Due to PHEAA Report** (PageSet LWT41LWT41R3) – The SGSP Items Due to PHEAA Report provides schools and employers with a list of outstanding rosters, reports, and refunds due to PHEAA across most PHEAA-administered programs. The report generates nightly when items are outstanding, using PageSet LWT41LWT41R3 in the institution's WORKSTUDY application folder.

- **SGSP Institutional Contacts Report** (PageSet LWR45LWR45R2) – The SGSP Institutional Contacts Report, available via the WORKSTUDY application within an institution's PageCenter mailbox, is designed to ensure that the delivery of important program communication is sent to the appropriate staff by providing a monthly list of the current institutional contacts on file for PHEAA-administered programs. So that the correct personnel at your institution can receive information needed to resolve operational and processing issues and find out about PHEAA-developed resources and events, it is critical that your institution regularly review the contacts listed and email the appropriate program inbox with any corrections and adjustments. Review subsequent reports to confirm that the updates were made. You may also contact PA State Grant & Special Programs staff for confirmation and additional details.
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 PA 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.

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Pennsylvania Higher Education Assistance Agency  
1200 North Seventh Street, Harrisburg, PA 17102-1444 • 1-800-692-7392

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