Pennsylvania State Grant Program Workshops

June-July 2022

Rolling with Enrollment: Part 2 of 2

2022-23 Academic Year and 2023 Summer Term
Housekeeping
PA State Grant & Special Programs (SGSP) staff welcome attendees, review the agenda, and explain how attendees should access event materials.

Presentation
Attendees receive an overview of the program policy as set forth by the 2022-23 PA State Grant Program Handbook.

Wrap-Up
PHEAA staff will issue reminders, provide additional resources, and share responses to questions posed during the session by attendees.

This content has been abridged and does not supersede current program policy. For complete guidance on program administration, please refer to the appropriate year PA State Grant Handbook.
Conclusion of our two-part series on reviewing and reporting PA State Grant student enrollment

- During this session, presenters will:
  - Highlight institutional reporting obligations surrounding several general eligibility requirements (e.g., incarcerated students, enrollment mode reporting, etc.)
  - Discuss how to calculate cost override thresholds and review the related requirements
  - Examine reporting requirements associated with student adds, drops, and withdrawals
Rolling with Enrollment: Part 1

Review Part 1 to learn about:

- Approved Program of Study
- Academic Credential & Admission Status
- PA State Grant Award Counters
- Enrollment Status
- Modular Enrollment
- Repeat, Incomplete, & Remedial Coursework
- Additional Enrollment Considerations

Visit PHEAA.org/SGSPResources to find prior presentation slides and a link to our webinar events and recordings.
**Enrollment Mode**

- Required reporting used to track the impact of online education
  - For 2022-23 student eligibility may be impacted at non headquartered and domiciled (Non-HQD) institutions

- Institutions must report on a **term-by-term basis** for all awarded students
  - Must match the student’s final enrollment used for eligibility determination
    - Includes all enrolled credits with the exception of:
      - Extra remedial credits during an exception term; and
      - Graduate courses that do not count toward the undergraduate credential
  - Reporting should be completed before reconciliation period begins
    - Re-reporting may be required as a student’s enrollment changes

*Example:* A student enrolled in 9 regular semester credits and 6 remedial semester credits who has a remedial exception reported should have an enrollment mode based upon 12 credits. The extra remedial credits during the exception term should not be included.
Enrollment Mode

- Report awarded students under one of the following:

  - **Enrollment Mode 1**
    - “100% classroom” (system default)
  
  - **Enrollment Mode 2**
    - “Up to 50% distance education”
  
  - **Enrollment Mode 3**
    - “Greater than 50%, but less than 100% distance education”
  
  - **Enrollment Mode 4**
    - “100% distance education”

- Refer to the instruction delivery guidance in Chapter 2 of the [2022-23 PA State Grant Handbook](#) for assistance with classifying classroom and online credits
  
  - Hybrid courses must be identified at the course registration or section level and contain the percentages of classroom and online hours
  
  - If classroom/online ratio cannot be verified, course is considered online (e.g., day-to-day attendance flexibility courses)
• Students reported as mode 3 or mode 4 will be subject to the Americans with Disabilities Act (ADA) accommodations if attending a Non-HQD school
  – ADA letter sent and students given 30 days to respond before award cancellation occurs
    • Monitor progress via student activity and <50% Attending Status Report
  – Non-HQD schools must submit a Special Request to retract mode 3 or mode 4 reporting
Different Educational Costs

• Postsecondary educational costs are the primary consideration when determining eligibility and calculating PA State Grant award amounts
  – **All** institutions required to submit tuition and fee charges annually during Costs on the Web (COTW) process

• Student award calculations should be evaluated against the actual costs, as listed in their institutional account
  – Charges may differ due to specialized enrollment (e.g., study abroad, combined day and evening classes, etc.), sponsoring costs, or tuition remission/waivers
  – Compare annual costs approved by PHEAA to actual student tuition and fee charges on a term-by-term basis
    • PHEAA-approved costs recorded on FG4B in OC/WebConnect
    • If student’s actual costs are at least 25% less than costs used by PHEAA, institutions **must** withhold crediting and report the reduced tuition and fees via a cost override
    • If actual tuition and fees are more than 25% greater than those reported during COTW, reporting is optional
### Different Educational Costs

**To calculate the cost override threshold:**

<table>
<thead>
<tr>
<th>Reported Tuition &amp; Fees for Full-time, Full-year Equivalent</th>
<th>Institution’s Schedule</th>
<th>Term Cost</th>
<th>Full-time Threshold*</th>
<th>Half-time Threshold*</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>Semester</td>
<td>X/2 = Y</td>
<td>Y*.75 = Z</td>
<td>Z/2</td>
</tr>
<tr>
<td></td>
<td>Quarter</td>
<td>X/3 = Y</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Term costs that are less than the threshold **must** be reported. Input the term amount into Partner Interface, as the PHEAA system will annualize the entered amount.

### Examples:

<table>
<thead>
<tr>
<th>Reported Tuition &amp; Fees for Full-time, Full-Year Equivalent</th>
<th>Institution’s Schedule</th>
<th>Term Cost</th>
<th>Full-time Threshold*</th>
<th>Part-time Threshold*</th>
</tr>
</thead>
<tbody>
<tr>
<td>$5,870</td>
<td>Semester</td>
<td>$2,935</td>
<td>$2,201</td>
<td>$1,100</td>
</tr>
<tr>
<td>$15,192</td>
<td>Quarter</td>
<td>$5,064</td>
<td>$3,798</td>
<td>$1,899</td>
</tr>
<tr>
<td>$24,890</td>
<td>Semester</td>
<td>$12,445</td>
<td>$9,333</td>
<td>$4,666</td>
</tr>
<tr>
<td>$36,596</td>
<td>Quarter</td>
<td>$12,198</td>
<td>$9,149</td>
<td>$4,574</td>
</tr>
<tr>
<td>$46,920</td>
<td>Semester</td>
<td>$23,460</td>
<td>$17,595</td>
<td>$8,797</td>
</tr>
<tr>
<td>$57,136</td>
<td>Quarter</td>
<td>$19,045</td>
<td>$14,283</td>
<td>$7,142</td>
</tr>
</tbody>
</table>

*Term costs that are less than the threshold must be reported.
• Tuition and fee threshold displays in Partner Interface based on institutional, program, and/or year charges
• Report actual term costs, not annual costs
• Do not include cents or round figures up or down
• If actual costs charged to the student are still above the college cap, then do not report
• Do not include excluded fees when submitting cost adjustments
  – Annual list of excluded fees available in the [2022-23 Institutional Cost Policies & Instructions](#) document

**Different Educational Costs**

Conduct all other eligibility tests (e.g., enrollment status, program of study, etc.)

Withhold crediting until all other changes have been processed by PHEAA

Report reduced tuition and fees via Cost Override feature in Partner Interface
## Sample of Additional Eligibility Checks

<table>
<thead>
<tr>
<th>Check</th>
<th>If</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the student’s name and Social Security number match the information in the PA State Grant record?</td>
<td>If no, do not proceed until the student’s identity is verified; Direct the student to contact PHEAA to correct the discrepancy</td>
</tr>
<tr>
<td>Is the student a citizen or eligible non-citizen?</td>
<td>If no, withhold crediting and notify PHEAA via Special Request</td>
</tr>
<tr>
<td>Has the student permanently resided in Pennsylvania for 12-months preceding their FAFSA application date?</td>
<td>If no, withhold crediting and notify PHEAA via Special Request (Reject D)</td>
</tr>
<tr>
<td>Does the student meet the high school graduation requirement as defined by PHEAA?</td>
<td>If no, withhold crediting and notify PHEAA via Special Request (Reject T)</td>
</tr>
<tr>
<td>Is the student currently in default on an educational loan and there is no evidence of this being identified and resolved in the PA State Grant record?</td>
<td>If yes, withhold crediting and notify PHEAA via Special Request (Reject U)</td>
</tr>
<tr>
<td>Is the student currently incarcerated?</td>
<td>If yes, withhold crediting and notify PHEAA via Special Request (Reject Q)</td>
</tr>
<tr>
<td>Has the student refused the PA State Grant?</td>
<td>If yes, retain signed documentation from the student and report to PHEAA or advise the student to contact PHEAA (Cancel R)</td>
</tr>
</tbody>
</table>

Appendix F features a recommended certification checklist that may be used in reviewing awarded students. References to relevant sections of the PA State Grant Handbook are included in the checklist.
A student’s term award may require a change (e.g., adjustment, cancellation, enrollment status or mode update) when the student initially enrolls but adds, drops, or withdraws from one or more courses prior to the end of the term.

Adjustments may:

– Occur at any point within the term
– Require the school to update a student’s enrollment or eligibility
– Impact when PA State Grant funds can be credited
– Require a refund back to PHEAA after disbursement has occurred
Adjusting for Adds & Drops

<table>
<thead>
<tr>
<th>Adds</th>
<th>Drops</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course(s) for which the student registers after the start of the term which will appear on the student’s transcript</td>
<td>Course(s) for which the student was registered but the course was removed from the student’s schedule and no attempted course credits exists or will exist</td>
</tr>
</tbody>
</table>

- Monitor and report changes due to added and dropped courses
  - Dropped courses do not count towards enrollment
  - Must be considered and adjusted even if award has already been credited
  - Enrollment mode changes must be reported even when eligibility is not impacted
  - May require re-evaluation of remedial exceptions
  - May establish eligibility or cause a loss of eligibility
    - Employ excess cash/netting principles if a refund becomes due to PHEAA
    - Credit newly awarded students in a timely manner
Adjusting for Withdrawals

Withdrawal = Student registers for a course(s), but it is later removed from their schedule and attempted credits will appear on the transcript

• Encompasses situations when a student: fully or partially withdraws, takes a leave of absence, passes away, is terminated/dismissed, or changes to a non-approved program of study

• Can occur at any point during the term (e.g., before add/drop deadline)

• Only apply withdrawal procedures when:
  1. PA State Grant awards are final (Commonwealth of PA budget is final), and
  2. Student was certified as eligible, and
  3. Award was disbursed to the school and previously credited to the student's account
Adjusting for Withdrawals

- Refund due back to PHEAA will depend upon the date of withdrawal and the school’s tuition refund policy

1. Determine the portion (%) of tuition refund

2. Check that the amount retained by the school does not exceed the percentage permitted under school’s tuition refund policy

3. Advise the student to pay when the amount retained is small

4. Report award adjustment amounts via Partner Interface (option under Update Record)

- If withdrawal occurs before term disbursement roster is received, student is not eligible
- Help avoid “double disbursements” by notifying PHEAA if funds have been credited and the student has withdrawn
**Adjusting for Withdrawals**

<table>
<thead>
<tr>
<th>Withdrawals to At Least Half-time</th>
<th>Withdrawal During Modular Enrollment</th>
<th>Unofficial Withdrawal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution may apply the withdrawal policy to the full-time award or report the student as half time</td>
<td>If enrolled in modules, a student’s award must be paid at the beginning of the final enrolled module</td>
<td>Investigate students with all “F” grades to determine whether grades were earned</td>
</tr>
<tr>
<td>School choice which option is applied</td>
<td>Final credit must be based on number of enrolled credits minus any withdrawn credits that occurred prior to crediting</td>
<td>If no last date of attendance/activity or student confirmed as “no show”, report as not enrolled</td>
</tr>
<tr>
<td>Option may be applied differently for each student</td>
<td>Apply Adjustment Steps once award has been credited if student withdraws from final enrolled module</td>
<td>If last date of attendance/activity, follow the Adjustment Steps</td>
</tr>
</tbody>
</table>
Scenario: Enrollment Adjustments & Reporting

- Jan, the FAA at PHEAA College of the Creative Arts, is reviewing enrollment and eligibility for the Fall 2022 semester when the term begins on August 18
- The tuition and fees submitted by the institution and approved by PHEAA total $23,220

<table>
<thead>
<tr>
<th>Student</th>
<th>Initial Enrollment/Eligibility</th>
<th>Enrollment Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charles</td>
<td>Enrolled full-time for the semester</td>
<td>Pursues a study abroad opportunity where the term charges are now $8,705</td>
</tr>
<tr>
<td>Mabel</td>
<td>Enrolled in 9 classroom/ 6 online credits</td>
<td>Drops 3 online/ 3 classroom credits</td>
</tr>
<tr>
<td>Oliver</td>
<td>Awarded and credited a $2,000 full-time Fall 2022 award</td>
<td>Withdrews at the end of the second week of classes and will receive a 75% tuition refund, per school policy</td>
</tr>
<tr>
<td>Tim</td>
<td>Enrolled in 6 classroom/ 6 online credits</td>
<td>In late November, adds another 3-credit online modular course</td>
</tr>
</tbody>
</table>

Questions:
- How does the enrollment change impact enrollment and/or eligibility for each student?
<table>
<thead>
<tr>
<th>Student</th>
<th>Initial Enrollment/Eligibility</th>
<th>Enrollment Change</th>
<th>Final Eligibility &amp; Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charles</td>
<td>Enrolled full-time for the semester</td>
<td>Pursues a study abroad opportunity where the term charges are now $8,705</td>
<td>Submit a cost override as term costs are now below the required reporting threshold $(23,220 ÷ 2) \times .75 = 8,707$</td>
</tr>
<tr>
<td>Mabel</td>
<td>Enrolled in 9 classroom/6 online credits</td>
<td>Drops 3 classroom/3 online credits</td>
<td>Update the enrollment status to half-time; Enrollment mode remains unchanged</td>
</tr>
<tr>
<td>Oliver</td>
<td>Awarded and credited a $2,000 full-time Fall 2022 award</td>
<td>Withdraws at the end of the second week of classes and will receive a 75% tuition refund, per school policy</td>
<td>Student retains 25% ($500) of the PA State Grant and the FAA should report the adjusted amount via Partner Interface</td>
</tr>
<tr>
<td>Tim</td>
<td>Enrolled in 6 classroom/6 online credits</td>
<td>In late November, adds another 3-credit online modular course</td>
<td>Update enrollment mode to mode 3. If attending an HQD school, there is no impact on eligibility. If attending a Non-HQD school, the award will be cancelled if ADA accommodations are not granted</td>
</tr>
</tbody>
</table>
Certifying Awards

• Certification means the institution has affirmed the student’s PA State Grant eligibility
  – PHEAA performs the initial eligibility assessment
  – Schools must review/test all enrollment and eligibility items as outlined in the PA State Grant Handbook
    • Updates should be reported to PHEAA in advance of the reconciliation period
    • Special Requests require manual review/processing by PHEAA staff
  – Do not certify or credit awards if the student does not appear to meet eligibility requirements
    • Review PageCenter reports or Partner Interface to determine if PHEAA has completed the review
  – Awards can be reinstated if eligibility is later established or confirmed
Reminders

• Submit Costs on the Web annually and by the communicated deadline
  – Late or unreported costs will yield processing holds and administrative findings
• Students under PHEAA review must submit any requested information by the reconsideration deadline
  – 2022-23 Academic Year = April 1, 2023
  – 2023 Summer Term = October 31, 2023
• Information available on PHEAA.org/StateGrant to assist students in understanding the enrollment and eligibility requirements
  – PA State Grant Program Manual and PA State Grant Policy Manual explain eligibility and award determination processes to students/families
Additional Reminders

• 2021-22 Academic Year and Summer Term awarding, disbursement, and reconciliation are underway
  – Complete reconciliation by the announced deadlines to avoid disbursement holds and program review findings

• 2022-23 PA State Grant awards finalized after passage of the Commonwealth budget
  – Maximum award projected to be $5,750

• Order the 2022-23 PA State Grant Handbook via PHEAA.org/Order-Online
  – Post-workshop Q&A released in the fall

• Keep institutional contacts up-to-date via Partner Interface
Join Us Next Time!

Visit [PHEAA.org/SGSPTraining](http://PHEAA.org/SGSPTraining) to sign up for our enhanced learning modules!

- **July 14, 2022**
  Your Students & The Progress They Make

- **July 21, 2022**
  The 3 R’s: Rosters, Reconciliation & Reviews

- **July 28, 2022**
  Getting Technical with PA State Grants
Resources

Connect With Us!

sghelp@pheaa.org

1.800.443.0646, Option 3, Option 1

PHEAA Sponsored Events & Other Financial Aid Events

PHEAA.org
Thank You!