Pennsylvania State Grant Program Workshops

June-July 2022

Your Students and the Progress They Make
This session will allow attendees to have a greater understanding of:

The steps of Academic Progress Reviews

How SAP reviews are influenced by:

- Repeat courses
- Remedial credits and exceptions
- Modular enrollment
- Other enrollment situations
What is Satisfactory Academic Progress?

• Each PA State Grant recipient must successfully complete the minimum number of credits (clock hours) appropriate to their enrollment status for each award year (fall, winter, spring and/or summer)
  – Full-time: at least 12 (semester) credits
  – Half-time: 6-11 (semester) credits

• Satisfactory Academic Progress evaluation is a look back at the last academic year when the student received a PA State Grant award
  – Compare the actual credits earned with the credits needed for awarding by enrollment status
  – GPA is not considered; instead, it is a pass/fail quantitative measure of earned credits
  – School’s institutional standards and federal standards do not apply
    • Do not reject students for SAP if they are not meeting major or program of study requirements
Academic Progress Review Steps

1. Select a Yearly Cycle

- Schools choose the order in which the year is reviewed
  - **Summer Header:** The summer term starts the academic year and all students reviewed after spring term
  - **Summer Trailer:** The fall term starts the academic year and all students reviewed after summer term

- Document the point at which PA State Grant Academic Progress is evaluated
  - Can be reviewed on FG3M via OC/Webconnect, and in Partner Interface soon

- Review must begin with the first awarded term
  - Exceptions exist for 10-year look-back and transfer students

<table>
<thead>
<tr>
<th>Yearly Cycle: Summer, Fall, Spring (Summer Header)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term</td>
</tr>
<tr>
<td>Credits Attempted</td>
</tr>
<tr>
<td>PA State Grant Awarded</td>
</tr>
<tr>
<td>Credits Earned</td>
</tr>
</tbody>
</table>

**Summary**
The progress check begins with the fall term. Summer credits are **NOT** used in the evaluation of progress. Student earned 21 credits (9+12) but needed 24 credits.
Academic Progress Review Steps

2. Determine Whether to Review

- A progress evaluation is required if the student was a PA State Grant recipient within the last 10 years
  - If the last award was received over 10 years prior, an evaluation is not needed
    - The 10-year period begins with Fall of the 2013-2014 Academic Year
  - Prior grant information provided on rosters, listings, and in Partner Interface

3. Gather Transcripts

- Verify credits successfully completed using official or unofficial transcripts
- Consider special enrollment situations (e.g., repeat work, remedial credits, etc.)
- Do not credit if unable to verify and document the number of credits earned
  - Incomplete grades cannot be considered until a grade has been earned
4. Check Academic Progress

- Verify award statuses for each term of the last award cycle and calculate total minimum credits needed
- Compare the student’s number of new credits earned to the number of credits needed to meet the enrollment requirement
- Reach out to prior institutions for assistance with interpreting transcripts
  - Transcripts used for SAP evaluations can be official or unofficial

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Award Counter</th>
<th>Minimum Student Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-Time Semester Award</td>
<td>.50</td>
<td>12 semester credits</td>
</tr>
<tr>
<td>Full-Time Quarter Award</td>
<td>.33 or .34</td>
<td>12 quarter or 8 semester credits</td>
</tr>
<tr>
<td>Half-Time Semester Award</td>
<td>.25</td>
<td>6 semester credits</td>
</tr>
<tr>
<td>Half-Time Quarter Award</td>
<td>.16 or .17</td>
<td>6 quarter or 4 semester credits</td>
</tr>
</tbody>
</table>
Do report students who do not make Academic Progress to PHEAA
- Reject P replaces award value
Do not cancel awards due to institutional progress standards if student meets the PA State Grant Academic Progress requirement
Do not reduce eligibility to half-time in order to satisfy Academic Progress
Academic Progress Review Steps

6. Re-check Progress

• Re-evaluate Reject P status on a term-by-term basis
• Reinstate for the next term if deficient credits are earned
  – Students may have a variety of opportunities to make up deficient credits (e.g., intersession enrollment, summer enrollment, grade adjustments, etc.)

7. Report Changes

• Cancel or reinstate awards as appropriate
  – Can be approached differently between students within institutional discretion
    • If previously canceled the entire year, reinstate winter and spring if credits are made up after the fall
    • If previously canceled fall only, cancel winter and spring if deficient credits still exist after the fall
• Use Partner Interface for single or small groups of students
• Certification Transmissions can be used by participating schools for updates to large numbers of students
Academic Progress & Transfer Students

- Transfer students must be evaluated for Academic Progress
  - Use Last Award, Diff School (LADS) message on rosters to assist in locating transfer students that may require a closer look
- Timing for a transfer student’s first review depends on the review cycle and student’s first term at your school
- Special considerations (e.g., repeat courses, remedial courses, etc.) may impact final Academic Progress determination
  - Contact the prior school’s Financial Aid Office, if needed
- Credits successfully completed at the previous school:
  - Do not need to be transferable to your school in order to be included in the total
  - Must be earned at a PA State Grant approved or Federal Title IV eligible postsecondary institution
  - Must be converted if the previous school used different credit values or clock hours
- Reject awards for transfer students until either:
  - Transcript from previous school confirms that progress was made or
  - Student makes up the required number of deficient credits at your school
Academic Progress & Transfer Students

If the student’s first term at your school is:

**Fall**
- School must review Academic Progress in accordance with their normal cycle
  - **After Spring:** Summer credits will not be considered until after the next review cycle
  - **After Summer:** No impact on review cycle; review prior to fall award

**Winter/Spring**
- If no award in current year, check immediately (before crediting Winter/Spring award)
- If award in current academic year, school can choose to:
  - Check immediately (before crediting winter/spring award); **or**
  - Assume previous school conducted review before crediting fall award, and check with normal cycle

**Summer**
- Check immediately:
  - If your school normally checks after spring; **or**
  - If last year of aid was not in the previous award year
- Check after summer if:
  - Your school normally checks after summer; **or**
  - The last year of aid was during the prior award year
## Academic Progress & Transfer Students

If the student’s first term at your school is fall:

### Example 1

<table>
<thead>
<tr>
<th>School Cycle</th>
<th>Fall 2021</th>
<th>Spring 2022</th>
<th>Summer 2022</th>
<th>Fall 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student A</td>
<td>Summer Trailer</td>
<td>School A</td>
<td>School A</td>
<td>School A</td>
</tr>
<tr>
<td></td>
<td>School A</td>
<td>School A</td>
<td>School A</td>
<td>School B</td>
</tr>
</tbody>
</table>

**Action:** School must check Academic Progress before crediting the Fall 2022 award.

### Example 2

<table>
<thead>
<tr>
<th>School Cycle</th>
<th>Fall 2021</th>
<th>Spring 2022</th>
<th>Summer 2022</th>
<th>Fall 2022</th>
<th>Spring 2023</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student B</td>
<td>Summer Header</td>
<td>School A</td>
<td>School A</td>
<td>School A</td>
<td>School B</td>
</tr>
<tr>
<td></td>
<td>School B</td>
<td>School B</td>
<td>School B</td>
<td>School B</td>
<td>School B</td>
</tr>
</tbody>
</table>

**Action:** School must check Academic Progress after the Spring 2023 term and only include the Summer 2022, Fall 2022, and Spring 2023 terms in the review.
Academic Progress & Repeat Courses

• Repeat courses should be counted each time for enrollment status, but Academic Progress evaluations should only include new credits earned
  – If student fails the course, then repeats and passes, the credits earned for that course would be counted only once it’s passed
  – If student passes the course, but repeats it for a higher grade, it cannot be counted each time as credits earned for progress

Example:

Hunter is a Nursing student attending PHEAA College, a semester school that checks progress after the summer term. The school requires all nursing students to maintain an overall 3.0 GPA. During the Fall 2022 term, Hunter enrolls in 12 credits but earns 9 credits and a 2.75 GPA. During the spring, he enrolls in 15 credits which includes a repeat of the failed course from the fall term. Hunter finishes the Spring 2023 term with 15 credits and a 3.0 GPA. During the 2023 Summer term, Hunter elects to repeat two classes from the academic year so that he may increase his GPA. During the summer, Hunter receives a half time PA State Grant award, earns all 6 credits that are attempted, and increases his overall GPA to 3.0.

When the school performs the PA State Grant Satisfactory Academic Progress evaluation, Hunter will be a Reject P effective with the next awarded term. Hunter was required to earn 30 new credits but only earned 24. The repeated courses from the 2023 Summer term cannot be included in the progress evaluation.
Academic Progress & Remedial Credits & Exceptions

- PHEAA does not define remedial credits
  - Requirements may vary by school
  - Check with Registrar if unsure which courses are remedial
- Credits must be considered during PA State Grant Academic Progress review
  - Remedial credits can be used toward enrollment minimums only when an exception has been reported
  - If no remedial exception was reported, the credits cannot be used in the academic progress cycle
- Exceptions are only used when necessary
  - Not for students with sufficient regular credits
  - Not for students who are ineligible for PA State Grant awards
- Deadline for reporting remedial exceptions is the last day of attendance for the term
  - Cannot retroactively report to bypass Academic Progress issues

Remove remedial exceptions if an academic period is no longer eligible for PA State Grant awards.
Academic Progress & Enrollment at Other Schools

• Credits earned simultaneously at another institution that do not count toward the degree or credential for which the student is enrolled may not be counted toward Academic Progress
  – Home school is always responsible for SAP evaluation during two-school enrollment
• If a student is visiting during the summer term, verify when home school checks progress
  – If after Spring, gather needed information to check SAP before crediting summer award
  – If after Summer, provide information needed for home school to check SAP when student returns

• Study abroad students may have additional Academic Progress considerations
  – Consortium agreements detail the financial aid responsibilities of each institution who joins
  – If the study abroad agreement requires specific grades to be earned, grades below those requirements are failures for PA State Grant Academic Progress checks and cannot be counted
    • This differs from standard “pass/fail” guidance for SAP
    • Example: Student must earn a “C” or above, but transcript shows “D” grades
Academic Progress & Incomplete Grades

• Incomplete grades may not be considered as “credits earned”
  – Assumption is that student did not withdraw but is missing a component of coursework required to have a grade assigned

• If there are insufficient credits to pass Academic Progress test, re-evaluate incomplete coursework once the class is completed
  – Do not credit awards for students with incomplete Academic Progress reviews
    • May instead cancel and reinstate once grade is received and progress test confirms the student’s eligibility
  – Re-evaluation must occur prior to the reconsideration deadline and once the course is complete
**Academic Progress & Intersession Courses**

- Intersession courses **may** be an opportunity to make up credits.
- If the student received a prior award in the current cycle, intersession credits not needed to meet enrollment minimums for Fall or Spring may be included when evaluating Academic Progress.
  - Intersession credits taken before the first awarded term may be counted toward progress **only** if the credits were used to meet the minimum enrollment for the spring term.

<table>
<thead>
<tr>
<th>Term</th>
<th>Fall 2021</th>
<th>Intersession 2022</th>
<th>Spring 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Credits Attempted</strong></td>
<td>12 regular</td>
<td>3 regular</td>
<td>15 regular</td>
</tr>
<tr>
<td><strong>PA State Grant Award</strong></td>
<td>Full-Time</td>
<td>None</td>
<td>Full-Time</td>
</tr>
<tr>
<td><strong>Credits Earned</strong></td>
<td>6 regular</td>
<td>3 regular</td>
<td>15 regular</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Term</th>
<th>Fall 2021</th>
<th>Intersession 2022</th>
<th>Spring 2022</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Credits Attempted</strong></td>
<td>Not Enrolled</td>
<td>3 regular</td>
<td>12 regular</td>
</tr>
<tr>
<td><strong>PA State Grant Award</strong></td>
<td>None</td>
<td>None</td>
<td>Full-Time</td>
</tr>
<tr>
<td><strong>Credits Earned</strong></td>
<td>None</td>
<td>3 regular</td>
<td>9 regular</td>
</tr>
</tbody>
</table>

PHEAA – Providing affordable access to higher education. (Public Information)
**Academic Progress & Modular Courses**

- Modular enrollment may affect a student’s academic progress
  - Classes added or dropped later in the term from a modular schedule could allow a student to make up credits, or could have a negative effect if class is not passed
- **All** credits attempted must be compared to all **new** credits earned

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**Assumption: Semester school reviews progress after the summer term and there are no remedial credits.**

<table>
<thead>
<tr>
<th>Term</th>
<th>Enrolled Credits at Term Start</th>
<th>Award Status</th>
<th>Modular Classes Added /Dropped</th>
<th>Total Credits Attempted</th>
<th>Full Term Credits Earned</th>
<th>Progress issue?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2021</td>
<td>12</td>
<td>Full Time</td>
<td>3 credits added</td>
<td>15</td>
<td>9</td>
<td>Yes; 33 credits attempted, and 30 needed. Only 24 earned, school must cancel fall award.</td>
</tr>
<tr>
<td>Spring 2022</td>
<td>15</td>
<td>Full Time</td>
<td>3 credits dropped during drop/add</td>
<td>12</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Summer 2022</td>
<td>6</td>
<td>Half Time</td>
<td>None added or dropped</td>
<td>6</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>
Academic Progress & Withdrawals

• Includes students who: fully or partially withdraw, take a leave of absence, pass away, are terminated/dismissed, or have changed to a non-approved program of study
  – Unofficial withdrawal occurs when student fails to notify institution of enrollment termination

• Can affect evaluations of Satisfactory Academic Progress
  – Investigate students with all “F” grades to determine if grades were earned
  – Completed term = earned grades
  – If no last date of attendance can be determined and it can be confirmed student was a “no show,” report student as Not Enrolled

• Partial withdrawal can be beneficial to students in regard to Academic Progress
  – Reporting a student as half-time will allow a consideration of fewer credits
  – If students refuse the award completely, award counters are recalculated

• Withdrawal procedures cannot be applied to intersession-only enrollment
Scenario: Academic Progress

- Jesse attends PHEAA Institute of Design, a semester school that checks progress after spring

<table>
<thead>
<tr>
<th>Term</th>
<th>Credits Attempted</th>
<th>PA State Grant Award Counter</th>
<th>Remedial Exception Reported?</th>
<th>Credits Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer 2022</td>
<td>6 regular credits</td>
<td>.25 (Half-time)</td>
<td>No</td>
<td>6 regular credits</td>
</tr>
<tr>
<td>Fall 2022</td>
<td>12 regular &amp; 3 remedial credits</td>
<td>.50 (Full-Time)</td>
<td>No</td>
<td>12 regular credits</td>
</tr>
<tr>
<td>Intersession 2023</td>
<td>3 regular credits</td>
<td>N/A</td>
<td>No</td>
<td>3 regular credits</td>
</tr>
<tr>
<td>Spring 2023</td>
<td>9 regular credits &amp; 3 credits repeated from summer term</td>
<td>.50 (Full-Time)</td>
<td>No</td>
<td>9 regular &amp; 3 repeat credits</td>
</tr>
</tbody>
</table>

Questions:
- Should a remedial exception have been used for Fall 2022?
- What is the preferred method(s) for this school to report changes to student eligibility?
- Are the intersession credits considered for Academic Progress evaluation?
- When the FAA checks progress, will there be an issue for Jesse?
Scenario: Academic Progress

Answers:

- No. Remedial exceptions should only be reported when absolutely needed, and since Jesse already had enough regular credits for a full-time award, no exception was needed.

- Schools are required to use either transmissions or Partner Interface to report student changes and updates, including award cancellations for academic progress issues.

- Yes, since Jesse had a prior PA State Grant award during the current SAP cycle. Even though those intersession credits were not needed to meet enrollment minimums for other terms, they can be included for SAP evaluation.

- No. Jesse attempted 36 credits. 30 credits were needed for enrollment minimums, and 30 were earned.
Academic Progress Exception Form

- Students not making progress due to extenuating circumstances may complete an Exception Form for reconsideration
  - Available at PHEAA.org/forms
  - Exception approvals are granted on a term-by-term and case-by-case basis
  - An approved exception will give a student a “pass” for any credit deficiencies from the prior term
  - Academic Progress must be met for the excepted term

- To confirm if the Academic Progress exception was approved, review the student’s “Activity” tab in the school portal (Partner Interface)

- The PA State Grant Academic Progress Approvals, Denials, & Exceptions Report is available in PageCenter

Exceptions will not be granted for repeated failures due to ongoing medical conditions. Please advise students appropriately when they are making enrollment decisions.
• Count repeat credits only when earned as new credits
• Count remedial credits only if exception reported
• Report lack of progress in Partner Interface
• Check back with “Reject P” students
• Annual review cycle must be applied to all students at the same time
  – Exceptions for transfer students
    • If first semester is fall, evaluate progress using the same timeframe as all other students
    • If first semester is winter, spring, or summer, check first to see if aid was awarded during the previous year
• Instructions available for interpreting the *PA State Grant Academic Progress Approvals, Denials & Exceptions Report*
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 to be finalized following the 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!

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

Visit PHEAA.org/SGSPTraining to sign up for our enhanced learning modules!

July 28, 2022
Getting Technical with PA State Grants
Thank you!