### Summary of Changes

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution Guidelines Section II</td>
<td>Student Eligibility</td>
<td>Define Cost of Attendance as defined by the institution Directed Institutions to the SG Handbook for academic progress determination</td>
</tr>
</tbody>
</table>
| Institution Guidelines Section VI | Crediting                                        | • Updated title of section  
• Moved Final Crediting to make subsection C  
• Moved Enrollment Changes to make subsection E |
| Institution Guidelines Section VII.B | Disbursement Roster Processing                   | Added additional information regarding the certification of rosters                              |
| Institution Guidelines Section XI | Administrative Capability, Retention of Records & Program Review | • Updated section name  
• Added language regarding administrative capabilities                                           |
| Partner Guidelines Section VI.B  | Nominee List                                     | Provide late deadline for nominee submission                                                     |
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Introduction

The Pennsylvania Higher Education Assistance Agency (PHEAA) administers the PA Partnerships for Access to Higher Education (PATH) Program, which operates under the provisions of the Higher Education Scholarship Law, the act of January 25, 1966 (1965 P.L.1546, No.541), as amended December 20, 1989 (P.L.652, No.80). This legislation authorizes PHEAA to conduct a Matching Funds Program for the purpose of assisting Pennsylvania students attending an approved Pennsylvania institution of higher learning and distributing federal or other funds to be used as aid to students in meeting their cost of attendance. The Pennsylvania General Assembly authorizes the Matching Funds appropriation which supports four individual Matching Funds Programs. The PATH Program is an extension of the PHEAA Match Grant Program initiated for the 1989-90 Academic Year.

The PATH Program offers nonprofit, community-based Pennsylvania organizations or foundations the opportunity to leverage private donations and contributions as both a means and incentive to provide additional need-based educational grants to Pennsylvania residents. These scholarships have the potential to be matched by PHEAA on a dollar-for-dollar basis.

The 2022-23 Program Guidelines provide participating institutions with the requirements for participation and administration of PATH funds for this program year. PHEAA will publish updates to this document if additional changes become necessary.

Institution Guidelines

I. Institution Participation

A. Institution Eligibility

Institutions are eligible to receive PATH funds if they are located in Pennsylvania and are approved to participate in the PA State Grant Program, per the 2022-23 PA State Grant Program Handbook found on PHEAA.org/SGSPResources (click “Pennsylvania State Grant Program”).

B. Institution Participation

i. ACH Authorization Agreement

PATH funds are disbursed to a participating institution via Electronic Funds Transfer (EFT), which requires the institution to have an approved PHEAA Automated Clearing House (ACH) Authorization Agreement on file.

The PHEAA ACH Authorization Agreement can be requested by contacting PHEAA Financial Management at 717-720-2168 or via email at fmeftadmin@pheaa.org.
**ii. 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.

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 SGSP_BPAMS_Processing@pheaa.org.

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

Once processed, the RAA and Authoritative Source grant access to the School Portal (Alec), which includes:

- **PageCenter** – 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** – Document Library is an online repository, storing and organizing documents such as program guidelines and memos.
- **My File Gateway** – My File Gateway 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 from only those mailboxes to which they have access.

For additional information on how to access and use PHEAA systems, visit [PHEAA.org/SGSPResources](http://PHEAA.org/SGSPResources). Specific documents can be found by clicking “General SGSP Resources.”

**II. Student Eligibility**

To receive a PATH grant, the student must meet the following criteria:

- Be nominated by and receive an academic year scholarship from a participating PATH partner. Partner scholarship funds awarded for a summer term will not be matched by PHEAA. For a complete list of participating PATH partners, visit [PHEAA.org/PATHpartnerlist](http://PHEAA.org/PATHpartnerlist).
- Demonstrate financial need, defined as: Unmet need = Cost of Attendance (COA), as defined by the institution - Expected Family Contribution (EFC) - all other grants and scholarships.
- Meet the PA State Grant requirements, as documented in the current year PA State Grant Program Policy Manual, which include, but are not limited to:
  - Be a resident of Pennsylvania
  - Be a PA State Grant recipient for the term (fall, winter, or spring) in which PATH funds are received (there is no summer PATH Program)
  - Be enrolled:
    - As an undergraduate student, and;
    - On at least a half-time basis, and;
    - In a degree-seeking program of study at a PA State Grant-approved postsecondary institution located in Pennsylvania.
  - Maintain satisfactory academic progress, as outlined in the 2022-23 PA State Grant Handbook
  - Not be in default or pending default on any educational loan or owe a PA State Grant refund
  - Not be incarcerated, which is consistent with the guidelines associated with the PA State Grant Program
III. Award Determination Process

Potential PATH grant recipients are nominated by participating PATH partners, who provide PHEAA with a list of their nominees and their full academic year scholarship award amounts. PHEAA can only match partner scholarships that are disbursed directly from the partnering organization or foundation to the postsecondary institution. This means that funds must be sent directly from the approved partnering organization to the postsecondary institution and cashed by that institution.

PHEAA will match partner scholarships that are made payable to only the postsecondary institution, as well as partner scholarships that are made payable to both the institution and the student, as long as the funds are sent directly to the institution. Partners have been advised to only include the dollar amount of scholarship funds that they will be sending directly to the institution when they submit their nominees to PHEAA. Matching of tuition waivers or institutional scholarships provided by the nominee’s postsecondary institution is prohibited. Partners providing payment directly to students is also prohibited.

PHEAA staff will verify that the nominee has a PA State Grant for each of the terms for which the nominee would receive PATH funds.

If funding is not sufficient to provide all eligible partner nominees with a PATH grant, awards will be given to those students with the most need.

IV. Maximum & Minimum Awards

The PATH grants are initially determined by PHEAA, who establishes total academic year awards using the lesser of the following:

- Total academic year partner award
- Total academic year PA State Grant award
- Maximum PATH award of $3,500 for the 2022-23 Academic Year

<table>
<thead>
<tr>
<th>Example</th>
<th>Partner Award</th>
<th>PA State Grant</th>
<th>Actual PATH Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>$500</td>
<td>$5,750</td>
<td>$500</td>
</tr>
<tr>
<td>B</td>
<td>$5,000</td>
<td>$5,750</td>
<td>$3,500</td>
</tr>
<tr>
<td>C</td>
<td>$3,500</td>
<td>$2,875</td>
<td>$2,875</td>
</tr>
</tbody>
</table>

The total academic year award determined for PATH is divided per term. The minimum amount a recipient can receive for the year is $200.

If a student receives a partial year PA State Grant award (i.e., only an award in the fall, winter, or spring), the recipient is only eligible to receive a partial year PATH grant (i.e., only an award in the same term that the PA State Grant funds were received). If the partial award amount is below $200, the student is not eligible to receive the PATH grant.

Minimum and maximum amounts are subject to change based on available funding.

V. Certification Process

PATH grant nominees are provided to institutions on the Applicant Certification and Status Listing (ACSL) (‘Appendix C’ on Page 28), which is made available via the PageCenter (Application: STEP, PageSet: FCFSXFV10) mailbox on a biweekly basis once partner allocation notifications are sent and PHEAA begins to
receive partner nominations. This typically occurs a few weeks after the Pennsylvania State Budget is passed. Institutions are required to certify PATH grant eligibility as a condition of disbursement. All pending students must be certified by July 1, 2023. PHEAA retains the right to cancel awards for any students who remain pending after this time. The ACSL provides student detail and summary information, as well as a certification page to be signed. Once completed, the report should be returned to PHEAA via fax at 717-720-3786. The recommended PATH grant provided by PHEAA on the ACSL has no official standing and is considered an estimate until an amount is provided and certified by the institution.

Institutions should not certify a student on the ACSL until acceptable notification (e.g., award letter) of the matching scholarship or grant is received by the institution. The PATH Scholarship List, which can be found in the Document Library, may aid institutions in identifying the corresponding scholarship. This list may be updated throughout the year as additional information is received from our PATH partners. Questions regarding funds received from a PATH partner but not tied to a scholarship on the list should be directed back to the partner.

**NOTE:** When certifying a record, you must circle Y or N for Program of Study, Academic Progress, and Unmet Cost/Need.

Specific data entry requirements for each of these items are as follows:

- **Graduation Date** – The date should be submitted in MMDDCCYY format. If the exact date of the student’s graduation cannot be determined, a reference to month and year is sufficient.

- **Approved Program of Study** – Eligible PATH grant recipients are required to be enrolled in a PA State Grant-approved, degree-seeking program of study for each term during which a PATH grant is received.

- **Academic Progress** – In order to receive a PATH grant, recipients are required to be making satisfactory academic progress as outlined in the 2022-23 PA State Grant Program Handbook.

- **Enrollment Status** – PATH grant recipients must be enrolled at least half-time (as defined by the 2022-23 PA State Grant Program Handbook) for each term PATH funds are received. The ACSL enrollment status field must be populated with one of the following numeric or alpha codes:
  - 1 – Full-time
  - 2 – At least half-time
  - C – Not enrolled
  - E – Less-than-half-time

- **Expected Family Contribution (EFC)** – EFC is provided to institutions for verification and may differ from the calculation used to determine unmet need.

- **Unmet Cost/Need** – This indicates the student has unmet need after all other grants and scholarships have been awarded. The formula to determine unmet need is: Unmet need = Cost of Attendance (COA) - Expected Family Contribution (EFC) - all other grants and scholarships.

- **Certified Award Amount** – The PATH recipient is eligible to receive the award amount based on the minimum/maximum awards (see “IV. Maximum & Minimum Awards” on Page 7).

- **Signature and Date** – These are required to certify that all information provided on the ACSL is accurate.

**NOTE:** Once an ACSL has been certified and returned, the institution does not need to return subsequent ACSLs for the same academic year to PHEAA if there are no additional status changes needed (see “Appendix D” on Page 30).

PHEAA will designate students who have had changes since the last ACSL or who are new to the ACSL as outlined:

- A pound sign (#) next to the student’s name indicates that the student was not on the previous ACSL.
• An asterisk (*) next to the student's name indicates that there has been a status or award change from the previous ACSL.

While the PATH partner nomination submission deadline is September 30, new nominees can appear on an institution's ACSL during the spring term, once reallocation is completed.

VI. Crediting

A. Preliminary Crediting

Before the school receives a term's disbursement, the school may choose to post a preliminary credit to the student's account. This means the school is permitting a deferment of payment (or bill deduction) of a portion of the term's bill, based on notifications of PATH eligibility. This action is generally done prior to the beginning of the term and prior to the full certification of eligibility. The school may choose to defer the amount of the PATH award on a term-by-term basis if BOTH of the following have occurred:

• The school has received notification of PATH eligibility for the term in question at its institution. Acceptable notifications for preliminary crediting are the ACSL or PATH student award letter from PHEAA.
• School records indicate the student is or will be enrolled for the minimum credits commensurate with their award in an approved program of study for the term in question. Note that students at the minimum award levels may be ineligible for a half-time award. PHEAA requires the school to adjust the preliminary credit, if necessary, for the reprocessed award.

B. Preliminary Credit Removal

If PHEAA determines that a student with a previously announced award requires a reduction or cancellation and the term disbursement roster has not been generated, PHEAA will adjust the award. The term disbursement roster will then reflect the reduction or cancellation of the student's award. Schools that have applied a preliminary credit must remove it in whole or in part if:

• The student does not appear or appears with a reduced award on the term's disbursement roster; or
• Full certification after the term has begun reveals the student ineligible for any reason (e.g., no partner funds or the student is not enrolled); or
• The student's enrollment status has changed prior to the date of the term disbursement roster.

Example:

A student receives an award notice in October after the September fall disbursement roster is generated, and the school pays the student based on that notification. It is later determined that the student is ineligible for further disbursements; therefore, the school cannot allow a winter/spring term preliminary credit to stand. The fall credit was permissible, but if the student does not appear on the subsequent term's disbursement roster, other term preliminary credits must be removed.

C. Final Crediting

If the student does not meet all eligibility requirements as outlined in these program guidelines for the term being reviewed, the student's account should not be credited nor should a credit be allowed to stand. The ineligible reasons should be noted on the most recent ACSL or Disbursement Roster. If there is a questionable situation, funds should not be credited, and PATH staff should be contacted by sending an email to path@pheaa.org.

PATH partnering organizations and foundations are required to send their scholarship and grant funds that serve as the basis for the PATH match directly to the institutions. The institution may not finalize the PATH grant credit to the student's account prior to receipt of the PATH partner funds BUT may retain
those PATH funds for a period of 90 days. If the PATH partner funds are not received at the end of the 90-day period, the school is required to return the PATH funds to PHEAA.

PATH funds must be credited on a term-by-term basis. Final crediting of a student’s account indicates that the institution has met the following requirements:

- Performed all eligibility checks for the student as set forth in these Program Guidelines (including enrollment)
- Provided PHEAA with certification of the student's PATH grant eligibility for the terms

For auditing purposes, PATH funds must be identified as a credit on the student's account, ledger card, or auditable record. Crediting should include the date the funds were posted and the amount and term to which the funds were applied, and it should clearly identify the funds as a PATH grant. In addition, schools should maintain a record of when the partner's matching funds were received by keeping a copy of the check that was sent to the institution or the EFT deposit notification.

If the final credit to the student's account creates a credit balance, a refund may be made to the student.

**NOTE:** The date of the credited PATH funds should be updated to correspond with the final crediting of funds.

If the student loses PA State Grant eligibility after the PATH grant has been certified, the following guidelines should be followed:

- If the PATH funds were fully credited (the institution has received the PATH partner's matching funds) and disbursed to the student's account for the term the student lost PA State Grant eligibility, the PATH funds may remain as a credit to the student's account, but the PATH grant should be canceled for any remaining terms.
- If the PATH funds were not fully credited (the institution has not received the PATH partner’s matching funds) to the student's account for the term the student lost PA State Grant eligibility, the PATH funds must be returned to PHEAA, and the PATH grant canceled for any remaining terms if the student remains ineligible for a PA State Grant.

**NOTE:** If PHEAA has not disbursed the PATH funds for the term the student lost PA State Grant eligibility, the institution should notify PHEAA that the PATH grant should be canceled by returning the most recent ACSL indicating the change.

### D. Unique Enrollment Situations

#### i. Modules

Modules are defined in the Federal Student Aid Handbook as shorter nonstandard terms. Two or more consecutive modules may be combined and treated as a single, standard quarter or semester term.

Institutions that offer modular enrollment must consider the student's enrollment across all modules that comprise the term. PATH awards must be credited once the student meets the enrollment and eligibility requirements. Institutions are not required to wait until the student's final enrolled module begins to certify or credit an award.
### Examples

<table>
<thead>
<tr>
<th>Students Enrolled in Modules</th>
<th>Module 1–5 Weeks</th>
<th>Module 2–5 Weeks</th>
<th>Module 3–5 Weeks</th>
<th>PATH Award</th>
<th>School Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student A</strong></td>
<td>3 credits</td>
<td>3 credits</td>
<td>6 credits</td>
<td>$500</td>
<td>Certify/credit the PATH award after the start of Module 2 and report the student as enrolled half-time. Once Module 3 begins, update the student to full-time enrollment status</td>
</tr>
<tr>
<td><strong>Student B</strong></td>
<td>3 credits</td>
<td>No enrollment</td>
<td>6 credits</td>
<td>$500</td>
<td>Certify/credit the PATH award after the start of Module 3 and report the student as enrolled half-time</td>
</tr>
<tr>
<td><strong>Student C</strong></td>
<td>No enrollment</td>
<td>3 credits</td>
<td>No enrollment</td>
<td>N/A</td>
<td>Not eligible; report the student as enrolled less than half-time after Module 2 begins</td>
</tr>
</tbody>
</table>

**Assumptions:** School offers three 5-week modules to make a 15-week semester.

### ii. Continuous Enrollment

In certain situations, a student’s enrollment in an approved program of study does not fit within the traditional semester and quarter terms. In these cases, institutions must reach out to PHEAA at path@pheaa.org for a disbursement schedule.

### E. Enrollment Changes

Any changes in enrollment—such as a student increasing from half-time to full-time status, dropping to less-than-half-time status, or withdrawing from the institution—must be reported via the ACSL.

#### i. Add

The term “add” is used in these guidelines to describe a course or courses for which the student registers after the start of the term which will appear on the student’s transcript.

An example of add would be when a student adds courses in a module after the term award has been credited to the student’s account; then your school is required to re-review and possibly adjust enrollment status at the start of the final module.

#### ii. Withdraw or Withdrawal

The terms “withdraw” or “withdrawal” in these guidelines encompass situations when the student fully or partially withdraws; takes a leave of absence; changes from an approved to a non-approved
program of study; or is terminated, expelled, suspended, or dismissed. The withdrawal policy also applies to cases of a student’s death within the term.

This means that the student withdrew from a course or courses and the student will receive attempted credits that appear on the transcript and was charged by the school. The transcript will reflect that no credits were earned for such course or courses.

iii. Drop

The term “drop” is used to describe a course or courses for which the student was registered but where the course was removed from the student’s schedule and thus no attempted course exists or will exist on the transcript.

If the student withdraws or drops to less-than-half-time enrollment during a term prior to the final crediting of the account but a disbursement has occurred, a full refund of the PATH funds must be returned. If disbursement has not yet occurred, the change must be reported to PHEAA staff via an ACSL.

If the student withdraws or withdraws to less-than-half-time enrollment status during a term in which PATH funds have been disbursed and posted to the student’s account, a refund to PHEAA for all or a portion of the PATH grant may be required. The section on Award Adjustments for Adds, Drops, & Withdrawals in the 2022-23 PA State Grant Program Handbook provides additional details for drop and withdrawal, as well as additional details on how these adjustments should be calculated.

VII. Disbursement Process

A. Disbursement Schedules

PATH funds are disbursed on the following disbursement schedule:

- Fall term disbursements typically begin to run the third week of September.
- Winter term disbursements typically begin to run the second week of December. Winter disbursements will include any funds not disbursed for fall.
- Spring term disbursements typically begin to run the third week of January. Spring disbursements will include any funds not disbursed for fall or winter.

In cases where schools have continuous enrollment or terms of irregular length, disbursements are made on the schedule that coincides as closely as possible to the school’s calendar.

B. Disbursement Roster Processing

All PATH disbursement rosters are placed in the institution’s PageCenter mailbox (Application: STEP, PageSet: FCFSXFF40); notification regarding the disbursement is sent to the school via email. Schools can choose to be automatically notified through PageCenter when a roster has been placed in their PageCenter mailbox by emailing the following information to path@pheaa.org:

- Institution name and OE Code
- PageSet(s)
- College Group(CG) numbers of the persons to receive the notifications

The PATH Disbursement Roster will include all students that the institution has certified as eligible on the PATH ACSL. Once eligibility is certified and funds are credited to each recipient’s student account, one complete copy of the roster must be returned to PHEAA with the signed certification page. If there are no changes or adjustments to the roster, only the signed certification page, indicating that there were no changes to the roster, must be returned.
The PATH Disbursement Roster with the certification page or (if there are no changes) only the certification page should be returned to PHEAA via email (path@pheaa.org), My File Gateway, fax (717-720-3786), or mail (PA State Grant and Special Programs, PO Box 8157, Harrisburg, PA 17105-8157). PHEAA will accept electronic signatures. A document outlining how to create acceptable signatures is available upon request or at PHEAA.org. The institution is required to certify and return each PATH Disbursement Roster within 30 calendar days of receipt of the roster or within 30 days of the first day of the term, whichever is later.

Subsequent disbursements will be withheld until the certified PATH Disbursement Roster with the certification page or only the certification page (if there are no changes) is returned. Disbursement of 2022-23 funds will not occur until all refunds from the prior year have been returned.

If the student does not meet all eligibility requirements as outlined in these program guidelines for the term being reviewed, the student’s account should not be credited. The ineligible reasons should be noted on the ACSL or roster. If there is a questionable situation, PATH funds should not be credited, and PHEAA staff should be contacted.

C. Disbursement of Funds

Funds are only disbursed to institutions through ACH. These funds are deposited directly into the designated bank account of the school at which the student is enrolled; institutions are notified of the disbursement via email and should allow at least 21 business days for the transfer to occur. When funds are transferred from PHEAA to the school’s bank account, the entry description associated with the transfer is “PATH.” If the entry description does not appear when the funds are transferred to the school, the bank may have removed this information.

An EFT account can be established by contacting fmeftadmin@pheaa.org. If you wish to use an existing account (e.g., same account as the PA State Grant Program), indicate the account to which PATH funds should be transferred. If you wish PATH funds to go to a different account, request an ACH Form. Once the form is completed, fax it to the number at the bottom of the form or scan it and email it back to fmeftadmin@pheaa.org.

Any questions regarding disbursement should be directed to PHEAA via email at path@pheaa.org.

PHEAA reserves the right to hold disbursement to an institution that is closing or is on a restriction or oversight by the United States Department of Education (ED) for participation in any Title IV program. We also reserve the right to hold disbursements to an institution if the accrediting agency suspends or cancels approval for the school. Any questions regarding holding disbursement should be directed to PHEAA via email at path@pheaa.org. PHEAA will exercise this right to determine the eligibility of the institution or recipients to receive further funding.

VIII. Reconciliation Process

The annual Reconciliation Roster provides the school with a final opportunity to report ineligible students or changes to a student’s status. The reconciliation roster must indicate the student’s final status for the PATH Program, in accordance with the school’s records, and must be returned to PHEAA within 30 days of receipt. Subsequent disbursements will be withheld until the certified roster, certification page, or outstanding refunds are returned.

If the school determines that there are changes to a student’s eligibility status after reconciliation, the school should contact PATH staff to request another reconciliation roster.

IX. Refund Process

The student’s account must not be credited if, after complete review of the student’s status according to these guidelines, the student is not eligible for all or any portion of the PATH funds for the term being reviewed, or if the institution questions the student’s PATH eligibility for any reason.
If the PATH funds have been disbursed, the institution should indicate on the disbursement roster the reason that the student is ineligible, and the PATH funds must be returned to PHEAA within 60 days.

Refunds returned via ACH or wire transfer should be transferred to M&T Bank, PHEAA Operations with a brief description of the payment reason and identifying the funds as “PATH Grant Award.” An email should also be sent to FMGrants@pheaa.org.

All PATH refund payments being made by check should be addressed to PHEAA, P.O. Box 64849, Baltimore, MD 21264-4849.

**NOTE:** All refunds must include a reference to the program and program year. Failure to include this information delays processing of the refund and may result in your institution being placed on a disbursement hold.

### X. 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 student eligibility and disbursement of the PATH funds for at least 5 years from the date the institution completes certification of the reconciliation roster. 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 PATH 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 a follow-up program review for the next academic year will be scheduled.

Below are examples of the most common PATH Program findings:

- PATH award posted for student who did not receive a PA State Grant award
- Student is not a Pennsylvania resident
- PATH funds exceed the PA State Grant award
- PATH funds exceed the sponsoring organization funds
- School posts and retains PATH funds without receipt of the sponsoring organization funds
- PATH funds not properly identified on the account records
- Student is PATH eligible but not awarded
- The amount of PATH funds credited to the student account disagrees with the amount disbursed

For additional details on the PA State Grant and Special Programs Program Review process, visit PHEAA.org/Program-Review.
Partner Guidelines

I. Partner Participation

A. Eligibility Criteria

Organizations or foundations are potentially eligible to participate in the PATH Program if they meet the following criteria:

- Are a Pennsylvania nonprofit or public charity organization with a tax-exempt status under Section 501(c)(3) of the United States Internal Revenue Code
- Have provided scholarships to Pennsylvania residents for a minimum of 2 academic years
- Award scholarships to at least 15 Pennsylvania students (per academic year) attending a postsecondary institution in Pennsylvania
- Involvement in motivating, counseling, mentoring, or encouraging students to pursue higher education
- Conduct scholarship fundraising or methods of fundraising based on private sector contributions and donations
- Disburse scholarship funds directly to postsecondary institutions
- Render scholarship services to students in the community-at-large throughout the region, county, or city without requirement of affiliation or membership with the organization or foundation or enrollment in an associated postsecondary institution

Organizations or foundations are not eligible to participate in the PATH Program if they require scholarship recipients to attend specific postsecondary institutions.

Information on the PATH Program can be accessed on the partner website at PHEAA.org/PATHpartner.

B. Application

To determine eligibility, each new organization or foundation interested in participating in the PATH Program must submit an application by June 30 for the upcoming academic year in which they wish to participate.

The completion of a PHEAA PATH Program application does not guarantee acceptance in the program; it allows PHEAA to more accurately evaluate organization/foundation eligibility relative to participation.

Each organization or foundation is required to submit (including, but not limited to):

- An annual report
- Proof of federal tax-exempt status
- Any information that further describes its programs and services

C. Partner Participation

Once a foundation or organization is approved to participate in the PATH Program, the new partner will need to complete the following:

i. PATH Partner Agreement

Complete a one-time PATH Partner Agreement to be sent upon PATH Partner Application approval.
ii. 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.

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 SGSP_BPAMS_Processing@pheaa.org.

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

Once processed, the RAA and Authoritative Source Form grant access to PHEAA systems and the School Portal (Alec), which includes:

- **PageCenter** – PageCenter is a secure report repository. Each institution will have its own mailbox within PageCenter through which all reports and listings will be delivered from PHEAA.
- **Document Library** – Document Library is an online repository, storing and organizing documents such as program guidelines, student applications, and memos.
- **My File Gateway** – My File Gateway is a web-based product that allows for the sharing and transferring of files between PHEAA and the partner through secure mailboxes. Users can upload to and download from only 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 “General SGSP Resources.”

iii. Annual Reporting

**Scholarship List**

A list of scholarships or scholarship funds that your organization will administer for the upcoming academic year by September 1 via email at path@pheaa.org.

**Nominee Listing**

Submit an annual list of scholarship nominees that your organization has awarded for the upcoming academic year by September 30 via My File Gateway.

As administrator of the PATH Program, PHEAA reserves the right to discontinue the active participation of an approved organization or foundation if they fail to maintain the requirements as set forth in these guidelines. To be reconsidered for active status, the organization or foundation must submit a new application and be approved. A new Participation Agreement must be fully executed in advance of any PATH Program activity.

The organization or foundation (PATH Partner) has the option to discontinue active participation in the PATH Program. To become officially inactive, a participating PATH partner must notify PHEAA in writing. Upon becoming officially inactive, a PATH partner can be reconsidered for active status by submitting a new application and, if approved, executing a new Participation Agreement.

The organization must report all changes to PHEAA, including but not limited to name changes, location, change in ownership, and Employer Identification Number (EIN), by emailing path@pheaa.org.
II. Allocation Process

A PATH match allocation is the funding assigned by PHEAA to approved PATH partners for the purpose of leveraging individual PATH partner scholarships awarded to Commonwealth students for educational expenses.

The PATH Program is funded by an annual Matching Funds appropriation provided by the Pennsylvania General Assembly. The funds approved for the PATH Program are allocated among the approved PATH partners. The minimum allocation per partner is $5,000. The allocation of available funds to participating partners is based on (but not limited to):

- PHEAA receiving a Matching Funds appropriation through the Commonwealth budget process
- Approval of Matching Funds allocations by the PHEAA Board of Directors
- A review of prior year participation and fund utilization
- Number of PATH partners

These allocations are sent annually to the PATH partners through an allocation letter after the Commonwealth budget has been finalized. Allocations are emailed to PATH partners once the Pennsylvania State Budget passes, typically no later than mid-August. PATH funds are allocated to a PATH partner for use during an academic year; therefore, PHEAA can only match partner scholarships awarded during the academic year. Partner scholarship funds awarded during summer terms will not be matched.

III. Allocation Adjustments

To request an adjustment to a PATH allocation, a PATH partner must submit the request in writing to PHEAA staff, outlining the circumstances related to the requested allocation adjustment.

A PATH allocation may also be adjusted by PHEAA in accordance with the total eligible nomination award amount the partner provided through the matching process. PHEAA reviews partner fund utilization in January through a process called reallocation. The reallocation process removes unused partner funds and allocates those funds to partners that have unfunded nominees. PATH partners will be notified regarding allocation changes via email once the process is complete. No action is required from the PATH partner for reallocation.

IV. Minimum & Maximum PATH Grants

The PATH grant match will not exceed the total amount the PATH partner awards to the student. For the current academic year, the maximum PATH grant is $3,500 and the minimum is $200. These maximum and minimum amounts are subject to change at the discretion of PHEAA.

V. PATH Match of Institutional Funds

PHEAA can only match partner funds that are disbursed directly from the partnering organization or foundation to the institution. PHEAA will not match any funds disbursed directly to the student. PHEAA will match funds awarded co-payable in both the student's and the institution's names, as long as the funds are sent directly to the institution. Matching of tuition waivers or institutional scholarships provided by the nominee's postsecondary institution is prohibited.

Example:

A partner has entered into an agreement with a college or university to provide $1,000 in scholarship aid to a student. The partner provides a $500 scholarship, and the school will “match” the $500 partner scholarship by awarding the student a tuition waiver or an institutional scholarship for $500. PHEAA can only provide a match for the $500 partner scholarship. The partner should only include the portion of scholarship funds that they provided on the nominee list.
VI. Submitting Scholarship Lists & Nominations

Once PATH partners are notified of their annual allocations, each partner must submit a list of all scholarships the partner administers (Scholarship List) and a nomination list of potential PATH grant recipients.

A. Scholarship List

Annually, each PATH partner must provide PHEAA with a complete list of all scholarships funded, administered, awarded, and disbursed by that partner. Each partner’s Scholarship List must be received by PHEAA on or before September 1.

PHEAA compiles individual partner scholarship lists on a master PATH Partner Scholarship List and provides this list to schools for award certification purposes.

NOTE: Unverifiable scholarships cannot be matched by PHEAA and may be canceled by the postsecondary institution.

B. Nominee List

Annually, each PATH partner must also provide PHEAA with a complete list of PATH grant nominees and the amount of their full academic year (i.e., fall, winter, and spring) partner grant or scholarship award. This nominee listing should contain all nominees for the year regardless of the student’s PA State Grant status and must be received by PHEAA on or before September 30. Late nominations are accepted at the discretion of PHEAA and may not be accepted after March 1.

NOTE: Each PATH partner may only nominate students who were awarded funds directly by that partner. PATH partners may not submit nominations on behalf of outside organizations that award separate scholarships to students. A separate scholarship is one that is not funded, administered, awarded, and disbursed by the PATH-approved partner.

In order to keep all nominee information secure, PATH partners must use the nominee template (see “Appendix D” on Page 30). The template and allocation information is emailed to partners once the Commonwealth budget is passed. Once all nominees are entered on this template, the listing must be sent electronically through My File Gateway. In addition, any changes to the original nominee listing must be submitted using the My File Gateway process and nominee template; changes or additions to the nominee listings will not be accepted over the phone or via email.

The nominee list requires the student’s Social Security number (SSN), as it serves as the primary means of student identification. Accuracy is essential. Whenever PHEAA records indicate an SSN is different from that on the nominee list, the PATH partner must verify the correct SSN with the student and report such to PHEAA. Nominees listed without an SSN will not receive a PATH match.

NOTE: PATH partners must not alter the template formatting in any way. Altering the formatting will result in nominees not being picked up for a PATH match.

VII. Partner Correspondence

If partners send out any type of correspondence to their constituencies that references the PATH Program, includes potential or actual scholarship recipients, or provides a status or an amount of the PATH match, they are required to send a draft to PHEAA for review to ensure that PATH Program information is accurately...
reflected. PHEAA will not be held responsible for erroneous information provided to your PATH nominees or their families that was not reviewed and approved by PHEAA. Materials can be sent to path@pheaa.org.

VIII. Student Eligibility Requirements

A. Criteria

To receive a PATH grant, the student must meet the following criteria:

• Be nominated by and receive an academic year scholarship from a participating PATH partner (Partner scholarship funds awarded for a summer term will not be matched by PHEAA. For a complete list of participating PATH partners, visit PHEAA.org/PATHpartnerlist.)
• Demonstrate financial need, defined as: Unmet need = Cost of Attendance (COA), as defined by the institution - Expected Family Contribution (EFC) - all other grants and scholarships
• Meet the PA State Grant requirements, as documented in the current year PA State Grant Program Policy Manual, which include, but are not limited to:
  - Be a resident of Pennsylvania
  - Be a PA State Grant recipient for the term (fall, winter, or spring) in which PATH funds are received (There is no summer PATH Program.)
  - Be enrolled:
    • As an undergraduate student, and;
    • On at least a half-time basis, and;
    • In a degree-seeking program of study at a PA State Grant-approved postsecondary institution located in Pennsylvania.
  - Maintain satisfactory academic progress as outlined in the 2022-23 PA State Grant Handbook
  - Not be in default or pending default on any educational loan or owe a PA State Grant refund
  - Not be incarcerated, which is consistent with the guidelines associated with the PA State Grant Program

PHEAA encourages PATH partners to advise potential recipients of the PA State Grant award deadlines and that PATH grant eligibility is predicated on receiving a PA State Grant. Deadlines for the PA State Grant are below.

### PA State Grant Deadlines

<table>
<thead>
<tr>
<th>TERM</th>
<th>DEADLINE DATE</th>
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<tbody>
<tr>
<td>2021-22 PA State Grant Application Deadline</td>
<td>May 1, 2022</td>
</tr>
<tr>
<td>2021-22 First-Time Applicant Deadline*</td>
<td>August 1, 2022</td>
</tr>
<tr>
<td>2022-23 PA State Grant Application Deadline</td>
<td>May 1, 2023</td>
</tr>
</tbody>
</table>

NOTE: Applicants enrolling in a community college; a designated Pennsylvania Open-Admission institution; a business, trade, or technical school; a hospital school of nursing; or a 2-year program that is not transferable to another institution

NOTE: Students or parents calling PHEAA to inquire how they can receive a PATH grant are referred to a PATH partner in the region where the student attended high school.

B. Eligibility Based on Need

Once PHEAA staff receive the nomination list, the nominees will go through an evaluation process that will determine if the student is eligible to receive a PA State Grant and is attending a school in Pennsylvania. Students who meet these requirements will have their unmet need calculated as follows:
The formula associated with determining unmet need is:

- COA – EFC = Need
- Need – All other grants and scholarships = Unmet need

**Formula Definitions:**

- COA is determined by the institution and includes, but is not limited to, the following items: tuition, fees, books, supplies, room, and board.
- EFC (Expected Family Contribution) is an index of the family's ability to contribute to the student's education costs.

Nominees will then be processed in descending order based on the greatest unmet need and will be awarded an estimated PATH grant based on the maximum and minimum award amounts (see Section C. Award Amounts of the PA State Grant Program Policy Manual). If the total amount of nominations exceeds the partner's allocation, PHEAA staff will determine the number of recipients that will meet the partner's allocation. It is important to note that once a student is nominated, the institution will determine final eligibility (see “IX. PATH School Certification Process” on Page 20).

**C. Award Amounts**

The amount of the annual PATH grant is ultimately determined by the postsecondary institution and is the lesser of the following:

- Partner award
- PA State Grant award
- Maximum PATH award amount of $3,500
- Minimum PATH award amount of $200

**Examples**

<table>
<thead>
<tr>
<th>Student</th>
<th>Partner Award</th>
<th>PA State Grant</th>
<th>Actual PATH Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>$500</td>
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<td>$500</td>
</tr>
<tr>
<td>B</td>
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<tr>
<td>C</td>
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</table>

If a student receives a partial year PA State Grant award (i.e., only an award in the fall, winter, or spring) the recipient is only eligible to receive a partial year PATH grant (i.e., only an award in the same term that the PA State Grant funds were received). If a PA State Grant is canceled for any term, the school is required to return the PATH funds to PHEAA for that term. PHEAA will monitor the PATH partner allocations to determine if there is enough funding to award the next student on the nomination listing.

**IX. PATH School Certification Process**

Institutions are provided a listing of potential PATH grant recipients and their estimated PATH grants through an Applicant Certification and Status Listing (ACSL). This listing is used by institutions to certify student eligibility and adjust the estimated awards based on all other financial aid the nominees may have received. Once this listing has been certified by the institution, PATH funds are disbursed by PHEAA.

A Partner Award Applicant Status Listing (PageSet FCFSXG010) is also available biweekly for partners and is accessible on PageCenter via their PageCenter mailbox. This provides partners with a list of their nominees being processed by PHEAA and their status.
X. **PATH Grant Disbursements**

All payment of funds (both partner and PHEAA disbursements) must go directly to the institution which the PATH recipient is attending; no funds can be sent directly to the recipient. Once PHEAA disburses PATH funds to an institution, the institution may not release the funds to the student’s account until the PATH partner funds are received; institutions may retain the PATH grant funds for 90 days. If the PATH partner funds are not received by the end of the 90-day period, schools are required to return the PATH funds to PHEAA. Therefore, it is critical that PATH partners disburse their funds to the institutions as soon as possible to ensure that a student's account is settled and the student will not be prohibited from registering for the following term.
Appendix A

PageCenter Reports
PageCenter Instructions

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

Institution PageCenter Reports

The following are three PATH reports that are placed in the institution’s PageCenter mailbox:

- **Applicant Certification and Status Listing (ACSL)** - The ACSL provides certification data and award information for those students who have been nominated by a PATH partner and have been identified by PHEAA as potential recipients. The ACSL is placed in the PageCenter mailbox of the institution and will include those applicants who listed the institution as their first choice when filing the FAFSA®. The ACSL serves as the school’s certification roster and must be returned to PHEAA to complete the PATH certification process.
  - The most recent version of the ACSL is automatically placed on PageCenter biweekly (every other Tuesday). 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 ACSL.
    - An asterisk (*) next to the student’s name indicates that there has been a status or award change from the previous ACSL.
  - Once an ACSL has been certified and returned, the institution does not need to return subsequent ACSLs for the same academic year to PHEAA if there are no status changes needed.

- **PATH Disbursement Roster** – The Disbursement Roster provides detailed information related to each student the institution has certified as a PATH grant recipient. The roster will include the total of PATH funds students received for each term and the total amount that was disbursed to the school on the student’s behalf. If there is an error related to the student’s eligibility or disbursement, the institution is required to provide the correct information on the roster and return it to PHEAA along with the signed certification page.
  - The Disbursement Roster must be returned within 30 days of receipt; if there are no changes to the roster, the institution is only required to sign and return the certification page. Subsequent disbursements will be withheld until the certified roster and/or the certification page is returned.

- **PATH Reconciliation Roster** – The annual Reconciliation Roster 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 PATH in accordance with the school's records. The roster must be returned within 30 days of receipt; if there are no changes to the roster, the institution is only required to sign and return the certification page. Subsequent disbursements will be withheld until the roster certification page or outstanding refunds are returned.

  If the school determines that there are additional funds to be disbursed after reconciliation, the school should contact PATH staff to request another reconciliation roster.

- **Items Due PHEAA Report** – The Items Due 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, using PageSet LWT41LWT41R2 in the institution's Grants application folder.

- **SGSP Institutional Contacts Report** – The SGSP Institutional Contacts Report, available via multiple applications 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.
Partner PageCenter Reports

The following are two PATH reports that are placed in the partner’s PageCenter mailbox. Partner reports are for informational purposes only and require no follow-up action from the partner.

• **Partner Award Applicant Status Listing** – The Award Applicant Status Listing provides term status, award, and college information for all students who have been nominated by the PATH partner and have been identified by PHEAA as potential recipients. The Award Applicant Status Listing is placed in the PageCenter mailbox of the nominating partner.
  - The Award Applicant Status Listing is accessed on PageCenter
  - The most recent version of the Award Applicant Status Listing is automatically placed on PageCenter biweekly (every other Tuesday). 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 Award Applicant Status Listing.
    • An asterisk (*) next to the student's name indicates that there has been a status or award change from the previous Award Applicant Status Listing.

• **PATH Denials List** – The PATH Denials List provides a list of those students who have been nominated by the PATH partner but are not eligible to receive a PATH award.
  - The most recent version of the PATH Denials List is automatically placed on PageCenter biweekly (every other Tuesday).
  - Denial reasons include:
    • **Less Than Min Award** – The PATH nominee is not eligible because the PATH award would be less than the minimum award allowed per program policy.
    • **Max Allocation** – The PATH partner nominated more students than its allocation could support. The PATH nominee is not eligible because funds are not available.
    • **No PA State Grant Award** – The PATH nominee is not eligible to receive PATH funds due to not having a PA State Grant award.
    • **Out-of-State School** – The PATH nominee is not eligible because they attend a postsecondary institution outside of Pennsylvania.

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Appendix B

Applicant Certification & Status Listing
### Legend 1 – Applicant Certification & Status Listing (ACSL) Codes

# Indicates that the student was not on the previous ACSL
* Indicates that there has been a status or award change since the previous ACSL

**CODE DEFINITIONS (NOTE: Bolded codes/definitions are required fields.)**

1. Institution’s OE Code
2. Student’s Name
3. Student’s SSN
4. Expected/Actual student graduation date; in MMDDCCYY format; if the exact graduation day is unknown use the last day of the month
5. Provides specific fall, winter or spring term award status
   “Legend 1 – Applicant Certification & Status Listing (ACSL) Codes” on Page 26
6. If applicable, this field indicates the reason the student is ineligible (see Legend 2).
7. Student must be enrolled in an approved Federal Title IV certificate, diploma or degree program of study; enter “Y” if Yes, “N” if No
8. Student must maintain Title IV satisfactory academic progress; enter “Y” if yes, “N” if No (if student is a freshman enter “Y”)
9. This field will be pre-populated with information from the FAFSA/PA State Grant record; if incorrect, use the appropriate code “Legend 3 – Ineligible Reasons Codes” on Page 27
10. Indicates if the student has unmet cost; indicate with a “Y” for Yes and an “N” for No
11. Lists the student’s federal EFC
12. This award amount is system generated based on FAFSA enrollment information; students enrolled at least
13. The institution is required to enter the certified award amount in this field; maximum award amount for 2022-23 is $3,500
14. Once funds have been disbursed, the “Certified Amount” will be blank
15. Total Award Disbursed will reflect net disbursed, i.e., refunds are deducted from the total disbursed

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#### Applicant Information

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<tr>
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<th>(7) PROGRAM</th>
<th>(8) PROGRESS</th>
<th>(9) ENROLLMENT STATUS</th>
<th>(10) UNMET NEED/COST</th>
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| **RECIPIENT:** Ruth (2) | | |
| Student ID: 222-22-2222 | | |
| GRAD DATE: | | |

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<th>(6) INELIGIBLE REASONS</th>
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**TOTAL AWARD DISBURSED:** $1,500

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<th>(6) INELIGIBLE REASONS</th>
<th>(7) PROGRAM</th>
<th>(8) PROGRESS</th>
<th>(9) ENROLLMENT STATUS</th>
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**TOTAL AWARD DISBURSED:** $0
**Legend 2 – Award Status**

- **CERTIFIED**: School has certified the student’s eligibility
- **DISBURSED**: PATH funds have been disbursed to the institution of record for the specific term
- **INELIGIBLE**: Ineligible code will be listed ("Legend 3 – Ineligible Reasons Codes" on Page 27)
- **PENDING**: Awaiting school certification
- **REFUND DUE**: PATH funds need to be returned to PHEAA due to student ineligibility
- **REFUNDED**: PATH funds have been returned to PHEAA due to student ineligibility

**Legend 3 – Ineligible Reasons Codes**

The list below indicates all reasons a student may be ineligible for PATH; it is important to understand that not all reasons will appear on your ACSL.

- **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 PATH
- **07**: Student is not approved for a PA State Grant
- **09**: School is not an eligible PA State Grant postsecondary institution
- **12**: School is out-of-state
- **18**: Student is not enrolled
- **23**: Student's address does not comply with the Patriot Act
- **24**: Student is not enrolled in a PA State Grant-approved, associate, or bachelor's degree program of study
- **25**: Student did not make academic progress
- **26**: Student is enrolled less than half-time
- **27**: Award has been cancelled by the school
- **28**: Total award for the year is less than $200, which is the program minimum

**Legend 4 – 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 C

PATH Student Certification Best Practices
PATH Student Certification

Best Practices

The PATH Applicant Certification and Status Listing (ACSL) is a biweekly report generated to the STEP application of an institution's PageCenter mailbox. This report provides certification data and award information for those students who listed the institution as first choice when filing the FAFSA®; have been nominated by a PATH partner; and have been identified by PHEAA as potential recipients. As a prerequisite for disbursement, institutions must confirm eligibility and award amounts for students who are potentially eligible.

Best Practices

ACSLs are printed, completed, and returned via fax to 717-720-3786 by the institution to be manually processed by PHEAA staff. Incomplete or incorrect certification could delay or prevent funds transfer. Follow the best practices below to facilitate efficient student certification.

**Do**

- Work from the most recently generated ACSL
- Circle “Y” or “N” in these three fields:
  - Degree Program (degree, diploma, or certificate)
  - Academic Progress
  - Unmet Cost/Need
- Insert information in these fields:
  - Graduation Date
  - Certified Amount
- Correct Enrollment Status information
- Indicate “$0” in the Certified Amount field to cancel an award for the term
- Send one completed ACSL (signed and dated)
- Only send subsequent program year ACSLs 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 PATH Program Guidelines for field definitions, descriptions, and additional certification information
- Allow 7-10 business days for processing

**Don’t**

- Leave Blank fields for students who are being certified
  - Degree Program (Circle “Y” or “N”)
  - Unmet Cost/Need (Circle “Y” or “N”)
  - Academic Progress (Circle “Y” or “N”)
  - Certified Amount
  - Graduation Date
- Write an amount in the Unmet Need/Cost field (circle “Y” or “N” only)
- Certify if partner funds have not been received
- Write “partner funds not received” or “$0” if partner funds are expected (leave blank)
- Send ACSL pages with no changes
- Send duplicate ACSLs or duplicate information
- Certify for terms the student has not yet started

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Appendix D

PATH Nomination List Sample & Instructions
## PATH Nomination List Sample

<table>
<thead>
<tr>
<th>SSN</th>
<th>LAST NAME</th>
<th>FIRST NAME</th>
<th>ADDRESS</th>
<th>CITY</th>
<th>STATE</th>
<th>ZIP CODE</th>
<th>SCHOOL ATTENDING</th>
<th>PARTNER SCHOLARSHIP NAME</th>
<th>FULL PARTNER AWARD FOR 20-21</th>
<th>PARTNER CODE (501c3) ID</th>
<th>PROGRAM TYPE</th>
<th>PROGRAM YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>147258369</td>
<td>MOUSE</td>
<td>MICKEY</td>
<td>123 MAIN STREET</td>
<td>DISNEY WORLD</td>
<td>PA</td>
<td>18753</td>
<td>PHEAA UNIVERSITY</td>
<td>UNIVERSITY FONDATION</td>
<td>3000</td>
<td>125874369</td>
<td>PATH</td>
<td>2223</td>
</tr>
<tr>
<td>987526413</td>
<td>LANE</td>
<td>LOIS</td>
<td>4758 NORTH AVE</td>
<td>HARRISBURG</td>
<td>PA</td>
<td>153698</td>
<td>UNIVERSITY OF PHEAA</td>
<td>CHERRY TREE SCHOLARSHIP</td>
<td>500</td>
<td>25413697</td>
<td>PATH</td>
<td>2223</td>
</tr>
</tbody>
</table>

**NOTE:** Partner organizations must not alter formatting or insert formulas in the nomination spreadsheet; doing so will prevent nominees from being processed by the system and will not receive a PATH match.
Guidelines for My File Gateway PATH Nominee Template Posting

- SSNs are to be posted with no dashes (ex., 111223333).
- First name, last name, address, city (must be spelled out), state (can be abbreviated) must all be upper case. PO Boxes must have a street address.
- Zip codes with extensions, if available, are to be posted with no dashes (ex., 123456666).
- School attending must be upper case.
- Partner scholarship name must be upper case.
- Partner awards must be rounded to the nearest dollar and should not contain a dollar sign ($) or commas (,).
- The partner code must not contain any dashes.

If you have questions about using My File Gateway, contact PA State Grant and Special Programs staff at 1-800-443-0646, Option 3, Option 2, a private number reserved for the use of PATH partners, or by sending an email to path@pheaa.org.
Appendix E

PATH Partners
### Central Partners

<table>
<thead>
<tr>
<th>Central Partners</th>
<th>Centre Partners</th>
<th>Degenstein Foundation</th>
</tr>
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<tbody>
<tr>
<td>Adams County Community Foundation</td>
<td>Centre County Community Foundation</td>
<td>Degenstein Foundation</td>
</tr>
<tr>
<td>25 S Fourth Street, Gettysburg, PA 17325</td>
<td>1377 Ridge Master Drive, State College, PA 16803</td>
<td>228 Arch Street, Sunbury, PA 17801</td>
</tr>
<tr>
<td>717-337-0060</td>
<td>814-237-6229</td>
<td>570-490-1410</td>
</tr>
<tr>
<td><a href="mailto:abievenour@adamscountycf.org">abievenour@adamscountycf.org</a></td>
<td><a href="mailto:lauren@centre-foundation.org">lauren@centre-foundation.org</a></td>
<td><a href="mailto:nunn@susqu.edu">nunn@susqu.edu</a></td>
</tr>
<tr>
<td></td>
<td></td>
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</tr>
<tr>
<td>Eastern York Dollars for Scholars</td>
<td>First Community Foundation of PA</td>
<td>Gettysburg Area Dollars for Scholars</td>
</tr>
<tr>
<td>PO Box 95, Wrightsville, PA 17368</td>
<td>201 W Fourth Street, Williamsport, PA 17701</td>
<td>PO Box 4339, Gettysburg, PA 17325</td>
</tr>
<tr>
<td>717-855-3361</td>
<td>570-321-1500</td>
<td>717-779-6280</td>
</tr>
<tr>
<td><a href="mailto:blkline96@gmail.com">blkline96@gmail.com</a></td>
<td><a href="mailto:bettyg@fcfpartnership.org">bettyg@fcfpartnership.org</a></td>
<td><a href="mailto:battleburg@gmail.com">battleburg@gmail.com</a></td>
</tr>
<tr>
<td></td>
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</tr>
<tr>
<td>Martin Luther King Scholarship Fund</td>
<td>PA State Resource Family Association</td>
<td>South East Dollars for Scholars</td>
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<tr>
<td>PO Box 6303, Lancaster, PA 17607</td>
<td>471 JPL Wick Drive, Harrisburg, PA 17111</td>
<td>377 Main Street, Fawn Grove, PA 17321</td>
</tr>
<tr>
<td>717-615-5607</td>
<td>800-951-5151</td>
<td>717-382-4843</td>
</tr>
<tr>
<td><a href="mailto:ahopkins71@comcast.net">ahopkins71@comcast.net</a></td>
<td><a href="mailto:dkinard@psrfa.org">dkinard@psrfa.org</a></td>
<td><a href="mailto:sedollarsforscholars@gmail.com">sedollarsforscholars@gmail.com</a></td>
</tr>
<tr>
<td></td>
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<tr>
<td>Southern York County School District Foundation</td>
<td>The Foundation for Enhancing Communities</td>
<td>The Lancaster County Community Foundation</td>
</tr>
<tr>
<td>PO Box 128, Glen Rock, PA 17327</td>
<td>200 N Third Street, 8th Floor Harrisburg, PA 17101</td>
<td>24 W King Street, Suite 201, Lancaster, PA 17603</td>
</tr>
<tr>
<td>717-235-4811</td>
<td>717-236-5040</td>
<td>717-397-1629</td>
</tr>
<tr>
<td><a href="mailto:susan.green@sycsd.org">susan.green@sycsd.org</a></td>
<td><a href="mailto:jdoyle@tfec.org">jdoyle@tfec.org</a></td>
<td><a href="mailto:afelex@lancfound.org">afelex@lancfound.org</a></td>
</tr>
<tr>
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<tr>
<td>Spring Grove Area Scholarship Fund</td>
<td>York City Dollars for Scholars</td>
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<tr>
<td>PO Box 66, Spring Grove, PA 17362</td>
<td>PO Box 2261, York, PA 17405</td>
<td>14 W Market Street, York, PA 17401</td>
</tr>
<tr>
<td>717-965-6378</td>
<td>717-424-1094</td>
<td>717-848-3733</td>
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<td><a href="mailto:springgrovescholarshipfund@gmail.com">springgrovescholarshipfund@gmail.com</a></td>
<td><a href="mailto:ycdfs1@gmail.com">ycdfs1@gmail.com</a></td>
<td><a href="mailto:LBoyce@yccf.org">LBoyce@yccf.org</a></td>
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<td><strong>Berks County Community Foundation</strong></td>
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<tr>
<td>237 Court Street</td>
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</tr>
<tr>
<td>Reading, PA 19601</td>
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</tr>
<tr>
<td>610-685-2223</td>
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<tr>
<td><a href="mailto:kims@bccf.org">kims@bccf.org</a></td>
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<tr>
<td><strong>Brighter Horizon Foundation</strong></td>
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<tr>
<td>739 Westview Street</td>
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<td></td>
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<tr>
<td>Philadelphia, PA 19119</td>
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</tr>
<tr>
<td>215-605-8397</td>
<td></td>
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</tr>
<tr>
<td><a href="mailto:yvette@brighterhorizonfoundation.org">yvette@brighterhorizonfoundation.org</a></td>
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<tr>
<td><strong>Chester County Community Foundation</strong></td>
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<td></td>
</tr>
<tr>
<td>West Chester, PA 19382</td>
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<tr>
<td>610-696-8211</td>
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<td><a href="mailto:grants@chescocf.org">grants@chescocf.org</a></td>
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<td><strong>Community Foundation of the Endless Mountains</strong></td>
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<tr>
<td>570-752-3930</td>
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<tr>
<td><a href="mailto:kharter@csgiving.org">kharter@csgiving.org</a></td>
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<tr>
<td><strong>Kids Chance of PA</strong></td>
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<tr>
<td>1231 Highland Avenue</td>
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<tr>
<td>Ft Washington, PA 19034</td>
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<td>215-302-3598</td>
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<td><a href="mailto:info@kidschanceofpa.org">info@kidschanceofpa.org</a></td>
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<tr>
<td><strong>Philadelphia Academies, Inc.</strong></td>
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<tr>
<td>1500 JFK Boulevard (2 Penn Center), Suite 312</td>
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<tr>
<td>Philadelphia, PA 19102</td>
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<td><strong>Philadelphia Futures</strong></td>
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<tr>
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<tr>
<td><strong>Police Athletic League of Philadelphia</strong></td>
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<td>Scranton, PA 18510</td>
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<tr>
<td><strong>The Community's Foundation</strong></td>
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<tr>
<td>900 W Sproul Road, Suite 101</td>
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</tr>
<tr>
<td>Springfield, PA 19064</td>
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<tr>
<td>610-461-6571</td>
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<tr>
<td><a href="mailto:info@tcfhelps.org">info@tcfhelps.org</a></td>
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<tr>
<td><strong>The Philadelphia Education Fund</strong></td>
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<td>Armstrong County Community Foundation</td>
<td>Bethlehem-Center Community Education Foundation</td>
<td>Bridge Builders Foundations</td>
</tr>
<tr>
<td>220 S Jefferson Street, Kittanning, PA 16201</td>
<td>1605 Morey Road, Fredericktown, PA 15333</td>
<td>206 Seneca Street, National Transit Building, 1st Floor, Oil City, PA 16301</td>
</tr>
<tr>
<td>724-548-5897</td>
<td>724-255-3939</td>
<td>814-677-8687</td>
</tr>
<tr>
<td><a href="mailto:samantha@servingtheheart.org">samantha@servingtheheart.org</a></td>
<td><a href="mailto:valcaprini@gmail.com">valcaprini@gmail.com</a></td>
<td><a href="mailto:lauren@bbcf.org">lauren@bbcf.org</a></td>
</tr>
<tr>
<td>Community Foundation for the Alleghenies</td>
<td>Community Foundation of Fayette County</td>
<td>Community Foundation of Greene County</td>
</tr>
<tr>
<td>Ameriserv Financial Building, 216 Franklin Street, Suite 400, Johnstown, PA 15901</td>
<td>5 S Mt Vernon Ave, Uniontown, PA 15401</td>
<td>PO Box 768, 108 E High Street, Waynesburg, PA 15370</td>
</tr>
<tr>
<td>724-437-8600</td>
<td>724-726-9553</td>
<td>724-981-5882</td>
</tr>
<tr>
<td><a href="mailto:rcouser@cffayettepa.org">rcouser@cffayettepa.org</a></td>
<td><a href="mailto:cfwc@westpa.net">cfwc@westpa.net</a></td>
<td><a href="mailto:dave.cfgcpa@gmail.com">dave.cfgcpa@gmail.com</a></td>
</tr>
<tr>
<td>Community Foundation of the Northern Alleghenies</td>
<td>Community Foundation of Warren County</td>
<td>Community Foundation of Western PA</td>
</tr>
<tr>
<td>PO Box 934, 32 S Street Marys Street, St. Marys, PA 15857</td>
<td>310 Second Avenue, Suite 1, Warren, PA 16365</td>
<td>PO Box 308, 7 W State Street, Suite 301, Sharon, PA 16146</td>
</tr>
<tr>
<td>814-834-2125</td>
<td>814-726-9553</td>
<td>724-981-5882</td>
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<tr>
<td><a href="mailto:eccf@elkcountyfoundation.org">eccf@elkcountyfoundation.org</a></td>
<td><a href="mailto:cfwc@westpa.net">cfwc@westpa.net</a></td>
<td><a href="mailto:linda@comm-foundation.org">linda@comm-foundation.org</a></td>
</tr>
<tr>
<td>Crawford Heritage Foundation</td>
<td>Erie Community Foundation</td>
<td>NEED</td>
</tr>
<tr>
<td>PO Box 933, 415 Chestnut Street, Meadville, PA 16335</td>
<td>459 W Sixth Street, Erie, PA 16507</td>
<td>The Law &amp; Finance Building 429, Fourth Avenue, 20th Floor, Pittsburgh, PA 15219</td>
</tr>
<tr>
<td>814-336-5206</td>
<td>814-454-0843</td>
<td>412-566-2760</td>
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<tr>
<td><a href="mailto:executive@crawfordheritage.org">executive@crawfordheritage.org</a></td>
<td><a href="mailto:mobrien@eriecommunityfoundation.org">mobrien@eriecommunityfoundation.org</a></td>
<td><a href="mailto:rbrooks@needld.org">rbrooks@needld.org</a></td>
</tr>
<tr>
<td>The Pittsburgh Foundation</td>
<td>The Pittsburgh Promise Foundation</td>
<td>Washington County Community Foundation</td>
</tr>
<tr>
<td>Five PPG Place, Suite 250, Pittsburgh, PA 15222</td>
<td>1901 Centre Avenue, Suite 204, Pittsburgh, PA 15219</td>
<td>PO Box 308, 1253 Route 519, Eighty Four, PA 15330</td>
</tr>
<tr>
<td>412-394-2649</td>
<td>412-745-2217</td>
<td>724-222-6330</td>
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<tr>
<td><a href="mailto:marinoj@pghfdn.org">marinoj@pghfdn.org</a></td>
<td><a href="mailto:sydney@pittsburghpromise.org">sydney@pittsburghpromise.org</a></td>
<td><a href="mailto:scholar@wccf.net">scholar@wccf.net</a></td>
</tr>
</tbody>
</table>
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 American Education Services (AES).

**Board of Directors**

<table>
<thead>
<tr>
<th>Representative Michael Peifer</th>
<th>Representative Mark Longietti</th>
<th>Eric Hagarty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chairman, Pike/Wayne</td>
<td>Mercer</td>
<td>Acting PA Secretary of Education</td>
</tr>
<tr>
<td>Senator Wayne D. Fontana</td>
<td>Representative Maureen E. Madden</td>
<td>Senate Democratic Appointee</td>
</tr>
<tr>
<td>Vice Chairman, Allegheny</td>
<td>Monroe</td>
<td>Vacant</td>
</tr>
<tr>
<td>Senator Ryan Aument</td>
<td>Representative Steven C. Mentzer</td>
<td>Senate Republican Appointee</td>
</tr>
<tr>
<td>Lancaster</td>
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<td>Vacant</td>
</tr>
<tr>
<td>Representative Mike Carroll</td>
<td>Representative Jennifer O’Mara</td>
<td>Governor Appointee</td>
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<tr>
<td>Lackawanna/Luzerne</td>
<td>Delaware</td>
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<tr>
<td>Representative Sheryl M. Delozier</td>
<td>Senator Kristin Phillips-Hill</td>
<td>Governor Appointee</td>
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<tr>
<td>Cumberland</td>
<td>York</td>
<td>Vacant</td>
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<tr>
<td>Senator Arthur Haywood</td>
<td>Senator Mario M. Scavello</td>
<td>Governor Appointee</td>
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<td>Montgomery/Philadelphia</td>
<td>Monroe/Northampton</td>
<td>Vacant</td>
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<tr>
<td>Senator Vincent J. Hughes</td>
<td>Representative Curtis G. Sonney</td>
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<tr>
<td>Montgomery/Philadelphia</td>
<td>Erie</td>
<td>Vacant</td>
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</tbody>
</table>

**Pennsylvania Higher Education Assistance Agency**

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