Pennsylvania Higher Education Assistance Agency
Summer Workshops

2023-24 Academic Year and 2024 Summer Term
June – July 2023

Updates Across PA State Grant
Agenda

1. **Housekeeping Items**
   PA State Grant & Special Program (SGSP) staff introduce themselves, review the agenda, and explain how to access event materials.

2. **Presentation**
   Attendees receive an overview of updates to the 2023-24 PA State Grant Program Handbook and related systems.

3. **Wrap Up**
   PHEAA staff will provide reminders, additional resources, and respond to questions from attendees.

*This content has been abridged and does not supersede current program policy. For complete guidance on program administration, please refer to the appropriate year PA State Grant Handbook.*
Summary of Updates

• Today’s session focuses on changed / clarified content and system updates
• 2023-24 Handbook available for online ordering at PHEAA.org
  – Cover to Cover presentation will be available at PHEAA.org/SGSPResources under PA State Grant
• Financial aid staff who are new to administering PA State Grant aid may watch for recorded sessions for additional in-depth coverage
Summary of Updates

• 2023-24 Handbook Changes
  – Clarification of examples and guidance throughout the Handbook
  – Several instances of new content
  – Operational changes due to system enhancements

• No updates to Chapter 5: Program Review in this year’s Handbook

• System enhancements
  – Rocket TE
  – Partner Interface
  – PageCenterX

Default policy updated to include Fresh Start guidance
Chapter 1:
School & Program
Eligibility
School & Program Eligibility Requirements

• **Administrative Capability** (Section I, Paragraph H)
  – PHEAA does not provide a recommendation to the number of staff needed
  – Financial Aid Offices should ensure adequate staffing, onboarding, and training to manage compliance with PHEAA programs
  – Resources for internal training are available at PHEAA.org/Training
  – Review Alec and PHEAA.org frequently for program and student updates

• **Modular Enrollment** (Section V, Paragraph B)
  – Courses not spanning the entire term length are considered modular
  – Modular courses can be overlapping or consecutive, but cannot have breaks longer than 3 weeks
  – Final crediting **must** be delayed until the student begins attendance in the final module
    • Schools may use preliminary crediting at their discretion
School & Program Eligibility Requirements

**Reporting New and Changed Programs at Business, Trade, and Technical (BTT) Schools** (Section III, Paragraph A, ii)
- Changes to previously approved programs or credentials awarded must be reported to sginstitutioneligibility@pheaa.org in accordance with established deadlines
  - Suspend processing if changes have already been made until review is complete
  - Processing and disbursement holds may be used to allow time for review

**Summer Terms: Year-round vs. Not Year-round** (Section V, Paragraph E)
- If an institution offers programs that are year-round in addition to programs that are not year-round, the summer term length definition must correspond to the structure of the program in which the student is enrolled
  - Not year-round = no less than 5 weeks
  - Year-round = adhere to term length definitions and tolerances outlined
Chapter 2:
Student Certification of Eligibility
Approved Program of Study

- Section I, Paragraph B (subsection iv) addresses handling for 2-year transferable programs at both 2- and 4-year institutions, community colleges, and BTT schools.
- Track counters used for students enrolled in two-year programs:
  - Submit a Special Request to cancel the award if a student is not pursuing a different 2-year degree or a 4-year degree and has exceeded a 2.0 counter.

<table>
<thead>
<tr>
<th>FAFSA Response</th>
<th>PHEAA Initial Assumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st or 2nd Bachelor’s Degree</td>
<td>Bachelor’s degree</td>
</tr>
<tr>
<td></td>
<td>College Transferable Program</td>
</tr>
<tr>
<td>Associate Degree (Occupational or Technical Program)</td>
<td>Two-year program at a 2-year or 4-year school</td>
</tr>
<tr>
<td>Associate Degree (General Education or Transfer Program)</td>
<td>College Transferable Program</td>
</tr>
<tr>
<td>Certificate or Diploma (Occupational, Technical, or Education program of less than 2 years)</td>
<td>Program of less than 2 years at a 2-year or 4-year school</td>
</tr>
<tr>
<td>Certificate or Diploma (Occupational, Technical, or Education Program of 2 or more years)</td>
<td>Two-year program at a 2-year or 4-year school</td>
</tr>
</tbody>
</table>
**Instruction Delivery**

**(Section II, Paragraph B, ii)**

- **Synchronous Learning**
  - Meets the definition of “classroom instruction”
  - Student and teacher are in the same physical location
    - Course Management Software (CMS) may add to the instruction but does not take the place of it
  - Two-way audio-visual technology (e.g., virtual meeting rooms, Teams or Zoom calls, live webinars, etc.) can be considered synchronous if:
    - Faculty and student are engaging in real time
    - Hours of instruction for the duration of the term are aligned with the number of credit hours for the course

- **Asynchronous Learning**
  - Instruction is not taking place in real time
  - Student and teacher are not together while instruction is taking place
  - Hybrid or Blended Classes
    - Determine what percentage of instruction is classroom vs. online
    - Published course descriptions must indicate percentage of classroom hours and online hours
  - Courses that are flexible or student-choice regarding percentage of asynchronous work must be considered 100% online

*If courses are not credit-bearing, do not include in enrollment mode calculations.*
Enrollment Mode Reporting

- All institutions are required to report enrollment mode on a term-by-term basis for all awarded students as part of the certification process—PHEAA defaults all records to mode 1
- Enrollment mode must match the student’s final enrollment used for eligibility determination
  - Must consider all credits/clock hours, including modular classes or intersession enrollment used for enrollment minimums
  - Partial credits cannot be rounded
    - Partial credits added within terms to determine enrollment status must be included in enrollment mode calculations
    - Hybrid classes may require consultation with other departments or instructors

<table>
<thead>
<tr>
<th>Structure of Student Enrollment</th>
<th>Enrollment Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>100% classroom</td>
<td>Mode 1</td>
</tr>
<tr>
<td>Up to 50% distance education</td>
<td>Mode 2</td>
</tr>
<tr>
<td>Greater than 50%, but less than 100% distance education</td>
<td>Mode 3</td>
</tr>
<tr>
<td>100% distance education</td>
<td>Mode 4</td>
</tr>
</tbody>
</table>
**Intersessions** can allow students to apply up to 5 credits to either the spring or fall terms to meet enrollment status requirements

- No more than 6 credits can be applied to PA State Grant eligible terms
  - Courses cannot be “split” between terms
- Intersessions **cannot** be used by schools with quarter schedules or BTT schools
- When used to determine eligibility, all credits from an intersession course must be considered in enrollment mode reporting and evaluation of costs
  - Intersession costs must be added to the regular term costs when determining if a cost override is needed

When working with **visiting students** “accept the grant” means “credit the PA State Grant”

- If school calendars do not align, all courses taken at non-home school must be assigned to a single term at the school where the student is seeking a degree
- After courses are assigned to that term, evaluate eligibility for a PA State Grant award
Refund Offsets

- If a student’s award is reduced to $0 due to a refund offset, that term should be considered a term of PA State Grant aid.

Credit Evaluators & Other Learning Platforms

- Credits must be earned at a PA State Grant-approved or federal Title IV-eligible postsecondary institution, and questions should be directed to sghelp@pheaa.org.

School Closures

- When a student cannot obtain a transcript due to the closure of their former school, they can contact PDE or ED to find out whether the school records are being held by another institution or ED.

Course numbers less than 100 are often considered remedial. Review the Institutional Catalog on the school’s website or reach out to the prior school and ask for assistance in determining the type of course that is listed on a transcript.
Incompletes & Retroactive Grade Changes

• Reevaluate students who are failing to meet PA State Grant academic progress standards due to incomplete or retroactive grade changes
  – Students who did not withdraw from the course but are missing a critical component of coursework required to be assigned a grade cannot be evaluated for academic progress
  – Incomplete grades may not be considered as credits passed for PA State Grant Academic Progress purposes

  - If credits are retroactively earned and posted to a prior term, grades may be reevaluated once updated on the transcript before the student’s April 1 (academic year) or October 31 (summer term) reconsideration deadline
  - If a student was determined to be ineligible due to lack of progress but subsequently departs from the school (e.g., is dismissed), the student should be updated to “not enrolled”
Transfers After the Summer Term (Students Starting in Fall)

- To summarize, the new school does not have to check for progress immediately upon transfer if **all of the following** apply:
  - The student is transferring in starting with the fall semester/quarter, **and**
  - Your school’s normal cycle is to check progress after spring, **and**
  - The student received a summer award at the previous school for the summer immediately preceding the fall for which the student transferred to your school

- The new school must check progress if the student did not have a summer award or if any of the above three points do not apply (e.g., if the student received their last award prior to Summer 2022, you must review the progress before you award Fall 2023)
Transfers After the Spring Term (Students Starting in Summer)

- For schools that normally check progress after the spring term, this does not impact their review cycle.
- Schools checking progress after the summer term may have an impact to their review cycle:
  - If the student received an award in the year immediately preceding the transfer, do not check progress until your normal progress review cycle occurs after summer.
    - By receiving this award, the student was cleared for that academic year payment and is eligible for the summer payment.
  - If the student did not receive an award immediately preceding the summer (which is the first term at your school), you must review progress immediately before crediting the summer award.
Additional Student Eligibility Items

Students in default on educational loans are not PA State Grant eligible

• In order to be eligible to receive a PA State Grant Award, students who have Federal student loans in default must:
  – Have paid the default in full or
  – Made six consecutive, voluntary, monthly payments of at least $50 prior to the start of the term for which aid is requested

• U. S. Department of Education (ED) announced the Fresh Start Program to give an alternative for those in default on federal student loans
  – Students who are determined eligible through the Fresh Start Program prior to the term start date provided by the school have satisfied the PA State Grant requirement
  – Students may need to provide the Fresh Start eligibility letter to PHEAA
Different Educational Costs

• PHEAA-approved costs are annualized when calculating PA State Grant eligibility
  – The PA State Grant Need Analysis calculation begins with full-year, full-time equivalent costs which are broken down based on term and enrollment
  • If PHEAA-approved tuition and fees for the summer term are annualized at $26,492, then the **summer term threshold** is calculated as:
    – $26,492 X .75 = 19,869/2 (semester school) = $9,934 (truncated, not rounded)

• Costs more than 25% less than the costs (tuition and allowable fees) reported during the cost collection process, a cost override is **required**
  • Failure to submit will result in a financial or administrative finding depending on amount
• When a student’s costs are greater than 25% higher than the costs reported, a cost override is **optional**
  – Failure to report will not result in an administrative finding

• Community Colleges in Pennsylvania must be sure that **students residing in non-sponsoring districts** are reported to PHEAA
  – Refer to the Student Identification/Address column on the roster to identify students who have already been reported to PHEAA as non-sponsoring

Cost overrides must be submitted via Partner Interface.
Chapter 3: PA State Grant Costs & Award Adjustments
## Evaluating Withdrawals in a Modular Term

<table>
<thead>
<tr>
<th>Student Action</th>
<th>Award Adjustment</th>
<th>Award Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total withdrawal</strong> from all credits in every module</td>
<td>Cancel “not enrolled”</td>
<td>None</td>
</tr>
<tr>
<td>Withdrawal from one or more modules which results in the student still <strong>maintaining full-time enrollment status</strong></td>
<td>Maintain full-time PA State Grant award</td>
<td>Pay full-time award at the beginning of the last enrolled module* in the term</td>
</tr>
<tr>
<td>Withdrawal from one or more modules which results in the student <strong>moving from full-time to half-time status</strong></td>
<td>Change to half-time enrollment</td>
<td>Pay half-time award at the beginning of the last enrolled module* in the term</td>
</tr>
<tr>
<td>Withdrawal from one or more modules which results in the student <strong>moving from either full-time or half-time to less-than-half-time status</strong></td>
<td>Change to less-than-half-time enrollment</td>
<td>None</td>
</tr>
</tbody>
</table>

* Enrollment in a module is confirmed when the student begins attendance in that modular class.
Chapter 4:

Disbursements & Cash Management
The institution has met the eligibility requirements for program participation during the payment periods included in the roster(s).

Student record updates have been submitted in accordance with PA State Grant policies and deadlines.

Roster processing procedures and deadlines were followed.

The institution has properly executed (Automated Clearinghouse) ACH agreements.

Program funds are not being retained beyond the reconciliation deadlines according to PA State Grant policy.

Institutional staff certify to a full understanding of the consequences for falsifying or misrepresenting information.

As indicated in Section IV, Paragraph A, only authorized representatives of the educational institution may certify the potential grant recipients on the roster.
Keeping a hard copy of the clean reconciliation roster is your school’s choice. Reconciliation rosters remain accessible in the PageCenterX report repository for the designated retention period.

- Certification of a pre-disbursement roster confirms that updates have been made as needed and that the roster has been “cleaned up”
  - Updates to enrollment information can still be made and will be reflected on future rosters
- Pre-disbursement rosters are generated on a term-by-term basis and must be returned before a disbursement can be made
  - Return the pre-disbursement roster even if the term has already ended
    - Failure to return a fall pre-disbursement roster will result in no disbursement of funds, even if the spring pre-disbursement roster has been returned
- Section III, Paragraph A and Section VII, Paragraphs D and E provide new examples and clarified requirements

Pre-Disbursement Rosters & Record Retention
General Updates
Rocket TE replaces OC/WebConnect to allow direct access to our mainframe for selected functions

- User guide is available at PHEAA.org/SGSPResources under the General section
  - Rocket TE can be accessed after logging into Alec, and will function in either Chrome or Edge browsers

- Most PA State Grant functionality has been moved to Partner Interface, however there are student data screens (e.g., the Student Record (FG59), the Student Need Display (FG6E), etc.) that are still accessed via Rocket TE

- Rocket TE allows for screen capture if data must be shared with others in same format as it is viewed
Partner Interface Enhancements

- Portal used for managing PA State Grant and PA Ready to Succeed Scholarship (RTSS) Program student and school records including roster certification
- Users can search for and update individual student records and eligibility, submit Special Requests, and more
- Recently added functionality replaces Rocket TE screens FG3M (State Grant specific school data), FG4B (school costs), and FG5O (school statistics)
- User guide is available at PHEAA.org/SGSPResources under PA State Grant
• Upgrade to PageCenter, with the following features:
  – Any browser can be used to access reports
  – Plugins are no longer required
  – Documents no longer need to be restored from Vault status
    • Version history is available
  – Users can now maintain their own subscriptions
• Access via Alec and the School Portal
• User guides available soon at PHEAA.org/SGSPResources
Modernization project to develop a premier solution that will enhance our approaches and administration of the 20+ financial aid programs that we administer.

GrantUs will:
- Streamline application processes for students and families
- Modernize award processing
- Centralize PHEAA systems used for program administration

All PHEAA-administered programs will be migrated into GrantUs using a phased implementation approach:
- First deployment targeted for early 2024

All project updates, announcements, and details are available on PHEAA.org/GrantUs.

Have a question about the GrantUs project? Please direct all questions to grantus@pheaa.org.

- Students and families are not aware of this project so please do not share project communications or details with these audiences.
Connect With Us!

Email at sghelp@pheaa.org

Phone at 1.800.443.0646, Option 3, Option 1

Attending PHEAA Sponsored Events & Other Financial Aid Events

Visiting PHEAA.org

Interact With Us on Social

PHEAA – Providing affordable access to higher education. (Public Information)
Join Us Next Time!

July 5, 2023
Assisting & Awarding Students

July 12, 2023
PA-TIP: Top To Bottom

July 19, 2023
Fostering Success in Higher Education

July 26, 2023
EAP Certification & Awarding

Visit PHEAA.org/SGSPTraining to sign up for our enhanced learning modules and revisit our recorded webinars at PHEAA.org/SGSPResources!
Thank You