PHEAA

State Grant & Special Programs Update

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Pennsylvania Higher Education Assistance Agency

2017-18 Appropriations

2017-2018 COMMONWEALTH APPROPRIATIONS
PHEAA OVERVIEW

Programs (in millions)	2016-2017 Budget	2017-2018 PHEAA Requested Budget	2017-2018 Governor's Recommendation	2017-2018 Approved Budget
Pennsylvania State Grant Program	$272.891	$352.029	$272.891	$273.391
Institutional Assistance Grants (IAG) Program	25.749	27.036	12.874	25.749
Matching Funds Program	12.496	13.121	12.496	12.496
Horace Mann Bond-Leslie Pinckney Hill Scholarship Program	.697	.697	.697	.697
Cheyney University Keystone Academy Program	1.813	3.500	1.813	1.813
Higher Education for the Disadvantaged (Act 101)	2.246	2.358	2.246	2.246
Higher Education for Blind or Deaf Students	.047	.049	.047	.047
Pennsylvania Internship Program Grants	.350	.350	.350	.350
Ready to Succeed Scholarships	5.000	5.000	5.000	5.000
TOTAL	$321.289	$404.140	$308.414	$321.789

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Award History

Average and Maximum State Grants to Pennsylvania College Students, 2007 to 2017
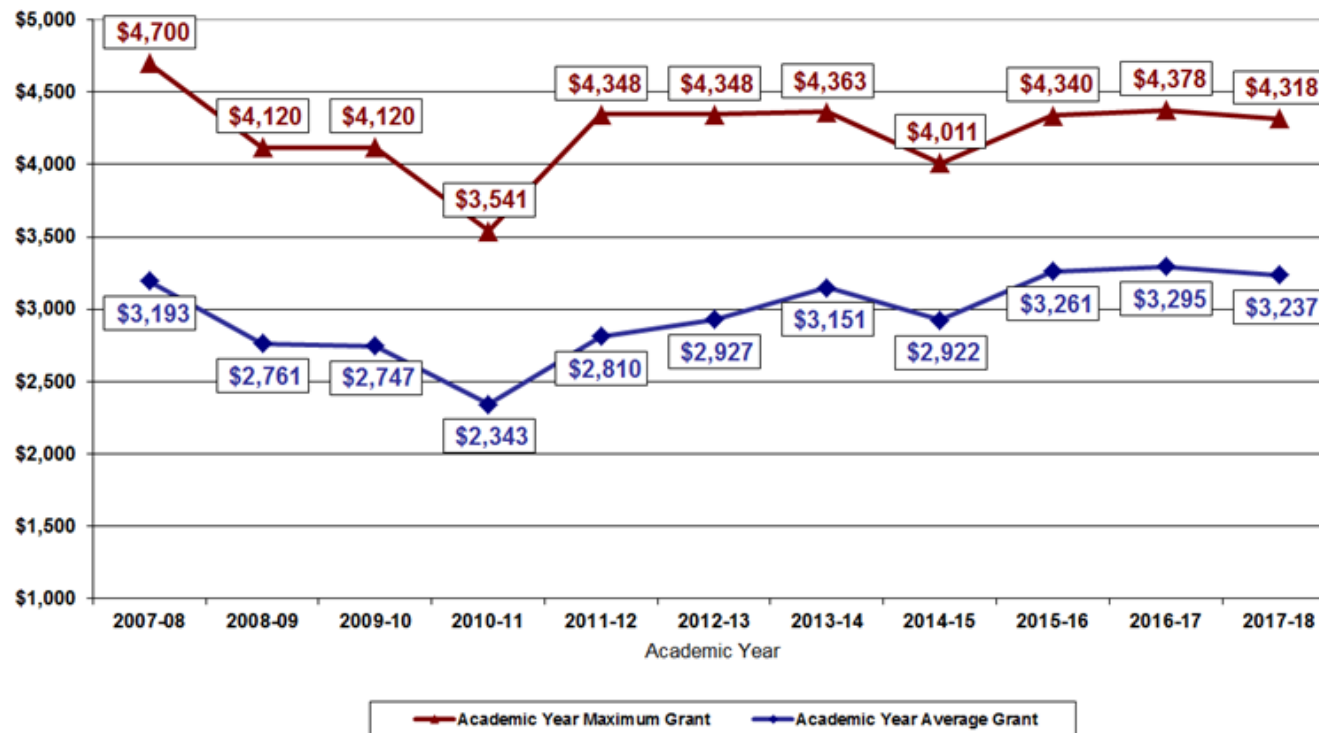
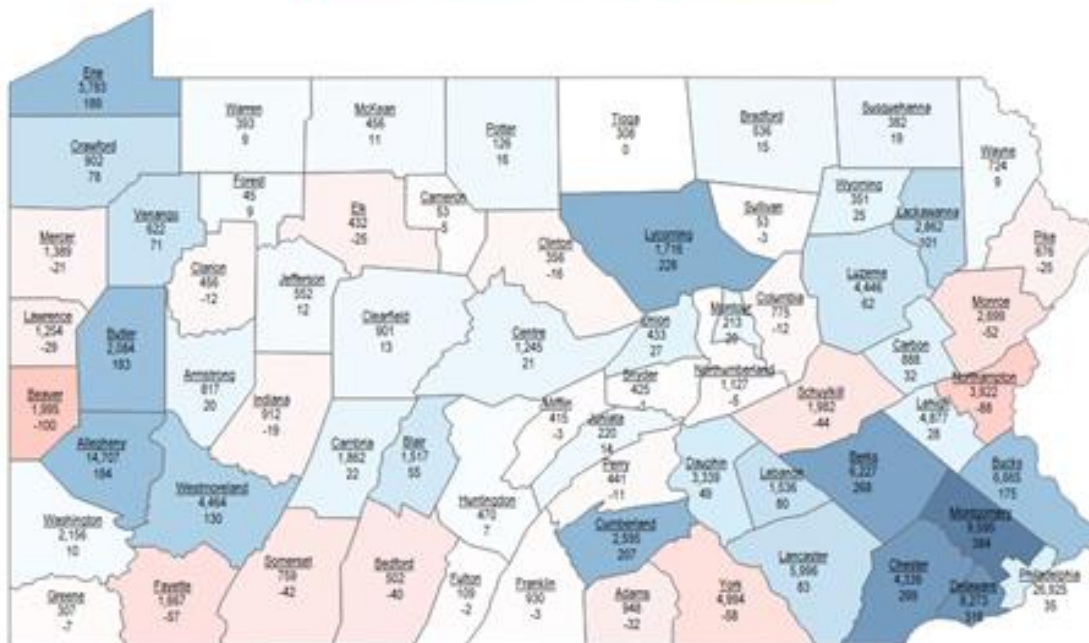# 2017-18 State Grant Awards

- Early FAFSA worked!
  - July Memo to Schools:
    - Fall and Winter term awards = Final
    - Spring awards = Tentative
  - Cancellations from Fall rosters
    - Tracking slightly ahead of prior year, but not a dramatic difference

Application History

Pennsylvania State Grant Recipients

The change in the number of State Grant recipients from 2016-17 to 2017-18, per County

This map represents each county's change in the number of State Grant recipients from 2016-17 to 2017-18, as of August 1, 2017. For each county, the first value represents the number of 2017-18 State Grant recipients and the second value represents the decrease or increase in the number of State Grant recipients from 2016-17. Overall, the number of State Grant recipients in Pennsylvania increased by 2,804 students or 1.78% from 2016-17 to 2017-18.

Application History

Pennsylvania Non-Renewal (First-Time) State Grant Recipients*

The change in the number of non-renewal State Grant recipients from 2016-17 to 2017-18, per County

Application History – 6-Month Data

FAFSA and State Grant Applications - Six-Month Statistics						
	2016-17 as of 7-1-2016		2017-18 as of 4-1-2017		Variance	
Sector	FAFSA	State Grant	FAFSA	State Grant	FAFSA	State Grant
Pennsylvania Independent Four-Year Colleges and Universities	114,645	92,292	86,222	71,038	-24.8%	-23.0%
Pennsylvania State System of Higher Education Universities	75,257	68,610	52,281	48,024	-30.5%	-30.0%
Pennsylvania State-Related Universities	87,264	78,587	67,805	61,645	-22.3%	-21.6%
Pennsylvania Independent Two-Year Colleges	7,938	7,637	3,661	3,512	-53.9%	-54.0%
Pennsylvania Community Colleges	83,838	81,184	53,805	51,889	-35.8%	-36.1%
Pennsylvania Hospital Schools of Nursing	2,166	1,904	1,321	1,144	-39.0%	-39.9%
Pennsylvania Postsecondary Business, Trade, and Technical Schools	23,533	22,602	14,004	13,467	-40.5%	-40.4%
Out-of-State Institutions	88,371	69,517	68,586	55,114	-22.4%	-20.7%
Unknown	8,503	6,658	5,554	4,256	-34.7%	-36.1%
Total All Institutions	491,515	428,991	353,239	310,089	-28.1%	-27.7%

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Application History
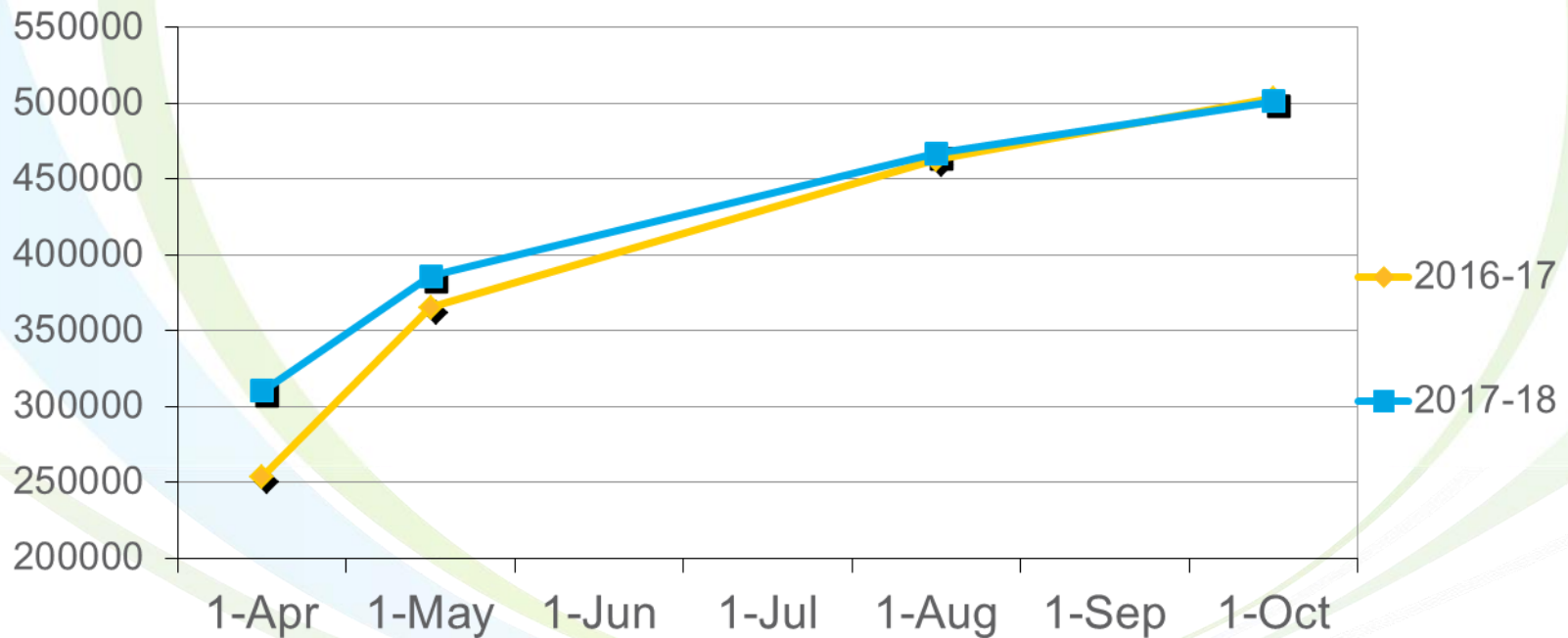
Application History

FAFSA and State Grant Applications 2016-17 vs. 2017-18 May 1 Deadline						
	FAFSA Applications			State Grant Applications		
	2016-17	2017-18	Variance	2016-17	2017-18	Variance
4-YR Private	103,536	109,333	5.60%	85,913	90,113	4.89%
PASSHE	66,062	67,323	1.91%	60,972	61,665	1.14%
State-Related	77,599	80,167	3.31%	70,648	72,600	2.76%
2-YR Private	4,889	4,240	-13.27%	4,708	4,050	-13.98%
Community College	65,016	71,817	10.46%	63,357	69,564	9.80%
Nursing	1,809	1,911	5.64%	1,616	1,662	2.85%
BTT	17,658	18,230	3.24%	17,039	17,557	3.04%
Out-of-State	71,634	80,474	12.34%	57,633	64,095	11.21%
Unknown	4,555	6,208	36.29%	3,364	4,716	40.19%
Total	412,758	439,703	6.53%	365,250	386,022	5.69%

FAFSA and State Grant Applications 2016-17 vs. 2017-18 as of October 1						
	FAFSA Applications			State Grant Applications		
	2016-17	2017-18	Variance	2016-17	2017-18	Variance
4-YR Private	130,052	132,064	1.55%	103,169	104,636	1.42%
PASSHE	82,703	82,288	-0.50%	74,570	73,885	-0.92%
State-Related	96,476	97,298	0.85%	86,182	86,746	0.65%
2-YR Private	7,080	5,847	-17.42%	6,776	5,585	-17.58%
Community College	112,472	111,842	-0.56%	108,927	107,961	-0.89%
Nursing	2,368	2,416	2.03%	2,064	2,072	0.39%
BTT	31,647	27,948	-11.69%	30,513	26,837	-12.05%
Out-of-State	105,574	109,242	3.47%	82,277	84,728	2.98%
Unknown	11,284	11,491	1.83%	8,991	9,039	0.53%
Total	579,656	580,436	0.13%	503,469	501,489	-0.39%

2017-18 State Grant Awards

- Spring Award reduction still necessary

- Likely range of reduction to awards:
  - $23 off of the minimum adjusted award
  - $195 off of the maximum award

- Updated awards coming soon!

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Meanwhile…

- 2018-19 activity is underway

  – October 1 - application window opened

    - SGF also available October 1

  – Budget request submitted to Governor

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2018-19 Processing

- Total 2017-18 FAFSA applications on the system as of October 15, 2016 -- 29,750

- Total 2018-19 FAFSA applications on the system as of October 16, 2017 -- 34,396

    - Currently up 16%, but with one extra day in the 2017-18 count

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2018-19 Processing

- Mid-October:
  - SGF emails
  - Paper Status Notices and postcards
- Last week of October:
  - Grant Applicant Status (GAPS) reports
- Mid-November:
  - FAA Status Listings/transmission
  - Student Display (FG59)
  - Partner Interface activated

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2018-19 Early Estimator

- Waiting for 2018-19 Pell Charts

- All schools must use for State Grant estimates
  - Provide uniform awards across sectors and schools
  - Awards must be +/- $100 of Early Estimator

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PA ABLE Accounts

PAABLE
SAVINGS PROGRAM

www.paable.gov

- Contributions and earnings to these accounts are exempt from being used in the calculation of eligibility for any state financial aid programs.

- Just like the Pennsylvania Tuition Assistance Program (PA 529 Plan), the State Grant Program will exclude these account amounts from the "net worth of investments" when calculating an EFC.

- Effective with the 2018-19 Academic Year, ABLE account information is reportable via the State Grant Form (SGF).

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Viewing 2018-19 SG Records

For a school listed as a 2 through 10 choice on the FAFSA:

- Cannot see the student's record in the State Grant system (FG59 or Partner Interface, including FG0B and FG7E).

- Estimates will not be provided via displays, status listings, or status transmissions.

- It is possible to not have the ability to view a student's State Grant record and then be able to view it if subsequent activity from the student changes the first school choice.

- **The planned OE Code ordering of schools on the 2018-19 FAFSA for State Grant Agencies did not happen!**

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2018-19 Special Consideration

- PHEAA will use estimated 2018 income for special consideration requests.

- October 2018 validation conducted to review accuracy of estimates.

2018-19 Budget

2018-2019 State Grant and Special Programs Budget Request

Programs (in millions)	2016-2017 Budget	2017-2018 Budget	2018-2019 Requested Budget	2017-2018 to 2018-2019 Percent Change
Pennsylvania State Grant	$272.891	$273.391*	$300.730	10.0%
Institutional Assistance Grants	25.749	25.749	27.036	5.0%
Matching Funds	12.496	12.496	13.121	5.0%
Higher Education for the Disadvantaged (Act 101)	2.246	2.246	2.358	5.0%
Higher Education for Blind or Deaf Students	0.047	0.047	0.049	4.3%
Cheyney University Keystone Academy	1.813	1.813**	4.000	120.6%
Horace Mann Bond-Leslie Pinckney Hill Scholarship	0.697	0.697	1.200	72.2%
Pennsylvania Internship Program Grants	0.350	0.350	0.350	0.0%
Ready to Succeed Scholarships	5.000	5.000	5.000	0.0%
Total	$321.289	$321.789	$353.844	10.0%

*The 2017-2018 appropriation includes $500,000 that likely will be directed by the General Assembly to Mansfield University once the 2017-2018 fiscal code is finalized.
**It is contemplated that, once the 2017-2018 fiscal code is finalized, the General Assembly will direct $500,000 of Agency resources to the program.

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Distance Education

- DE Pilot sunsets at end of 2017-18
- Legislation in process to integrate DE into overall State Grant program for 2018-19
  - HB 1653
  - SB 53
- Talking points and op-ed language available for school use

Distance Education

- Eligible institutions are headquartered and domiciled in PA

- PHEAA Board has authority to manage cost to the program of DE awards

- Updated reporting mechanism for each recipient's classroom vs. online credits

- No more SGDEPP reporting after 2017-18 AY

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PA State Grant Program Trends
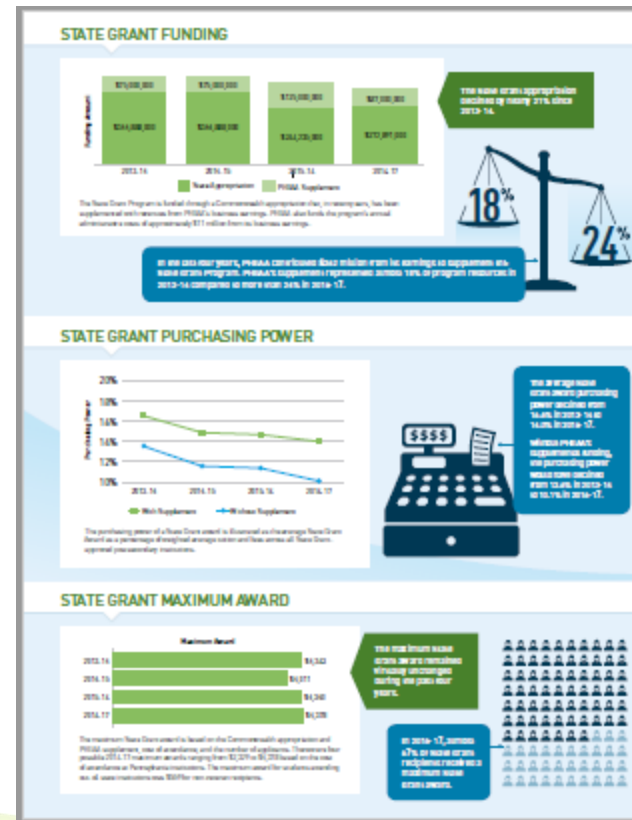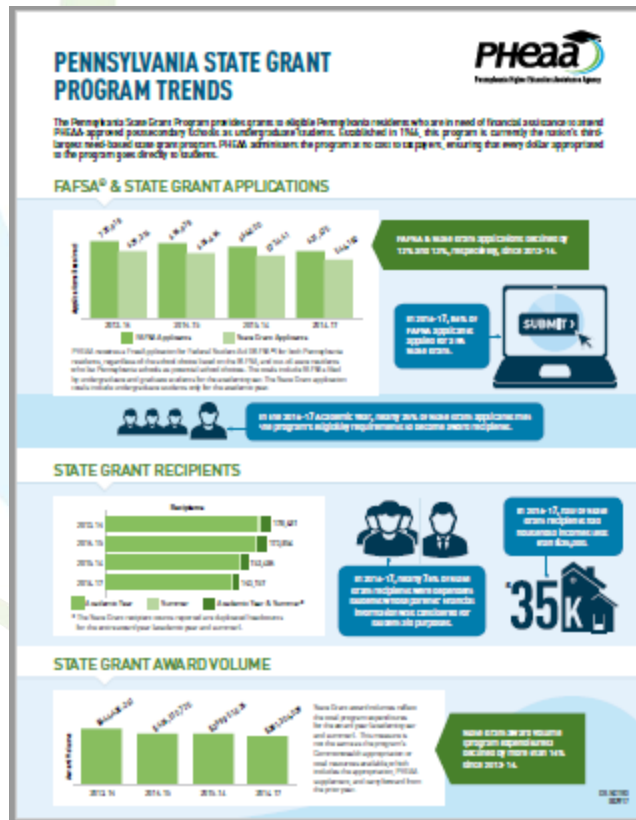
2017 Summer State Grant

- Minimum number of weeks of enrollment decreased to 5 weeks

- Continued decline in summer program participation
  - 2015: 10,424 awards ($11,585,623)
  - 2016:   8,280 awards ($10,236,403)
  - 2017:   7,799 awards ($ 9,536,493)

IAG

- 2016-17 *per capita* of $644

- Received flat funding for 2017-18

- Estimated *per capita* for 2017-18 is $634

  – Advance payment coming soon

Incomplete State Grant Records

- Email campaign to reduce incomplete records

- Sending to prior-year applicants

- Goal to complete files by April 1 deadline

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Other Sibling Audit

- Process ran in late September
  - Last run in 2014, will be annual moving forward

- Students selected have reported a higher number enrolled than can be verified in our system

- Students selected for the review need to complete a form and submit verification of a family member's enrollment (e.g., copy of the class schedule, tuition bill, letter from the registrar, etc.)

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Bona Fide Five-Year Program

- Permits up to an additional year of State Grant eligibility
- Reported through the annual cost collection effort
- PHEAA review of reported programs revealed many programs misreported
- Reaching out to a few schools again this year

Out-of-State Awards

- Reciprocal states for 2017-18 include DC, DE, MA, OH, VT, and WV

- Reminder: Eligibility for unique programs of study at schools in non-reciprocal states discontinued beginning with 2017-18

Program Review - Reminder

- Beginning with reviews covering the 2016-17 Award Year:
  - Error Rate calculations will be based on mis-payment of a student award by plus or minus $50. This includes non-payment of funds to an eligible student.
  - An Administrative Findings section will address concerns with program administration
  - A Program Improvement Plan (PIP) may be required to address findings

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ACICS

- Accrediting Council for Independent Colleges and Schools lost recognition from USDE
- ACICS appealing ruling
- Schools remain accredited during the appeal
- SG regulations require accreditation

- **Notify PHEAA immediately upon gaining new accreditation!** **ProgramReview@PHEAA.org**

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Partner Interface Filtering Tips

- June 2017 resource for schools
- Available on pheaa.org

  - Partner Interface Display Overview
  - Partner Interface Q&A
  - Partner Interface Filtering Tips Revised June 2017
  - Partner Interface Overview Presentation Part 1
  - Partner Interface Overview Presentation Part 2
  - Distance Education Partner Interface User Guide
  - Ready to Succeed Partner Interface User Guide
  - State Grant Partner Interface User Guide

State Grant
Partner Interface
FILTERING TIPS
June 2017

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OC/WebConnect

- Did you know that you can view the status of your State Grant, RTSS, and SGDEPP information in OC/WebConnect?

- Check out **FG3S** in OC/ WebConnect to view the status of your disbursements, refunds, and rosters. In the Program Type field, use "G" for State Grant, "S" for RTSS, or "D" for SGDEPP.

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Faxes

- Schools may contact State Grant and Special Programs to verify receipt of faxed correspondence

- Note: Faxes take up to 24 hours to show in the proper queue
  - Please wait 24 hours before calling in to check
  - Email is best: staff will respond in 24-48 hours

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Speaking of Emails…

Program Mailboxes - Automated responses now generated

From students, schools, partners:

StateGrantandSpecialPrograms@pheaa.org
granthelp@pheaa.org
sghelp@pheaa.org
specialprogramscorr@pheaa.org
swsp@pheaa.org
rtss@pheaa.org
eap@pheaa.org
bdbg@pheaa.org
path@pheaa.org
patip@pheaa.org
nets@pheaa.org
paetg@pheaa.org

For use of schools ONLY:

IAG@pheaa.org
act 101@pheaa.org
matchingfunds@pheaa.org
sgdepp@pheaa.org
pegp@pheaa.org
High School Access@pheaa.org

E-Sign is in the works!

- E-Sign = "No Sign"
- Applicants will continue to complete the State Grant Form
- No longer will have to print, sign, and mail the signature pages

Rollout planned for Spring 2018!

Training Webpage

- PHEAA.org/training
  - Program Integrity staff created a one-stop shop
  - Covers every PHEAA-administered program (except NETS)
  - For schools, employers, and partners

- Student resources, memos, and apps
  - Still available in Doc Library or on program webpages

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Training Webpage

PHEAA.org/LivingSituation

- Assists students with selecting the correct living situation when completing a Status Notice for the PA State Grant Program

- Directions for students when they are considered Independent for federal aid but Dependent for State Grant

- Guidance on two types of living situations:
  – "In the care of a person (guardian)/appointed entity"
  – "Unmarried and in my own care"

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NEW! FWS Program Webpage

http://www.pheaa.org/partner-access/federal-work-study.shtml

RTSS-SGDEPP Reconciliation Page

- Page 4 of FG3S


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FG3S I 2016;A;S;00326700;01;0100            RTSS COLLEGE RECONCILIATION DISPLAY
OE CODE       00326700 01    APPLICATION YEAR 2016-17            PAGE  4 OF  4
PHEAA CODE    010075              ACAD YEAR             LAST USER FGXVA
GENEVA COLLEGE                                          LAST UPDATE 08/14/2017

                        RECONCILIATION DETAIL SUMMARY

TOTAL AWARDS                    $      9,000   REMAINING FUNDS DUE
                                              NEEDS CERTIFIED $       1,000
ACTUAL DISBURSED AMOUNT         $     11,000   CERTIFIED       $           0
                                              TOTAL           $       1,000
TOTAL COLLEGE REFUND            $          0
TOTAL PROGRAM REVIEW REFUND     $          0   OUTSTANDING REFUNDS
                                              TOTAL           $       3,000

                                              CLEAN ROSTER NEEDED   YES

                                              RECONCILED NO     08/14/2017




    F1=HELP       F2=FG3Y       F3=EXIT      F4=SUMMARY  F5=RFR       F6=FG3M
    F7=          F8=           F9=PRT       F10=PAGEBK  F11=PAGEFWD F12=CAN
TT
                         »                              0   1,2    B
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Patriot Act

- Effective 2018-19:
  - Students listing a P.O. Box address will continue to receive a letter requesting that a physical address be submitted.
  - State Grant records will no longer be held from processing for eligibility due to only having a P.O. Box on file.

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Customer Experience (CX)

Social Media
- PHEAA Brand on Facebook and Twitter
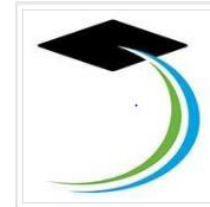
Sentiment Surveys
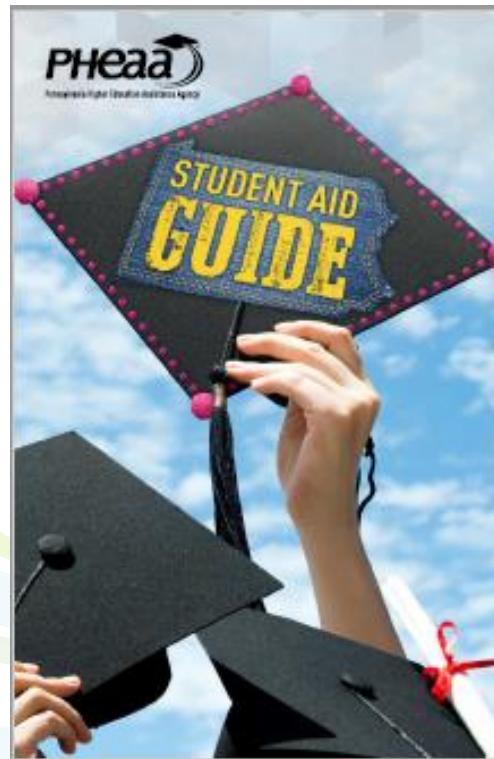- Began sending to State Grant applicants over the summer

Email Campaign
- Effort to reduce incomplete State Grant records

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Outreach

- Updated *PA Student Aid Guide* and many other publications available at pheaa.org

Outreach

- 14 Access Partners ready to assist with financial aid nights, FAFSA Completion events, and other outreach activities

- Contact Will Lindsey at wlindsey@pheaa.org

Questions? Comments?

- Elizabeth McCloud
  - 717.720.1600
  - emccloud@pheaa.org

Lifting Dreams

PASFAA
October 23-25, 2017
Seven Springs Mountain Resort

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