Agenda

• Year Round Pell Overview
• Additional Pell Rules
• Examples of Awarding Additional Pell
• Crossover Payment Periods
• COD Implementation
• Resources
Year Round Pell Overview
Year-Round Pell- General
(See DCL GEN17-06)

- The Consolidated Appropriations Act of 2017 now allows a student to receive Pell Grant funds up to 150% of the student’s Pell Grant Scheduled Award for an award year.
  - See DCL GEN-17-07.

- Effective with the 2017-2018 award year.
  - Does not apply to summer of 2017 if treated as a trailer to 2016-2017 eligibility.
Year-Round Pell - General

- Student must be otherwise eligible to receive Pell Grant funds for the payment period.
- Student must be enrolled at least half-time in the payment period(s) for which the student receives the additional Pell Grant funds.
- Pell Calculations and formulas remain unchanged
- Additional Pell Grant will be included in the student’s 600% maximum Pell Lifetime Eligibility Used (LEU).
Awarding Additional Pell
Year-Round Pell – Additional Pell

- Student must be enrolled at least half-time in the payment period(s) for which the student receives the additional Pell Grant funds.
  - Dropping below half-time enrollment after Pell is disbursed will not render the student ineligible.
Year-Round Pell – Additional Pell

- Payment Period may include awards from both the initial Pell Grant Scheduled Award and from the additional Pell Grant award.
- When the calculated award for a payment period is greater than the remaining balance of an initial Scheduled Award, the award for the payment period is the remaining balance plus an amount from the additional Pell Grant award.
The student has used 100% of the original Scheduled Award. A Pell eligible student can be enrolled in any enrollment status to receive any portion of the Scheduled Award.

Before the student can receive any portion of the Additional Pell (up to 50%), the student must use up the Scheduled Award and be enrolled at least HT.
The student used 87.5% of the Scheduled Award with 12.5% still remaining. Note the student’s eligibility for Additional Pell is dependent upon being enrolled at least FT.

Initial Scheduled Award = 12.5%
Additional Pell = 37.5%
The student has used up 100% of the scheduled award prior to enrolling in the Summer term.

Since the student is not enrolled at least HT, is not eligible for Additional Pell.
The student is enrolled LTHT in the Fall Term. Since this is not the Payment Period in which the student is receiving Additional Pell, it does not make the student ineligible for Additional Pell in the Summer Term.

Initial Scheduled Award = 25%
Additional Pell = 25%
Additional Pell - Clock Hour

Clock Hour Program: 1215 Clock Hours / 41 Weeks

8/7/17

450 Clock Hours
PP 1
50% Used

3/9/18

450 Clock Hours
PP 2
50% Used

3/12/18

315 Clock Hours
PP 3
35% Eligible

5/25/18

Student used 100% of Initial Scheduled Award for their first defined AY of 900 hours / 30 wks.

Final Payment Period within 2017-18 Award Year. Student is Eligible for Additional Pell
Additional Pell - Clock Hour

Clock Hour Program: 1050 Clock Hours / 32 Weeks

9/12/16  5/12/17  5/22/17  6/30/17

450 Clock Hours  450 Clock Hours  150 Clock Hours
PP 1  PP 2  PP 3
50% Used  50% Used

Student used 100% of Initial Scheduled Award for their first defined AY of 900 hours / 30 wks.

Final Payment Period within 2016-2017 Award Year. The student is not eligible for AdditionalPell because there is no YRP in 16-17.
Additional Pell - Clock Hour

Clock Hour Program: 1050 Clock Hours / 32 Weeks

10/3/16
450 Clock Hours
PP 1
50% Used

5/26/17
450 Clock Hours
PP 2
50% Used

6/5/17
150 Clock Hours
PP 3
35% Eligible

7/14/17

Student used 100% of Initial Scheduled Award for their first defined AY of 900 hours / 30 wks.

Final Payment Period within 2017-18 Award Year. Student is Eligible for Additional Pell
Additional Pell – Transfer Students

Student Transfer to New School on 1/8/2018

- 2017-18 Pell TEU Prior to Transfer = 90%
- Enrolled FT Spring Term 50% Eligible
- Student completed Certificate Program at School A prior to transferring to School B.
  Student used 90% of Initial Scheduled Award
- Initial Scheduled Award = 10%
  Additional Pell = 40%
Additional Pell – Transfer Students

Student Transfer to New School on 1/8/2018

Student completed Certificate Program at School A prior to transferring to School B. Student used 90% of Initial Scheduled Award

2017-18 Pell TEU
Prior to Transfer = 90%

Enrolled LTHT
Spring Term
12.5% Calculated

Eligible for Initial Scheduled Award = 10%
Ineligible for Additional Pell = 2.5%

Student is Eligible for Remaining Initial Scheduled Award, but Ineligible for Additional Pell since LTHT
Crossover Payment Periods
Crossover Payment Periods

- Includes both June 30 and July 1 overlapping two award years.
- Institutions have the flexibility to assign crossover payment periods to either of the relevant award years.
  - The law states “as it [the institution] determines is most beneficial to students”.
Crossover Payment Periods

2017-2018 Scheduled Award: $2000
2018-2019 Scheduled Award: $3000

SUMMER
Full-time
Disbursement = $1000

FALL
Half-time
Disbursement = $500

SPRING
Half-time
Disbursement = $500

SUMMER
Full-time
Disbursement = $1000 (2017-2018)

OR
$1500 (2018-2019)
Crossover Payment Periods

The choice of crossover payment period award year can be made based on an institutional policy that:

- Provides for an individual decision for each student;
- Applies to all students (or students within a group) without exception; or
- Applies to all students (or students within a group) with allowance for individual student exception.
Crossover Payment Periods

- Must consider the crossover payment period to occur entirely within one award year.
- Must have a valid SAR or valid ISIR for the selected award year.
- May be different than the year used for the student’s other Title IV aid (i.e., loans, campus based).
COD Implementation
Year-Round Pell: EA June 20, 2017

- COD Implementation October 13-15, 2017
  - The `<AdditionalEligibilityIndicator>` tag identifies Pell Grant recipients eligible for additional grant funds
  - The Pell Grant Potential Overaward Project (POP) process updated to account for additional Pell Grant eligibility
  - Reject/warning edits specific to updated Pell calculations are sent in response files
    - COD Web Site screens and reports updated to incorporate Year-round Pell

After October 15, schools may update Pell Grant information in COD to reflect additional eligibility
Resources
Resources

**Federal Registers**
June 16, 2017: Negotiated Rulemaking Committee; Public Hearings

**Dear Colleague Letters**
GEN 17-06: Implementation of Year-Round Pell Grants

**Electronic Announcements**
EA June 20, 2017: Year-Round Pell Grant Information - Preliminary COD System Implementation Information and School Processing Timeline
Questions???
Department of Education Contacts

Research and Customer Care Center
800.433.7327
fsa.customer.support@ed.gov

Reach FSA
855.FSA.4FAA -- 1 number to reach 10 contact centers!

eZ-Audit
COD
CPS/SAIG
NSLDS
G5

Campus Based Call Center
School Eligibility Service Group
Foreign Schools Participation Division
Research and Customer Care Center
Nelnet Total & Permanent Disability Team
Contact Information: Region III School Participation Team

• **School Participation Main Number**
  215-656-6442

• **Region III Institutional Improvement Specialist (IIS)**
  Joe Kern
  215 656-8566
  joe.kern@ed.gov
Contact Information: Region III Training Team

- **Amber Johnson**
  202-377-3369
  amber.johnson@ed.gov

- **Craig Rorie**
  215-656-5916
  craigrorie@ed.gov
Training Feedback

To ensure quality training we ask all participants to please fill out an online session evaluation

- Go to [http://s.zoomerang.com/s/CraigRorie](http://s.zoomerang.com/s/CraigRorie)
  - Evaluation form is specific to Craig Rorie
- This feedback tool will provide a means to educate and inform areas for improvement and support an effective process for “listening” to our customers
- Additional feedback about training can be directed to Joan Borel at [joann.borel@ed.gov](mailto:joann.borel@ed.gov)
Thank you!