PA State Grant & Special Programs Update

Elizabeth McCloud
Vice President, State Grant and Special Programs
PHEAA
News from PHEAA

• Mr. Jim Preston, PHEAA President & CEO, announced in February that he plans to retire from the Agency in July 2018
  – Joined PHEAA in 2003
  – Became interim President and CEO in October 2007
  – Serving in current capacity since March 2008
FSA Solicitation

• Next Gen improvements to loan process
• Open to non-student loan industry companies
• Nine Components
• All components will operate behind FSA branding
• Evaluating what fits with PHEAA’s strengths and capabilities
2017-18 Awards

• Please cancel any active awards for students who are not eligible as currently indicated on school roster

• April 2, 2018 is the deadline for reinstatement or reconsideration of a 2017-18 State Grant award
2017-18 Reconciliation

• 2017-18 AY Reconciliation Rosters generate the week of March 26
• Due date for reconciliation and refunds is June 1
• Sign and submit the Certification Page of the roster, preferably using the online Web Certification Page available on Alec
Third Party Authorization

• No longer using Third-Party Authorization forms
• Revised procedures for calls and emails
  – School/Partner/Employer Email:
    » Appropriate email address
    » Full name of school staff member
    » Full name of school
    » OE/PHEAA code
    » Student/recipient’s first and last name, if applicable
    » Student/recipient’s account number or SSN (or last four), if applicable
2018-19 Cost on the Web
2018-19 Cost on the Web

• Cost collection applicable for 2018 Summer term and 2018-19 Academic Year
• Opened on March 9
• Due date for submission is April 9, 2018
• Provide room and board amounts for statistical purposes
• 2017-18 costs used if new data is not submitted via the school portal
2018-19 Cost on the Web

State Grants
- View State Grants Dashboard
  Standard Lists and Worklists
- Create Mass Update Queue
  Create Mass Update Queue
- View Weekly Update and Roster
  Download from PageCenter
- State Grant Disbursement Certification
  Disbursement Certification Form

- View My Exports
  View Exported Student Lists
- Access State Grant & Special Programs
  OC/Webconnect
- State Grant Education Costs
  Education Cost Form
- Request Primary School Change
  Change Primary School in Student Record

Pennsylvania Higher Education Assistance Agency
FAFSA Mobile App coming soon…

• New FAFSA mobile app expected from FSA this spring
  – First version not expected to include the API link to the PA State Grant Form
  – A large proportion of low-income students use smart phones to access on-line applications
  – Possible second version of the app for the October 1 start of the 2019-2020 application cycle
  – PHEAA is developing a mobile-enabled state grant application
    • Hope to have available in mid-April
State Grant Electronic Signature

• On track for a late April rollout
• FAFSA signature(s) will be used to satisfy the State Grant requirement in most cases
• Promoting online resolution of missing signatures
• Students will agree to the “Rights and Responsibilities” online as part of the SGF
## 2018-19 Appropriations

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
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<tbody>
<tr>
<td><strong>PHEAA Administered</strong></td>
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<tr>
<td>State Grant Program</td>
<td>$273.391</td>
<td>$300.730</td>
<td>$272.891</td>
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<td>Institutional Assistance Grants (IAG)</td>
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<td>$27.036</td>
<td>$25.749</td>
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<tr>
<td>Matching Funds</td>
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<td>$13.121</td>
<td>$12.496</td>
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<td>Higher Education of the Disadvantaged (Act 101)</td>
<td>$2.246</td>
<td>$2.358</td>
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<td>Higher Education of Blind or Deaf Students</td>
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<td>$0.049</td>
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<tr>
<td>Pennsylvania Internship Program Grants</td>
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<tr>
<td>Ready to Succeed Scholarships</td>
<td>$5.000</td>
<td>$5.000</td>
<td>$5.000</td>
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<tr>
<td><strong>Co-Administered</strong></td>
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<tr>
<td>Bond-Hill Scholarship</td>
<td>$0.697</td>
<td>$1.200</td>
<td>$0.697</td>
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<td>Cheyney Keystone Academy</td>
<td>$1.813</td>
<td>$4.000</td>
<td>$1.813</td>
<td>0.00%</td>
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<tr>
<td><strong>Total</strong></td>
<td>$321.789</td>
<td>$353.844</td>
<td>$321.289</td>
<td>-0.16%</td>
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</table>
# Application History

## History of Applications Received/Awards Made

<table>
<thead>
<tr>
<th>Award Year</th>
<th>Combined Academic Year and Summer State Grant Applications</th>
<th>Combined Academic Year and Summer State Grant Awards</th>
<th>FAFSA Applications as of December 31</th>
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<tbody>
<tr>
<td>2006-07</td>
<td>522,944</td>
<td>178,594</td>
<td>548,955</td>
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<tr>
<td>2007-08</td>
<td>538,112</td>
<td>174,643</td>
<td>564,896</td>
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<td>2008-09</td>
<td>564,789</td>
<td>164,633</td>
<td>597,713</td>
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<td>2009-10</td>
<td>631,624</td>
<td>183,217</td>
<td>672,813</td>
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<td>2010-11</td>
<td>657,251</td>
<td>192,121</td>
<td>705,825</td>
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<td>2011-12</td>
<td>668,067</td>
<td>205,739</td>
<td>716,557</td>
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<tr>
<td>2012-13</td>
<td>683,221</td>
<td>192,386</td>
<td>706,813</td>
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<tr>
<td>2013-14</td>
<td>669,570</td>
<td>178,681</td>
<td>692,056</td>
</tr>
<tr>
<td>2014-15</td>
<td>644,472</td>
<td>173,142</td>
<td>670,214</td>
</tr>
<tr>
<td>2015-16</td>
<td>610,562</td>
<td>153,684</td>
<td>639,662</td>
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<tr>
<td>2016-17</td>
<td>572,778</td>
<td>143,157</td>
<td>607,905</td>
</tr>
<tr>
<td>2017-18*</td>
<td>567,050</td>
<td>144,400</td>
<td>607,584</td>
</tr>
<tr>
<td>2018-19**</td>
<td>572,720</td>
<td>152,476</td>
<td>613,569</td>
</tr>
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</table>

* Estimated
** Estimated (Includes $50M Supplement & Distance Education Recipients)
Distance Education Integration

- Governor Wolf signed HB 1653 into law in February as “Act 5 of 2018”
- Incorporates DE into the State Grant Program, beginning Fall 2018
- PHEAA is working to perform the necessary system updates
  - Technical changes beginning 2018 Summer
  - Webinars planned for May, to address changes
Act 5 of 2018 – DE Integration

• Headquartered and Domiciled Status:
  – HQD schools: full DE integration
  – Non-HQD schools: eligibility unchanged

• Authorizes the PHEAA Board of Directors to implement necessary controls to limit the impact of online education and protect State Grant purchasing power.
SGDEPP Ending

- 2017-18 is the last year of the five year State Grant Distance Education Pilot Program
  - The pilot was a success!
  - HB 1653 passed at the end of January, allowing for integration beginning 2018-19 Academic Year

  ➢ No funding for 2018 Summer
  ➢ No reporting for 2018 Summer
SGDEPP: 2017-18

• 2017-18 funding has been exhausted, leading to Reject N and $-Adjusted notices for some students

• PHEAA continues to make cancellation and reject funds available, and subsequently has been able to fund some of these awards
  – No funding for 2018 Summer
  – No reporting for 2018 Summer
2018 Summer State Grant

What isn’t changing?

- Student application period is March 15 through August 15
- Awards not determined until after 2018-19 AY awards are announced
- Disbursements to schools at calculated percentage of prior three years utilization
- Minimum term = 5 weeks of at least HT enrollment for students in degree-granting programs
2018 Summer State Grant

What is changing?

- No SGDEPP
- NEW!

  • Required Enrollment Mode Indicator for all students with summer State Grant awards
Enrollment Mode Indicator

- Replaces Attempted Credits Reporting and reporting of DE Program of Study
- Must match enrollment status tied to award
- Defaults to 100% classroom

1. 100% classroom instruction
2. Up to 50% distance education
3. Greater than 50% but less than 100% distance education
4. 100% distance education
Enrollment Mode Indicator
Enrollment Mode Indicator

Please note that PHEAA will initially assume an enrollment mode of 100 percent classroom instruction. Students who are not enrolled in 100 percent classroom instruction must be accurately reported in the term enrollment mode fields on Partner Interface or through the Certification Transmission process.

1. 100% classroom instruction
2. Up to 50% distance education
3. Greater than 50% but less than 100% distance education
4. 100% distance education

Again, all schools will need to update the Enrollment Mode Reporting starting with 2018 Summer State Grant recipients. This is necessary to ensure that students do not receive funding for greater than 50 percent distance education enrollment prior to the start of integration in Fall 2018. Starting with the 2018 Summer term, attempted credits reporting will no longer be required.

RESOURCES

Training for the new reporting for 2018 Summer will be provided via webinars on Tuesday, May 8th and Thursday, May 17th and will also be covered during our PA State Grant Summer Workshops (see schedule below). Additional information for questions can be on PHEAA.org/training. Updates will also be included in the monthly PA School Services newsletters. Additional information on the integration of distance education into the PA State Grant Program is in development and will be shared as available.

If you have questions, please contact State Grant staff at 1.800.413.2044, option 3, option 1, a private number reserved for the use of postsecondary school administrators, or via email at sghelp@phea.org.

PA STATE GRANT SUMMER WORKSHOP LOCATIONS & DATES

<table>
<thead>
<tr>
<th>LOCATION</th>
<th>DATE</th>
<th>TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHEAA Headquarters</td>
<td>6/12/2018</td>
<td>9:00 AM - 2:00 PM</td>
</tr>
<tr>
<td>Delaware County Community College</td>
<td>6/14/2018</td>
<td>9:00 AM - 2:00 PM</td>
</tr>
<tr>
<td>Community College of Allegheny County</td>
<td>6/19/2018</td>
<td>9:00 AM - 2:00 PM</td>
</tr>
<tr>
<td>La Salle University</td>
<td>7/16/2018</td>
<td>9:00 AM - 2:00 PM</td>
</tr>
<tr>
<td>King's College</td>
<td>7/19/2018</td>
<td>9:00 AM - 2:00 PM</td>
</tr>
<tr>
<td>Wexford County Community College</td>
<td>7/23/2018</td>
<td>9:00 AM - 2:00 PM</td>
</tr>
</tbody>
</table>

PHEAA
Pennsylvania Higher Education Assistance Agency
2018-19 State Grant Training

State Grant Summer Training Events!

Summer 2018 Distance Education Reporting Webinars
May 8, 2018 – 1 PM – 3 PM
May 17, 2018 – 10 AM – 12 PM

2018-19 State Grant Program Workshops
June 12, 2018 – PHEAA Headquarters
June 14, 2018 – Delaware County Community College
June 19, 2018 – Community College of Allegheny County – Boyce Campus
July 10, 2018 – La Salle University
July 12, 2018 – King’s College
July 18, 2018 – Westmoreland County Community College

Registration will become available on PHEAA.org/training in the coming weeks!
2018-19 State Grant Training

• Webinars offered this summer

Summer 2018 Distance Education Reporting Webinars
May 8, 2018 – 1 PM – 3 PM
May 17, 2018 – 10 AM – 12 PM
2018-19 State Grant Training

Workshops offered this summer

2018-19 State Grant Program Workshops
June 12, 2018 – PHEAA Headquarters
June 14, 2018 – Delaware County Community College
June 19, 2018 – Community College of Allegheny County - Boyce Campus
July 10, 2018 – La Salle University
July 12, 2018 – King’s College
July 18, 2018 – Westmoreland County Community College
2018-19 State Grant Training

• 2018-19 State Grant Program Handbook
  – Focus on *New* Enrollment Indicator
    • Beginning 2018 Summer
    • Replaces Attempted Credits Reporting
  – Distance Education Integration
    • Beginning Fall 2018
IAG

• SG reconciliation must be completed by late April to be reflected on the IAG reconciliation roster in early May
• Estimated *per capita* for 2017-18 is $634, subject to change
• Proposed 2018-19 budget for IAG would lead to an estimated 2017-18 *per capita* of $580
  – Schools with distance education students may see no change or growth in total funding received
2017-18 PA-TIP

- EFC eligibility up to 12000
- Student application deadline is May 1, 2018
- School deadline to certify pending awards is July 1, 2018
- Funds have been fully expended, however new awards are being made as current awards are cancelled
Other 2018-19 Programs

• 2018-19 student applications will be available in mid-April for:
  – Blind or Deaf Beneficiary Grant Program
  – Chafee Education and Training Grant Program
2018 Summer SWSP Application
Ready to Succeed Scholarship

• Funds over 3,000 students per year with $5 M
• Approximately $10 M more needed to fund all of the remaining 6,000+ eligible students
• Reconciliation begins early May; due July 1
• August 1 disbursement deadline
Ready to Succeed Scholarship

• Partner Interface Enhancements
  – RTSS student candidates who are a State Grant Reject E or M can now be reported as
    “H - RTSS Not Enrolled”
    • This will remove non-enrolled students from schools’ RTSS Student Candidate listings
  – Special Request no longer needed when students partially withdraw from FT to HT
    “J – RTSS Half Time (HT)
  – Non-enrolled RTSS student candidates with a State Grant award should still have their award cancelled as usual
Ready to Succeed Scholarship

- **Partner Interface Enhancements**
  - Changes/Updates to the RTSS refund group statuses:
    - “Pending” status - This status displays when a refund group is created
    - “Received” status – This status displays when a refund group is created and the refund amount is received by PHEAA but not processed

School users are now able to export a list of RTSS awards for terms that need certified, that have been certified, or listed in the following refund groups: Pending, Changed, Received or Under Review
Ready to Succeed Scholarship

• RTSS Income Validation process
  – Normally runs prior to certification and disbursement
  – Technical error occurred this year
  – Minimal number of students placed under review in late February, with 30 days to respond
  – Schools will refund to PHEAA
Partner Interface Enhancements

• Option to filter records with data that occurs
  – in “All” of the selected terms
  – in “Any” of the selected terms
Roster Workflow Improvements

- New initiative to reduce:
  - unnecessary reminder emails to schools
  - duplicate roster submissions
- SGSP has a new method to track returned rosters that are in our processing queue
  - Applies to SGP, RTSS, SGDEPP and EAP
  - R status entered on FG3S (FG94 for EAP)
Roster Workflow Improvements
PageCenter

- New and updated PageCenter resources on PHEAA.org/training under State Grant and Special Programs Resources...
PageCenter

• General SGSP Resources:
Ordering Publications

- Stay tuned for an improved online ordering process!
PA Student Aid Guide
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@PHEAAjobs
@AesSuccessOrg
@MyFedLoan

Twitter
@PHEAAaid
@AesSuccessOrg
@MyFedLoan

LinkedIn

YouTube
@PHEAAStudentAid
Other Web Resources
Program Contacts

• Mailboxes:
  ▪ sghelp@pheaa.org
  ▪ act101@pheaa.org
  ▪ bdbg@pheaa.org
  ▪ eap@pheaa.org
  ▪ iag@pheaa.org
  ▪ swsp@pheaa.org
  ▪ matchingfunds@pheaa.org
  ▪ paetg@pheaa.org
  ▪ path@pheaa.org
  ▪ patip@pheaa.org
  ▪ pegp@pheaa.org
  ▪ rtss@pheaa.org
Questions? Comments?

• Elizabeth McCloud
  – 717.720.1600
  – emccloud@pheaa.org