#### PASFAA Spring & Support Staff Training 2018

#### 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

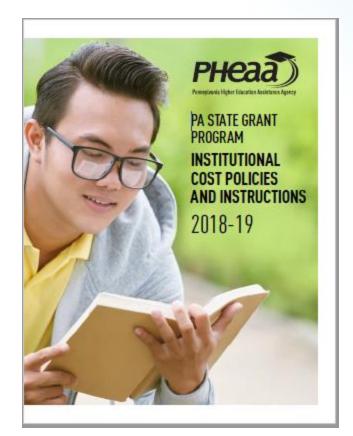


### **Third Party Authorization**

- 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



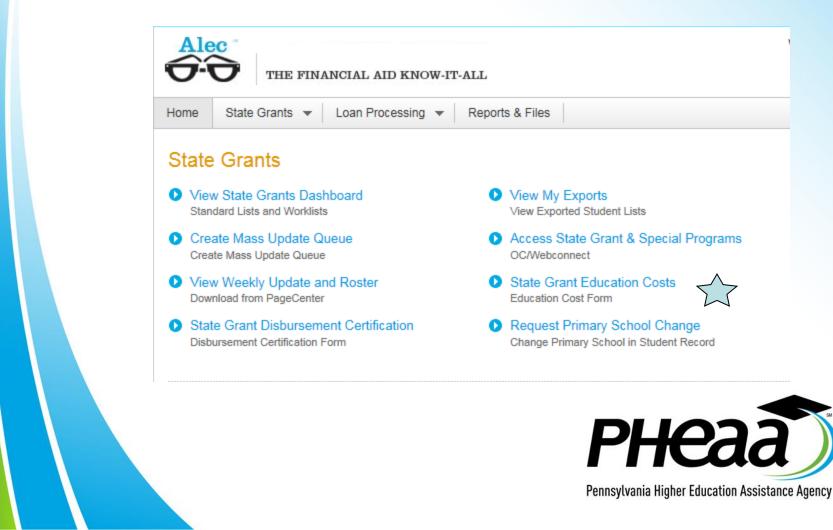


#### 2018-19 Cost on the Web

- 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



#### 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

	2017-2018 Budget	2018-2019 Board Request	2018-2019 Governor's Proposals	Percent Change from 2017-2018 to 2018-2019
PHEAA Administered				
State Grant Program	\$273.391	\$300.730	\$272.891	-0.18%
Institutional Assistance Grants (IAG)	\$25.749	\$27.036	\$25.749	0.00%
Matching Funds	\$12.496	\$13.121	\$12.496	0.00%
Higher Education of the Disadvantaged (Act 101)	\$2.246	\$2.358	\$2.246	0.00%
Higher Education of Blind or Deaf Students	\$0.047	\$0.049	\$0.047	0.00%
Pennsylvania Internship Program Grants	\$0.350	\$0.350	\$0.350	0.00%
Ready to Succeed Scholarships	\$5.000	\$5.000	\$5.000	0.00%
Co-Administered				
Bond-Hill Scholarship	\$0.697	\$1.200	\$0.697	0.00%
Cheyney Keystone Academy	\$1.813	\$4.000	\$1.813	0.00%
Total	\$321.789	\$353.844	\$321.289	-0.16%



# **Application History**

History of Applications	Received/Awards Made
-------------------------	----------------------

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

\* 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**

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

	Fall	Spring
Branch Campusc	PHEAA University	PHEAA University
Program of Study:	C - Bachelor's Degree (	C - Bachelor's Degree (/ 🛩
Housing Status:	1 - Donnikory 👻	1 - Dosmitory
Enrollment Status:	1 - Full Time Student 🛛 👻	1 - Pul Time Student 🛛 💌
Erroliment Node:	<ul> <li>Select -</li> <li>1 - 100% classroom isstruction</li> <li>2 - Up to 50% distance education</li> <li>3 - Greater than 50%, but least t</li> <li>4 - 106% distance education</li> </ul>	04

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



#### **Enrollment Mode Indicator**



#### INTEGRATION OF DISTANCE EDUCATION & NEW ENROLI MENT REPORTING REQUIREMENT



On February 15, 2018, the Governor signed HB 1653 into Law Mct 5 of 20181. This legislation incorporates distance education eligibility into the PA Scase Grant Program, beginning with the 2016-19 Academic Year. The legislation authorities the PNEAA Roard of Directors to implement necessary controls to limit the impact of online education and protect Scase Grant purchasing power.

Technical system changes will be implemented starting with the 2018 Summer term, as outlined below, even though funding for distance education istudents does not begin until Fall 2018.

#### ELIGIBILITY

INSTITUTIONAL Elicipility for Participation	TERM	PROGRAM STRUCTURE	ENROLLMENT PATTERN	
Pennoykania Headquaraend and Domictical (H2D) Institucions*	2018 Summer	Soudence enrolled in a program that is not concerned to allow as lease SD percent of their clack or credit hours in the claceroom are inseligible and muce continue to be reported as US <sup>®</sup> in their program offerade.	Soudence entrolled in approved programs must have all entrollineen passen by serm that consists of a least 20 percent datastroom instruction latilex; the student has a medical disubility <sup>en</sup> L	
	2019-19 Academic Year and beyond	Scuterns enrolled are eligible, no manar the percentage of distance education instruction of their program's structure.	Students enrolled in approved programs are eligible no matter the percentage of distance education of their enrollament pattern.	
Non-Headquartend and Domiciled Inco- HGDI Institutions*	2018 Summer and bayond	Soudems enrolled in a program that is not concerned to allow at leases 30 percent of their clock or credit hours in the classroom are inskipplie and music continue to be reported as: 10%" in their program of roady.	Soudence entrolled in approved programs must have all entrollineers paraters by serm that consists of a lease 10 percent classer-serm instruction fariliess the student has a medical displating #1.	

\* To deviated initiation is as welling a parent company, the parent company must be beadqueries of in Perceptions for the initiation is the constitu-H20. If the parent surgery is beautyperforming balls of Perceptures, the institution is surviviewed our H20.

• Americane with Check Direct Act Many lines and ince to apply to state de where term conditional patients surveis 10 proved distance education. This was be processed if he briggered by updating the excellenced result reporting on sufficient lesion. ADL exceptions in cut apply in stated with an envolution program that is devolved in easy that does not allow at least 10 propert deservance iterations.

#### ENROLLMENT MODE REPORTING (REPLACES ATTEMPTED CREDITS REPORTING)

Scaning with the 2018 Summer term, all institutions are required to report new enrollment mode data on a term-by-term basis for awarded gudenss. The empliment made must match the student's final enrollment for eligibility determination. incread of point-in-time attempted credits reporting. PHDM will use the enrollment mode reporting to track the impact of online education and the purchasing power of the PA State Grant Program, as well as reflect the appropriate eligibility of the student, based on the institution IHDD or non-HODI at which he or she is enrolled. Collined No I Peer



#### **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 <u>must</u> be accurately reported in the term enrollment mode field(s) on Partner Interface or through the Certification Transmission process:



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

GR-DNERR

Training for the new reporting for 2018 Summer will be provided via webinars on Tuesday, May 9<sup>th</sup> and Thursday, May 17<sup>th</sup>, and will also be covered during our PA State Grant Summer Workshops [see schedule below]. Additional information for sessions will 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 when available.

If you have questions, please contact State Grant staff at 1.800.443.0646, option 3, option 1, a private number reserved for the use of postsecondary school administrators, or via email at sghelp@pheaa.org.

#### PA STATE GRANT SUMMER WORKSHOP LOCATIONS & DATES

LOCATION	DATE	TIME
PHEAA Headquarters	6/12/2018	9:00 AM - 2:00 PM
Delaware County Community College	6/14/2018	9:00 AM - 2:00 PM
Community College of Allegheny County-Boyce	6/19/2018	9:00 AM - 2:00 PM
La Salle University	7/10/2018	9:00 AM - 2:00 PM
King's College	7/12/2018	9:00 AM - 2:00 PM
Westmoreland County Community College	7/18/2018	9:00 AM - 2:00 PM

These materials have been developed and paid for by the Frenzylvania Higher Education Academance Agency (PHEAA) for informational purposes. Although the information contained in this document is believed to be accurate as the time of printing. PHEAA does not guarantee its accurate, You should independently writh that this information is accord.









Webinars offered this summer

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



#### 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 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

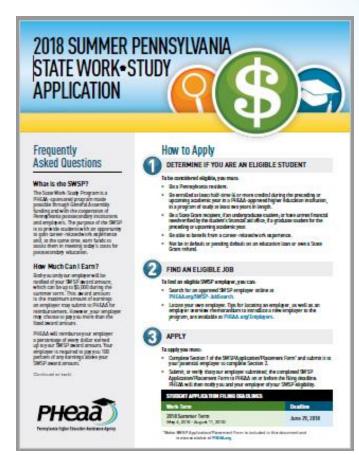


### Other 2018-19 Programs

- 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**





- 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



- 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



- 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



- 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

ted By: - Select -	Updated When: Select -
al Conditions: - Select -	
n Level Filters Mee	ts ANY of the following Terms: I Fall I Winter I Spring ?
Eligibility Date: From:	To: Reject Types: Select · V
ibility Status: - Select - 🔽 Cr	edit Info: Select - V Housing Status: Select - V
Full Time-Evening Half-time Student Half-time Student Less Than Half-Time	Cancellation Reasons:       Program of Study:         A - Graduated from a Bachelor's       A - 5 Year Co-op Work-Study (All B - Bachelor's Dogree (Religion A - C - Bachelor's Dogree (All Other I - F - 5 Yr Bona Fide Program         B - Not a High School Graduate       C - Bachelor's Dogree (All Other I - F - 5 Yr Bona Fide Program
tts: 1492 Records	Reset Filters Apply Filters

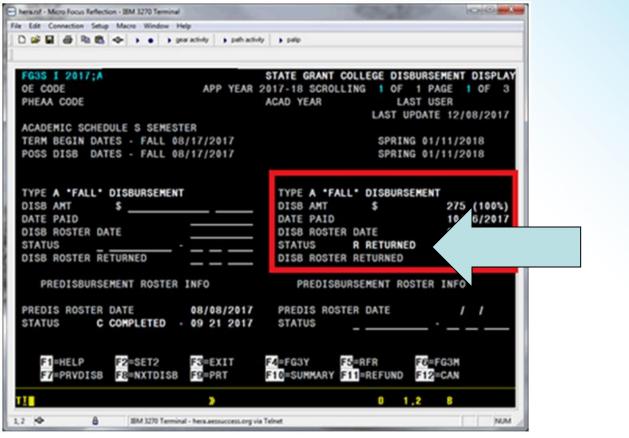


### **Roster Workflow Improvements**

- 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)



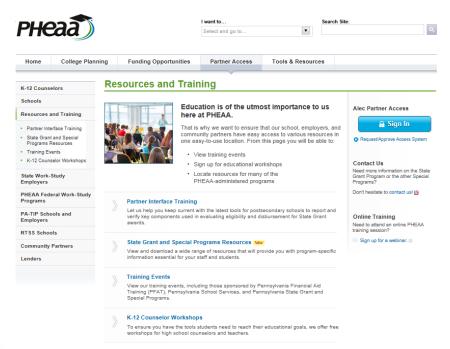
#### **Roster Workflow Improvements**





#### PageCenter

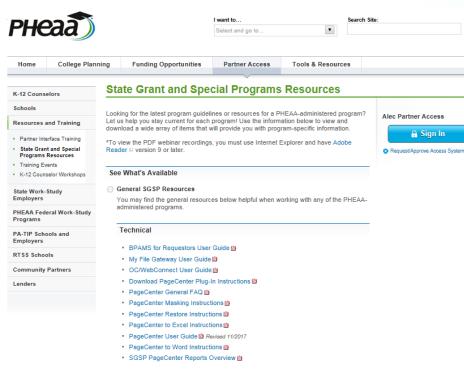
 New and updated PageCenter resources on PHEAA.org/training under State Grant and Special Programs Resources...





#### PageCenter

#### ...General SGSP Resources:



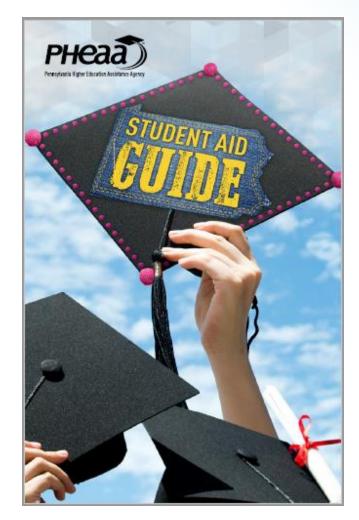


# **Ordering Publications**

Stay tuned for an improved online ordering process!

		I want to	Search	Site:
рнеаа)		Select and go to	•	٩
Home College Plan	nning Funding Opportunities	Partner Access	Tools & Resources	
Account Access From AES	Tools & Resour	ces	× ·	and and a for the
alculators Online Ordering System	We offer tools and resources to	help you prepare and pay	for college.	699674 Min Min
y SmartBorrowing				
	Account Accession Sign in to our online accound Education Services (AES) 24/7.	nt management tool from		For Our Partners 2017-18 PHEAA-Administered Program Calendar for Postsecondary Schools and Employers in Financial Aid Night Toolkit FAFSA Toolkit
	Calculators     Use our online calculators     your bottom line.	to see how your financial	choices can affect	
2	Order a wide range of mate information needed to plan Place your order by complete	erials online to provide fan for a student's future afte		
				PHe

#### **PA Student Aid Guide**







Facebook

Twitter

@pheaa.aid @PHEAAjobs @AesSuccessOrg @MyFedLoan



@PHEAAStudentAid

LinkedIn



YouTube

#### **Other Web Resources**









# **Program Contacts**

- Mailboxes:
  - sghelp@pheaa.org
  - act101@pheaa.org
  - bdbg@pheaa.org
  - <u>eap@pheaa.org</u>
  - 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

