PA State Grant & Special Programs Update

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

• James H. Steeley named permanent PHEAA President & Chief Executive Officer
  – Joined PHEAA in 2015 as CFO
  – Became COO in February 2018
  – Interim President and CEO since July 2018
FSA NextGen Solicitation Update

• New Solicitations:
  – NextGen Enhanced Processing Solution
  – NextGen Optimal Processing Solution
  – Business Process Operations Solution
2018-19 Awards

- Level funding for PA State Grant Program
- Two years of PHEAA Supplement ($101 million)
- Maintain max award of $4,123
- Final award memo provided two award maximums:

<table>
<thead>
<tr>
<th>Cost Tier</th>
<th>Final Maximum Award</th>
<th>Final DE Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0 - $12,000</td>
<td>$2,193</td>
<td>$1,096</td>
</tr>
<tr>
<td>$12,001 - $19,000</td>
<td>$3,509</td>
<td>$1,754</td>
</tr>
<tr>
<td>$19,001 - $29,000</td>
<td>$3,772</td>
<td>$1,886</td>
</tr>
<tr>
<td>$29,001 - $32,000</td>
<td>$4,123</td>
<td>$2,061</td>
</tr>
</tbody>
</table>
2018-19 Awards

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

• April 1, 2019 is the deadline for reinstatement or reconsideration of a 2018-19 PA State Grant award

• Update Enrollment Mode for all recipients
## SGDEPP Recap

### SGDEPP School Participation by PHEAA Sector

<table>
<thead>
<tr>
<th>Sector</th>
<th>Participating Schools</th>
<th>Recipients</th>
<th>Award Value</th>
<th>% of Total Recipients</th>
<th>% of Total Award Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Four-Year</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private</td>
<td>40</td>
<td>7,444</td>
<td>$19,371,786</td>
<td>30.99%</td>
<td>39.57%</td>
</tr>
<tr>
<td>PASSHE</td>
<td>10</td>
<td>3,626</td>
<td>$7,574,952</td>
<td>15.09%</td>
<td>15.47%</td>
</tr>
<tr>
<td>State-Related</td>
<td>25</td>
<td>4,845</td>
<td>$13,825,160</td>
<td>20.17%</td>
<td>28.24%</td>
</tr>
<tr>
<td><strong>Two-Year</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Private</td>
<td>5</td>
<td>406</td>
<td>$1,036,963</td>
<td>1.69%</td>
<td>2.12%</td>
</tr>
<tr>
<td>Community College</td>
<td>11</td>
<td>7,659</td>
<td>$7,021,938</td>
<td>31.89%</td>
<td>14.34%</td>
</tr>
<tr>
<td>BTT</td>
<td>3</td>
<td>40</td>
<td>$129,813</td>
<td>0.17%</td>
<td>0.26%</td>
</tr>
<tr>
<td><strong>All Sectors</strong></td>
<td>94</td>
<td>24,020</td>
<td>$48,960,612</td>
<td>100.00%</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

*Throughout the report, school counts include branch campuses.*
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 PA State Grant purchasing power
Distance Education Integration

• Incorporated DE into the PA State Grant Program, beginning Fall 2018
• Enrollment Mode reporting for all students
• PHEAA Board exercised the ability to limit spending on expanded distance education eligibility for the 2018-19 Award Year
• DE enrollments have been lower than anticipated based on SGDEPP participation and IPEDS data
Enrollment Mode

- Replaced 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
## Grant Information

<table>
<thead>
<tr>
<th></th>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
<th>Academic Year Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>School Name (OE Code):</strong></td>
<td>999999999-01 PHEAAUniversity</td>
<td>999999999-01 PHEAAUniversity</td>
<td>999999999-01 PHEAA University</td>
<td></td>
</tr>
<tr>
<td><strong>Program of Study:</strong></td>
<td>Distance Education</td>
<td>Distance Education</td>
<td>Distance Education</td>
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</tr>
<tr>
<td><strong>Award Date:</strong></td>
<td>01/04/2019</td>
<td>01/04/2019</td>
<td>01/04/2019</td>
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</tr>
<tr>
<td><strong>Housing Status:</strong></td>
<td>Dormitory</td>
<td>Dormitory</td>
<td>Dormitory</td>
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</tr>
<tr>
<td><strong>Enrollment Status:</strong></td>
<td>Full Time Student</td>
<td>Full Time Student</td>
<td>Full Time Student</td>
<td></td>
</tr>
<tr>
<td><strong>Enrollment Mode:</strong></td>
<td>Distance education program of study</td>
<td>Distance education program of study</td>
<td>Distance education program of study</td>
<td></td>
</tr>
<tr>
<td><strong>Award/Reject:</strong></td>
<td>Non-Approved Course of Study</td>
<td>Non-Approved Course of Study</td>
<td>Non-Approved Course of Study</td>
<td></td>
</tr>
</tbody>
</table>
Upcoming DE Enhancements

• Displaying Enrollment Mode on Disbursement Roster and on Disbursement Transmissions

• Displaying Alternative Awards (for all enrollment modes) on Partner Interface

• Displaying Alternative Awards (for all enrollment modes) on mainframe
2018-19 Reconciliation

• 2018-19 AY Reconciliation Rosters generate the week of March 25
• 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
2019 Summer State Grant

What isn’t changing?

– Student application period is mid-March through August 15
– Awards not determined until after 2019-20 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
– Required Enrollment Mode Indicator for all students
2019 Summer State Grant

What is changing?

- Students at HQD schools are now eligible for summer awards when enrolled more than 50% in DE credits
2019 Summer SWSP Application

2019 SUMMER PENNSYLVANIA STATE WORK•STUDY APPLICATION

How to Apply

1. DETERMINE IF YOU ARE AN ELIGIBLE STUDENT

To be considered eligible, you must:
- Be a Pennsylvania resident.
- Have earned at least half-time (6 or more credits) during the preceding or upcoming academic year at a PHEAA-approved postsecondary institution.
- Be a PA State Grant recipient if an undergraduate student. Graduate student must participate if they have unmet financial need verified by their financial aid office.
- Not be in default or delinquent on an education loan or owe a PA State Grant refund.

2. FIND AN ELIGIBLE JOB

To find an eligible SWSP employer, you can:
- Search for an approved SWSP employer online at PHEAA.org/WorkJobs.
- Which your own employer. Tips for locating an employer, as well as an employer resource information, is available at PHEAA.org/Providers.

3. APPLY

To apply you must:
- Complete Section 1 of the SWSP Application/Placement Form and submit it to your designated employer.
- Notify your employer of the completed SWSP Application/Placement Form.
- PHEAA will notify you and your employer of your SWSP eligibility.

STUDENT APPLICATION FILING DEADLINES

<table>
<thead>
<tr>
<th>Work Term</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019 Summer Term</td>
<td>June 15, 2019</td>
</tr>
</tbody>
</table>

Note: SWSP Application/Placement Form is included in this document and is available at PHEAA.org
2019-20 Cost on the Web

- Cost collection applicable for 2019 Summer term and 2019-20 Academic Year
- Opened on March 11
- Due date for submission is April 15, 2019
- Provide room and board amounts for statistical purposes
- Requiring updated costs from all schools
2019-20 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

PHEAA
Pennsylvania Higher Education Assistance Agency
# 2019-20 Budget Appropriation

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>PHEAA-Administered</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PA State Grant</td>
<td>$273.391*</td>
<td>$368.233**</td>
<td>$310.233</td>
<td>13.5%</td>
</tr>
<tr>
<td>Institutional Assistance Grants (IAG)</td>
<td>$26.521</td>
<td>$27.847</td>
<td>$26.521</td>
<td>0.0%</td>
</tr>
<tr>
<td>Matching Funds</td>
<td>$12.496</td>
<td>$13.121</td>
<td>$13.121</td>
<td>5.0%</td>
</tr>
<tr>
<td>Higher Education of the Disadvantaged (Act 101)</td>
<td>$2.246</td>
<td>$2.358</td>
<td>$2.358</td>
<td>5.0%</td>
</tr>
<tr>
<td>Higher Education for Blind or Deaf Students</td>
<td>$0.047</td>
<td>$0.049</td>
<td>$0.049</td>
<td>4.3%</td>
</tr>
<tr>
<td>Pennsylvania Internship Program Grants</td>
<td>$0.450</td>
<td>$0.450</td>
<td>$0.450</td>
<td>0.0%</td>
</tr>
<tr>
<td>Ready to Succeed Scholarships</td>
<td>$5.000</td>
<td>$5.250</td>
<td>$5.000</td>
<td>0.0%</td>
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<tr>
<td>PA Targeted Industry Program</td>
<td>$0.000</td>
<td>$6.300</td>
<td>$6.300</td>
<td>N/A</td>
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<tr>
<td>Primary Health Care Practitioner Loan Repayment Program</td>
<td>$0.000</td>
<td>$0.000</td>
<td>$4.550</td>
<td>N/A</td>
</tr>
<tr>
<td>Co-Administered</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bond-Hill Scholarship</td>
<td>$0.697</td>
<td>$1.800</td>
<td>$0.800</td>
<td>14.8%</td>
</tr>
<tr>
<td>Cheyney University Keystone Academy</td>
<td>$1.813</td>
<td>$2.500</td>
<td>$3.500</td>
<td>93.1%</td>
</tr>
<tr>
<td>Total</td>
<td>$322.661</td>
<td>$427.908</td>
<td>$372.882</td>
<td>15.6%</td>
</tr>
</tbody>
</table>
2019-20 FAFSA Application

- Tracking 2019-20 applicants on a weekly basis to assist with award projections
- Both FAFSA and PA State Grant Applications are down in Pennsylvania compared to 2018-19
- Pop-up blockers keeping students from accessing the PA State Grant Form via the API link from the FAFSA
- GAPS reports available in PageCenter to view incomplete PA State Grant applications
- Electronic Signature working well for the SGF
E-Sign

If the signature is considered incomplete, the student has two options:

- Student and/or parent signs the FAFSA
  - Updates will be reviewed within 3-5 days by PHEAA upon receipt of the FAFSA update
- Student provides our Signature Request Form
  - Form is mailed to PHEAA and manually processed
E-Sign

HOW DO I APPLY FOR PENNSYLVANIA STATE GRANT AID IF I WAS UNABLE TO CONNECT TO THE PENNSYLVANIA STATE GRANT FORM FROM THE DIRECT LINK ON THE FAFSA ON THE WEB?

You may have to wait up to 7 business days for the Pennsylvania Higher Education Assistance Agency (PHEAA) to receive and process your completed FAFSA information. After PHEAA processes the FAFSA information and creates your PA State Grant record, you can complete the process in three simple steps:

1. Sign in or create a student account at www.pheaa.org/sgf
   Note: This will direct you to the American Education Services (AES) website where PHEAA houses your student portal account (Account Access).
2. Provide basic information about your school and status.
3. Read and agree to the PA State Grant Rights and Responsibilities.

Once you complete the form, you can check your application status in the student portal. Please note that if your record is considered to be in a “complete” status, you won’t be notified of your eligibility until approximately May 2019. If your record is incomplete, don’t worry, PHEAA will reach out to you for any additional information necessary to consider your eligibility for a PA State Grant award.
2019-20 Early Estimator

• Version 2 released in February
  – Max award $3,233
• All schools must use for PA State Grant estimates
  – Provide uniform awards across sectors and schools
  – Awards must be +/- $100 of Early Estimator
2019-20 PA State Grant Training

2019 SUMMER TRAINING EVENTS

PA State Grant & PA Forward training coming to a location near you!

June 13 – PHEAA Headquarters
June 18 – La Salle University
June 20 – Community College of Allegheny County – North Campus
July 9 – Westmoreland County Community College
July 11 – Montgomery County Community College
July 16 – King’s College
July 18 – PHEAA Headquarters

Registration will become available on PHEAA.org/training in the coming weeks!

PHEAA
Pennsylvania Higher Education Assistance Agency
2019-20 PA State Grant Training

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
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<tbody>
<tr>
<td>June 13</td>
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<td>July 11</td>
<td>Montgomery County Community College</td>
</tr>
<tr>
<td>July 16</td>
<td>King’s College</td>
</tr>
<tr>
<td>July 18</td>
<td>PHEAA Headquarters</td>
</tr>
</tbody>
</table>
2019-20 PA State Grant Training

- 2019-20 PA State Grant Program Handbook
  - Focus on DE integration
  - Optional PA Forward Lunch session
Act 121 (HB2124)

- HB2124 signed into law on October 24, 2018
- PHEAA will offer a low-cost solution to satisfy the provisions of the bill
- PHEAA is collaborating with the Pennsylvania Department of Education (PDE)
- PHEAA plans to have a prototype to show schools in April/May time frame
- Schools have until July 1, 2020 to send their first notices to students
- Questions - Contact Will Lindsey at 717.720.1529 or via email at wlindsey@pheaa.org
IAG

- SG reconciliation must be completed by late April to be reflected on the IAG reconciliation roster in early May
- Estimated *per capita* for 2018-19 is $640, subject to change
- Proposed 2019-20 budget for IAG would lead to an estimated *per capita* of $660
2018-19 PA-TIP

- EFC eligibility up to 12000
- Student application deadline is May 1, 2019
- School deadline to certify pending awards is July 1, 2019
- Funds are still available
Ready to Succeed Scholarship

Effective with the Fall 2018 term:

• The minimum GPA requirement for RTSS eligibility increased from 3.25 to 3.50

• Schools are no longer required to report student GPA data below the minimum eligible GPA for the program
Ready to Succeed Scholarship

- Funds over 3,000 students per year with $5 M
- Reconciliation begins early May; due July 1
- August 1 disbursement deadline
PHEAA.org

Invested in You.

WHO IS PHEAA

Pennsylvania Higher Education Assistance Agency
Outreach

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

• Contact Will Lindsey at wlindsey@pheaa.org
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@phea.org