

Year-Round Pell

Joseph Massman | Spring 2018
U.S. Department of Education


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Agenda

- Year-Round Pell overview
- Legislative background
- General requirements
- Unchanged Pell rules
- Changed Pell rules
- Policy examples
- Operational reminders for Year-Round Pell
- Resources

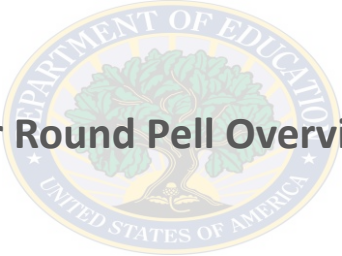


2

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Year Round Pell Overview

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Legislative Background

- The Consolidated Appropriations Act of 2017 allows a student to receive Pell Grant funds up to 150% of the student's Scheduled Award for an award year
 - 1st 100% is initial scheduled Pell award
 - Final 50% is considered the additional Pell award (YRP)
- Effective beginning with the 2017-18 award year
 - Applied to summer 2017, *if* treated as a header to 2017-2018

DCL GEN-17-06 issued June 19, 2017

4

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General Requirements

- 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
- Additional Pell Grant will be included in the student's 600% maximum Pell Lifetime Eligibility Used (LEU)

5

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General Requirements

- 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

6

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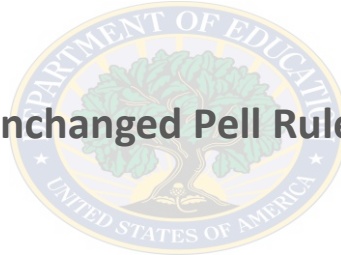
Differences from “Two Pell Grants in an Award Year”

- No acceleration requirement
- No requirement to place a crossover payment period in the award year that produces the largest Pell Grant award

7

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Unchanged Pell Rules


8

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Unchanged Pell Rules

- Definition of an academic year
- Definition of a Scheduled Award
- Award Amount
- Payment period determination
- Pell Grant formulas
- Crossover payment periods
- Recalculation policies



9

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Definition of an Academic Year

- Must be defined for each eligible program
 - May be the same for all programs
 - May be different for some or all programs
 - Credit-hour and clock-hour programs will have different academic years

10

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Definition of an Academic Year

Statutory Definition of an Academic Year		
Academic Progress Measured By:	Minimum Completion Requirement*	Minimum Instructional Time Requirement
Semester hours	24 semester hours	30 weeks
Trimester hours	24 trimester hours	30 weeks
Quarter hours	36 quarter hours	30 weeks
Clock hours	900 clock hours	26 weeks

- Required by statute and 34 C.F.R. § 668.3
- Sometimes referred to as the Statutory Academic Year, Title IV Academic Year or the Defined Academic Year

11

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Definition of a Scheduled Award

- Amount that a full-time student would receive for a full academic year based on the student's EFC and COA


12

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Award Amount

- No change in the way an award for a payment period is calculated
 - Pell Grant formulas have not changed
- Award is calculated by payment period based on a student's Scheduled Award




13

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Payment Period Determination

- Defined in 34 C.F.R. § 668.4
 - For term-based programs, payment period is the term
 - For non-term programs and all clock-hour programs, payment period is half of the hours and half of the weeks in an academic year
 - Same rules also still apply for determining payment periods for remaining portions of a program



14

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Pell Grant Formulas

- The existing five Pell formulas have not changed
- 34 C.F.R. § 690.63
- Use the formula that corresponds to the structure of the program

15

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Pell Grant Formulas

Formula 1

Standard Term Credit-Hour Programs

- Traditional Semesters/T trimesters 15-17 weeks in length, or
- Traditional Quarters 10-12 weeks in length, and
- Full-time is defined as at least 12 credit hours in each term

Formula 3

Other Term-Based Programs

- Non-standard terms
- Full-time defined as something less than 12 credit hours in any term
- Program offered a type of credit inconsistent with type of term (e.g., semester credits for 10-week quarters)

Formula 4

Clock-Hour and Non-Term Programs

- All clock-hour programs
- All non-term credit-hour programs
- Programs with terms that overlap

16

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Pell Crossover Payment Periods

- Payment period that includes both June 30 and July 1, thus overlapping two award years
- Must consider the crossover payment period to occur entirely within one award year
- Must have a valid SAR/ISIR for the selected award year
- May be different than the award year used for other Title IV aid (i.e., loans, campus-based)
- The institution has the flexibility to assign crossover payment periods to either of the relevant award years, "as it determines is most beneficial to students"

17

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Crossover Payment Periods

- 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 a category of students) without exception, or
 - Applies to all students (or a category of students) with allowance for an individual student exception

18

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Mandatory Recalculations

- Pell must be recalculated if the student's EFC changes
- Pell must be recalculated to reflect changes to enrollment status between terms
- A student must start all credits for which Pell is paid
 - *To be eligible for the additional Pell Grant, a student must be enrolled at least half-time and begin the classes that support that enrollment status*

19

34 C.F.R. § 690.80

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Recalculation Policies—Optional

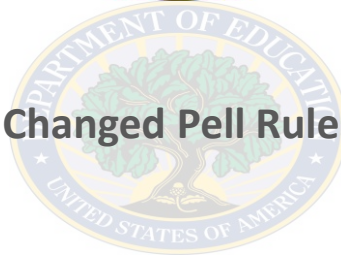
- Institutions may develop a policy to recalculate for changes in enrollment status during a payment period
- May set a date after which no recalculation will be performed for changes in enrollment status (Pell Recalculation Date)
 - PRD only applies to Pell *recalculations*, not to initial calculations
- If an institution does not establish a policy for recalculating for changes in enrollment status, a student's Pell Grant award is based on the initial calculation even if the student later changes her enrollment status

20

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Changed Pell Rules

21


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Changed Pell Rules

- Scheduled Award limitation
- Enrollment status



22

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Scheduled Award Limitation

- Old: Student may receive only one Scheduled Award for an award year
- New: Student may receive up to one and one-half of a Scheduled Award for an award year


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Enrollment Status


- Old: Less-than-half-time enrollment eligible at all times
- New: Must be enrolled at least half-time to receive the additional award
 - Final 50%



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Semester Example #1

- Assume student's 2017-18 Scheduled Award is \$5,920 based on an EFC of 0 and a COA of \$10,000

<div>Fall 2017 Full-Time</div> <div>Award - \$2,960 which is 50.0000% of the Scheduled Award</div> <div>Total Percent of Initial Scheduled Award used is 50.0000%</div>	<div>Spring 2018 Full-Time</div> <div>Award - \$2,960 which is 50.0000% of the Scheduled Award</div> <div>Total Percent of Initial Scheduled Award used is 100.0000%</div>	<div>Summer 2018 Full-Time</div> <div>Award - \$2,960 which is 50.0000% of the Scheduled Award</div> <div>Total 100% used of Initial Scheduled Award, as well as the 50.0000% Additional Award</div>
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26

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Clock-Hour Example

- 1200 clock-hour/35-week program that occurs entirely within the 2017-18 award year
- Academic Year = 900 clock-hours/26 weeks
- Student's Scheduled Award is \$5,920 for 2017-18

<div>450 hours/13 weeks \$2,960</div>	<div>450 hours/13 weeks \$2,960</div>	<div>300 hours/9 weeks \$1,973.33</div>
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2017-18 Award Year

133.3333%
2017-18 Award Year

27

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One Term—Additional Pell Amount

- When the calculated award for a payment period is greater than the remaining balance of the initial Scheduled Award, the award for the payment period is the remaining amount of the initial Scheduled Award plus the Additional Pell amount
 - Awarded as one amount
 - Reported to COD as one amount

28

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Semester Example #2

- Assume student's 2017-18 Scheduled Award is \$5,370 based on an EFC of 550 and a COA of \$10,000

<div>Summer 2017 (assigned to the 2017-18 AY) Three-Quarter-Time Award - \$2,014 which is 37.5046% of the Scheduled Award</div>	<div>Fall 2017 Full-Time Award - \$2,685 which is 50.0000% of the Scheduled Award Total Percent of Initial Scheduled Award used is 87.5046%</div>	<div>Spring 2018 Full-Time Award - \$2,685 which is 50.0000% of the Scheduled Award Total 100% used of Initial Scheduled Award 37.5046% of Additional Award</div>
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29

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Semester Example #2

- In this example, the Spring 2018 Pell award is made up of 12.4954% (\$671) remaining from the initial Pell Grant Scheduled Award and 37.5046% (\$2,014) from the additional Pell Grant award
 - The student has 12.4954% (\$671) remaining from the additional Pell Grant award for the 2017–18 award year
- If the student had used up 100% of his Pell Grant Scheduled Award for Summer 2017 and Fall 2017, the entire Spring 2018 award amount would be from the additional Pell Grant award

30

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Semester Example #3

- Assume student's 2017-18 Scheduled Award is \$5,920 based on an EFC of 0 and a COA of \$10,000

Fall 2017 Full-Time Award - \$2,960 which is 50.0000% of the Scheduled Award Total Percent of Initial Scheduled Award used is 50.0000%	Spring 2018 Full-Time Award - \$2,960 which is 50.0000% of the Scheduled Award Total Percent of Initial Scheduled Award used is 100.0000%	Summer 2018 Less-Than-Half-Time Award - \$740 Ineligible Total 100% already used of Initial Scheduled Award, and the student must be enrolled at least half-time to be eligible for Additional Pell
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31

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Example #4 – Transfer Students

Student Transfers to New School on 1/8/2018

**2017-18 Pell TEU
Prior to Transfer =
90%**

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

**Enrolled FT
Spring Term
50% Eligible**

Initial Scheduled Award = 10%
Additional Pell = 40%

**Eligible Pell amount now
based out of 150%**

32

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Example #5 – Transfer Students

Student Transfers to New School on 1/8/2018

**2017-18 Pell TEU
Prior to Transfer =
90%**

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

**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

33

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Semester Example #6 (Crossover Period)

2017-2018 EFC 0	Scheduled Award:	\$5,920
2018-2019 EFC 800	Scheduled Award:	\$5,345

SUMMER 2017
Half-time

FALL 2017
Full-time

SPRING 2018
¾-time

SUMMER 2018
Full-time

Disbursement = \$1480
(Paid from 2017-18)

Disbursement = \$2960
(2017-18)

Disbursement = \$2220
(2017-18)

Disbursement = \$2220
(2017-2018)
(37.5%, full Additional)
OR
\$2672.50 (2018-2019)
(50% of 2018-19 Initial)

25% Initial Award used

50% Initial Award used

25% Initial Award, plus
12.5% Additional Pell

Total used 25%

Total used 75%

Total used 112.5%

34

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Semester Example #6

- In this example, the Spring 2018 Pell award is made up of 25% (\$1,480) remaining from the initial Pell Grant Scheduled Award and 12.5% (\$740) from the additional Pell Grant award
 - At that point, the student had 37.5% (\$2,220) remaining from the additional Pell Grant award for the 2017–18 award year
- For Summer 2018, the choice of which award year to use will depend upon the school's Pell crossover awarding policy
 - Could use the remaining 37.5% of Additional Pell Grant for 2017-18 (\$2,220), OR
 - Could begin the first 50% percent of Initial Pell Grant for 2018-19 (\$2,672.50)
- Which option is "most beneficial" to the student?
 - 2017-18 is based on a lower EFC but also has limited remaining funds
 - 2018-19 is based on a higher EFC but student would receive a larger disbursement

35

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Optional Recalculation Examples

Scenario: Pell Studies University (PSU) uses semester standard terms. PSU has a policy to recalculate a student's Pell award up to the add/drop date for the term, which the school also uses for its Pell Recalculation Date (PRD).

Recalculation example 1: Abbie Rhoades

- Abbie attended full-time summer and fall semesters, and received her full 100% initial Pell award.
- For spring semester, Abbie enrolls in two 3 credit-hour courses prior to PRD, and receives a disbursement of additional Pell for half-time enrollment (6 credit-hours)
- She begins attendance in both classes
- After the PRD, Abbie drops one 3 credit-hour course
- Abbie is still considered half-time, and remains eligible for the additional Pell

36

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Optional Recalculation Examples

Scenario: Pell Studies University (PSU) uses semester standard terms. PSU has a policy to recalculate a student's Pell award up to the add/drop date for the term, which the school also uses for its Pell Recalculation Date (PRD).

Recalculation example 2: Pennie Layne

- Pennie attended full-time summer and fall semesters, and received her full 100% initial Pell award.
- For spring semester, Pennie enrolls in two 3 credit-hour courses prior to PRD, and receives a disbursement of additional Pell for half-time enrollment (6 credit-hours)
- She begins attendance in both classes
- Pennie drops one 3 credit-hour course before the PRD
- Pennie is considered less-than-half-time, and is not eligible for the additional Pell

37

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Optional Recalculation Examples

Scenario: Pell Studies University (PSU) uses semester standard terms. PSU has a policy to recalculate a student's Pell award up to the add/drop date for the term, which the school also uses for its Pell Recalculation Date (PRD).

Recalculation example 3: Henry Kite

- Henry attended full-time summer and fall semesters at another school, and received his full 100% initial Pell award at that school
- For spring semester, Henry enrolls in two 3 credit-hour courses prior to PRD
- He begins attendance in both classes
- Henry drops one 3 credit-hour course after the PRD
- Henry was slow to update his FAFSA to add PSU's school code, so PSU doesn't receive an ISIR until mid-terms (after the course was dropped)
- PSU's initial calculation of Henry's Pell Grant occurs after the PRD. PSU must use Henry's enrollment status as of the date of the initial calculation (less-than-half-time), so he is not eligible for the additional Pell Grant
- An initial Pell calculation is not the same as a Pell recalculation!

38

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Mandatory Recalculation, Module Example

- Standard term, semester-hour program with a summer term comprised of two modules
- School uses one fixed PRD for the full summer term
- Rita is enrolled half-time during summer 2018
 - 100% of 2017-18 initial Scheduled Award has been paid for fall/spring
 - Payment for the payment period will be from additional 2017-18 Pell

Summer 1 Summer 2018 Summer 2

3 credits 3 credits

Pell recalculation date Disbursement made Student withdraws from 3 credits in module 2 July 1, 2018

2017-18 2018-19

39

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Required Recalculation Example - Conclusions

- Rita was paid half-time Pell award based on enrollment in 6 credits as of the Pell Recalculation Date (PRD)
- Pell recalculation/COD adjustment necessary
 - Withdrawal from 3 credits in summer 2 was after the PRD, but Rita will not begin attendance in all credits upon which the Pell payment was based
 - A similar situation would exist if she did not withdraw from the 3 credits in summer 2, but simply failed to begin attendance in them
- Rita is now less-than-half-time and may not receive payment from 2017-18 additional Pell
 - Payment may be made from the initial 2018-19 Scheduled Award, depending upon the school's crossover awarding policy

40

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Year-Round Pell Operations Reminders

41

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Year-Round Pell Grants-Operations

Myths about COD system editing

- *It will always keep me from awarding/dispersing the wrong amount of Pell*
- *It knows the student...*
 - Didn't enroll
 - Has a SAP problem
 - Graduated
 - Completed verification
- *Should be paid off a different CPS transaction number because it is higher than the one originally submitted to COD*
- *Should not be paid off a different CPS transaction number just because it is higher than the one originally submitted to COD*

42

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Year-Round Pell Grants-Operations

- **Additional Eligibility Indicator (AEI)**
 - Schools may submit the AEI, an optional tag, that will indicate eligibility for up to 150% Scheduled Federal Pell Grant (SFPG)
 - If a school submits an AEI = "true", the total awarded Pell should equal an amount > 100% of the student's SFPG for that award year across schools
 - FSA will be monitoring schools that submit the AEI = "true" for students **not awarded or disbursed** Pell over the 100% SFPG. Any school suspected of such practices will be referred to Program Compliance for review and sanctioning if not corrected

43

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Setting the AEI to "true"

When should I set the AEI = "true" in COD?

- When I award Pell for the award year?
- When the student indicates intent for "added" attendance?
 - Crossover period attendance
- Is the program a "year-round" program?
- Transfers
 - Does my school's disbursement represent an amount between 100%-150% in the student's TEU for that award year?

44

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Setting the AEI to "false"

When should I set the AEI = "false" in COD?


- Why was it set to "true" previously?
 - Do those conditions still exist?
- Withdrawals/R2T4
- Nonattendance
 - Do you have a procedure when students that fail to enroll as planned?
- **Sooner is always better**
 - Don't wait until you are reconciling Pell for the award year

45

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46

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Policy Resources

- FSA Handbook
 - Volume 3, Chapter 3: Pell Calculations
- DCL GEN-17-06
 - Year-Round Pell
- DCL GEN-16-19
 - 2017-18 Pell Payment and Disbursement Schedules
- DCL GEN-18-01
 - 2018-19 Pell Payment and Disbursement Schedules

47

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Technical Resources

- June 20, 2017 EA
 - Provides preliminary COD System implementation information and school processing timeline DCL GEN-17-06
- Updated 2017-18 COD Technical Reference
 - Posted 8/30/17
- October 4, 2017 EA
 - COD 16.2 Implementation documentation

For more technical information on Year-Round Pell, review 2017 FSA Training Conference Session #14 – COD Update

- Recording available at fsaconferences.ed.gov

48


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Contacts

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- Denver (Region 8) Training Officer
 - Joseph Massman 303-844-0432
- Email – `firstname.lastname@ed.gov`



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89

Training Feedback

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

- Go to <https://www.surveymonkey.com/s/Massman>
- Evaluation form is specific to Joseph Massman
- 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 `Mark.Gerhard@ed.gov`; 415-486-5620



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Thank You!

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51

QUESTIONS?



52

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