

Session #9

Year-Round Federal Pell Grant Exploration and Answers

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2019 FSA Training Conference *for Financial Aid Professionals*

Year-Round Pell Grants – Agenda

- Policy Review
- Year-Round Pell Operational Review
- One School's Perspective on Year-Round Pell Grant

Policy Review

- Student can receive up to 150% of Scheduled Award for an award year
- Must be enrolled at least half-time in the payment period for which the student receives the additional Pell
- Must be otherwise eligible to receive Pell for the payment period

Policy Review

- Additional Pell included in student's 600% LEU
- Transfer students remaining eligibility
- DCL GEN 17-06 issued June 19, 2017 and Volume 3 of the *FSA Handbook*

Policy Review

- Unchanged Pell basics
 - Formulas
 - Calculate for the payment period
 - Pay on valid ISIR or valid SAR only
 - Duration of eligibility
 - Frequency of payment in payment period
 - Recalculation rules

Policy Review

- Crossover payment period
 - Payment period that includes June 30 and July 1 overlapping two award years
 - Valid ISIR or valid SAR for applicable award year
 - Assign as you determine is most beneficial to students/maximize eligibility
 - Student by student basis

Policy Review

- Formula 3/Nonstandard term programs
- Academic Year = 30 weeks/24 semester hours
- Scheduled Award is \$6,195 for 2019-20
- 13-week term, 17-week term, 12-week term
- Enrolls full-time in each term

13 week/30 weeks
\$2,684.50

17 week/30 weeks
\$3,510.50

12 week/30 weeks
\$2,478.00

2019-20 Award Year

140%
2019-20 AY

Policy Review

- Formula 4/nonterm or clock-hour programs
- 1,350 clock-hour program that occurs entirely within the 2019-20 award year
- Academic Year = 900 clock-hours/26 weeks
- Student's Scheduled Award is \$6,195 for 2019-20

450 hours/13 weeks
\$3,097.50

450 hours/13 weeks
\$3,097.50

450 hours/13 weeks
\$3,097.50

2019-20 Award Year

150%
2019-20 AY

Year-Round Pell Grants – Operational Review

- Additional Eligibility Indicator (AEI)
- Rounding
- Identifying Year-round Pell Grant issues
- Setting the AEI Correctly
- Operational Reminders

Year-Round Pell Grants- Additional Eligibility Indicator

- The AEI is the sole means of certifying Year-round Pell Grant eligibility
 - *AEI must be “true”* if student’s Total Eligibility Used (TEU) will be 100 -150%
 - Even if the Eligibility Used (EU) *at your* school will be < 100%
 - AEI not submitted for ineligible students
 - but may be submitted as “false”

Year-Round Pell Grants – Rounding

- There is no special rounding exceptions for the Year-round Pell process
 - TEU cannot exceed 100% if there is no “additional” attendance – eligibility for Year-round Pell
- If your school does not disburse in cents, 2019-20 150% maximum limit is \$9,292
 - \$9,293 exceeds the maximum limit of \$9,292.50

Year-Round Pell Grant – Identifying Issues

- Don't ignore the edits returned in responses from COD!*
- Disbursement Warning Edit 68 – POP is a clue the AEI may need to be set to “true”
- Award Level Edits 173, 174, 175 all point to a change in the AEI from “true” to “false” and the award/disbursement is no longer consistent with that determination

* *COD Technical Reference Volume 2, Section 4*

Year-Round Pell Grant – Identifying Issues

- Review reports with the AEI*
 - Pell Grant POP Report CSV (*column V in CSV format*)
 - POP is a primary indicator the AEI is not set correctly
 - Pell Grant Multiple Reporting Record (MRR) (*position 449*)
 - Pell Grant Reconciliation Report Record (*position 97*)
 - Pell Grant Year-to-date Record (*position 251*)

* *COD Technical Reference Volume 6, Section 8*

Year-Round Pell Grant – Setting the AEI Correctly

- Update procedures for R2T4 calculations, non-attendance, and all other recalculated disbursements
 - When AEI is changed from “true” to “false,” always recalculate and submit award *and* disbursement changes if necessary
 - When award and disbursements are changed, always evaluate if AEI needs to be changed to/from “true”/“false”

Year-Round Pell Grant – Setting the AEI Correctly

- Reduction in award and disbursement to \$0, change the AEI from “true” to “false”
- Disbursing any part of 100%-150% eligibility, must also submit AEI = “true”

Year-Round Pell Grant – Operational Reminders

- One Pell Grant per student, per school, per award year
 - There is no “First Pell” and “Second/Additional Pell” in COD regardless of how your system is structured
- Always calculate remaining Eligibility Used in percentages, not dollars

Year-Round Pell Grant – Operational Reminders

- Setting the AEI=“true” can increase the student’s Pell Grant eligibility *across all schools* for that award year, not just your school
- Schools may not know their COD submissions are being edited at the 150% limit if another school set the AEI=true
- Don’t wait until year-end reconciliation to correct the AEI

One School's Perspective on Year-Round Pell Grant

Daniel T. Barkowitz
Valencia College

Year-Round Pell: One College's Experience

- About Valencia College
 - Orange and Osceola counties' State College
 - 9 Campuses
 - In 2018-19, enrollment was 63,448. FTE was 32,954.
 - 34.1% FT / 65.9% PT
 - Received 71,266 FAFSAs in 2018-19
 - 22,260 Pell Grant Recipients in 2018-19
 - 64.0% Dependent / 36.0% Independent
 - 60.5% with \$0 EFC
 - \$81.3M in Pell Grant received by students in 2018-19

Valencia College Outreach efforts

- Student communication
 - Fall – Letter to all enrolled students receiving Pell
 - Spring – Targeted letter to segmented Pell populations:
 - Enrolled Fall and Spring FT → encouraged FT summer enrollment
 - Enrolled Fall and Spring LTFT but might benefit from more Pell in Summer → encouraged greater summer enrollment (concept of 150% Pell)
 - Enrolled Fall and/or Spring, but not enough hours to benefit from new Pell, encouraged summer enrollment

Sample Valencia College Fall Email

Dear Daniel,

You may now be eligible to receive Federal Pell Grants -- financial aid that you do not have to pay back -- during fall, spring AND summer semesters!

Your Pell Grant can be awarded for **all three semesters**. This means that full-time students can potentially graduate sooner by continuing their studies through the summer semester with Pell Grant assistance.

You must enroll in a minimum of 6 compliant credit hours in the summer to receive the summer Pell Grant. As a reminder, you may receive approximately 144 credit hours (600%) of Pell funding [until you receive your first Bachelor's degree](#).

Additional information may be found at [FATV](#). Of course, you are also welcome to speak to one of our Financial Aid or Answer Center advisors for more information about your Pell Grant.

Here are five examples of how students with an [Expected Family Contribution EFC](#) of 0000 will be able to use Pell Grants to pay for college.

	Fall	Spring	Summer	Pell Usage for the year
1	Enrolled 12+ credits Award = \$3,047 Pell usage is 50%	Enrolled 12+ credits Award = \$3,048 Pell usage is 50%	Enrolled 12+ credits Award = \$3,047 Pell usage is 50%	150%

2	Enrolled 12+ credits Award = \$3,047 Pell usage is 50%	Enrolled 9 credits Award = \$2,285 Pell usage is 37.5%	Enrolled 6 credits Award = \$1,523 Pell usage is 25%	112.5%
3	Enrolled in 9 credits Award = \$2,285 Pell usage is 37.5%	Enrolled in 9 credits Award = \$2,285 Pell usage is 37.5%	Enrolled in 9 credits Award = \$2,285 Pell usage is 37.5%	112.5%
4	Enrolled in 9 credits Award = \$2,285 Pell usage is 37.5%	Enrolled in 9 credits Award = \$2,285 Pell usage is 37.5%	Enrolled in 3 credits Award = \$761 Pell usage is 12.5%*	87.5%
5	Enrolled in 12 credits Award = \$3,047 Pell usage is 50%	Enrolled in 12 credits Award = \$3,048 Pell usage is 50%	Enrolled in 3 credits Pell = 0**	100%

*as the student is still utilizing the first 100% Pell, the student doesn't have to be 1/2 time
**the student has received 100% and is not enrolled 1/2 time in the summer term

Sincerely,
Financial Aid Services

Sample Valencia College Spring Emails

MESSAGE FOR FT/FT (2,546 students)

Dear <Fname>,

As we near Spring Break, we are writing to make you aware of a wonderful opportunity! As a recipient of the Federal Pell Grant, **you could be eligible for Pell Grant funding this summer!**

The Federal Government has authorized *year-round Pell Grants*. This means that as long as you are registered for 6 compliant credits or more (toward your current degree program) during the summer term, you could qualify for additional Pell Grant funding, and potentially graduate sooner by continuing your studies at Valencia this summer!

Class registration for summer is available now through Atlas. Additional information on year-round Pell Grants may be found at [FATV](#). Of course, you are also welcome to speak to one of our Answer Center Advisors at our walk-in centers or Enrollment Services Advisors at 407-582-1507 for more information about your Pell Grant.

Sincerely,

Financial Aid Services

MESSAGE FOR CAN 2ND (3,679 students)

Dear <Fname>,

As we near Spring Break, we are writing to make you aware of a wonderful opportunity! As a recipient of the Federal Pell Grant, **you could be eligible for additional Pell Grant funding this summer!**

The Federal Government has authorized *additional Pell Grant Funds* (up to 150% of their full-time award). This means that as long as you are registered for 6 compliant credits or more (toward your current degree program) during the summer term, you could qualify for additional Pell Grant funding, and potentially graduate sooner by continuing your studies at Valencia this summer!

Class registration for summer is available now through Atlas. Additional information on year-round Pell Grants may be found at [FATV](#). Of course, you are also welcome to speak to one of our Answer Center Advisors at our walk-in centers or Enrollment Services Advisors at 407-582-1507 for more information about your Pell Grant.

Sincerely,

Financial Aid Services

MESSAGE FOR LTFT (2,933 students)

Dear <Fname>,

As we near Spring Break, we are writing to make you aware of a wonderful opportunity! As a recipient of the Federal Pell Grant, **you could be eligible for Pell Grant funding this summer!**

As a reminder, since you have not used all of your Pell Grant eligibility in Fall and Spring semesters, you may qualify for additional Pell Grant funding, and potentially graduate sooner by continuing your studies at Valencia this summer!

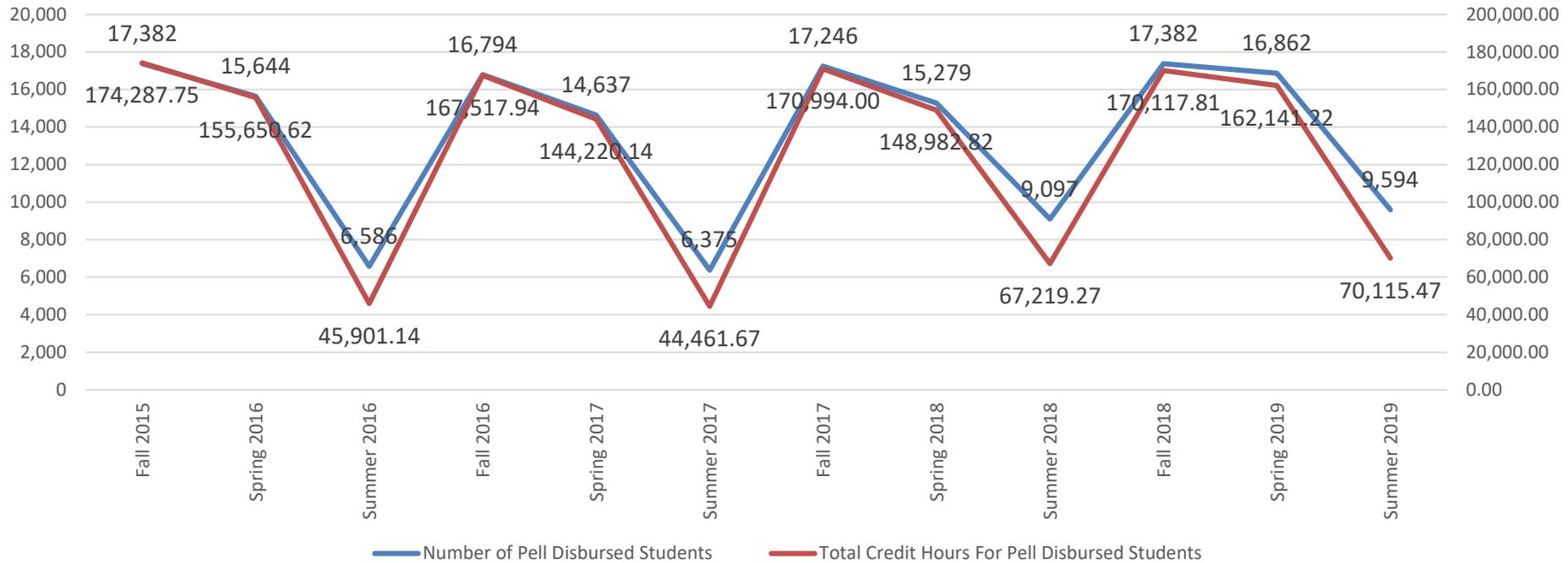
Class registration for summer is available now through Atlas. Additional information on year-round Pell Grants may be found at [FATV](#). Of course, you are also welcome to speak to one of our Answer Center Advisors at our walk-in centers or Enrollment Services Advisors at 407-582-1507 for more information about your Pell Grant.

Financial Aid History at Valencia

AY	FAFSAs (all applicants, including non-enrolling)	Undup Aid Recips (Head count)	Ttl Credit Enrollment (Head count)	% on aid	Pell Grant Recips (Head count)	Pell Grant (\$M)	Student With Loans (Head count)	Total Stud Loan (\$M)	Avg. Loan per Stud
2011-12	75,187	30,483	58,992	51.67%	24,130	\$73.2	15,215	\$85.3	\$5,610
2012-13	81,518	29,876	59,211	50.46%	24,298	\$76.6	13,420	\$72.8	\$5,425
2013-14	79,732	29,140	59,070	49.33%	23,730	\$75.6	11,962	\$57.1	\$4,773
2014-15	76,883	28,370	59,509	47.67%	23,537	\$75.6	10,826	\$51.0	\$4,709
2015-16	72,948	26,719	59,813	44.67%	21,952	\$71.2	9,710	\$49.0	\$5,043
2016-17	68,489	25,693	59,670	43.06%	20,947	\$68.0	9,082	\$45.2	\$4,975
2017-18	72,553	26,840	62,026	43.27%	21,942	\$76.9	8,147	\$41.8	\$5,135
2018-19	71,266	27,183	63,448	42.84%	22,260	\$81.3	7,907	\$41.0	\$5,191

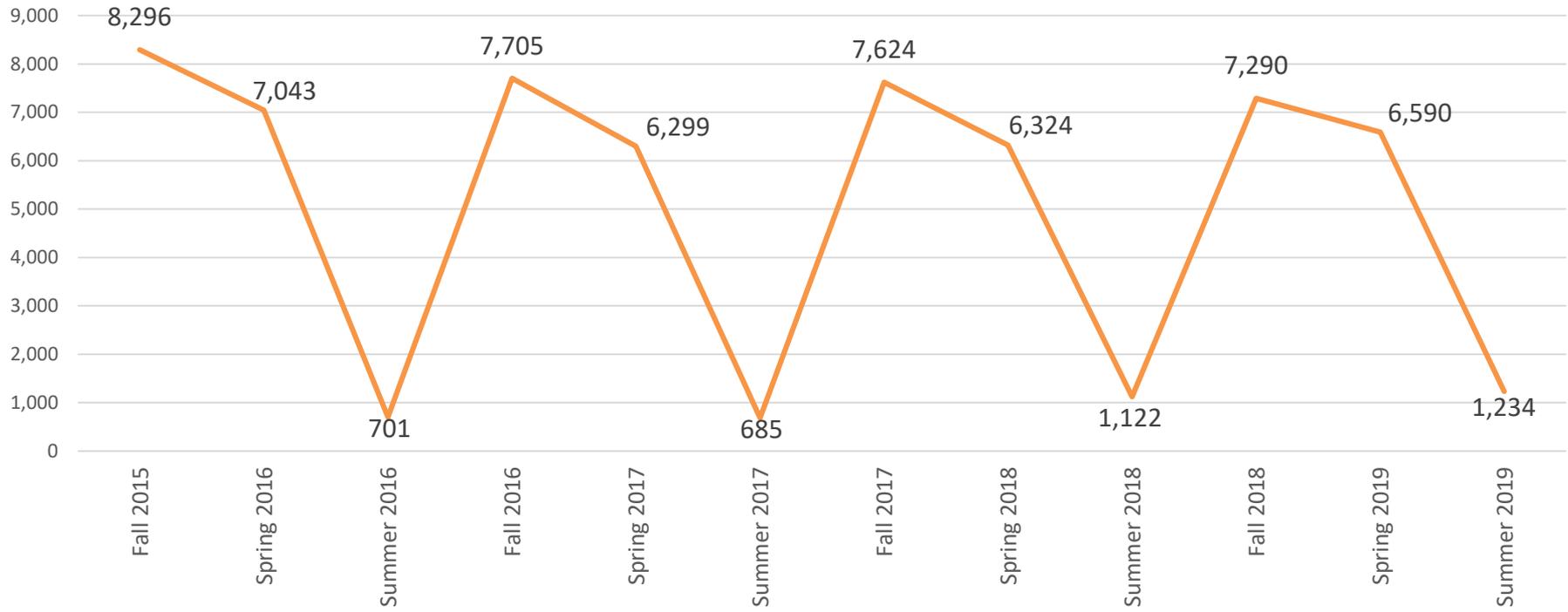
Impacts of Summer Pell at Valencia College

Pell Awards: # of Students and Total Hours



Pell Demographics at Valencia College

Number of Pell Disbursed Full-Time Students



Practical Considerations for Valencia College

- System Considerations
 - Readiness of Pell Awarding
 - System Errors / Delays
 - Rounding
 - LEU
 - Summer is a Trailer for Valencia
 - How to handle student variation?

AEI at Valencia College

- Automatic semester by semester roll-forward
 - Created summer records for all
 - Automatic Pell Awarding
 - AEI created based on Awarding
 - Post-summer Clean-up Campaign for students $\leq 100\%$
 - Net result:
 - 3,038 students had Pell AEI of Yes and TEU of greater than 100% (13.65% of our Pell population)
 - Average TEU for these students was 125.82%
 - Average increased Pell Grant was \$1,808.51.
 - Total increase for Year-Round Pell: \$5.49M

Resources

- [June 19, 2017 DCL](#) –GEN-17-06 –Implementation of Year-Round Pell Grants
- [June 20, 2017 EA](#) - preliminary COD System implementation information with school processing timeline
- [October 4, 2017 EA](#) –COD Implementation documentation
- COD Technical Reference
 - Volume 2, Section 4 -- Edits
 - Volume 6, Section 8 -- Reports

Contact Information

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Questions and Answers