



Agenda

- Definitions.
- Two Pell Grants in an Award Year.
- Calculating Two Scheduled Awards for a Payment Period.
 - Crossover Payment Periods.
- Transfer Students.
- Special Circumstances.
- Reporting Requirements.
- Duration of Eligibility.

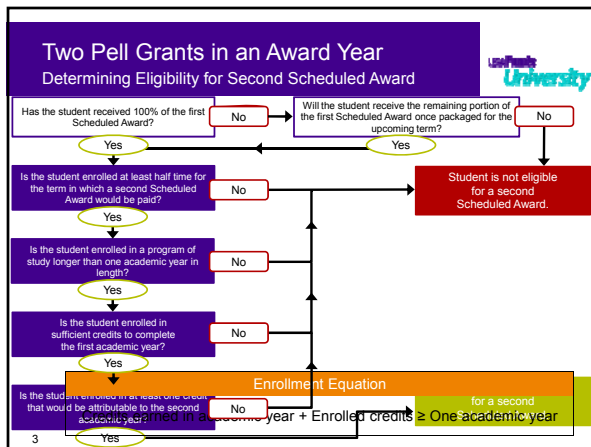
Year-Round Pell Grants	
Definitions	
Academic Year	Defined by each institution and must include at least: <ul style="list-style-type: none"> – 24 credit hours with at least 30 weeks. – 36 quarter hours with at least 30 weeks. – 900 clock hours with at least 26 weeks.
Acceleration	Completion of one academic year during a single award year and enrollment in at least one additional hour attributable to the next academic year.
Annual Award	Maximum Pell Grant amount a student would receive during a full academic year for a given enrollment status, expected family contribution and cost of attendance.
Award Year	Begins July 1 and ends June 30.

Year-Round Pell Grants Definitions (Continued)	
Crossover Payment Period	Occurs when a single payment period is in two award years. – When June 30 and July 1 coincide during the same payment period.
Earned/Completed Credits	Hours associated with courses for which a student receives credit in a given period.
Enrolled Credits	Hours associated with courses a student currently is attending in a given period.
Scheduled Award	Maximum Pell Grant amount the student would receive during the award year if attending full time for a full academic year.

Two Pell Grants in an Award Year

- The HEOA requires a student receive up to 200 percent of a Scheduled Award if the student:
 - Has received 100 percent of the first Scheduled Award.
 - Is enrolled in a program of study longer than one academic year in length.
 - Is enrolled at least half time, for the term in which a second Scheduled Award would be paid.
 - Is otherwise Pell Grant-eligible.

Beginning July 1, 2010, students also must be enrolled in at least one hour attributable to the student's next academic year.



Two Pell Grants in an Award Year

• Example:

- School paid the 2010 summer Pell Grant from the 2010-2011 award year.
- 24 hours equals one academic year.

Summer 2010	Fall 2010	Spring 2011
Half time 6 hours earned	Three-quarter time 9 hours earned	Full time 12 hours enrolled
15 hours attributed to first academic year		Nine hours to be attributed to first academic year Three hours to be attributed to next academic year

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Case Studies

Student	Completed Hours		Enrolled Hours	Second Scheduled Award?	
	Term 1	Term 2	Term 3		
Sarah	12	12	6	Yes	No
Allan	15	9	6	Yes	No
Kayla	15	15	3	Yes	No
Hannah	12	9	6	Yes	No
Carl	9	9	6	Yes	No
Cooper	6	6	15	Yes	No
Alice	6	6	12	Yes	No

Academic Year	FT Enrollment	HT Enrollment
24 hours	12 hours	6 hours

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Two Pell Grants in an Award Year

Trainer's Tidbit – Academic Year vs. Grade Level

• Undergraduate grade level is not a consideration for the purpose of awarding Pell Grants.


	Academic Year	Grade Level
Used for awarding...		
Second Scheduled Pell Grant Awards	Yes	No
Stafford Loans	Yes	Yes
ACG/National SMART Grants	No	Yes
Based on...		
Hours	Yes	Yes
Calendar Dates	Yes	No


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Calculating Two Scheduled Awards for a Payment Period 

- **Scheduled Award:**
 - Assumes full-time enrollment for entire academic year.
- **Annual award:**
 - Is based on actual enrollment status.
 - Part-time students should receive their full annual award, but not necessarily their full Scheduled Award.
- **First Scheduled Award must be fully utilized during the award year before accessing the second Scheduled Award.**

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Calculating Two Scheduled Awards for a Payment Period 



- **Example:**
 - Semester-based institution.
 - 30 credit hours equals one academic year.
 - 12 hours is full time.
 - Scheduled Award is \$4,500.

	Term 1	Term 2	Term 3
Enrollment	9 hours	18 hours	6 hours
Pell Grant Award	\$1,688	\$2,250	TBD

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Calculating Two Scheduled Awards for a Payment Period 

- **Example (continued):**

	Term 1	Term 2	Term 3
Enrollment	9 hours	18 hours	6 hours
Pell Grant Award	\$1,688	\$2,250	TBD
Term 3 Award Amount	$\$2,250 \div 2 = \$1,125$		
Scheduled Award			\$4,500
Paid in Terms 1 and 2			- 3,938
Remaining			\$562
Term 3 Award Amount			\$1,125
Remaining First Scheduled Award			- 562
Portion from Second Scheduled Award			\$563

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Crossover Payment Periods

♦ Example 1:

Award Year A				Award Year B			
July 1		June 30		July 1			
Academic Year A				Academic Year B			
Fall Term		Spring Term		Summer Term		Fall Term	
Sept. 1	Dec. 15	Jan. 15	May 31	June 10	Aug. 1	Sept. 2	Dec. 16
Crossover Payment Period							

♦ Example 2:

Award Year A				Award Year B			
July 1		June 30		July 1			
Academic Year A				Academic Year B			
Fall Term		Spring Term		Summer Term		Fall Term	
Sept. 1	Dec. 15	Jan. 15	May 31	June 10	Aug. 1	Sept. 2	Dec. 16
Crossover Payment Period							

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Crossover Payment Periods

- ♦ Effective July 1, 2010, crossover payment periods must be assigned based on the greater Pell Grant payment.
- ♦ Crossover periods must be reassigned if new information results in a higher Pell Grant payment.
- ♦ Schools may assume no new information is available if:
 - No ISIR/SAR is on file.
 - Rejected ISIR is on file without an EFC.
 - Verification on a selected ISIR is not complete.
- ♦ Students may have Pell Grant payments assigned to different award years.
- ♦ One award year may include two crossover periods.


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Crossover Payment Periods


♦ Sample crossover payment assignments:


Award Year A				Award Year B							
June 30		July 1		June 30		July 1					
Academic Year A				Academic Year B							
Crossover Term		Fall Term		Spring Term		Crossover Term					
June 9	July 31	Sept. 1	Dec. 15	Jan. 15	May 31	June 10	Aug. 1	Sept. 2	Dec. 16	Jan. 16	May 30
Student 1: Pell Assigned to Award Year A Crossover Payment Amount \$500				Student 1: Pell Assigned to Award Year B Crossover Payment Amount <u>\$1,500</u>							
Student 2: Pell Assigned to Award Year A Crossover Payment Amount <u>\$2,775</u>				Student 2: Pell Assigned to Award Year B Crossover Payment Amount \$2,125							
Student 3: No Pell Assigned to Award Year A Crossover Payment Amount \$0				Student 3: Pell Assigned to Award Year B Crossover Payment Amount <u>\$1,125</u>							

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Crossover Payment Periods
Trainer's Tidbit 

- Payments assigned to next award year cannot be drawn down until on or after July 1:
 - Wait to award until July 1.
 - Award, but not disburse until July 1.
 - Pay prior to July 1 using institutional funds and be reimbursed after July 1 drawdown.
 - Award and disburse using current award year, switch to next year once eligibility is known.

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Crossover Payment Periods
Assigning Pell Awards – Policies and Procedures 


For 2009-2010 crossover transition, most flexibility given if policy is set by June 30, 2010.

If policy is set prior to July 1, 2010, schools awarding Pell Grants from the...

<p>2009-2010 award year are:</p> <ul style="list-style-type: none"> – Not required to compare awards. – Not required to apply acceleration rule. 	<p>2010-2011 award year:</p> <ul style="list-style-type: none"> – Must compare awards and pay higher amount. <ul style="list-style-type: none"> • If paying from the 2009-2010 ISIR, not required to apply acceleration rule.
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Schools may award on a student-by-student basis.

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Crossover Payment Periods
Assigning Pell Awards – Policies and Procedures 

For 2009-2010 crossover transition, most flexibility given if policy is set by June 30, 2010.

If policy is set on or after July 1, 2010...


All new rules apply for awarding for both award years, 2009-2010 and 2010-2011.

- Must pay higher award.
- Acceleration rule applies.

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Crossover Payment Periods

Award Amounts





Pell Grants may use different award year information than what is used when packaging other aid for that period.

- When packaging:
 - Title IV aid**
Use current year EFC, COA and enrollment status.
 - Pell amount for crossover periods**
Use EFC and COA from award year from which student will be paid.

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Crossover Payment Periods

Award Amounts – Example





- Second-year, dependent student.
- Attending summer 2010 term.
- Meets all requirements to receive a second Scheduled Award.

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Crossover Payment Periods

Award Amounts – Example



	2009-2010	2010-2011
Summer Scheduled Award	\$1,125	\$2,050

Using 2009-2010 ISIR	Using 2010-2011 ISIR	Using 2010-2011 ISIR
Summer 2010 Financial Need	\$4,822	\$4,822
Summer 2010 Pell Award	-\$1,125	-\$2,050
Remaining Financial Need	= \$3,697	= \$2,772

Using 2010-2011 ISIR (header)	Paying Pell from 2009-2010	Paying Pell from 2010-2011
Summer 2010 Financial Need	\$5,295	\$5,295
Summer 2010 Pell Award	-\$1,125	-\$2,050
Remaining Financial Need	= \$4,170	= \$3,245

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Crossover Payment Periods
Summer Minisessions

Lehigh University

Minisessions begin and end at different times during the summer term.

Schools may choose to...

Combine sessions to create a crossover payment period.	OR	Maintain sessions as separate periods.
– Combined term must include June 30 and July 1.		– Must review start and end dates of each term to determine the correct award year to use for payment.

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Crossover Payment Periods
Assigning Pell Grant Awards


Lehigh University

- For schools electing to use new regulations for the 2010 crossover payment period, if the ISIR is received by:
 - Sept. 10, 2010:
 - Schools **must** recalculate and reassign the Pell Grant award, if required.
 - Sept. 11, 2010 – Feb. 1, 2011:
 - Schools **may** recalculate and reassign the Pell Grant award.
- Future award year deadlines will be published in the Federal Register for each award year.

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Case Study
David

Lehigh University



- Full-time student for fall 2009 and spring 2010 terms.
- Scheduled Award is \$5,350.
- Will enroll half time for summer term.
 - June 7 through Aug. 6.
- As of May 1, has not yet filed his 2010-2011 FAFSA.


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Case Study
David 

- Calculate David's Pell Grant awards for each term.

2009-2010 ISIR	Fall 2009	Spring 2010	Summer 2010
Enrollment	Full time	Full time	Half time
Pell Grant Award	\$2,675	\$2,675	\$1,338


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Case Study
David 

- On May 15, school receives David's 2010-2011 ISIR.
 - Scheduled Award is \$5,550.
- Recalculate David's summer Pell Grant award based on new information:

2010-2011 ISIR	Summer 2010	Fall 2010	Spring 2011
Enrollment	Half time	Full time	Full time
Pell Grant Award	\$1,388	\$2,775	\$2,775

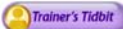
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Case Study
David 

- To which award year should his summer 2010 Pell Grant be assigned? Why?
 - 2009-2010
 - 2010-2011

2009-2010 ISIR	Fall 2009	Spring 2010	Summer 2010
Enrollment	Full time	Full time	Half time
Pell Grant Award	\$2,675	\$2,675	\$1,338


2010-2011 ISIR	Summer 2010	Fall 2010	Spring 2011
Enrollment	Half time	Full time	Full time
Pell Grant Award	\$1,388	\$2,775	\$2,775

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Transfer Students 

- New school must determine for prior school:
 - Amount of Pell Grant paid.
 - Number of credit or clock hours earned.
- Scheduled Award and disbursement information will be displayed on the:
 - National Student Loan Data System.
 - Student's ISIR.
- School has two options to determine hours earned at prior school:
 - Hours earned method.
 - Assumption method.


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Transfer Students
Hours Earned Method 

- Count all hours completed in the same award year.
- Information must include when hours were earned.
 - Student transcript.
 - Documentation from prior school.

Include hours earned...	Do not include hours from...
<ul style="list-style-type: none"> • Between July 1 and June 30 of award year. • During crossover periods that include a portion of the award year being evaluated. • Even if not accepted as credit at the new school. • From remedial courses. 	<ul style="list-style-type: none"> • Advanced Placement courses. • International Baccalaureate programs. • Testing out. • Life experience. • Similar competency measures.

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Transfer Students
Assumption Method 

- If at the previous institution...
 - The entire Scheduled Award was received:
 - Assume student completed enough credits for one academic year.
 - Less than the entire Scheduled Award was received:
 - Use the following formula to determine hours completed.

$$\frac{\text{Pell disbursed at prior school} \times \text{Hours in current school's academic year}}{\text{Amount of Scheduled Award at prior school}} = \text{Hours considered completed}$$

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Case Study
Jon




- Attended County College in fall.
 - Received \$2,500 Pell Grant award.
- Transferring to your school in spring.
 - 24 credit hours equal one academic year.
 - Full-time enrollment is 12 hours.
- Eligible for Scheduled Award of \$5,000 for 2010-2011.

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Case Study
Jon




- How many hours will be considered complete?

$$\frac{\$2,500 \times 24}{\$5,000} = 12 \text{ credit hours considered complete}$$
- What will be his spring Pell Grant award?

2010-2011 Award Year	
Prior Institution	Current Institution
Fall	Spring
12 credits \$2,500	Full time, 12 credits \$2,500


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Case Study
Jon



- If Jon enrolled for 6 credit hours during the summer of 2011, will he be eligible for a second Scheduled Award?
 - Yes, if he earns at least 7 credits in the spring term.
- If so, from which award year will payment be assigned? Why?
 - Will depend on:
 - Whether his summer period is considered a crossover period.
 - If he has a 2011-2012 ISIR on file indicating a higher Pell Grant payment than 2010-2011.


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Special Circumstances 


- Credit or clock hour completion may be waived if the student is unable to complete hours in the first academic year due to circumstances beyond the student's control.
 - Must be documented and made on a case-by-case basis.

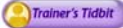
Acceptable situations...	Unacceptable situations...
<ul style="list-style-type: none"> • Withdrawing from classes for health reasons. • Being unable to register for classes necessary to complete program. <ul style="list-style-type: none"> – Timing of class. – School not offering class. – Class is full. 	<ul style="list-style-type: none"> • Not registering because of instructor. • Withdrawing from classes to avoid failing grades.


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Special Circumstances Discussion 

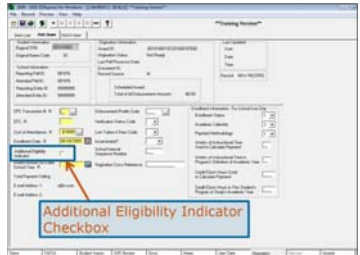
Fall:	Spring:	Summer:
<ul style="list-style-type: none"> – Completed 12 of 12 credits attempted. 	<ul style="list-style-type: none"> – Completed 6 of 12 credits attempted. – Mother was very ill. 	<ul style="list-style-type: none"> – Enrolled for 6 credits. – Is primary caregiver for mother; must limit self to 6 credits.

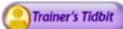



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Reporting Requirements 


- When reporting a second Scheduled Award through:
 - COD, set "Additional Eligibility Indicator" field to "true."
 - EDEExpress, check indicator box on Pell Grant screen.




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Duration of Eligibility 

- Lifetime maximum of 18 full-time semesters or the equivalent.
 - For first-time Pell Grant recipients on or after July 1, 2008.
 - NSLDS displays amount received in "Lifetime Eligibility Used" field.
 - Year-round Pell counts toward lifetime limit.



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