

Federal Pell Grant
2012 - 2013
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- Designed to assist students with the greatest financial need.
- Pell Grants are the foundation upon which all other need-based aid programs are built
- Awarded at full time, ¾ time, ½ time and < half time enrollment

Valid Institutional Student Information Record

- Federal Pell Grant payments are based on a 9-month official expected family contribution (EFC) from a valid institutional Student Information Record (ISIR)

Maximum Annual Awards

- For 2012-13, maximum full-time annual award is \$5,550; minimum award is \$602
- Maximum Pell-eligible EFC for 2012-13 is \$4,995

Factors Influencing Student's Actual Award Amount

- Enrollment status
- Cost of attendance (COA)
- Payment period length
- Program academic year (AY) length

Enrollment Status: Standard Term Credit-Hour Programs

Academic year divided into 2 semesters or trimesters, or 3 quarters

- Semester or trimester generally provides 14 to 17 weeks of instructional time
- Quarter generally provides 10 to 12 weeks of instructional time

Enrollment Status: Nonstandard Term Credit-Hour Programs

- Divided into terms, but do not use semesters, trimesters, or quarters;
- A different credit measure is used for a semester, trimester, or quarter (e.g., award semester hours for quarters); or
- Full time (FT) is defined as fewer than 12 credits in any term

Example: Determining Enrollment Status, Nonstandard Term Credit-Hour Programs

- Program has 4 nonstandard terms per year:
 - Term #1 = 8 weeks Term #3 = 6 weeks
 - Term #2 = 6 weeks Term #4 = 8 weeks
- AY definition = 34 weeks, 28 credits
- Establish FT status for 8-week terms:

28 credit hours X 8 weeks in term
34 weeks in AY

= 6.59

Round up to 7 credit hours = full time

Once you have full time you can determine half time, ¾ time, and < half time enrollment

**Nonstandard Terms Within
Standard Term Programs**

- Standard term measure of enrollment status may be used if nonstandard term is:
 - Embedded within a semester, trimester, or quarter; or
 - Combined with a standard term
- Enrollment status is determined by adding credit hours in nonstandard term to credit hours in standard term

**Choosing the Appropriate
Formula - Questions to ask**

- Is program measured in clock or credit hours?
- If a credit-hour program, does program have standard terms, nonstandard terms, or no terms?

**Choosing the formula -
Questions Cont.**

- If a standard term credit-hour program, does program's AY include 2 semesters or trimesters, or 3 quarters offered:
 - In a fall through spring time frame; or
 - On a periodic basis (e.g., monthly) for different cohorts of students who, throughout their program, remain with the same cohort in which they start unless they withdraw from or skip a term and re-enroll in a subsequent term?

**Choosing the formula -
Questions Cont.**

- If a term-based credit-hour program, do any terms overlap?
- If a credit-hour program, does the academic calendar include at least 30 weeks of instructional time?
- If a term-based credit-hour program, is full-time enrollment defined as at least 12 credits for each term in the award year?
- Is the program a correspondence program?

Rounding Rule

General rule for rounding to nearest dollar:

- Round up, if decimal is .50 or higher
- Round down, if decimal is less than .50
- If student is expected to be enrolled for more than 1 payment period, round up or down in manner that ensures student will not receive more than Scheduled Award for award year
- *Can pay cents. Do not have to round*

**Crossover Payment Period
(SUMMER)**

- Begins before and ends on or after July 1
- Must assign entire payment period to one award year

Payments to Transfer Students

- Transfer students receive same payments as any other student until 100% of remaining eligibility is received
- EXAMPLE: Prior school
 - Scheduled Award = \$3,700
 - Amount disbursed = \$1,850 Summer

Payments to Transfer Students EXAMPLE Cont.

- Current School
- Scheduled Award = \$3,700
 - Remaining eligibility = \$1,850
 - Actual disbursements:

Fall quarter	\$1,233
Winter quarter	\$ 617
Spring quarter	\$ 0

Recalculating Federal Pell Grant

Establish a policy for recalculation that provides for:

- Recalculating all changes in enrollment status throughout the term;
- OR
- Recalculating changes that occur up to a specific date;
- OR
- No recalculations

Lifetime Eligibility Used (LEU)

- Beginning 1213 Pell Lifetime Limit is 600%
- Percentage calculated based on first Pell ever so many are already over 600%
- Comment codes on SAR
- LEU% on COD and NSLDS

Pell LEU Example

- After Fall 12 disbursement of \$2775 LEU% = 575%
- Spring 13 student registered for 13 hours.
- Pell yearly eligibility = \$2775 but LEU% remaining = 25%
- Spring 13 Pell award = \$1387.50 (25%)

Iraq and Afghanistan Service Grant

- Student does not have Pell-eligible EFC
- Parent or guardian died as result of U.S. military service in Iraq or Afghanistan after 9/11/01
- At time of parent's or guardian's death, student was:
 - Age 23 or younger; or
 - Enrolled at an institution of higher education

Iraq and Afghanistan Service Grant

Eligible student identified by database match between Central Processing System (CPS) and Department of Defense (DoD)

- CPS sends student a personal letter
- School receives an ISIR containing DoD match flag set to "Y" and date of parent's or guardian's death

Iraq and Afghanistan Service Grant

- IASG recipient must meet all Federal Pell Grant eligibility requirements except Pell-eligible EFC and verification
- Amount of IASG is same as maximum Federal Pell Grant for award year, adjusted for student's enrollment status and COA
 - Enrollment status and COA adjustments made by same formulas used to calculate Federal Pell Grants

The Process

- Originate record to COD using false trigger flag
- Calculate eligibility based on EFC and enrollment status (check LEU%)
- Send Disbursement record to COD with true trigger flag to authorize award
- Receive Disbursement record acknowledgment from COD
- Schedule and pay Pell Grant

Follow up

- Check school pay date against COD disbursement date and correct if necessary.
- Review reports to identify any POPS (Potential Pell Overpayments) and resolve discrepancies
- Reconcile regularly between your award file, the Bursar's office and COD to avoid end of year problems

Questions?


