



## Two Pell Grants in One Award Year – The Basics



# 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.

# Two Pell Grants in One Award Year

## Definitions



Academic Year	Defined by each institution and must include at least: <ul style="list-style-type: none"><li>– 24 credit hours with at least 30 weeks.</li><li>– 36 quarter hours with at least 30 weeks.</li><li>– 900 clock hours with at least 26 weeks.</li></ul>
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.

# Two Pell Grants in One Award Year

## Definitions (Continued)



<b>Crossover Payment Period</b>	Occurs when a single payment period is in two award years. <ul style="list-style-type: none"><li>– When June 30 and July 1 coincide during the same payment period.</li></ul>
<b>Earned/ Completed Credits</b>	Hours associated with courses for which a student receives credit in a given period.
<b>Enrolled Credits</b>	Hours associated with courses a student currently is attending in a given period.
<b>Scheduled Award</b>	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

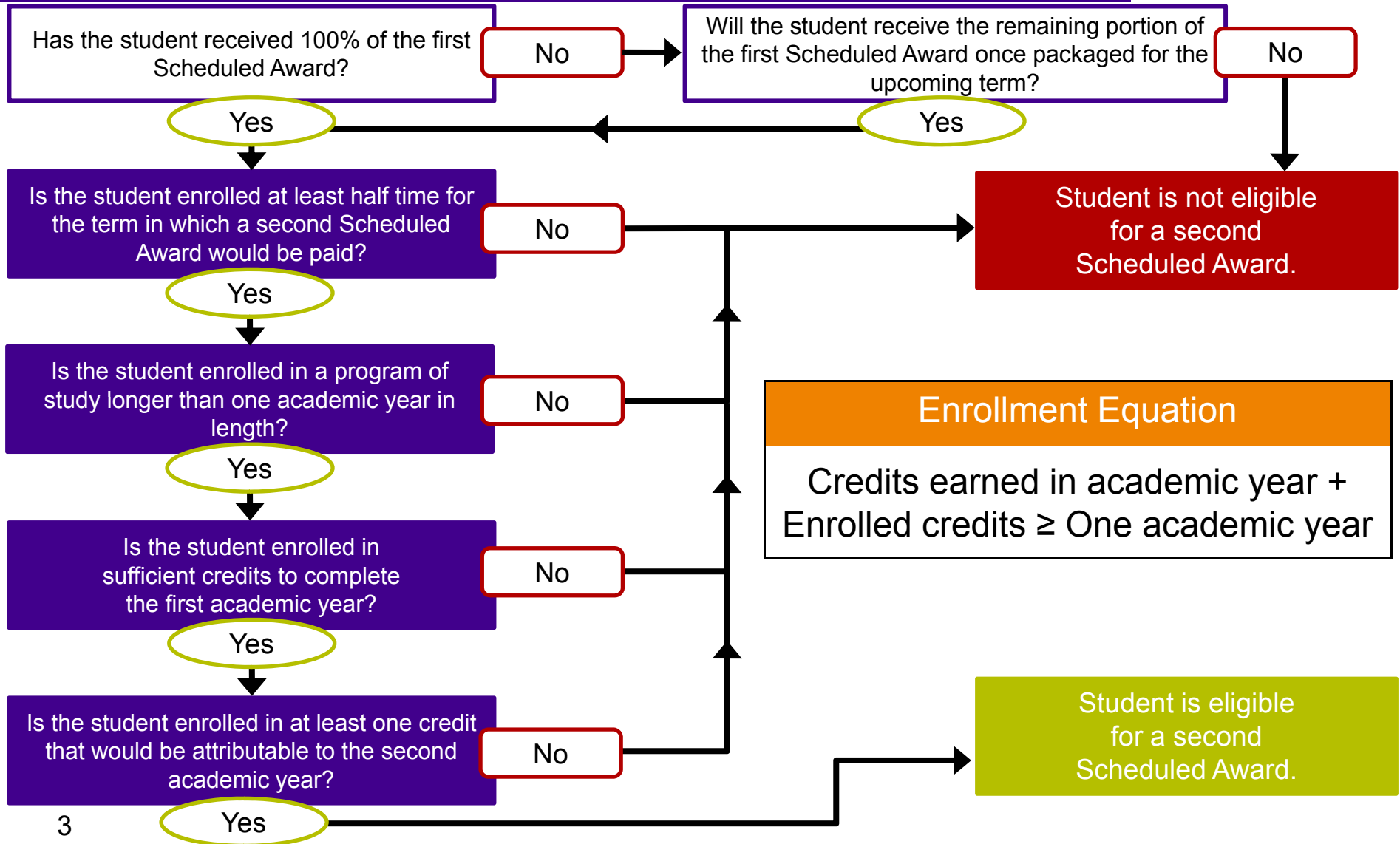


- ◆ The HEOA requires a student receive up to 200 percent of a Scheduled Award if the student:
  - Has received 100 percent of the first Scheduled Award.
  - Is enrolled in a program of study longer than one academic year in length.
  - Is enrolled at least half time, for the term in which a second Scheduled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

## Determining Eligibility for Second Scheduled Award



# 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

# 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

Hannah	12	9	6	Yes	No
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Cooper	6	6	15	Yes	No
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Academic Year	FT Enrollment	HT Enrollment
24 hours	12 hours	6 hours

# 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.

# 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

# 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	$\$2,250 \div 2 = \$1,125$
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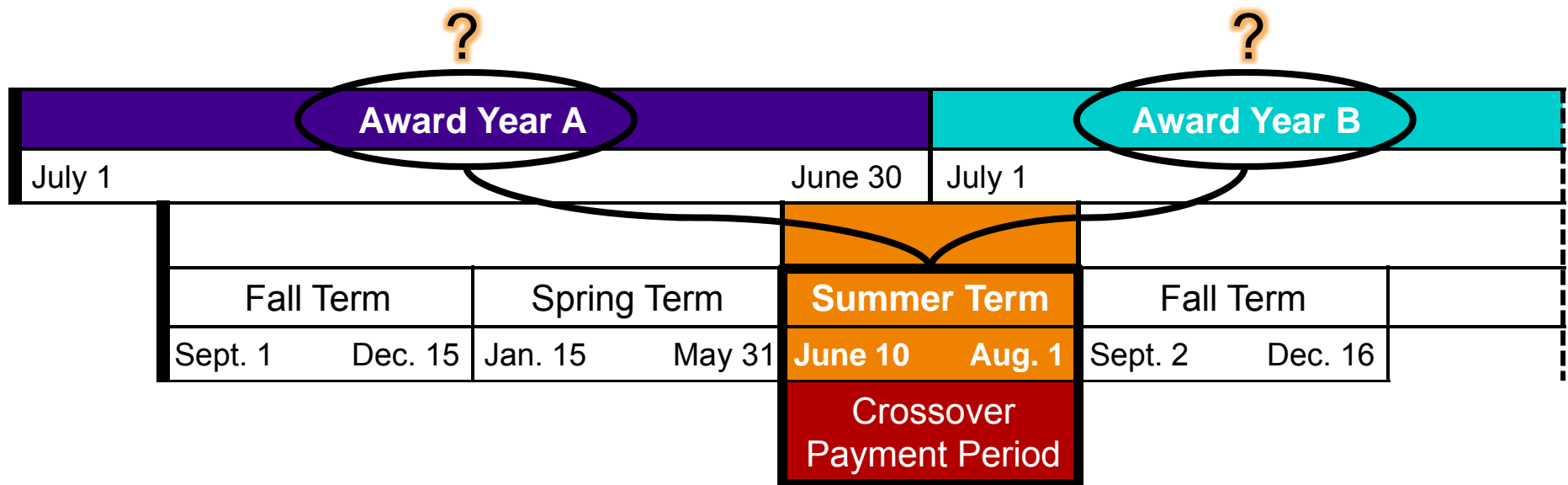
Scheduled Award	\$4,500
Paid in Terms 1 and 2	- 3,938
Remaining	\$562

Term 3 Award Amount	\$1,125
Remaining First Scheduled Award	- 562
Portion from Second Scheduled Award	\$563

# Crossover Payment Periods



- ◆ Payment period that includes both June 30 and July 1.
  - Can be assigned to either award year.
    - Student must have valid ISIR for the assigned year.



# 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					



# 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.

# Crossover Payment Periods



◆ Sample crossover payment assignments:

		Award Year A					Award Year B				
June 30		July 1					June 30		July 1		
Crossover Term	Academic Year A					Crossover Term	Academic Year B				
	Fall Term		Spring Term				Fall Term		Spring 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
<b>Student 1:</b> Pell Assigned to Award Year A Crossover Payment Amount \$500						<b>Student 1:</b> Pell Assigned to Award Year B Crossover Payment Amount <b>\$1,500</b>					
<b>Student 2:</b> Pell Assigned to Award Year A Crossover Payment Amount <b>\$2,775</b>						<b>Student 2:</b> Pell Assigned to Award Year B Crossover Payment Amount \$2,125					
<b>Student 3:</b> No Pell Assigned to Award Year A Crossover Payment Amount \$0						<b>Student 3:</b> Pell Assigned to Award Year B Crossover Payment Amount <b>\$1,125</b>					

# 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...

2009-2010 award year are:

- Not required to compare awards.
- Not required to apply acceleration rule.

2010-2011 award year:

- Must compare awards and pay higher amount.
  - If paying from the 2009-2010 ISIR, not required to apply acceleration rule.

Schools may award on a student-by-student basis.

# 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.

# 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.

# Crossover Payment Periods

## Award Amounts – Example



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

# Crossover Payment Periods

## Award Amounts – Example



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

Using 2009-2010 ISIR (trailer)	Paying Pell from 2009-2010	Paying Pell from 2010-2011
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

# Crossover Payment Periods

## Summer Minisessions



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

### Schools may choose to...

Combine sessions to create a crossover payment period.

- Combined term must include June 30 and July 1.

OR

Maintain sessions as separate periods.

- Must review start and end dates of each term to determine the correct award year to use for payment.

# Crossover Payment Periods

## Assigning Pell Grant Awards



- ◆ 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.

# Case Study

David



- ◆ 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.

# 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	<b>\$2,675</b>	<b>\$2,675</b>	<b>\$1,338</b>

# 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	<b>\$1,388</b>	<b>\$2,775</b>	<b>\$2,775</b>

# 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

# 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.

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

# 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.

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

# 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.

# Case Study

Jon



- ◆ How many hours will be considered complete?

$$\frac{\$ \underline{2,500} \times \underline{24}}{\$ \underline{5,000}} = \underline{12} \text{ credit hours considered complete}$$

- ◆ What will be his spring Pell Grant award?

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

# 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.**

# 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...

- ◆ Withdrawing from classes for health reasons.
- ◆ Being unable to register for classes necessary to complete program.
  - Timing of class.
  - School not offering class.
  - Class is full.

## Unacceptable situations...

- ◆ Not registering because of instructor.
- ◆ Withdrawing from classes to avoid failing grades.

# Special Circumstances

## Discussion



### Fall:

- Completed 12 of 12 credits attempted.

### Spring:

- Completed 6 of 12 credits attempted.
- Mother was very ill.

### Summer:

- Enrolled for 6 credits.
- Is primary caregiver for mother; must limit self to 6 credits.



# 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.

2009 - 2010 EDEExpress for Windows - (0 BARBER Z. SEVILLE) \*\*Training Version\*\*

File Record Process View Help

\*\*Training Version\*\*

Direct Loan Pell Grant TEACH Grant

Student Information  
Original SSN: 001010001  
Original Name Code: SE

School Information  
Reporting Pell ID: 081876  
Attended Pell ID: 081876  
Reporting Entity ID: 99999999  
Attended Entity ID: 99999999

Origination Information  
Award ID: 001010001SE201008187600  
Origination Status: Not Ready  
Last Pell Processor Date:  
Document ID:  
Record Source: M

Last Updated  
User:  
Date:  
Time:  
Record: NEW RECORD

Scheduled Award:  
Total of All Disbursement Amounts: \$0.00

CPS Transaction #: R  
EFC: R  
Cost of Attendance: R \$18000  
Enrollment Date: R 08/29/2009

Disbursement Profile Code:  
Verification Status Code:  
Low Tuition & Fees Code:  
Incarcerated?  
School Internal Sequence Number:  
Origination Cross Reference:

Enrollment Information - For School Use Only  
Enrollment Status: 1  
Academic Calendar: 3  
Payment Methodology: 1  
Weeks of Instructional Time Used to Calculate Payment:  
Weeks of Instructional Time in Program's Definition of Academic Year:  
Credit/Clock Hours Used to Calculate Payment:  
Credit/Clock Hours in This Student's Program of Study's Academic Year:

Additional Eligibility Indicator:

Award Amount for Entire School Year: R  
Total Payment Ceiling:  
E-mail Address 1: a@n.com  
E-mail Address 2:

Additional Eligibility Indicator Checkbox

Demo FAFSA Student Inquiry ISIR Review Docs Notes User Data Origination Disburse Awards

For Help, press F1 C:\PROGRAM FILES\EDSUITE\EDEXPRESS FOR WINDOWS 2009-2010\extraining4.mdb NUM



# 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.

The screenshot displays the NSLDS interface for a user logged in as 'FAA-FIRST LASTNM' from 'UNIVERSITY OF NORTH CAROLINA - GREENSBORO'. The main content area shows the following information:

- Student Information:** GRANT H GRANDSTANDER, SSN: \*\*\*-\*\*-2127, DOB: 06/30/1989.
- Grants:** A blue information icon is present.
- Transfer Monitoring List:** A message states "Student is not on your school's Transfer Monitoring List." with an "Add Student to Monitoring List" button.
- Pell Grant History:** A table with one row: "Lifetime Eligibility Used: 132.6%". This row is highlighted with a red border.

# Agenda



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  - Crossover Payment Periods.
- ◆ Transfer Students.
- ◆ Special Circumstances.
- ◆ Reporting Requirements.
- ◆ Duration of Eligibility.

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