

Year Round Pell

Year-Round Pell




David Bartnicki, FSA Trainer | October 6, 2017
U.S. Department of Education

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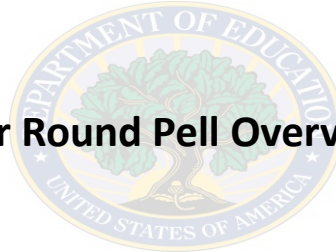
Agenda

- Year Round Pell Overview
- Additional Pell Rules
- Examples of Awarding Additional Pell
- Crossover Payment Periods
- COD Implementation
- Resources



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Year Round Pell Overview




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Year-Round Pell- General
(See DCL GEN17-06)

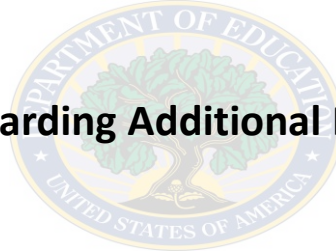
- The Consolidated Appropriations Act of 2017 now allows a student to receive Pell Grant funds up to 150% of the student's Pell Grant Scheduled Award for an award year
 - 1st 100% is initial scheduled Pell award
 - Final 50% is considered the additional Pell award (YRP)
- Effective with the 2017-2018 award year
 - Does not apply to summer of 2017 if treated as a trailer to 2016-2017 eligibility

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Year-Round Pell - General

- 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
- *Pell Calculations and formulas remain unchanged*
- Additional Pell Grant will be included in the student's 600% maximum Pell Lifetime Eligibility Used (LEU)

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Awarding Additional Pell

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Year-Round Pell – Additional Pell

- Student must be enrolled at least half-time in the payment period(s) for which the student receives the additional Pell Grant funds
 - Dropping below half-time enrollment after Pell is disbursed will not rend the student ineligible

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Year-Round Pell – Additional Pell

- 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

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Additional Pell – Standard Term

Additional Pell: Example 1 (Semesters)

The student has used 100% of the original Scheduled Award. A Pell eligible student can be enrolled in any enrollment status to receive any portion of the Scheduled Award

Before the student can receive any portion of the Additional Pell (up to 50%), the student must use up the Scheduled Award and be enrolled at least HT

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Additional Pell – Standard Term

Additional Pell: Example 2 (Semesters)

Enrolled FT
Fall Term
50% Used

Enrolled 3/4 time
Spring Term
37.5% Used

Enrolled FT
Summer Term
50% Eligible

The student used 87.5% of the Scheduled Award with 12.5% still remaining. Note the student's eligibility for the 37.5% in Additional Pell is dependent upon being enrolled at least HT.

Initial Scheduled Award = 12.5%
Additional Pell = 37.5%

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Additional Pell – Standard Term

Additional Pell: Example 2 (Semesters)

Enrolled FT
Fall Term
50% Used

Enrolled FT
Spring Term
50% Used

Enrolled LTHT
Summer Term
12.5% Ineligible

Since the student has used up 100% of the scheduled award prior to enrolling in the Summer term. Since the student is not enrolled at least HT, s/he is not eligible for Additional Pell.

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Additional Pell – Standard Term

Additional Pell: Example 2 (Semesters)

Enrolled LTHT
Fall Term
12.5% Used

Enrolled FT
Spring Term
50% Used

Enrolled FT
Summer Term
50% Eligible

The student is enrolled LTHT in the Fall Term. Since this is not the Payment Period in which the student is receiving Additional Pell, it does not make the student ineligible for Additional Pell in the Summer Term.

Initial Scheduled Award = 37.5%
Additional Pell = 12.5%

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Additional Pell - Clock Hour

Clock Hour Program: 1215 Clock Hours / 41 Weeks

8/7/17 3/9/18 3/12/18 5/25/18

450 Clock Hours PP 1 50% Used 450 Clock Hours PP 2 50% Used 315 Clock Hours PP 3 35% Eligible

Student used 100% of Initial Scheduled Award for their first defined AY of 900 hours / 30 wks.

Final Payment Period within 2017-18 Award Year. Student is Eligible for Additional Pell

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Additional Pell – Transfer Students

Student Transfer to New School on 1/8/2018

2017-18 Pell TEU Prior to Transfer = 90%

Enrolled FT Spring Term 50% Eligible

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

Initial Scheduled Award = 10%
Additional Pell = 40%

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Additional Pell – Transfer Students

Student Transfer to New School on 1/8/2018

2017-18 Pell TEU Prior to Transfer = 90%

Enrolled LTHT Spring Term 12.5% Calculated

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

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

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Crossover Payment Periods

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Crossover Payment Periods

- Includes both June 30 and July 1 overlapping two award years
- Institutions have the flexibility to assign crossover payment periods to either of the relevant award years
 - The law states "as it [the institution] determines is most beneficial to students"

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Crossover Payment Periods

2017-2018 Scheduled Award: \$2000
2018-2019 Scheduled Award: \$3000

| | | | |
|-----------------------|----------------------|----------------------|---|
| SUMMER Full-time | FALL Half-time | SPRING Half-time | SUMMER Full-time |
| Disbursement = \$1000 | Disbursement = \$500 | Disbursement = \$500 | Disbursement = \$1000 (2017-2018) OR \$1500 (2018-2019) |

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Crossover Payment Periods

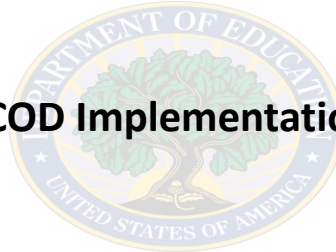
- The choice of crossover payment period award year can be made based on an institutional policy that –
 - Provides for an individual decision for each student;
 - Applies to all students (or students within a group) without exception; or
 - Applies to all students (or students within a group) with allowance for individual student exception

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Crossover Payment Periods

- Must consider the crossover payment period to occur entirely within one award year
- Must have a valid SAR or valid ISIR for the selected award year
- May be different than the year used for the student's other Title IV aid (i.e., loans, campus based)

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COD Implementation

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Year-Round Pell: EA June 20, 2017

- COD Implementation October 13-15, 2017**
 - The <AdditionalEligibilityIndicator> tag identifies Pell Grant recipients eligible for additional grant funds
 - The Pell Grant Potential Overaward Project (POP) process updated to account for additional Pell Grant eligibility
 - Reject/warning edits specific to updated Pell calculations are sent in response files
 - COD Web Site screens and reports updated to incorporate Year-round Pell

After October 15, schools may update Pell Grant information in COD to reflect additional eligibility

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Resources

Federal Registers
 June 16, 2017: Negotiated Rulemaking Committee; Public Hearings
 June 16, 2017: Postponement of Certain Provisions of the Borrower Defense Regulations


Dear Colleague Letters
 GEN 17-06: Implementation of Year-Round Pell Grants

Electronic Announcements
 EA June 20, 2017: Year-Round Pell Grant Information - Preliminary COD System Implementation Information and School Processing Timeline

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Questions???

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Department of Education Contacts

Research and Customer Care Center
800.433.7327
fsa.customer.support@ed.gov



Reach FSA
855.FSA.4FAA -- 1 number to reach 10 contact centers!

| | |
|-----------------|---|
| <i>eZ-Audit</i> | <i>Campus Based Call Center</i> |
| <i>COD</i> | <i>School Eligibility Service Group</i> |
| <i>CPS/SAIG</i> | <i>Foreign Schools Participation Division</i> |
| <i>NSLDS</i> | <i>Research and Customer Care Center</i> |
| <i>G5</i> | <i>Nelnet Total & Permanent Disability Team</i> |

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Contacts

- Atlanta School Participation Team**
 - Main Number: 404-974-9303
 - Point-of-Contacts
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 - Cassandra Weems (IIS) 404-974-9305
- Atlanta Training Officer**
 - David Bartnicki – 404-974-9312



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Training Feedback

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

- Go to <http://s.zoomerang.com/s/DavidBartnicki>
 - Evaluation form is specific to David Bartnicki
- 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 joann.borel@ed.gov

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