

# Year-Round Pell

Joseph Massman | Spring 2018  
U.S. Department of Education

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## Agenda

- Year-Round Pell overview
- Legislative background
- General requirements
- Unchanged Pell rules
- Changed Pell rules
- Policy examples
- Operational reminders for Year-Round Pell
- Resources



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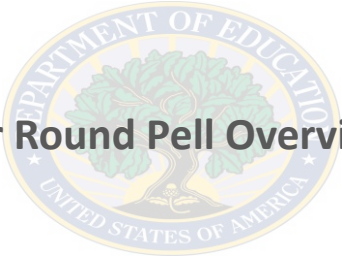
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# Year Round Pell Overview

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### Legislative Background

- The Consolidated Appropriations Act of 2017 allows a student to receive Pell Grant funds up to 150% of the student's Scheduled Award for an award year
  - 1<sup>st</sup> 100% is initial scheduled Pell award
  - Final 50% is considered the additional Pell award (YRP)
- Effective beginning with the 2017-18 award year
  - Applied to summer 2017, *if treated as a header to 2017-2018*

DCL GEN-17-06 issued June 19, 2017




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### General Requirements

- 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
- Additional Pell Grant will be included in the student's 600% maximum Pell Lifetime Eligibility Used (LEU)




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### General Requirements

- 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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**Differences from “Two Pell Grants in an Award Year”**

- No acceleration requirement
- No requirement to place a crossover payment period in the award year that produces the largest Pell Grant award

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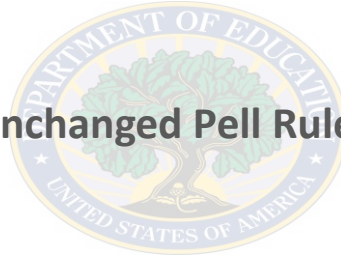
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**Unchanged Pell Rules**

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**Unchanged Pell Rules**

- Definition of an academic year
- Definition of a Scheduled Award
- Award Amount
- Payment period determination
- Pell Grant formulas
- Crossover payment periods
- Recalculation policies



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### Definition of an Academic Year

- Must be defined for each eligible program
  - May be the same for all programs
  - May be different for some or all programs
  - Credit-hour and clock-hour programs will have different academic years

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### Definition of an Academic Year

| Statutory Definition of an Academic Year |                                 |  |
|--|---------------------------------|--|
| Academic Progress Measured By:           | Minimum Completion Requirement* | Minimum Instructional Time Requirement |
| Semester hours                           | 24 semester hours               | 30 weeks                               |
| Trimester hours                          | 24 trimester hours              | 30 weeks                               |
| Quarter hours                            | 36 quarter hours                | 30 weeks                               |
| Clock hours                              | 900 clock hours                 | 26 weeks                               |

- Required by statute and 34 C.F.R. § 668.3
- Sometimes referred to as the Statutory Academic Year, Title IV Academic Year or the Defined Academic Year

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### Definition of a Scheduled Award

- Amount that a full-time student would receive for a full academic year based on the student's EFC and COA

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### Award Amount

- No change in the way an award for a payment period is calculated
- Pell Grant formulas have not changed
- Award is calculated by payment period based on a student's Scheduled Award



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### Payment Period Determination

- Defined in 34 C.F.R. § 668.4
- For term-based programs, payment period is the term
- For non-term programs and all clock-hour programs, payment period is half of the hours and half of the weeks in an academic year
- Same rules also still apply for determining payment periods for remaining portions of a program



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### Pell Grant Formulas

- The existing five Pell formulas have not changed
- 34 C.F.R. § 690.63
- Use the formula that corresponds to the structure of the program

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### Pell Grant Formulas

|   |   |   |
|---|---|---|
| <p style="text-align: center;"><b>Formula 1</b></p> <p style="text-align: center;"><b>Standard Term Credit-Hour Programs</b></p> <ul style="list-style-type: none"> <li>• Traditional Semesters/Triesters 15-17 weeks in length or</li> <li>• Traditional Quarters 10-12 weeks in length <u>and</u></li> <li>• Full-time is defined as at least 12 credit hours in each term</li> </ul> | <p style="text-align: center;"><b>Formula 3</b></p> <p style="text-align: center;"><b>Other Term-Based Programs</b></p> <ul style="list-style-type: none"> <li>• Non-standard terms</li> <li>• Full-time defined as something less than 12 credit hours in any term</li> <li>• Program offered a type of credit inconsistent with type of term (e.g., semester credits for 10-week quarters)</li> </ul> | <p style="text-align: center;"><b>Formula 4</b></p> <p style="text-align: center;"><b>Clock-Hour and Non-Term Programs</b></p> <ul style="list-style-type: none"> <li>• All clock-hour programs</li> <li>• All non-term credit-hour programs</li> <li>• Programs with terms that overlap</li> </ul> |
|---|---|---|

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### Pell Crossover Payment Periods

- Payment period that includes both June 30 and July 1, thus overlapping two award years
- Must consider the crossover payment period to occur entirely within one award year
- Must have a valid SAR/ISIR for the selected award year
- May be different than the award year used for other Title IV aid (i.e., loans, campus-based)
- The institution has the flexibility to assign crossover payment periods to either of the relevant award years, "as it determines is most beneficial to students"

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### Crossover Payment Periods

- 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 a category of students) without exception, or
  - Applies to all students (or a category of students) with allowance for an individual student exception

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### Mandatory Recalculations

- Pell must be recalculated if the student's EFC changes
- Pell must be recalculated to reflect changes to enrollment status between terms
- A student must start all credits for which Pell is paid
  - *To be eligible for the additional Pell Grant, a student must be enrolled at least half-time and begin the classes that support that enrollment status*

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### Recalculation Policies—Optional

- Institutions may develop a policy to recalculate for changes in enrollment status during a payment period
- May set a date after which no recalculation will be performed for changes in enrollment status (Pell Recalculation Date)
  - PRD only applies to Pell *recalculations*, not to initial calculations
- If an institution does not establish a policy for recalculating for changes in enrollment status, a student's Pell Grant award is based on the initial calculation even if the student later changes her enrollment status

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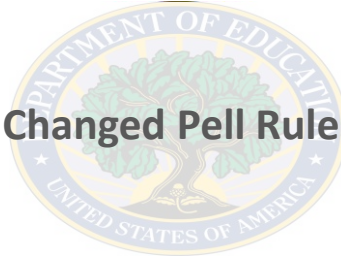
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### Changed Pell Rules

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### Changed Pell Rules

- Scheduled Award limitation
- Enrollment status



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### Scheduled Award Limitation

- Old: Student may receive only one Scheduled Award for an award year
- New: Student may receive up to one and one-half of a Scheduled Award for an award year

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### Enrollment Status

- Old: Less-than-half-time enrollment eligible at all times
- New: Must be enrolled at least half-time to receive the additional award
  - Final 50%



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**Examples**

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### Semester Example #1

- Assume student's 2017-18 Scheduled Award is \$5,920 based on an EFC of 0 and a COA of \$10,000

| Fall 2017 Full-Time                                       | Spring 2018 Full-Time                                      | Summer 2018 Full-Time  |
|---|--|--|
| Award - \$2,960 which is 50.0000% of the Scheduled Award  | Award - \$2,960 which is 50.0000% of the Scheduled Award   | Award - \$2,960 which is 50.0000% of the Scheduled Award                             |
| Total Percent of Initial Scheduled Award used is 50.0000% | Total Percent of Initial Scheduled Award used is 100.0000% | Total 100% used of Initial Scheduled Award, as well as the 50.0000% Additional Award |

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### Clock-Hour Example

- 1200 clock-hour/35-week program that occurs entirely within the 2017-18 award year
- Academic Year = 900 clock-hours/26 weeks
- Student's Scheduled Award is \$5,920 for 2017-18

|   |   |   |
|---|---|---|
| <b>450 hours/13 weeks</b><br><b>\$2,960</b>   | <b>450 hours/13 weeks</b><br><b>\$2,960</b> | <b>300 hours/9 weeks</b><br><b>\$1,973.33</b> |
| <b>2017-18 Award Year</b>                     |   |   |
| <b>133.3333%</b><br><b>2017-18 Award Year</b> |   |   |

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### One Term—Additional Pell Amount

- When the calculated award for a payment period is greater than the remaining balance of the initial Scheduled Award, the award for the payment period is the remaining amount of the initial Scheduled Award plus the Additional Pell amount
  - Awarded as one amount
  - Reported to COD as one amount



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### Semester Example #2

- Assume student's 2017-18 Scheduled Award is \$5,370 based on an EFC of 550 and a COA of \$10,000

|  |   |   |
|--|---|---|
| <p style="text-align: center;">Summer 2017<br/>(assigned to the<br/>2017-18 AY)<br/>Three-Quarter-Time</p> <p>Award - \$2,014<br/>which is 37.5046% of<br/>the Scheduled Award</p> | <p style="text-align: center;">Fall 2017<br/>Full-Time</p> <p>Award - \$2,685<br/>which is 50.0000% of<br/>the Scheduled Award</p> <p>Total Percent of Initial<br/>Scheduled Award used is<br/>87.5046%</p> | <p style="text-align: center;">Spring 2018<br/>Full-Time</p> <p>Award - \$2,685<br/>which is 50.0000% of<br/>the Scheduled Award</p> <p>Total 100% used of Initial<br/>Scheduled Award<br/>37.5046% of Additional Award</p> |
|--|---|---|



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### Semester Example #2

- In this example, the Spring 2018 Pell award is made up of 12.4954% (\$671) remaining from the initial Pell Grant Scheduled Award and 37.5046% (\$2,014) from the additional Pell Grant award
  - The student has 12.4954% (\$671) remaining from the additional Pell Grant award for the 2017-18 award year
- If the student had used up 100% of his Pell Grant Scheduled Award for Summer 2017 and Fall 2017, the entire Spring 2018 award amount would be from the additional Pell Grant award



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### Semester Example #3

- Assume student's 2017-18 Scheduled Award is \$5,920 based on an EFC of 0 and a COA of \$10,000

| Fall 2017<br>Full-Time                                      | Spring 2018<br>Full-Time                                    | Summer 2018<br>Less-Than-Half-Time   |
|---|---|--|
| Award - \$2,960<br>which is 50.0000% of the Scheduled Award | Award - \$2,960<br>which is 50.0000% of the Scheduled Award | Award - <del>\$740</del> Ineligible  |
| Total Percent of Initial Scheduled Award used is 50.0000%   | Total Percent of Initial Scheduled Award used is 100.0000%  | Total 100% already used of Initial Scheduled Award, and the student must be enrolled at least half-time to be eligible for Additional Pell |

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### Example #4 – Transfer Students

Student Transfers to New School on 1/8/2018

2017-18 Pell TEU  
Prior to Transfer = 90%

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

Enrolled FT  
Spring Term  
50% Eligible

Initial Scheduled Award = 10%  
Additional Pell = 40%

Eligible Pell amount now based out of 150%

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### Example #5 – Transfer Students

Student Transfers to New School on 1/8/2018

2017-18 Pell TEU  
Prior to Transfer = 90%

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

Enrolled LTHT  
Spring Term  
12.5% Calculated

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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### Semester Example #6 (Crossover Period)

|                   |                  |         |
|-------------------|------------------|---------|
| 2017-2018 EFC 0   | Scheduled Award: | \$5,920 |
| 2018-2019 EFC 500 | Scheduled Award: | \$5,370 |

|                                 |                               |                              |                                 |
|---------------------------------|-------------------------------|------------------------------|---------------------------------|
| <b>SUMMER 2017</b><br>Half-time | <b>FALL 2017</b><br>Full-time | <b>SPRING 2018</b><br>½-time | <b>SUMMER 2018</b><br>Full-time |
|---------------------------------|-------------------------------|------------------------------|---------------------------------|

|  |                                    |  |  |
|--|------------------------------------|--|--|
| Disbursement = \$1480<br>(Paid from 2017-18) | Disbursement = \$2960<br>(2017-18) | Disbursement = \$2220<br>(2017-18)               | Disbursement = \$2220<br>(2017-2018)<br>(37.5%, full Additional) |
| 25% Initial Award used                       | 50% Initial Award used             | 25% Initial Award, plus<br>12.5% Additional Pell | OR<br>\$2685 (2018-2019)<br>(50% of 2018-19 Initial)             |
| Total used 25%                               | Total used 75%                     | Total used 112.5%                                |  |

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### Semester Example #6

- In this example, the Spring 2018 Pell award is made up of 25% (\$1,480) remaining from the initial Pell Grant Scheduled Award and 12.5% (\$740) from the additional Pell Grant award
  - At that point, the student had 37.5% (\$2,220) remaining from the additional Pell Grant award for the 2017-18 award year
- For Summer 2018, the choice of which award year to use will depend upon the school's Pell crossover awarding policy
  - Could use the remaining 37.5% of Additional Pell Grant for 2017-18 (\$2,220), OR
  - Could begin the first 50% percent of Initial Pell Grant for 2018-19 (\$2,685)
- Which option is "most beneficial" to the student?
  - 2017-18 is based on a lower EFC but also has limited remaining funds
  - 2018-19 is based on a higher EFC but student would receive a larger disbursement

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### Optional Recalculation Examples

**Scenario:** Pell Studies University (PSU) uses semester standard terms. PSU has a policy to recalculate a student's Pell award up to the add/drop date for the term, which the school also uses for its Pell Recalculation Date (PRD).

**Recalculation example 1:** Abbie Rhoades

- Abbie attended full-time summer and fall semesters, and received her full 100% initial Pell award.
- For spring semester, Abbie enrolls in two 3 credit-hour courses prior to PRD, and receives a disbursement of additional Pell for half-time enrollment (6 credit-hours)
- She begins attendance in both classes
- After the PRD, Abbie drops one 3 credit-hour course
- Abbie is still considered half-time, and remains eligible for the additional Pell

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### Optional Recalculation Examples

Scenario: Pell Studies University (PSU) uses semester standard terms. PSU has a policy to recalculate a student's Pell award up to the add/drop date for the term, which the school also uses for its Pell Recalculation Date (PRD).

**Recalculation example 2:** Pennie Layne

- Pennie attended full-time summer and fall semesters, and received her full 100% initial Pell award.
- For spring semester, Pennie enrolls in two 3 credit-hour courses prior to PRD, and receives a disbursement of additional Pell for half-time enrollment (6 credit-hours)
- She begins attendance in both classes
- Pennie drops one 3 credit-hour course before the PRD
- Pennie is considered less-than-half-time, and is not eligible for the additional Pell

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### Optional Recalculation Examples

Scenario: Pell Studies University (PSU) uses semester standard terms. PSU has a policy to recalculate a student's Pell award up to the add/drop date for the term, which the school also uses for its Pell Recalculation Date (PRD).

**Recalculation example 3:** Henry Kite

- Henry attended full-time summer and fall semesters at another school, and received his full 100% initial Pell award at that school
- For spring semester, Henry enrolls in two 3 credit-hour courses prior to PRD
- He begins attendance in both classes
- Henry drops one 3 credit-hour course after the PRD
- Henry was slow to update his FAFSA to add PSU's school code, so PSU doesn't receive an ISIR until mid-terms (after the course was dropped)
- PSU's initial calculation of Henry's Pell Grant occurs after the PRD. PSU must use Henry's enrollment status as of the date of the initial calculation (less-than-half-time), so he is not eligible for the additional Pell Grant
- An initial Pell calculation is not the same as a Pell recalculation!

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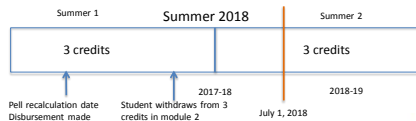
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### Mandatory Recalculation, Module Example

- Standard term, semester-hour program with a summer term comprised of two modules
- School uses one fixed PRD for the full summer term
- Rita is enrolled half-time during summer 2018
- 100% of 2017-18 initial Scheduled Award has been paid for fall/spring
- Payment for the payment period will be from additional 2017-18 Pell



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Required Recalculation Example - Conclusions

- Rita was paid half-time Pell award based on enrollment in 6 credits as of the Pell Recalculation Date (PRD)
- Pell recalculation/COD adjustment necessary
  - Withdrawal from 3 credits in summer 2 was after the PRD, but Rita will not begin attendance in all credits upon which the Pell payment was based
  - A similar situation would exist if she did not withdraw from the 3 credits in summer 2, but simply failed to begin attendance in them
- Rita is now less-than-half-time and may not receive payment from 2017-18 additional Pell
  - Payment may be made from the initial 2018-19 Scheduled Award, depending upon the school's crossover awarding policy

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**Year-Round Pell  
Operations Reminders**

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Year-Round Pell Grants-Operations

**Myths about COD system editing**

- *It will always keep me from awarding/dispersing the wrong amount of Pell*
- *It knows the student...*
  - Didn't enroll
  - Has a SAP problem
  - Graduated
  - Completed verification
- *Should be paid off a different CPS transaction number because it is higher than the one originally submitted to COD*
- *Should not be paid off a different CPS transaction number just because it is higher than the one originally submitted to COD*

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### Year-Round Pell Grants-Operations

- **Additional Eligibility Indicator (AEI)**
  - Schools may submit the AEI, an optional tag, that will indicate eligibility for up to 150% Scheduled Federal Pell Grant (SFPG)
  - If a school submits an AEI = "true", the total awarded Pell should equal an amount > 100% of the student's SFPG for that award year across schools
  - FSA will be monitoring schools that submit the AEI = "true" for students **not awarded or disbursed** Pell over the 100% SFPG. Any school suspected of such practices will be referred to Program Compliance for review and sanctioning if not corrected

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### Setting the AEI to "true"

**When should I set the AEI = "true" in COD?**

- When I award Pell for the award year?
- When the student indicates intent for "added" attendance?
  - Crossover period attendance
- Is the program a "year-round" program?
- Transfers
  - Does my school's disbursement represent an amount between 100%-150% in the student's TEU for that award year?

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### Setting the AEI to "false"

**When should I set the AEI = "false" in COD?**

- Why was it set to "true" previously?
  - Do those conditions still exist?
- Withdrawals/R2T4
- Nonattendance
  - Do you have a procedure when students that fail to enroll as planned?
- **Sooner is always better**
  - Don't wait until you are reconciling Pell for the award year

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### Policy Resources

- FSA Handbook
  - Volume 3, Chapter 3: Pell Calculations
- DCL GEN-17-06
  - Year-Round Pell
- DCL GEN-16-19
  - 2017-18 Pell Payment and Disbursement Schedules
- DCL GEN-18-01
  - 2018-19 Pell Payment and Disbursement Schedules

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### Technical Resources

- June 20, 2017 EA
  - Provides preliminary COD System implementation information and school processing timeline DCL GEN-17-06
- Updated 2017-18 COD Technical Reference
  - Posted 8/30/17
- October 4, 2017 EA
  - COD 16.2 Implementation documentation

For more technical information on Year-Round Pell, review 2017 FSA Training Conference Session #14 – *COD Update*

- Recording available at [fsaconferences.ed.gov](http://fsaconferences.ed.gov)

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**Contacts**

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  - Main Number: 816-268-0410
  - Jim Wyant (IIS) 816-268-0431
- Kansas City Training Officer
  - David Bartlett 816-268-0434



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**Training Feedback**

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

- Go to <https://www.surveymonkey.com/s/Massman>
- Evaluation form is specific to Joseph Massman
- 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 Mark.Gerhard@ed.gov; 415-486-5620

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**Questions?**

Contact me with follow-up questions about this session:  
Joseph Massman, Federal Training Officer  
[Joseph.Massman@ed.gov](mailto:Joseph.Massman@ed.gov); 303-844-0432



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