


### 2 Pells in an Award Year

**2 Pell Grants in One Award Year**  
 \*\*\*\*\*  
*It's still here – for now!*

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**Two Pells in an Award Year became effective in 2009-2010**

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**2010-2011 Award Year & Beyond????**

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## 2 Pells in an Award Year

**Student Eligibility – 10/11 Award Year**

- Second Scheduled Award
  - Student otherwise Pell Grant Eligible
  - Enrolled in degree or certificate program
    - Exception with intellectually disabled student programs
  - Received 100% of 1<sup>st</sup> Scheduled Award
    - May have 1<sup>st</sup> and 2<sup>nd</sup> Pell in same payment period
  - Enrolled at least Half-Time
  - Must be enrolled in a program greater than an academic year
    - Both in hours and weeks
    - AY is the larger of ED's minimum, OR school's definition

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**Student Eligibility – 10/11 Award Year**

- Additional requirements added for 2010-2011:
  - **Be enrolled for at least one credit or clock hour in the payment period attributable to the student's second academic year definition in the award year**
    - Hours attributable toward 2<sup>nd</sup> AY based on any enrollment status changes due to a school's Pell recalculation policy or ED recalculation requirements
    - Not required to successfully complete hours attributable to a second academic year to retain payment eligibility

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**Semester Progression Example**

- A traditional semester-based academic calendar has fall and spring semesters and a 12-semester-hour nonstandard summer term.
- Title IV academic year is 24 semester hours and 30 weeks of instructional time.
- In 2010-2011 award year, student
  - Is *paid as full-time* for fall and spring (receives 100% of 1<sup>st</sup> Pell Award),
  - Earns 12 hours in the fall and 10 hours in the spring, and
  - Enrolls for 6 hours in the summer.

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## 2 Pell's in an Award Year

**Semester Progression Example**

Fall 2010 Earns 12 hr	Spring 2011 Earns 10 hr	Summer 2011 Enrolls 6 hr
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2010-11 Award Year

- Only consider hours in current award year
  - Do not consider weeks of instructional time or prior award year hours
- Through spring earns 22 hours, after institution determines grades for spring
- Consider 2 hours of summer attributable to first academic year and 4 hours to second academic year
- Is eligible for half-time payment from second Scheduled Award

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GO FURTHER  
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**Clock-hour Progression Example**

- Academic calendar is 1,350 graded clock-hours over 39 weeks of instructional time in the 2010-2011 award year.
- Program has 3 payment periods of 450 clock hours and 13 weeks of instructional time each.
- Title IV academic year is 900 clock hours and 26 weeks of instructional time.
- In 2010-2011 award year, student
  - Is paid first Scheduled Award over the first two payment periods, and
  - Enrolls in the third payment period after passing first 900 clock hours.

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**Clock-hour Progression Example**

1 <sup>st</sup> P.P. 450 cl hr	2 <sup>nd</sup> P.P. 450 cl hr	3 <sup>rd</sup> P.P. 450 cl hr
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2010-11 Award Year

- Only consider hours in current award year
  - Do not consider prior award year hours
- Through second payment period, earns 900 clock hours
- Consider hours of 3<sup>rd</sup> payment period attributable to the second academic year
- Is eligible for payment from second Scheduled Award for 3<sup>rd</sup> payment period

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### 2 Pells in an Award Year

**Academic Year Progression**

- In determining eligibility for a second Scheduled Award in an award year, may *NOT* use hours based on:
  - Advanced Placement (AP) programs
  - International Baccalaureate (IB) programs
  - Testing out, life experience, or similar competency measures
- Because not earned by attendance in the award year
- Applies to both transfer students and nontransfer students

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**Academic Year Progression**

- *Count* equivalencies of reduced credit and noncredit remedial coursework toward determining eligibility for a second Scheduled Award in an award year
- Do *not* count any equivalent hours in excess of the 30 semester hours, 45 quarter credits, or 900 clock hours unless they are equivalent hours of ESL coursework

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**Academic Year Progression**

- *May waive requirement* to be enrolled in hours attributable to the 2<sup>nd</sup> academic year
  - Must be due to circumstances beyond the student's control
    - May include circumstances such as illness or classes not offered
    - Does not include withdrawing to avoid a grade or failing to register
  - Must be determined and documented on individual basis

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### 2 Pells in an Award Year

**Crossover Payment Periods**

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**Cross-Over Payment Period**

- Payment period that includes June 30 & July 1
- May be term or nonterm payment period
- Must have valid SAR/ISIR for assigned year
- First and last cross-over payment periods could be from the same award year
- May assign Pell to a different award year from other Title IV aid
- Pay all Pell from one Award Year

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**Crossover Payment Period Assignment**

- Must reassign if receive information that student would receive greater payment
  - within deadline date for the first award year  
(2010 crossover payment period, September 10, 2010)
- May reassign if information received after initial deadline
  - but not later than the deadline date for administrative relief for the first award year  
(2010 crossover payment period, February 1, 2011)

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## 2 Pells in an Award Year

### Crossover Payment Period Assignment

- Must determine the greater payment based on all requirements that apply
- Must not rely on EFC or Scheduled Award alone
- If only have valid SAR/ISIR for one award year, must rely on that record
- Is higher payment if, for the other award year—
  - No SAR/ISIR
  - Rejected SAR/ISIR without an EFC
  - Incomplete verification

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### Term Example

- Academic calendar: traditional semester-based with fall and spring semesters and a 12-semester-hour nonstandard summer term.
- Title IV academic year: 24 semester hours and 30 weeks of instructional time.
- Formula 1 payment calculations

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### Term example

Fall 2010 Full-time <b>(12 hr passed)</b> \$2,000	Spring 2011 Full-time <b>(12 hr passed)</b> \$2,000	Summer 2011 Full-time (12 hr) <b>\$2,000</b>
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2010-11 Award Year

- \$4,000 Scheduled Award for 2011-2012
- \$2,000 disbursement from second Scheduled Award in summer payment period
- *Summer payment period is a crossover payment period*

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## 2 Pell in an Award Year

### Term example

Summer 2011 Full-time (12 hr) <b>\$2,500</b>	Fall 2011 Full-time (12 hr) \$2,500	Spring 2012 Full-time (12 hr) \$2,500
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2011-12 Award Year

- \$5,000 Scheduled Award for 2011-2012
- *Reassignment of Summer (crossover payment period)*
- Report \$4,000 disbursed for 2010-2011 to COD (a \$2,000 reduction)
- Report \$2,500 disbursement for Summer for 2011-2012

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### Clock Hour Example

- Academic calendar: nonterm, clock-hour program
- 1,800 clock-hour program over 52 weeks of instructional time
- Title IV academic year: 900 clock hours and 26 weeks of instructional time.
- Four payment periods
- Formula 4 payment calculations

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### Clock-hour example

1 <sup>st</sup> P.P. 450 cl hr/13 wk it \$2,000	2 <sup>nd</sup> P.P. 450 cl hr/13 wk it \$2,000	3 <sup>rd</sup> P.P. 450 cl hr/13 wk it <b>\$2,000</b>
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2010-11 Award Year

- \$4,000 Scheduled Award for 2010-2011
- \$2,000 disbursement from second Scheduled Award in 3<sup>rd</sup> payment period
- *3<sup>rd</sup> payment period of program, a crossover payment period*

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## 2 Pell in an Award Year

**Clock-hour example**

3 <sup>rd</sup> P.P. 450 cl hr/13 wk it <b>\$2,500</b>	4 <sup>th</sup> P.P. 450 cl hr/13 wk it <b>\$2,500</b>
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2011-12 Award Year

- \$5,000 Scheduled Award for 2011-2012
- *Reassignment of 3<sup>rd</sup> payment period (crossover payment period)*
- Report \$4,000 disbursed for 2010-2011 to COD (a \$2,000 reduction)
- Report \$2,500 disbursement in 3<sup>rd</sup> payment period for 2011-2012

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**Crossover Payment Period: Packaging**

- May be different award year for Pell than for other Title IV aid.
- Packaging issues
  - For Pell, use EFC for the award year from which the student will be paid.
- Must use same EFC, COA and need for all programs except Pell.
  - Amount of Pell is EFA for other aid.

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**Year Round Pell – 2010-2011 Transfers**

- Two Methods
  - Assumption Method
  - Hours-Earned Method

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## 2 Pells in an Award Year

### Transfer student

- Determination of hours completed
- Final regulations: two options
  - *Assumption method*
    - Based on disbursements received
    - Do not consider hours earned at other institutions to be conflicting information
  - *Hours-earned method*
    - Based on actual hours earned in award year
- Method at option of institution: apply on a student-by-student basis or to all students

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### Transfer student: Assumption method

- Assume completed first academic year if received all of first Scheduled Award at prior institution(s)
- If less than first Scheduled Award was disbursed, calculate hours assumed to have been completed:

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

\*Round down any fraction unless current institution uses partial hours.

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### Assumption Method

EXAMPLE – credit hour

- Fall transfer student received \$1,000 of \$4,000 Scheduled Award for summer at prior institution.
- Current institution, without a summer term, defines academic year, in part, as 24 semester hours.
- Hours in award year considered to have earned for prior attendance:

$$\frac{\$1,000 \text{ disbursed at prior institution} \times 24 \text{ hours in current institution's academic year}}{\$4,000 \text{ Scheduled Award at prior institution}} = 6 \text{ hours considered completed}$$

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## 2 Pell's in an Award Year

### Assumption Method

**EXAMPLE – clock hour**

- Transfer student received \$3,000 of \$4,000 Scheduled Award at prior institution.
- Current institution defines academic year, in part, as 900 clock hours.
- Hours in award year assumed to have been earned for prior attendance:

$\frac{\$3,000 \text{ disbursed at prior institution}}{\$4,000 \text{ Scheduled Award at prior institution}} \times 900 \text{ clock hours in current institution's academic year} = 675 \text{ clock hours considered completed}$	
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### Hours Earned Method

- The institution may determine the credit or clock hours actually earned at other institutions.
- The institution must have information that includes the time periods when the credit or clock hours were earned.
- Any hours earned are applicable. For example, hours—
  - Need not be earned in an eligible program, or
  - Be accepted on transfer
- Does not include *nonapplicable* hours that are not earned
- Include hours in current award year for any hours earned in a payment period scheduled to occur in the prior year and the current award year (crossover)

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## Operations

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## 2 Pells in an Award Year

**2<sup>nd</sup> Scheduled Pell - Processing**

- New field added to COD record
  - Additional Eligibility Indicator (AEI)
- School sets AEI to “true” on origination record when awarding any part of second scheduled award
- If you do not increase the award amount **AND** set the AEI to “true” on the *origination record*, the disbursement record will reject.
- AEI students will not trigger POP MRR
  - Still check for concurrent enrollment

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**Cross-Over Pell Reporting**

If Pell disbursements must change Award Years due to requirement to pay largest payment then:

**COD**  
Cancel disbursement from the incorrect year and re-originate and enter actual disbursement amount under the correct award year.

**G5**  
Business Office will do a draw down adjustment reassigning the Pell disbursement to the correct Award Year and draw down any additional Pell funds from the proper Award Year if necessary.

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**Cross-Over Pell Reporting**

If Pell disbursements must change Award Years due to requirement to pay largest payment then:

**G5\***  
*For 10/11 Pell funds, schools was able to draw down funds as of May 25, 2010 (Earlier in future award years)*

**FISAP**  
Report Pell disbursement on the FISAP for the Award Year from which Pell was paid.  
 •Fall correction period through December 15  
 •After December 15, call campus-based call center for assistance: (877) 801-7168

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### 2 Pells in an Award Year

**Feedback on Training**  
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