

Modules and How They Can Impact Pell Recalculations



Designing Pathways to Success

Under the Turquoise Skies

2015 SWASFAA Conference

November 4-6, 2015

Sandia Resort & Casino

Albuquerque, New Mexico

AASFAA LASFAA NMASFAA OASFAA TASFAA

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United States
Department of
Education

Federal Student Aid
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Today's Session

- Four Scenarios
- All deal with determining whether the student is, in fact, subject to having his or her Pell Grant recalculated based on a change in the student's enrollment status
- While a school sometimes discovers that a Pell recalc is necessary when a student withdraws, this session is only about recalcs and NOT about withdrawals and R2T4
- Slides will be shared with SWASFAA for posting
- Most of you have Answer Cards of A, B and C

Pell Calculations

- Initial Pell Calculations
- Pell Recalculations

Pell Calculations vs Pell Disbursements

- Some schools choose to pay the disbursement for the payment period in installments
 - $\frac{1}{2}$ at the beginning of the payment period and $\frac{1}{2}$ when the student begins Module 2, for example
- This is not a recalc
- Student was always the enrollment status that the student started at or had locked in
- Disbursement for that enrollment status is being paid in installments
 - School choice
 - Not an ED requirement

Pell Calculations vs Pell Disbursements

- This student is full time even if the school chooses to divide the disbursement into two halves

Fall Semester Sep 1 – Dec 22

Module 1

Module 2

\$

\$

6 hours

6 hours

Initial Pell Calculations

- Document the date that you initially calculate a student's Pell Grant
- Earliest date is the date of receipt of an ED-produced EFC*, such as on a SAR or ISIR (assuming the school has a documented or projected enrollment status for the student)

*Note: An ED-produced EFC may be an EFC from a SAR/ISIR, FAA Access, or FAFSA on the Web

Initial Pell Calculations

- If school fails to document the date of the initial calculation, you must use the later of
 - the date that the SAR or ISIR is first received and the student’s enrollment status as of that date
 - or
 - the date the student enrolls
- Your school is considered to have received the ISIR on the date it was processed. This date is labeled “Processed Date” on the ISIR

Mandatory Pell Recalculations

- Student's enrollment status changes between payment periods
- Student's EFC changes
- Student does not begin attendance in each class that was used to calculate that student's enrollment status
 - Pell
 - TEACH
 - Iraq-Afghanistan Service Grant

Optional Pell Recalculations

- 690.80(b) *Change in enrollment status.* (2)(i) If the student's projected enrollment status changes during a payment period after the student has begun attendance in all of his or her classes for that payment period, the institution may (but is not required to) establish a policy under which the student's award for the payment period is recalculated. Any such recalculations must take into account any changes in the cost of attendance. If such a policy is established, it must apply to all students.

Optional Pell Recalculations

- The reg continues...
- (ii) If a student's projected enrollment status changes during a payment period before the student begins attendance in all of his or her classes for that payment period, the institution shall recalculate the student's enrollment status to reflect only those classes for which the student actually began attendance.

Optional Pell Recalculations

- Some schools choose to have no Pell recalculation policy
 - They use the initial calculation and never recalculate
- Some choose to have a policy that establishes one Pell Recalculation Date (PRD) for each payment period
 - Many schools choose the drop/add deadline or use the census date but any date is ok to use in policy

Optional Pell Recalculations

- Still others choose to have a policy that establishes multiple Pell Recalculation Dates for each payment period
 - A date is established in each module that occurs in a given payment period
 - Only one PRD is ever applicable to a given student at a time based on the latest module or term in which the student has classes
 - But it will change if the student's classes change

University of Casablanca

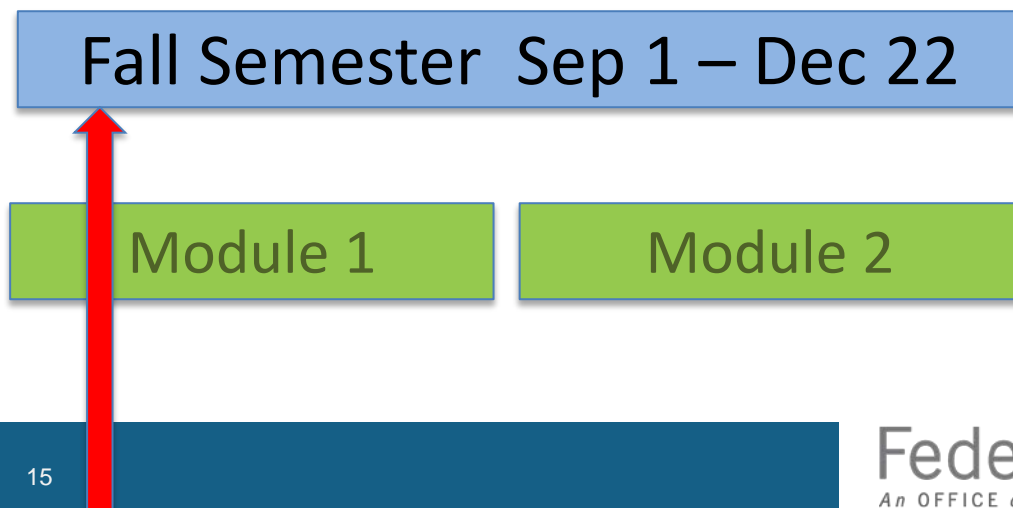
- UC has a standard semester term calendar with a 16 week Fall, a 16 week Spring and a 10 week Summer
- Fall and Spring both have classes that last the entire semester but both also have two 8 week modules contained within the semester, Modules 1 and 2
- UC establishes a single PRD for each payment period which is the 12th day of each payment period
 - UC will not recalculate a student's Pell Grant, up or down, when enrollment changes after that date

Scenario 1 - Rick



Scenario 1 - Rick

- Rick, a Pell recipient, attends Casablanca University in the Fall Semester which starts on Sep 1 and has a PRD of Sep 12
- On Aug 31, he registers for 3 hours in Module 1 of Fall and 3 hours in Module 2 of Fall and begins attendance in Module 1 on Sep 1



Scenario 1 - Rick

- Let's say Rick drops his Module 1 class on Sep 14
- Pell must be recalculated???
- A = Yes
- B = No
- C = It depends & I know what it depends on!

Fall Semester Sep 1 – Dec 22

Module 1

Module 2

Scenario 1 - Rick

- Let's say Rick drops his Module 1 class on Sep 14
- Pell must be recalculated???

- C = It depends & I know what it depends on!

Fall Semester Sep 1 – Dec 22

Module 2

Scenario 1 - Rick

- Rick may or may not be a withdrawn student at this point
- We can get written confirmation that he plans to return for Module 2 and then he is not a withdrawal, for now
- No written confirmation = withdrawn student

Fall Semester Sep 1 – Dec 22

Module 2

Scenario 1 - Rick

- If he is a withdrawn student we
 - First recalculate Pell because he never began attendance in Module 2
 - Second, calculate an R2T4 using the recalculated Pell amount

Fall Semester Sep 1 – Dec 22

Module 2

Scenario 2 - Stephen and Lydia



Scenario 2 - Stephen and Lydia

- Stephen and Lydia are Pell recipients and attend Skateboard College in the Fall Semester which starts on Sep 1 and has a PRD of Sep 12
- On Aug 31, Stephen registers for 3 hours in Module 1 of Fall and 3 hours in Module 2 of Fall and begins attendance in Module 1 on Sep 1

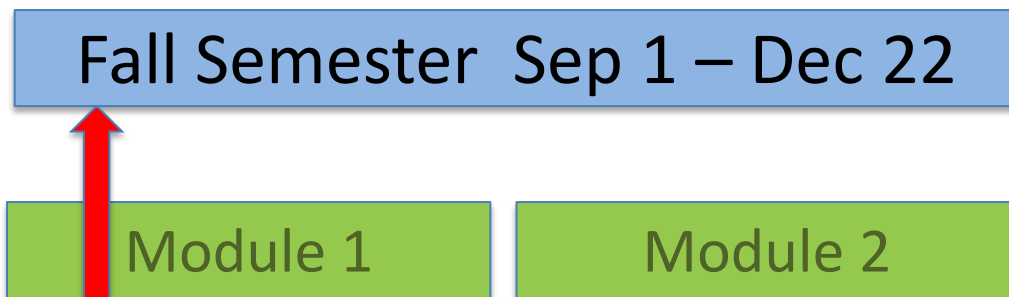
Fall Semester Sep 1 – Dec 22

Module 1

Module 2

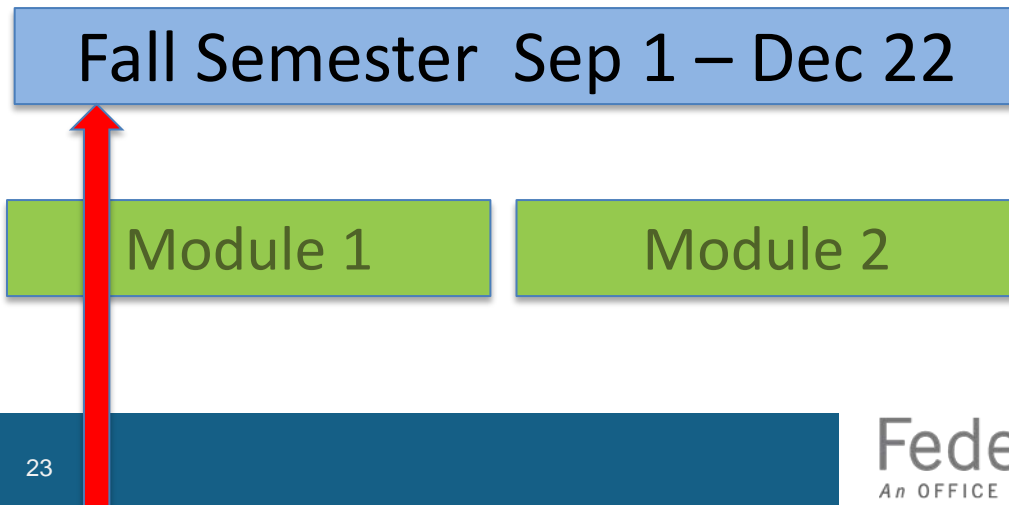
Scenario 2 - Stephen and Lydia

- On Aug 31, Lydia registers for the same three hours that Stephen has in Module 1
- Near the end of Module 1, Lydia finds out Stephen is taking three hours in Module 2 and promptly registers for the same class
- Both begin the class in Module 2 on Oct 20



Scenario 2 - Stephen and Lydia

- Does Stephen's Pell get recalculated?
 - A = Yes
 - B = No
 - C = It depends & I know what it depends on!



Scenario 2 - Stephen and Lydia

- Does Stephen's Pell get recalculated?
 - B = No
 - Stephen was calculated as a half time Pell recipient
 - We locked in half time on Sep 12, the PRD
 - Stephen began attendance in all hours used to calculate his enrollment status

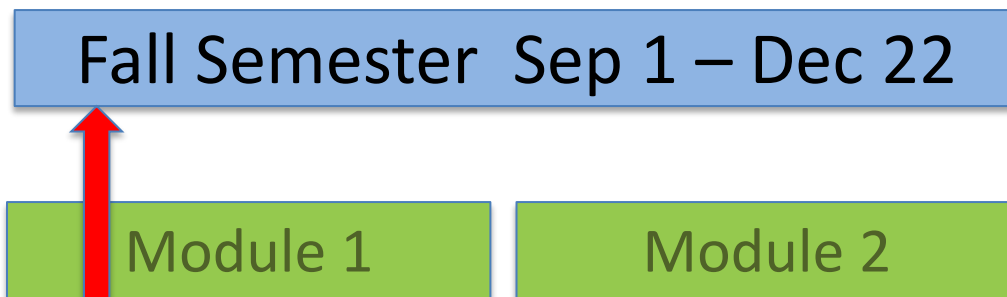
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Module 1

Module 2

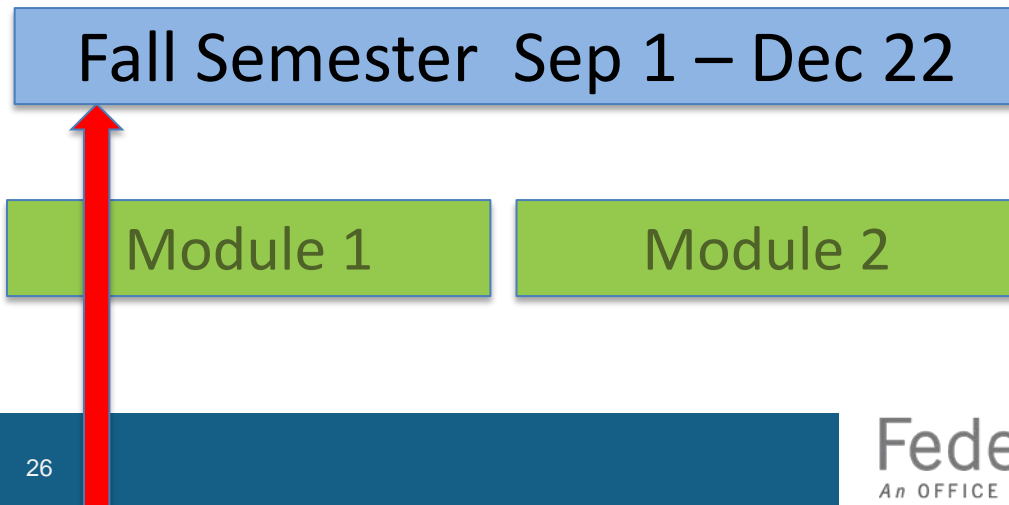
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- Both begin the class in Module 2 on Oct 20



Scenario 2 - Stephen and Lydia

- Does Lydia's Pell get recalculated?
 - A = Yes
 - B = No
 - C = It depends & I know what it depends on!



Scenario 2 - Stephen and Lydia

- Does Lydia's Pell get recalculated?
 - B = No
 - Lydia was calculated as a less than half time Pell recipient
 - We locked in less than half time on Sep 12, the PRD
 - Lydia began attendance in the Module 1 class
 - Lydia added the Module 2 class after the PRD and we cannot change her enrollment status up or down

Fall Semester Sep 1 – Dec 22

Module 1

Module 2

Scenario 2 - Stephen and Lydia and Jorge

- Stephen and Lydia's friend, Jorge, decides to join them in the Module 2 class
- Jorge has filled out a FAFSA and is a Pell recipient
- He enrolls in Skateboard College on Oct 8 and registers for three hours in Module 2 and begins attendance in that module on Oct 20, along with his buddies, Lydia and Stephen

Fall Semester Sep 1 – Dec 22

Module 2

Scenario 2 - Stephen and Lydia and Jorge

- Does Jorge get any Pell for Fall?
 - A = Yes
 - B = No
 - C = It depends & I know what it depends on!

Fall Semester Sep 1 – Dec 22

Module 2

Scenario 2 - Stephen and Lydia and Jorge

- Does Jorge get any Pell for Fall?
 - A = Yes
- This is NOT a Pell recalculation!
- It is an initial Pell calculation
- Jorge is eligible for a LTHT Pell



Fall Semester Sep 1 – Dec 22

Module 2

Scenario 3 – Jermaine and Yvonne



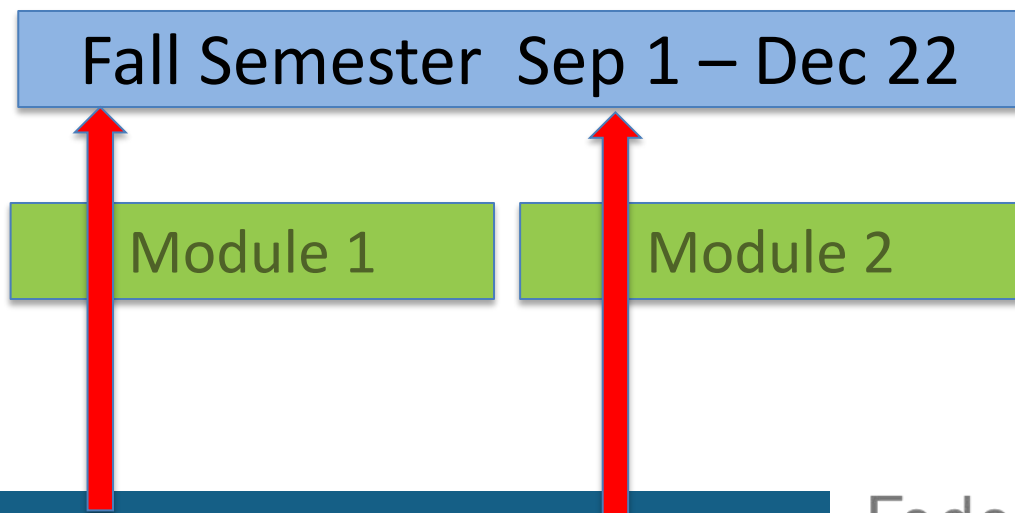
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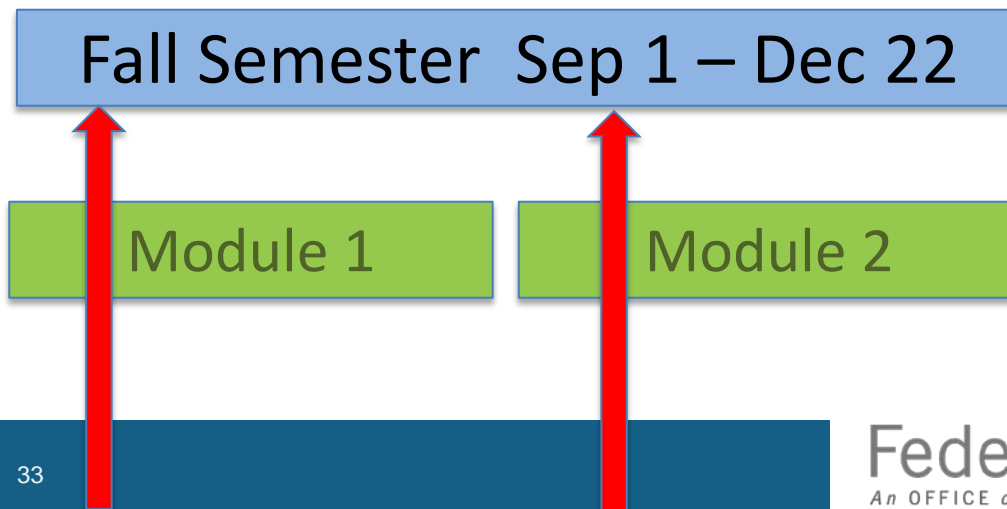
Scenario 3 – Jermaine and Yvonne

- Jermaine and Yvonne are Pell recipients and attend Turquoise Institute in the Fall Semester which starts on Sep 1 and has two modules and two PRDs
- Module 1 begins on Sep 1 and has a PRD of Sep 12
- Module 2 begins on Oct 20 and has a PRD of Nov 1



Scenario 3 – Jermaine and Yvonne

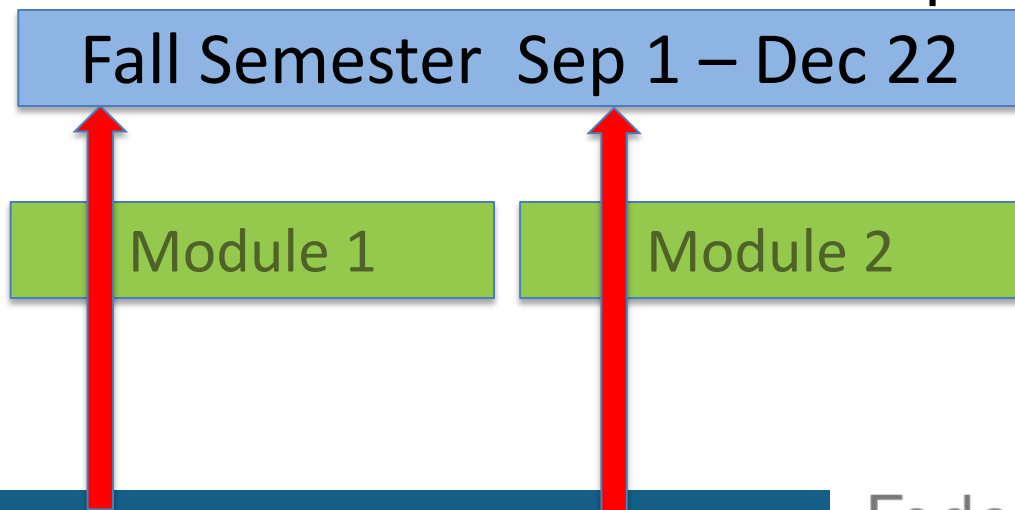
- A student only ever has one PRD that applies to him and it is the PRD in the module or term that has the latest start date and in which the student has a classe(s)
- So if the student has classes in Module 2, that PRD applies to him
- If the student does not have classes in Module 2, that PRD does not apply to her, the PRD in Module 1 will



PRDs can change if the student's classes change

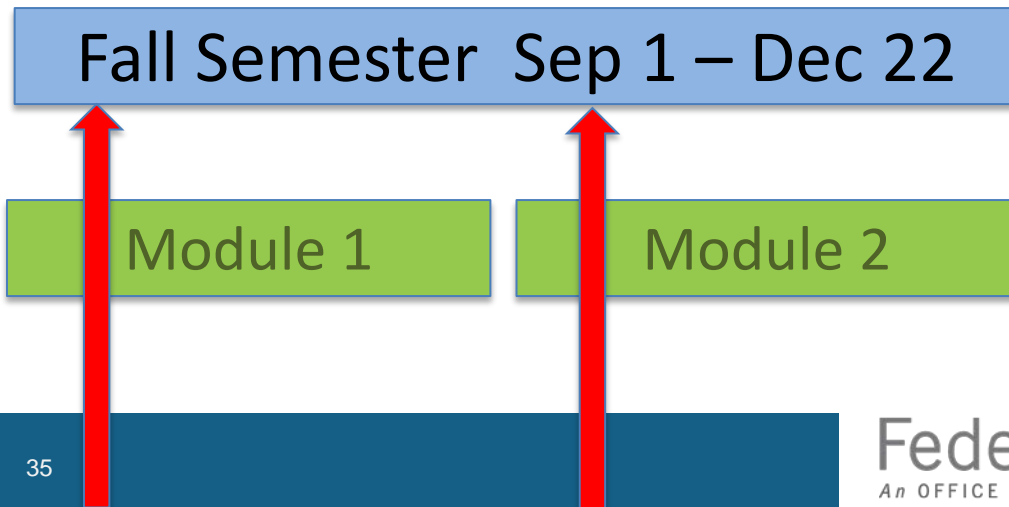
Scenario 3 – Jermaine and Yvonne

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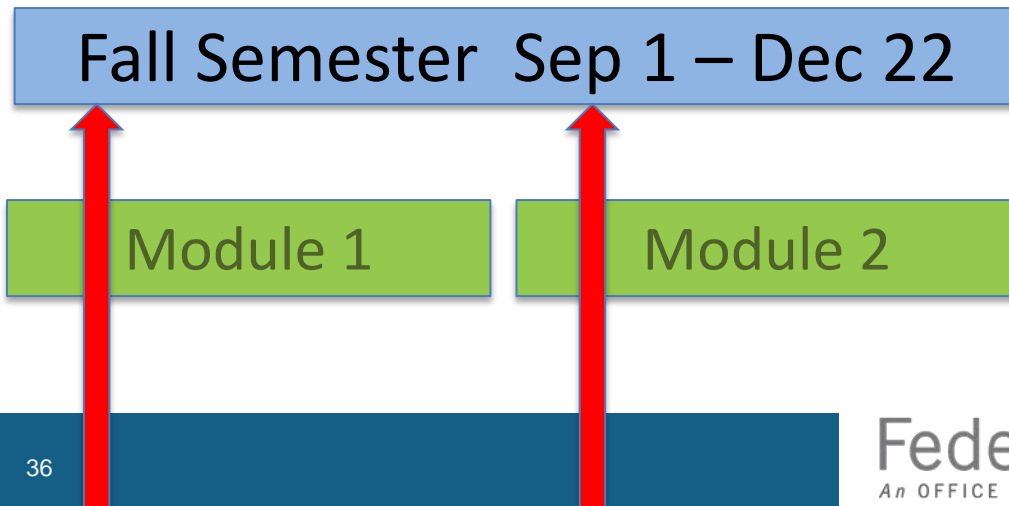
Scenario 3 – Jermaine and Yvonne

- On Aug 31, Yvonne registers for the same three hours that Jermaine has in Module 1
- Near the end of Module 1, Yvonne finds out Jermaine is taking three hours in Module 2 and promptly registers for the same class
- Both begin the class in Module 2 on Oct 20



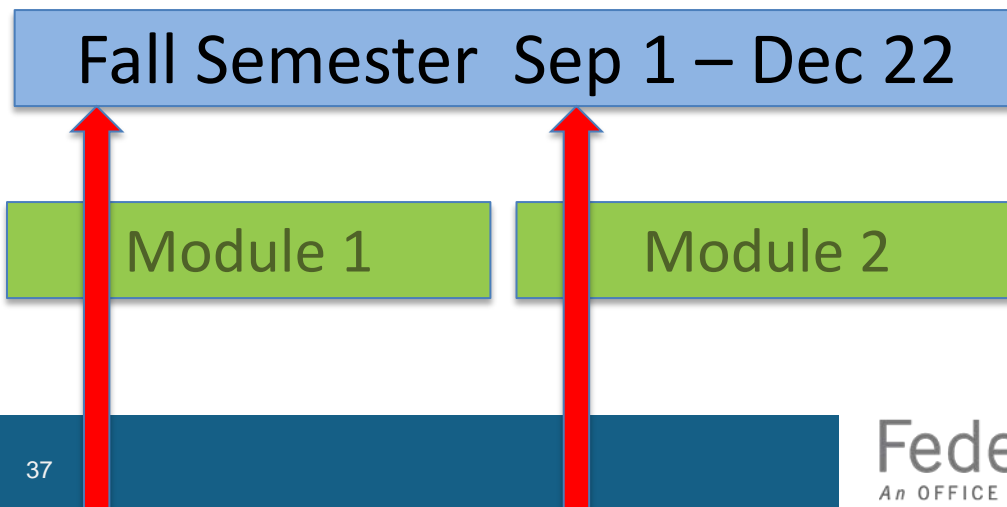
Scenario 3 – Jermaine and Yvonne

- Does Jermaine's Pell get recalculated?
 - A = Yes
 - B = No
 - C = It depends & I know what it depends on!



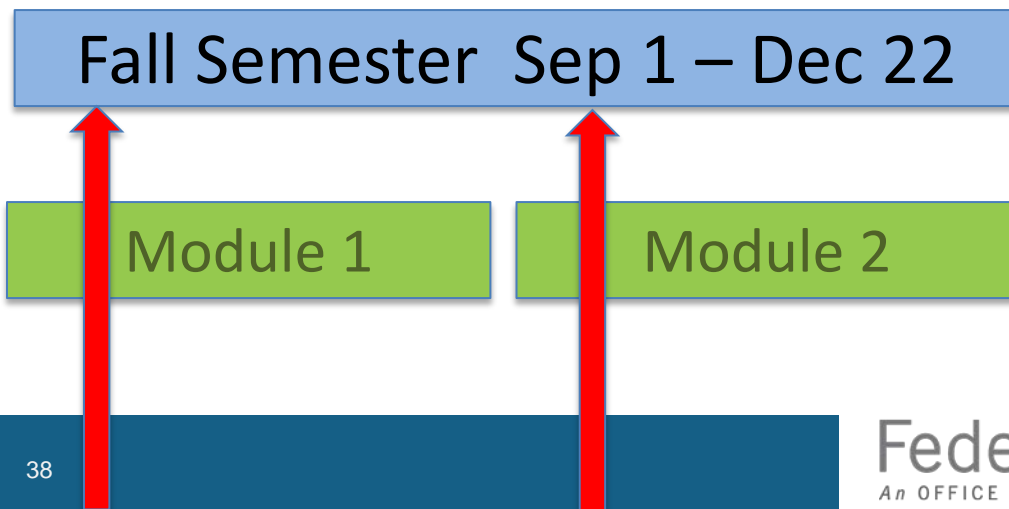
Scenario 3 – Jermaine and Yvonne

- Does Jermaine's Pell get recalculated?
 - B = No
 - Jermaine was calculated as a half time Pell recipient
 - We locked in half time on Nov 1, the PRD in Module 2
 - Jermaine began attendance in all hours used to calculate his enrollment status



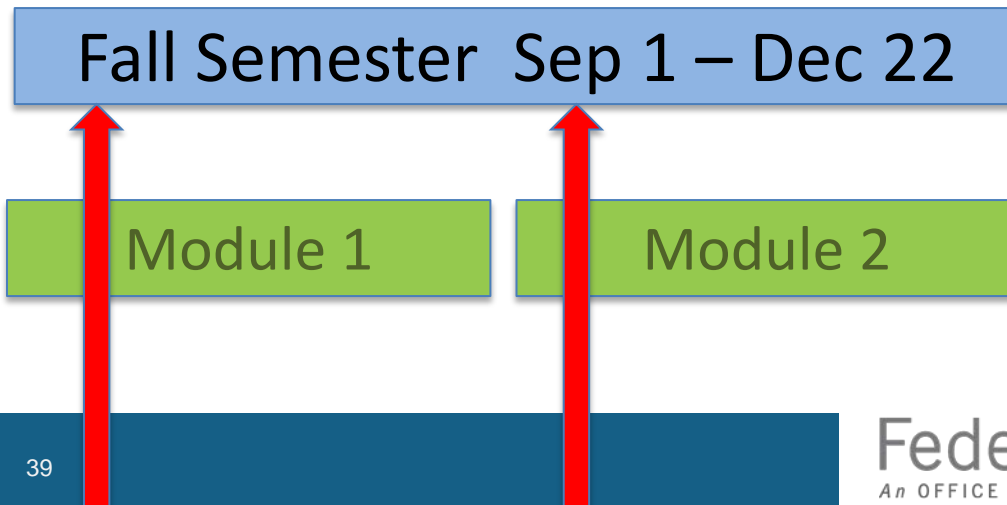
Scenario 3 – Jermaine and Yvonne

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- Both begin the class in Module 2 on Oct 20



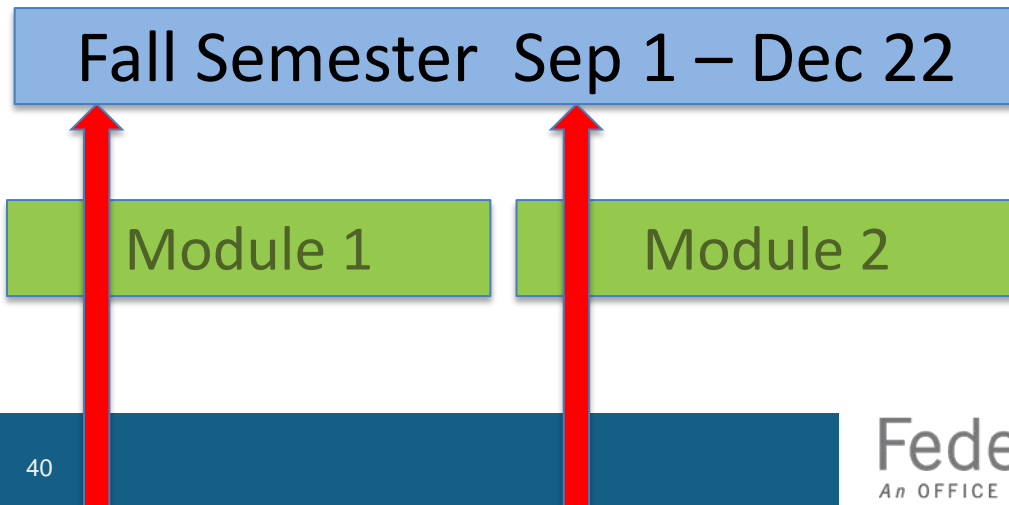
Scenario 3 – Jermaine and Yvonne

- Does Yvonne's Pell get recalculated?
 - A = Yes
 - B = No
 - C = It depends & I know what it depends on!



Scenario 3 – Jermaine and Yvonne

- Does Yvonne's Pell get recalculated?
 - A = Yes
- Originally, the Module 1 PRD applied to Yvonne
- Now, the Module 2 PRD applies to Yvonne
- We recalculate Yvonne's Pell from LTHT to $\frac{1}{2}$ time



Multiple Pell Recalculation Dates

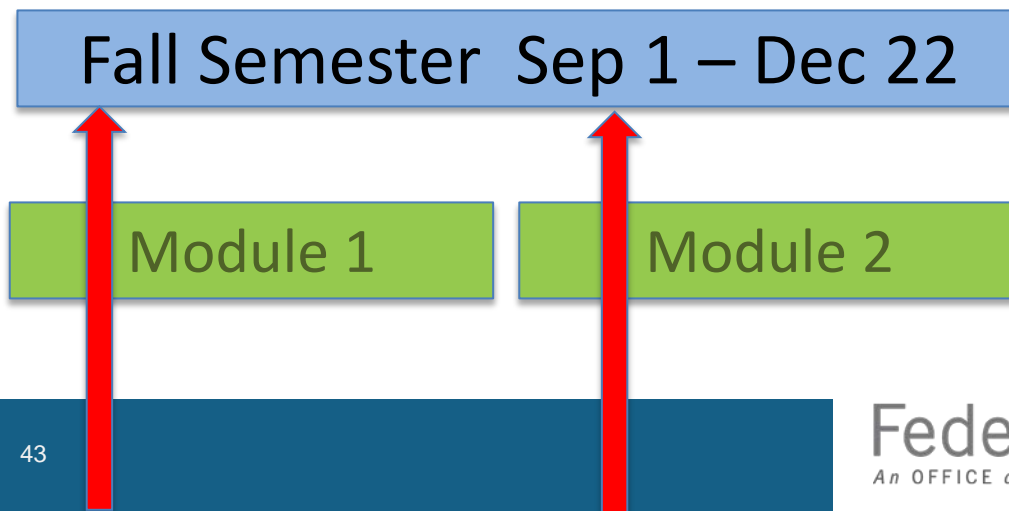
- Multiple PRDs are great!
- We can always give more money to the student when they add an additional class
- Hmmmmmmmm
- Can we?

Scenario 4 – Yogi



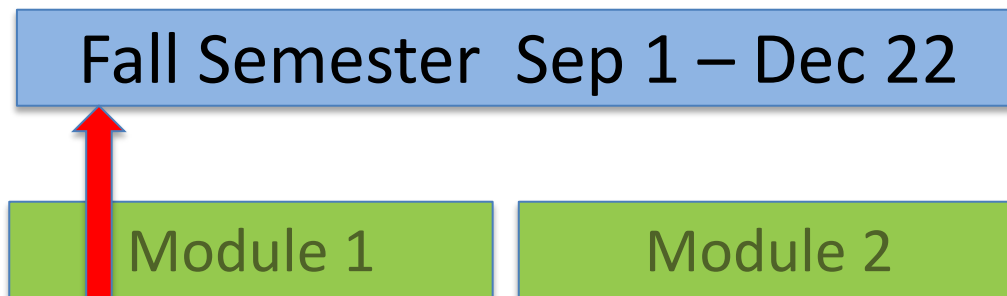
Scenario 4 – Yogi

- Yogi enrolls in 12 hours, 6 are in the full semester and 6 are in Module 1
- The full semester begins on Sep 1 and has a PRD of Sep 12
- Module 1 begins on Sep 1 and has a PRD of Sep 12
- Module 2 begins on Oct 20 and has a PRD of Nov 1
- Does Yogi care about the Module 2 PRD?



Scenario 4 – Yogi

- Yogi is a full time student and begins attendance in all 12 hours
- His PRD is Sep 12
- On Sep 12, Yogi remains enrolled in 12 hours and he is locked in as full time and his Pell funds are disbursed
- On Sep 30, Yogi drops the 6 hours in Module 1 and remains enrolled in the 6 hours in the full semester



Scenario 4 – Yogi

- Does Yogi's Pell get recalculated?
 - A = Yes
 - B = No
 - C = It depends & I know what it depends on!

Fall Semester Sep 1 – Dec 22

Module 1

Module 2

Scenario 4 – Yogi

- Does Yogi's Pell get recalculated?
- B = No

Fall Semester Sep 1 – Dec 22

Module 1

Module 2

Scenario 4 – Yogi

- On Sep 30 Yogi dropped 6 of his 12 hours but remained full time
- On Oct 6, Yogi sees there is a 3 hour Baseball Management class being offered in Module 2 and he enrolls in that class
- He begins attendance on Oct 20



Scenario 4 – Yogi

- Does Yogi's Pell get recalculated?
 - A = Yes
 - B = No
 - C = It depends & I know what it depends on!

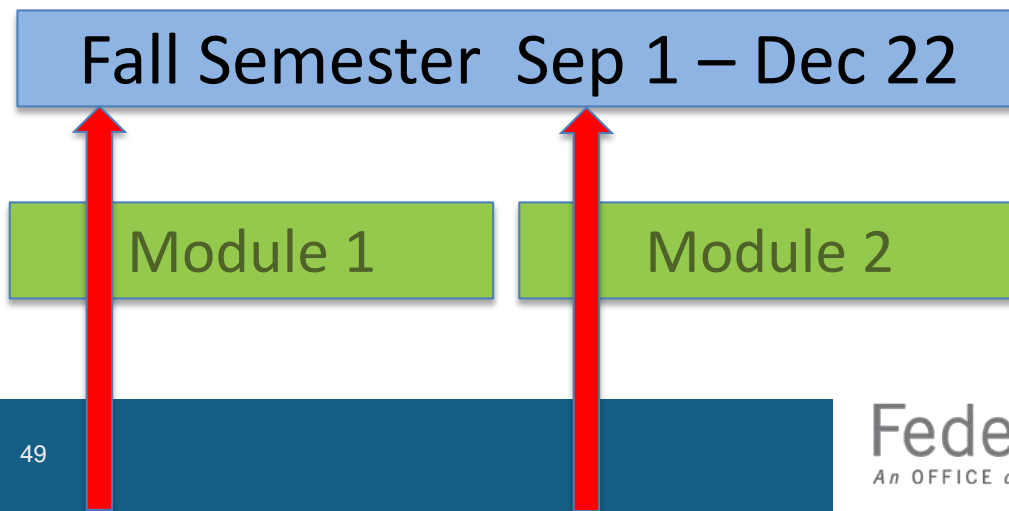
Fall Semester Sep 1 – Dec 22

Module 1

Module 2

Scenario 4 – Yogi

- Does Yogi's Pell get recalculated?
 - A = Yes
 - Module 2's PRD is now Yogi's PRD
 - Module 1's PRD is no longer Yogi's
 - On Nov 1, what is Yogi's enrollment status?



Scenario 4 – Yogi

- Yogi is a $\frac{3}{4}$ time student and his full time Pell must be recalculated
- So will multiple PRDs ALWAYS result in more Pell money for students?
- Not always...

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Module 1

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Survey feedback is a tool to help us improve our training, justify training/travel expenditures and to listen to our customers.

Please provide any comments regarding this training or the trainer to:

Jo Ann Borel, Title IV Training Supervisor
joann.borel@ed.gov

Thank You SWASFAA!

