Awarding Pell Grants

Awarding Pell Grants

This section provides an overview of Pell Grant awarding and discusses how to:

- Define Pell eligibility calculation setup.
- Define Aggregate Aid Limit Percentage Maximums for Pell Grant.
- Calculate Pell Grants.
- Package Pell Grants Using Pell Table Enablement Tables
- Repackage Pell Grants.
- Manually award Pell Grants.
- Award Pell Grants using professional judgment.
- Reinstate a cancelled Pell Grant award.
- Award Pell Grants for post-baccalaureate teaching certificate candidates.

Understanding Pell Grant Awarding

The Pell Grant awarding functionality automatically calculates a Pell Grant award based on a student's:

- Maximum Scheduled Award
- Pell Grant Formula and Enrollment
- Total Percent Used
- Lifetime Eligibility Used

Maximum Scheduled Award

The system determines a student's maximum scheduled Pell Grant (full-time, full-year Pell Grant award) by using:

- Expected Family Contribution (EFC)

  The student's 9–month EFC from a valid Institutional Student Information Report (ISIR)

- Pell Grant Cost of Attendance (COA)

  The student's Pell COA or Pell COA for Less-Than-Half-Time (LTHT)

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Note: If the student is enrolled only in terms tied to the Academic Award Period, Packaging uses the Academic Pell COA for determining Pell Grant awards.
If the student is enrolled in terms tied to both the Academic and Non-Standard Award Periods, Packaging uses the Academic Pell COA for determining Pell Grant awards.
If the student is enrolled only in terms tied to Non-Standard Award Period, Packaging uses the Non-Standard Pell COA for determining Pell Grant awards.

See Defining Budget Components.

The system uses the student's EFC and Pell COA to determine the student's maximum scheduled Pell Grant award from the U.S. Department's Full-time Pell Grant payment schedule for the appropriate aid year.

Pell Grant Formula and Enrollment

These Pell Grant Formula options are available:

- Formula 1 — FA Load
- Formula 1 — Full-time
- Formula 3 — FA Load
- Formula 3 — Current Load
- Formula 3 — Full-time

Among the formula options, there are three enrollment values used:

- FA Load

  The Financial Aid Term build process determines the student's FA Load using the units in the FA Taken field. The FA Load field can be locked using census-date locking. If you use census-date locking, you may want to use the census date locked value (FA Load) for any Pell recalculations that occur after the financial aid census date.

- Current Load

  Current Load calculates the student's enrollment load using the units from sessions the student is currently enrolled (In Progress value from FA Term) in as well as sessions within the term that the student has already completed (Completed value from FA Term). This field enables you to calculate the enrollment load of Open Entry/Open Exit students more accurately.

- Full-time

  The student's full-time enrollment is assumed.

You can choose to calculate the student's Pell Grant eligibility using different default enrollment values for different points in time in relation to the term:

- before the term's start date,
- on or after the term's start date but before the financial aid census date, and

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- on or after the financial aid census date.

Having different values for these three points in time gives you flexibility in calculating Pell Grant awards. For example, for Formula 1, you can calculate a student's Pell Grant using a projected full-time enrollment value for the period prior to the term start date. Then when the student's term begins, you can recalculate the student's Pell Grant award using the student's actual enrollment (FA Load).

Note: If a term does not have a financial aid census date established, the Pell recalculation process uses the academic census date (defined in Student Records).

See Defining Pell Eligibility Calculation (PEC) Setup.

See Calculating Pell Grants.

Total Percent Used

The amount of Pell Grant the system can award a student also takes into account the percentage of a student's maximum scheduled Pell Grant award that has already been used. The system uses the Percent Scheduled Used from a student's incoming Aggregate Aid Data and any existing Pell Grant awards packaged by the system for the aid year to calculate the Total Percent Used.

The Percent Scheduled Used is populated by the NSLDS Data Push process but can also be overridden manually.

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Added capability to award Year Round Pell beginning with the 2017–2018 Aid Year.

With the implementation of Year Round Pell beginning in the 2017-2018 award year, students can receive up to 150 percent of their Federal Pell Grant Scheduled Award in a single award year. You must define the maximum scheduled award percentage for First Pell (Pell1) and Second Pell (Pell2) in the Aggregate Aid Limit Setup.

See Defining Aggregate Aid Limit Percentage Maximums for Pell Grants.

See Calculating Pell Grants.

Lifetime Eligibility Used

Beginning with the 2013 aid year, the amount of Pell Grant the system can award a student also takes into account the total amount of Pell Grant a student has used across all aid years in pursuit of an undergraduate degree. The system uses Lifetime Eligibility Used and Percent Scheduled Used from a student's incoming Aggregate Aid Data and any existing Pell Grant awards packaged by the system for the aid year to determine the student's remaining Pell Grant eligibility.

Defining Pell Eligibility Calculation (PEC) Setup

You must complete the Pell eligibility calculation (PEC) setup for your Pell Grants to be properly calculated. PEC setup is done at the institution defaults level and be overridden at the academic career, academic program, and student levels.

The fields that define your PEC setup are:

- Academic Base Weeks

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- Non-Standard Base Weeks
- Pell 3 Academic Weeks Only
- Pell Calculation Start
- Pell Calculation Midterm
- Pell Calculation Census
- Pell Number of Terms

Defining PEC at the Institution Level

Access the Financial Aid Defaults page (Set Up SACR, Install, Financial Aid Installation, Financial Aid Defaults).

Because the values you enter on this page are used as installation level defaults, they should be the values you want to use for most of your undergraduate programs.

Note: For a complete description of this page: See Establishing Defaults.

Academic Base Weeks

Enter the number of weeks that define your institution's Academic Award Period (AAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated expected family contribution (EFC).

Valid values are 0.0 to 99.9.

Non-Standard Base Weeks

Enter the number of weeks that define your institution's Non-Standard Award Period (NSAP). Several financial aid processes use this value to calculate eligibility and to calculate prorated EFCs. Non-standard terms are usually summer terms or inter-sessions.

Valid values are 0.0 to 99.9.

Pell 3 Academic Weeks Only

Select so the Pell Grant calculation uses only Academic Base Weeks as the Academic Program's Weeks of Instruction for Formula 3. If not selected, the Pell Grant calculation sums the Academic Base Weeks and Non-Standard Base Weeks together to determine the Academic Program's Weeks of Instruction.

Note: An Academic Program's Weeks of Instruction serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term when calculating Pell Grant eligibility for Formula 3 — FA Load, Formula 3 — Current Load, and Formula 3 — Full-time Load.

Pell Calculation Start

Enter the calculation mode to use for Pell calculations made before the student's academic term start date:

Formula 1 — FA Load: Directs the Pell calculation to divide the Pell Grant by the Pell Number of Terms and uses the student's actual FA Load for each term.

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Formula 1 — Full-time: Directs the Pell calculation to divide the Scheduled Pell Grant by the Pell Number of Terms and uses full-time as the student's FA Load for each term.

Formula 3 — Current Load: Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for student's number of enrolled weeks in a term. This mode uses the Current Load value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility for a Pell Grant. The Current Load value uses the number of units in which a student is currently enrolled ("In Progress" from the Financial Aid Term Session Detail) plus the number of units from completed sessions in the term to determine the student's load for the term.

Formula 3 — FA Load: Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses the FA Load value from Financial Aid Term to determine which Federal Pell Grant schedule to use when it is calculating the student's eligibility. The FA Load value uses the number of financial aid eligible units in which the student is enrolled for the term to determine the student's load.

Formula 3 — Full-time Load: Directs the Pell calculation to sum the Academic Base Weeks and Non-Standard Base Weeks values to determine an Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. This mode uses Full-time as the FA Load value when it is calculating the student's eligibility.

Pell Calculation Midterm

Enter the load value to use for Pell Grant calculations made on or after the student's academic term start date but before the student's term census date. The available values match those for Pell Calculation Start.

Pell Calculation Census

Enter the load value to use for Pell Grant calculations made on or after the student's term census date. The available values match those for Pell Calculation Start.

Pell Number of Terms

Enter the number of terms that define the Academic Program. Although this value should match the TERM_TYPE on the ACAD_CAR_TBL, there is no automatic cross-check between the two to ensure that these values correlate. Packaging uses this value to distribute a Pell Grant across the student's enrolled terms when making a Pell Grant calculation using *Formula 1 - FA Load* or *Formula 1 - Full-time* Pell calculation values. If you

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select *Formula 1 - FA Load* or *Formula 1 - Full-time,* you must populate the Pell Number of Terms field.

Valid values are *0 to 99.*

Overriding PEC at the Career Level

Access the Aid Processing Rule Setup page (Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Processing Rule Setup) and the Valid Careers for Aid Year page (Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Careers for Aid Year).

Note: For a complete description of the Aid Processing Rule Setup page: See Creating Aid Processing Rule Sets.

Note: For a complete description of the Valid Careers for Aid Year page: See Listing Valid Careers for the Aid Year.

For careers that require a different PEC setup than specified on the Financial Aid Defaults page, create an aid processing rule set with the required PEC setup for those careers. You create aid processing rule sets on the Aid Processing Rule Setup page; the fields for PEC setup on this page correspond to those on the Financial Aid Defaults page. Then you assign aid processing rule sets on the Valid Careers for Aid Year page to only those careers that need a PEC setup that differs from the installation level default. If two careers require the same PEC setup (which differs from the installation level default setup), create only one aid processing rule set and select it for each career.

Note: You do not need to create an aid processing rule set for every career. You do not need to assign an aid processing rule set to every career on the Valid Careers for Aid Year page. If you do not specify an aid processing rule set on the Valid Careers for Aid Year page, the Packaging routine uses the installation defaults for PEC.

For example, you may want to create an aid processing rule set for a career where the Base Weeks of Instruction is greater or less than the Base Weeks of instruction at the installation default level. On the Aid Processing Rule Setup page, you would specify the values for the weeks of instruction in the Academic Base Weeks and Non-Standard Base Weeks fields for these careers. Fill out all fields in the aid processing rule set.

Overriding PEC at the Program Level

Access the Aid Processing Rule Setup page (Set Up SACR, Product Related, Financial Aid, Aid Year, Aid Processing Rule Setup) and the Valid Programs for Aid Year and Career page (Set Up SACR, Product Related, Financial Aid, Aid Year, Valid Programs for Aid Year).

Note: For a complete description of the Aid Processing Rule Setup page: See Creating Aid Processing Rule Sets.

Note: For a complete description of the Valid Programs for Aid Year and Career page: See Defining Valid Programs for Aid Year and Career.

For academic programs that require a different PEC setup than specified at the career or installation level, create an aid processing rule set with the required PEC setup; the fields for PEC setup on this page correspond to those on the Financial Aid Defaults page. Then you assign aid processing rule sets to only

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those academic programs that require a PEC setup different from the career or installation level default on the Valid Programs for Aid Year page. If two academic programs require the same PEC setup, create only one aid processing rule set and assign it to both academic programs.

For programs, the Pell number of terms that you enter on the Aid Processing Rule Setup page must match the Pell number of terms at the career level.

Note: You do not need to create an aid processing rule set for every career/program combination. You do not need to enter every program on the Valid Programs for Aid Year page. If you do not specify an aid processing rule set on the Valid Programs for Aid Year page, the Packaging routine uses the career or installation level defaults for PEC. For example, if an Academic Program supports a Leading Summer term, you want to create a unique PEC that distinguishes it from an Academic Program that does not support a Summer Term

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Overriding PEC at the Student Level

Access a student's Pell Calculation Eligibility Student Override page (Financial Aid, View Packaging Status Summary) and click on the Pell Calculation Override link after querying a student.

Note: For a complete description of the Pell Calculation Eligibility Student Override page: See Overriding Pell Eligibility Calculation Setup Values.

Status

Select *Active* to override the PEC setup at the FA installation, career, or program level. The override applies to all terms and all Pell Grant awards across award periods.

Select *Inactive* to use the PEC setup at FA installation, career, or program level.

The other fields for PEC setup on this page correspond to those on the Financial Aid Defaults page.

Note: In the Pell calculation fields, if you select Formula 1 - FA Load or Formula 1 - Full-time, you must populate the Pell Number of Terms field. If you select Formula 3 - FA Load, Formula 3 - Current Load, or Formula 3 — Full-time Load, you must populate the Academic or Non-Standard Base Weeks fields.

Related Links

Overriding Census Date Locking

Defining Aggregate Aid Limit Percentage Maximums for Pell Grants

You must define the Lifetime Eligibility Maximum percent and the maximum scheduled award percentage for First Pell (Pell1) and Second Pell (Pell2) in the Aggregate Aid Limit Setup.

Access the Aggregate Aid Limits page (Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Aid Limits).

Note: For a complete description of this page: See Creating Aggregate Aid Limits.

First Pell Percentage

This field appears when the Aggregate Area has been activated as a Pell Grant. Enter *100.00* to ensure students are fully awarded a Pell1. If you enter any value less than 100.00,

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students are not fully awarded a Pell1. To calculate a student's remaining eligibility percentage for a Pell1, Packaging subtracts the Total Percent Used (Percent Scheduled Used from Incoming Aggregates plus Total Percent Used for Pell1 awards) from this field.

Lifetime Eligibility Maximum

This field appears when the Aggregate Area has been activated as a Pell Grant and the Aid Year is 2013 and beyond. Enter the maximum percentage for a student's Lifetime Pell Eligibility. For example, when the United States Department of Education says that a student cannot exceed 12 full-time semester terms (translated as 600 percent), then you would enter 0600.0000 in this field. An individual student's Lifetime Eligibility Used percentage plus current year system-generated Pell Grant award cannot exceed this maximum percentage.

Second Pell Percentage

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Added capability to award Year Round Pell beginning with the 2017–2018 Aid Year.

This field appears when the Aggregate Area has been activated as a Pell Grant. Enter 150.00 to ensure that students are fully awarded a Pell2. If you enter any value less than 150.00, students are not fully awarded a Pell2. To calculate a student's remaining eligibility percentage for a Pell2, Packaging subtracts the Total Percent Used (Percent Scheduled Used from Incoming Aggregates plus Total Percent Used for Pell1 and Pell2 awards) from this field.

When awarding a Pell2, the system determines if the term being awarded qualifies as a crossover payment period. If the term is a crossover payment period and if it is more beneficial for the student to be awarded Pell for that term using the Forward Year Pell Schedule, the system does not award Pell2 for that term under the current award year and does not it count towards the Total Percent used for that current award year.

Note: The term being awarded should have the start date and end date defined on Maintain FA Term to determine if crossover payment period criteria has been met.

Calculating Pell Grants

The section discusses how Pell Grants are calculated and includes example calculations.

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Note: The system can award two Pell Grants consecutively by term, First Pell (Pell1) and Second Pell (Pell2), to eligible students in a single aid year. As part of the Pell Eligibility Calculation (PEC), the system determines a student's Maximum (Max) Scheduled Award and uses this value to determine maximum Pell eligibility for the aid year. The system does not consider and does not award Pell2 until the student has been awarded Pell1 in the amount of his or her Max Scheduled Award.

Note: The system does not attempt to calculate a Pell Grant award for a student who has neither a federal nor an institutional application for the applicable aid year in the system. However, the system does attempt to calculate a Pell Grant award for a student who has an institutional application, but no federal application, for the applicable aid year in the system.

Step 1

The first step for Packaging (Manual Packaging, Auto Packaging, Repackaging, Mass Packaging, or Batch Repackaging) to calculate a student's Pell Grant award is to determine the Pell Eligibility Calculation (PEC) setup values to use. Because PEC setup defaults can be at the program, career, or installation level and can be overridden at the student level, Packaging checks for defaults in the following order to ensure that the proper aid processing rules are used:

1. Student override values.
2. Aid processing rule set associated with the student's program.
3. Aid processing rule set associated with the student's career.
4. Installation defaults specified on the Financial Aid Defaults page

Once PEC values are detected, the checking for defaults is done and those values are used.

Step 2

The second step is to compare the current (system) date to the term start date (earliest session start date) and the financial aid census date. After identifying the current date in relation to these dates, Packaging uses this date to determine which PEC Pell formula and enrollment values to use (Pell Calculation Start, Pell Calculation Midterm, or Pell Calculation Census).

Step 3

The third step is to determine the percentage of the student’s Max Scheduled Award of Pell Grant award that has been used.

Once the Max Scheduled Award has been established, the system calculates the student's remaining Pell eligibility by using both the student's Percent Scheduled Used and, for the 2013 aid year and beyond, the Lifetime Eligibility Used fields. Both fields are displayed on the Aggregate Aid Data page and are populated by the NSLDS Data Push process. The pushed values can be manually overridden.

Note: You must regularly push NSLDS data to the Aggregate Tables in order for Packaging to calculate accurately the student's remaining Pell eligibility.

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Note: As of the 2013 aid year, the NSLDS Aggregate Push routine updates the Pell Aggregate Area for the 2013 aid year and beyond with the NSLDS Pell Lifetime Eligibility Used percentage value reported on either a Financial Aid History File or Transfer Student Monitoring data file. Excluded from this value is any current year NSLDS Pell transaction that matches any internally awarded Pell Grants based on school code match. *Therefore*, to ensure that the most current and accurate Pell Lifetime Eligibility Used value is evaluated, you should regularly load and push NSLDS data sourced from the NSLDS Financial Aid History or Transfer Student Monitoring data file.

To calculate the student's remaining Pell Grant eligibility, the system uses the lower percentage of (a) Lifetime Eligibility Maximum percent minus the student's Lifetime Eligibility Used percent and (b) First Pell Percentage minus the student's Percent Scheduled Used value. The lower of these two percentages is applied to the Max Scheduled Award.

Access the Aggregate Aid Data page (Financial Aid, Awards, Aggregates, Update Incoming Aggregates, Aggregate Aid Data).

Note: For a complete description of the Aggregate Aid Data page: See Updating Aggregate Aid Information.

Percent Scheduled Used and **Override**

Displays the percentage of a student's Pell Grant Maximum (Max) Scheduled Award used at prior institutions from NSLDS or, if overridden, manually populated by the user. Valid values are 000.0 to 150.0. The field can exceed 100.0 when a student has received the Max Scheduled Award for first Pell Grant (Pell1) plus a partial or Max Scheduled Award for second Pell Grant (Pell2) at prior institutions. Packaging always uses the Percent Scheduled Used as part of its Pell eligibility determination regardless of the designated Aggregate Source (NSLDS or PS).

Select the Override check box and manually enter a value to override Percent Scheduled Used.

Total % Used

Displays the sum of Percent Scheduled Used and the percent of Pell Grant awards already packaged by the system for the aid year. Valid values are 000.0 to 150.0.

Note: The system uses these internal fields (not displayed on any pages) to calculate Total % Used: Max Scheduled Award (full-time, full-year Pell Grant award based on Pell COA and EFC), student's remaining Pell Grant eligibility, and Max Scheduled Award minus the lesser of Lifetime Eligibility Used or Percent Scheduled Used.

Lifetime Eligibility Used and **Override**

Displays the percentage of a student's Pell Grant received over his or her lifetime as reported from NSLDS or, if overridden, manually populated by the user. Valid values are 0000.0000 to 9999.9999. This field is populated by the Aggregate Push routine.

Select the Override check box and manually enter a value to override.

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Lifetime Eligibility Used is evaluated against the corresponding Pell Aggregate Aid Limit, Lifetime Eligibility Maximum Percent setup value as one of the factors when determining a Pell Grant award.

See Creating Aggregate Aid Limits.

Note: Pell Grant eligibility always uses NSLDS aggregate values.

Step 4

The fourth step is to use the identified Pell Grant formula with the appropriate Pell Grant Payment Schedule based on the enrollment load value, the student's Maximum Scheduled Award, the appropriate weeks of instruction or Pell Number of Terms, and the student's Total Percent Used (of Pell) to calculate the Pell Grant award term by term.

The Packaging routine repeats this process for each term in the student's academic program, and adds the individual term amounts to determine the student's annual Pell Grant award.

Pell Grant Formula Examples

The next four sections provide of examples of the Pell Formula calculations supported by the system:

- Formula 1 — FA Load
- Formula 1 — Full-Time
- Formula 3 — FA Load
- Formula 3 — Current Load
- Formula 3 — Full-time

See Defining Pell Eligibility Calculation (PEC) Setup.

Formula 1 — FA Load

The system divides the Pell Grant award by the Pell Number of Terms. It uses the student's FA Load value for each term to determine which Pell Grant schedule to use.

Pell COA = 5000.00 USD

EFC =02350

Max Scheduled Award: 3000.00 USD

Pell Number of Terms: 2

Summer: Leading

FA Load Term 1: 3/4 (Summer Term)

FA Load Term 2: 3/4

FA Load Term 3: 3/4

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Annual Award: 3000.00 USD

Term 1 Actual Award: 2250.00 USD / 2 = 1125.00 USD

Term 2 Actual Award: 2250.00 USD / 2 = 1125.00 USD

Term 3 Actual Award: 750.00

The Term 3 Actual Award is calculated like this: (2250.00 USD / by 2 = 1125.00 USD, THEN reduced to remaining eligibility: 3000.00 USD (Annual Award) minus 2250.00 USD (combined Term 1 and Term 2 Actual Awards) equals 750.00 USD.

Formula 1 - Full-Time

The system divides the Max Scheduled Award (full-time, full-year) by the Pell Number of Terms.

Pell COA = 5000.00 USD

EFC = 02350

Max Scheduled Award: 3000.00 USD

Pell Number of Terms: 2

Summer: Trailing

FA Load Term 1: FT (Summer Term)

FA Load Term 2: FT

FA Load Term 3: FT

Annual Award: 3000.00 USD

Term 1 Actual Award: 3000.00 USD / 2 = 1500.00 USD

Term 2 Actual Award: 3000.00 USD / 2 = 1500.00 USD

Term 3 Actual Award: 0.00 USD

Student used entire Max Scheduled Award in Terms 1 and 2, leaving no remaining eligibility for Term 3.

Formula 3 - FA Load

The system sums the Academic and Non-Standard Base Weeks to determine the length of the Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. Formula 3 — FA Load uses the FA Load from FA Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility. The FA Load value uses the number of financial aid eligible units in which the student is enrolled for the term to determine the student's load.

Pell COA = 5000.00 USD

EFC = 02350

Max Scheduled Award: 3000.00 USD

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Base Weeks Academic + Non-standard = 34

Term 1 Weeks in Term = 12

Term 2 Weeks in Term = 10

Term 3 Weeks in Term = 12 (Non-standard/Summer)

FA Load Term 1: 3/4 (Summer Term)

FA Load Term 2: FT

FA Load Term 3: FT

Term 1 Actual Award: 12 / 34 x 2250.00 USD = 794.03 USD

Term 1 Actual Award: 10 / 34 x 3000.00 USD = 882.30 USD

Term 1 Actual Award: 12 / 34 x 3000.00 USD = 1058.70 USD

Annual Award: 2735.03

Term 1 disb: 794.03 USD

Term2 disb: 882.30 USD

Term 3 disb: 1058.70 USD

Formula 3 - Current Load

The system sums the Academic and Non-Standard Base Weeks to determine the length of the Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. Formula 3 — Current Load uses the Current Load from FA Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility. The Current Load value uses the number of units that the student is currently enrolled in (Financial Aid, Financial Aid Term, Maintain Student FA Term, Statistics tab, Session Detail box, In Progress field) plus the number of units from completed sessions in the term to determine the student's load for the term.

Pell COA = 5000.00 USD

EFC = 02350

Max Scheduled Award: 3000.00 USD

Base Weeks Academic + Non-standard = 34

Term 1 Weeks in Term = 12

Term 2 Weeks in Term = 10

Term 3 Weeks in Term = 12 (Non-standard/Summer)

FA Load Term 1: HT (Summer Term)

FA Load Term 2: 3/4

FA Load Term 3: HT

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Term 1 Actual Award: 12 / 34 x 1500.00 USD = 529.35 USD

Term 2 Actual Award: 10 / 34 x 2250.00 USD = 661.73 USD

Term 3 Actual Award: 12 / 34 x 1500.00 USD = 529.35 USD

Annual Award: 1,720.43

Term 1 disb: 529.35 USD

Term 2 disb: 661.73 USD

Term 3 disb: 529.35 USD

Formula 3 - Full-time Load

The system sums the Academic and Non-Standard Base Weeks to determine the length of the Academic Program's Weeks of Instruction. This value serves as the denominator in the percentage calculation for a student's number of enrolled weeks in a term. Formula 3 — Full—time Load uses Full-time as the FA Load Value to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility.

Pell COA = 5000.00 USD

EFC = 02350

Max Scheduled Award: 3000.00 USD

Base Weeks Academic + Non-standard = 36

Term 1 Weeks in Term = 12

Term 2 Weeks in Term = 10

Term 3 Weeks in Term = 12 (Non-standard/Summer)

Ignore student's actual enrollment and use Full-time Load for all terms

Term 1 Actual Award: 12 / 36 x 3000.00 USD = 1000.00 USD

Term 2 Actual Award: 10 / 36 x 3000.00 USD = 833.33 USD

Term 3 Actual Award: 12 / 36 x 3000.00 USD = 1000.00 USD

Annual Award: 2833.33 USD

Lifetime Eligibility Used Examples

Beginning the 2013 aid year, a student may receive a maximum of 6 years of Pell Grant awards over the course of pursuing an undergraduate degree. This is measured by a cumulative percentage of disbursed Lifetime Pell Grant awards (represented as Lifetime Eligibility Used, up to 600 percent).

When evaluating Lifetime Eligibility Used, Packaging always reviews the relationship between (annual) Percent Scheduled Used value and the Lifetime Eligibility Used Percent and awards the lesser of the two values. This is to ensure that the system does not overaward the student a Pell Grant from either an annual limit perspective *or* a lifetime limit perspective.

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Example 1

1. Student's remaining Percent Scheduled Used is 50 percent (Pell1 maximum of 100 percent minus 50 Percent Scheduled Used equals a delta of 50 percent).
2. Student's remaining Lifetime Eligibility is 75 percent (Lifetime Eligibility Percent Maximum of 600 percent minus 525 percent Lifetime Eligibility Used equals a delta of 75 percent).
3. Packaging compares the two percentages (50 Percent remaining Scheduled Used versus 75 Percent remaining Lifetime Eligibility) and uses the lower of the two percentages (50 percent) times the Max Scheduled Award (adjusted for FA Load) to determine the Pell Grant award.

Example 2

1. Student's remaining Percent Scheduled Used is 50 percent (Pell1 maximum of 100 percent minus 50 Percent Scheduled Used equals a delta of 50 percent).
2. Student's remaining Lifetime Eligibility is 25 percent (Lifetime Eligibility Percent Maximum of 600 percent minus 575 percent Lifetime Eligibility Used equals a delta of 25 percent).
3. Packaging compares the two percentages (50 Percent remaining Scheduled Used versus 25 Percent remaining Lifetime Eligibility) and uses the lower of the two percentages (25 percent) times the Max Scheduled Award to determine the Pell Grant award.

Pell Grant Disbursement Rounding Examples

Financial aid award disbursement amounts, including Pell Grants, are determined in part by the Rounding Option selected in Financial Aid Item Type setup. For complete information on Financial Aid Item Type setup:

See Defining Financial Aid Item Types.

If the Financial Aid Item Type Rounding Option attribute *equals* None, then no rounding takes place, and Pell Grant award disbursement amounts are in U.S. dollars and cents. If the Rounding Option attribute *does not equal* None, then the following Pell Rounding Rules are applied regardless of the settings of Rounding Option, Round Direction, or Award Remainder Rule.

- If the number of terms is *even,* the system alternately rounds term amounts up or down based on how the first term amount is rounded and disregards the decimal amount for all other terms. For example:

  If the first term decimal amount is equal to or greater than .50 USD, then the first term amount is rounded up, and all remaining terms follow a rounding treatment of down, up, down, etc. regardless of their decimal amounts.

  If the first term decimal amount is less than .50 USD, then the first term amount is rounded down, and all remaining terms follow a rounding treatment of up, down, up, etc. regardless of their decimal amounts.

  Example 1: Formula 1, two terms, Full-time student, Even Term Rounding

  Term 1 Full-time 2775.00 USD/2 = 1387.50 USD – Round up to 1388.00 USD

  Term 2 Full-time 2775.00 USD/2 = 1387.50 USD – Round down to USD 1387.00 USD

  Total Award = 2775.00 USD

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Example 2: Formula 1, four terms, Full-time student, Even Term Rounding

Term 1 Full-time 2650.00 USD/4 = 662.50 USD – Round up to 663.00 USD

Term 2 Full-time 2650.00 USD/4 = 662.50 USD – Round down to 662.00 USD

Term 3 Full-time 2650.00 USD/4 = 662.50 USD – Round up to 663.00 USD

Term 4 Full-time 2650.00 USD/4 = 662.50 USD – Round down to 662.00 USD

Total Award = 2650.00 USD

Example 3: Formula 3, four terms, Mixed-load student, Even Term Rounding

Term 1 (8–weeks) Half-time (1038.00 USD x 8)/30 weeks = 276.80 USD – Round up to 277.00 USD

Term 2 (8–weeks) Half-time (1038.00 USD x 8)/30 weeks = 276.80 USD – Round down to 276.00 USD

Term 3 (8–weeks) Full-time (2075.00 USD x 8)/30 weeks = 553.33 USD – Round up to 554.00 USD

Term 4 (8–weeks) Full-time (2075.00 USD x 8)/30 weeks = 553.33 USD – Round down to 553.00 USD

Total Award = 1660.00 USD

Note: For Example 3, note that for Term 2, the disbursement is rounded down even though cents are greater than or equal to .50 USD. Also, note for Term 3, the disbursement is rounded up even though the cents are less than .50 USD

- If the number of terms is *three,* the system rounds to one direction, up or down, for the first two terms, and to the other direction for the third term. Whether the system initially rounds up or down for the first two terms depends on the decimal amount of the first term only; it disregards the decimal amount for the third term and rounds up or down based on the first two terms.

  If the first term decimal amount is equal to or greater than .50 USD, then the first term amount is rounded up, the second term amount is rounded up, and the third term amount is rounded down.

  If the first term decimal amount is less than .50 USD, then the first term amount is rounded down, the second term amount is rounded down, and the third term amount is rounded up.

  Example 4: Formula 1, three terms, Full-time student, Three-term Rounding

  Term 1 Full-time 4700.00 USD/3 = 1566.66 USD – Round up to 1567.00 USD

  Term 2 Full-time 4700.00 USD/3 = 1566.66 USD – Round up to 1567.00 USD

  Term 3 Full-time 4700.00 USD/3 = 1566.66 USD – Round down to 1566.00 USD

  Total Award = 4700.00 USD

  Example 5: Formula 1, three terms, Full-time student, Three-term Rounding

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Term 1 Full-time 2200.00 USD/3 = 733.33 USD – Round down to 733.00 USD

Term 2 Full-time 2200.00 USD/3 = 733.33 USD – Round down to 733.00 USD

Term 3 Full-time 2200.00 USD/3 = 733.33 USD – Round up to 734.00 USD

Total Award = 2200.00 USD

- When determining the rounding methodology, the system only includes terms where the scheduled disbursement's decimal amount is greater than zero to determine whether there is an even number of terms or not. In other words, terms with a scheduled disbursement amount ending in whole dollars are not considered part of the term count when assessing terms eligible for rounding.

  Example 6: Formula 1, two terms, Mixed-load student, One-term Rounding (only one term has a decimal amount greater than .00).

  Term 1 Full-time 2075.00 USD/2 = 1037.50 USD – Round up to 1038.00 USD

  Term 2 Half-time 1038.00 USD/2 = 519.00 USD – No rounding needed, 519.00 USD

  Total Award = 1557.00 USD

  Example 7: Formula 1, four terms, Mixed-load student, Three-term Rounding (three terms have decimal amounts greater than .00).

  Term 1 Less-than-half-time 1325.00 USD/3 = 441.67 USD – Round up to 442.00 USD

  Term 2 Three-quarter-time 3975.00 USD/3 = 1325.00 USD – No rounding needed, 1325.00 USD

  Term 3 Full-time 5300.00 USD/3 = 1766.66 USD – Round up to 1767.00 USD

  Term 4 Full-time 5300.00 USD/3 = 1766.66 USD – Round down to 1766.00 USD

  Total Award = 5300.00 USD

- Disbursement protection is not used with Pell Grant awards. The system disregards the disbursement protection attribute of the Financial Aid Item Type setup for Pell Grant item types and always recalculates the Pell Grant award and scheduled disbursements without regard to what has been originated or disbursed.

  If the originated or disbursed amount exceeds the revised calculation by 1.00 USD (for example, the disbursed amount = 1367.00 USD and the revised calculation amount = 1366.00 USD), the disbursement process takes 1.00 USD back, and you should consider a change origination with Common Origination and Disbursement for the recalculated, lesser amount.

  If the originated or disbursed amount is less than the revised calculation by 1.00 USD (for example, the disbursed amount = 1127.00 USD and the revised calculation amount = 1128.00 USD), the disbursement process disburses an additional 1.00 USD for the term. You should consider a change origination with Common Origination and Disbursement for the recalculated, greater amount.

  If the originated or disbursed amount contained cents and the revised calculation no longer contains cents (for example, the disbursed amount = 333.33 USD and the revised calculation amount = 333.00 USD), in order for the total Pell Grant award (sum of all scheduled disbursements) to result in whole

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dollars, you should either: (a) turn rounding off at the Pell Grant item type level so subsequent disbursements contain cents, (b) perform a custom split to reflect cents in subsequent disbursement terms, or (c) handle cents through professional judgment. If you choose option (a) and you have already disbursed your Pell amounts with cents, you should consider continuing to award in dollars and cents (Pell Item Type Rounding Option = None) for the duration of the award year.

Pell Grant Point–in–Time Examples

This section provides examples of how a Pell Grant can be calculated differently based on the PEC setup and different points in time in relation to the term start date:

- Before term start date
- Mid-term prior to term census date
- On or after term census date

A student attends a semester-based institution, and is an undergraduate in the liberal arts academic program. Neither the student's program nor career have defaults that differ from the installation defaults. The student's annual Pell COA is 5450.00 USD and the primary EFC is 00154; resulting in a Max Scheduled Award of 5,200.00 USD. The Pell Number of Terms is 2. According to the Federal Pell Grant Schedule, the student receives an annual award of 5200.00 USD if enrolled full-time, an annual award of 3900.00 USD if enrolled three-quarter time, and an annual award of 2600.00 USD if enrolled half-time.

The student is first awarded a Pell Grant on March 1, 2009. To calculate the student's Pell Grant amount, the Packaging routine first determines whether PEC setup values exist at the student override level and then the academic program level for the student. After the routine determines that no aid processing rule set is attached to the liberal arts academic program, it checks for career level defaults. Because no aid processing rule set is assigned to the undergraduate career, it uses the installation defaults. The Pell calculation fields on the Financial Aid Defaults page have the following values:

Field	***Value***
Pell Calculation Start	Formula 1 — Full-time
Pell Calculation Midterm	Formula 1 — Full-time
Pell Calculation Census	Formula 1 — FA Load

Packaging compares the current date (March 1, 2009) against the term start date and census date to determine which enrollment value to use when calculating the student's Pell Grant:

Term	***Term Start Date***	***FA Census Date***
Fall	09/17/09	10/20/09
Spring	01/23/10	03/10/10

Because the system date is before the term start date for both semesters, Packaging uses the Pell Calculation Start value for enrollment, *Formula 1 Full-time.* The student's Pell Grant award is 5200.00 USD for the aid year, with a term amount of 2600.00 USD for each term.

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The following table shows how the student's Pell Grant award changes as you recalculate the student's Pell Grant eligibility at different points in the aid year. The student's current FA Load value after the census date is three-quarter time in fall and is half-time in spring.

Current Date	***Pell Calculation Field Used - Fall***	***Load***	***Fall Pell Award Amt***	***Pell Calculation Field Used - Spring***	***Load***	***Spring Pell Award Amt***	***Total Pell Award***
03/01/09	Pell Calculation Start Formula 1 — Full-time	Full Time	2600.00 USD	Pell Calculation Start Formula 1 — Full-time	Full Time	2600.00 USD	5200.00 USD
09/20/09	Pell Calculation Mid-term Formula 1 — Full-time	Full Time	2600.00 USD	Pell Calculation Start Formula 1 — Full-time	Full Time	2600.00 USD	5200.00 USD
10/25/09	Pell Calculation Census Formula 1 — FA Load	3/4 Time	1950.00 USD	Pell Calculation Start Formula 1 — Full-time	Full Time	2600.00 USD	4550.00 USD
01/30/10	Pell Calculation Census Formula 1 — FA Load	3/4 Time	1950.00 USD	Pell Calculation Start Formula 1 — Full-time	Full Time	2600.00 USD	4550.00 USD
03/25/10	Pell Calculation Census Formula 1 — FA Load	3/4 Time	1950.00 USD	Pell Calculation Census Formula 1 — FA Load	Half Time	1300.00 USD	3250.00 USD

See Defining Pell Eligibility Calculation (PEC) Setup.

Pell Grants for Non-standard Terms and Two Pell Grants in an Aid Year Examples

To support Leading or Trailing Summer terms, the system can package a Pell Grant across both Academic and Non-Standard award periods. You should consider carefully the Disbursement Plan/Split Code being used to award Pell1 and Pell2. The system uses Disbursement Plans to determine for which terms to consider the student's Pell eligibility, but it does not use the Split Code nor Split Code Formulas as part of its distribution spread determination. Instead, the system uses either (a) Pell Number of Terms or (b)

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Academic plus Non-Standard Base Weeks to determine each term's award amount and how the award is spread across the enrolled terms.

Note: Although not used for Pell Grant awarding, the system still requires that you specify default Split Code and Split Code Formula values so that the fields are populated. These values are not used to distribute the Pell award into scheduled disbursements.

If your institution intends to award Pell Grants in either the Leading or Trailing Summer, you need to create Disbursement Plans that encompass all terms in which the student may receive a Pell Grant.

If the Academic Program supports a Leading Summer term, create a new Disbursement Plan like this:

- Semester-based: Leading Summer, Fall, Spring
- Quarter-based: Leading Summer, Fall, Winter, Spring

Example:

- Leading Summer Term: 2675.00 USD
- Fall Term: 2675.00 USD
- Spring Term: 0.00 USD

If the Academic Program supports a Trailing Summer term, create a new Disbursement Plan like this:

- Semester-based: Fall, Spring, Trailing Summer
- Quarter-based: Fall, Winter, Spring, Trailing Summer

Example:

- Fall Term: 2675.00 USD
- Spring Term: 2675.00 USD
- Trailing Summer Term: 0.00 USD

If the Academic Program supports both Leading Trailing Summer terms, create a new Disbursement Plan like this:

- Semester-based: Leading Summer, Fall, Spring, Trailing Summer
- Quarter-based: Leading Summer, Fall, Winter, Spring, Trailing Summer

Similar to awarding Leading or Trailing Summer terms, if you intend to award a Pell2 award in the succeeding term following a Pell1 award, you should use the same Disbursement Plan/Split Code pattern for both awards. Inherent logic in the system ensures that, based on the Disbursement Plan/Split Code being used, Packaging inserts a Pell2 award in the next available term following a Pell1 award.

Example — Leading Summer:

- Leading Summer Term: 2675.00 USD (Pell1)
- Fall Term: 2675.00 USD (Pell1)

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- Spring Term: 2675.00 USD (Pell2)

Example — Trailing Summer:

- Fall Term: 2675.00 USD (Pell1)
- Spring Term: 2675.00 USD (Pell1)
- Trailing Summer Term: 2675.00 USD (Pell2)

The system supports the awarding of Pell1 and Pell2 awards in the same term up to the maximum Pell eligibility based on the student's enrollment for that term. For purposes of this example, the student:

- has an Incoming Aggregates Percentage of 65 percent, which leaves a remaining Pell1 eligibility of 1,855.
- is Half-Time for the Fall Term – scheduled max award of 2,650 /2 = 1,325.
- is Full-Time for the Spring Term – scheduled max of 5,300 / 2 = 2,650
- is Full-Time for the Trailing Summer Term – scheduled max of 5300 / 2 = 2,650

Example — Pell1 and Pell2 in the same term:

- Leading Summer Term: 0.00 USD (No Enrollment)
- Fall Term: 1325.00 USD of Pell1 (based on the student's scheduled max award for that term's enrollment.)
- Spring Term: 2650.00 USD of Pell1 and Pell2 (530.00 USD of Pell1, based on the student's remaining Pell1 award of 1855.00 minus 1325.00 Fall Pell1 *and* 2120.00 of Pell2, based on the student's scheduled max award of Full-time for the term of 2650.00 minus the 530.00 of Pell1 already awarded.)
- Trailing Summer Term: 2650.00 USD of Pell2 (based on student's scheduled max award for that term's enrollment)
- Student receives both a 1855.00 USD Pell1 and a 4770.00 USD Pell2 for the award year.

Pell Grant Packaging Error Messages

The following table lists and explains possible Pell Grant Packaging error messages:

Message Number	***Message Text***
9022	PELL -Invalid Title IV eligibility indicator
9023	PELL - Not Title IV eligible
9026	PELL -Invalid NSLDS level
9027	PELL -Student is not an undergraduate, not PELL eligible
9033	PELL -Student has Bachelors degree, not PELL eligible

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Message Number	***Message Text***
9136	Student Base Weeks or term count found to be 0 during PELL calculation
9148	PELL award cannot be assigned; there is no matching disbursement for term
9149	Not PELL eligible based on combination PELL Index and PELL COA
9150	Invalid FA Load Code; Must have a value of 'F', 'T', 'H', 'L' or 'N'
9151	Item Type, Term, Aggregate, and/or Plan limits are less than PELL award
9152	PELL Index (Federal EFC) exceeds PELL Index maximum
9161	Student Enrollment Weeks (or terms) total exceeds Base Weeks (or term count).
9185	Calculated PELL award exceeds aggregate eligibility; award rejected.
9214	Not Pell Eligible: The Student is a Graduate Student
9234	For 2010, Pell Calculation Start, Midterm and Census date entries are invalid
9236	Not eligible for 2nd Pell award since 1st Pell award was not awarded at 100%
9237	Not eligible for 2nd Pell award; disbursement terms overlap with 1st Pell award
9238	Ineligible for Pell award; Lifetime Eligibility Percentage has been reached.
9239	Pell award has been reduced by student's remaining Lifetime Eligibility.
9405	PELL award reduced by Aggregate limits
9244	Regular Pell Disbursement Schedules have not been loaded into the system for this Aid Year. Therefore, an estimated award is assigned using the previous Aid Year’s Regular Pell Disbursement Schedule.

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Message Number	*Message Text*
9249	Alternate Pell Disbursement Schedules have not been loaded into the system for this Aid Year. Therefore, an estimated award is assigned using the previous Aid Year's Alternate Pell Disbursement Schedule.

Packaging Pell Grants Using Pell Table Enablement Tables

Beginning with Aid Year 2016 (Award Year 2015-2016), you can select the Use Pell Table feature in FA Installation and import the Department of Education's published Federal Pell Grant (Regular and Alternate) Payment and Disbursement Schedules directly into your system to evaluate Pell awards.

If the annual schedules have not been published for the future year (for example, Aid Year 2017), and you attempt to package a student's Pell Grant for that year, the system uses the current year's (Aid Year 2016) schedules to make the 2017 award. If the student is eligible, the system returns a non-zero Pell award with an estimated award message (9244 or 9249) depending on whether the Pell award was made using the Regular or Alternate Schedules.

Use the delivered queries QA_CS_FA_PELL_SCHEDULE_REGULAR and QA_CS_FA_PELL_SCHED_ALTERNATE to render contents of the Pell Award (PTE) tables. Query results are not in spreadsheet formats.

Note: To calculate Pell grants for Aid Years 2016 and 2017 (Award Years 2015-2016 and 2016-2017), Oracle supports both the current Pell Program FAPPKPEL delivered as a Critical Update, and the new Pell Table Enablement feature (FAPPKPTE).
Beginning with Aid Year 2018 (2017-2018), Oracle plans to discontinue the old Pell Program (FAPPKPEL) and support only the Pell Table Enablement program to calculate Pell grants.

Related Links

Defining Installation Level Defaults

Repackaging Pell Grants

If your system

- has existing awards with a Disbursement Plan/Split Code that includes only Academic terms; and
- you want to tie these existing awards to a Disbursement Plan/Split Code that spans both the Academic and Non-Standard terms,

you cannot use a repackaging plan that incorporates the Repackaging Rule Validate Item Type for Pell item types. This is because Validate Item Type always uses the Disbursement Plan/Split Code tied to the existing award. You can use the Repackaging Rule Use Original Plan to repackage Pell Item Types that require a Disbursement Plan/Split Code change. If your institution does not intend to award Pell Grants in Leading or Trailing Summer terms, you can use the Repackaging Rule Validate Item Type for Pell item types.

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Awarding Pell Grants Manually

If you manually award a Pell Grant that *exceeds* the Max Scheduled Award, the system reduces the award down to the Max Scheduled Award amount. Conversely, if you manually award a Pell Grant *for less than* the Max Scheduled Award, the system allows the award.

Note: When entering a Pell Grant manually on the Student Aid Package page, you can leave the award amount at zero. When you click the Validation button, the system automatically calculates the Pell Grant award according to the Pell eligibility calculation defined in your setup.

Awarding Pell Grants using Professional Judgment

Any amount of Pell Grant you award using Professional Judgment is accepted. Pell1 or Pell2 can exceed the Max Scheduled Award, the Total Percent Used value, and other Pell Grant awarding validations.

Reinstating a Canceled Pell Grant Award

Before reinstating a previously canceled Pell Grant, you must change the custom split code from *XX* to a valid disbursement split code for the student. You can then click the Validation button to recalculate the Pell Grant amount. After you recalculate the Pell Grant amount, you must remember to post it before leaving the award entry page.

Awarding Pell Grants for Post-Baccalaureate Teaching Certificate Candidates

A student who has earned a bachelor's degree and is pursuing an initial teaching certification or licensing credential that does not lead to a graduate degree is eligible for a Pell Grant for that aid year. The Packaging process determines the eligibility for this type of student by evaluating the following fields:

Record	***Field***	***Description***
ISIR_STUDENT	DEGREE_CERTIF	The degree or certification the student is pursuing. The student must be pursuing a teaching credential.
ISIR_STUDENT	FIRST_BACH_DEGREE	Indicates whether the student has a bachelor's degree. The student can have earned a bachelor's degree.
STUDENT_FA_TERM	NSLDS_LOAN_YEAR	The NSLDS loan year for the student. Eligible students cannot be graduate students.

If a student is pursuing a teaching credential and has a bachelor's degree and the student's NSLDS loan year is not graduate, then Packaging evaluates the student for a Pell Grant.

If a student is *not* pursuing a teaching credential but has a bachelor's degree and the student's NSLDS loan year is not graduate, then Packaging does *not* evaluate the student for a Pell Grant.

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