Oracle PeopleSoft Campus Solutions Financial Aid

Guide to Year Round Pell Grant Administration

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Overview

Beginning with the 2017-2018 Award Year, an eligible student may receive up to 150% of their scheduled Federal Pell grant award in a single award year. The Pell award up to the first 100% is treated as the “Initial Pell”. The Pell award beyond the first 100% is treated as the “Additional Pell”.

This update restores and updates features that were used in the past for administering Year Round Pell. At that time a similar guide was made available that discussed Year Round Pell features and functionality. This guide covers much of the same information, including:

Awarding Two Pell Grants in a Single Aid Year
Determining the Percentage of Scheduled Pell Grant Used
Enhancements to Non-Standard Term Awarding
Enhancements to the NSLDS Data Push

Awarding Two Pell Grants in a Single Aid Year

The Higher Education Opportunity Act amended the Higher Education Act so that students can receive up to 150% of a maximum Scheduled Pell Grant in a single Aid year. This is sometimes referred to as “Year Round Pell”. The system is enhanced to award two Pell Grants consecutively by term, First Pell (Pell1) and Second Pell (Pell2), to a student in a single Aid year.

For more information, refer to the Financial Aid PeopleBook/Online Help and see:

- Setting Up Your Financial Aid Awarding Cycle, Establishing Defaults
- Setting Up Packaging Basics, Defining Financial Aid Item Types
- Awarding Pell Grants

Determining the Percentage of Scheduled Pell Grant Used

The system determines the percentage of a student’s scheduled Pell Grant that has been used. This is used to accurately calculate Pell1 and Pell2.

For more information, refer to the Financial Aid PeopleBook/Online Help and see:

- Setting Up Packaging Basics, Setting Up Aggregate Aid, Creating Aggregate Aid Limits
- Preparing for Awarding and Packaging, Managing Aggregate Aid, Updating Aggregate Aid Information
- Reviewing Awards, Reviewing Aggregate Aid
- Awarding Pell Grants

Non-Standard Term Awarding

The system can award Pell Grants across award periods to include Non-Standard Terms. You can award Pell Grants in either a Leading Summer or Trailing Summer term.

For more information, refer to the Financial Aid PeopleBook and see:

- Setting Up Your Financial Aid Awarding Cycle, Establishing Defaults
- Awarding Pell Grants

NSLDS Data Push

The NSLDS Data Push process updates a Percent Scheduled Used field on the Aggregate Aid Data page.

For more information, refer to the Financial Aid PeopleBook and see:

- Assessing Eligibility for Financial Aid, Using NSLDS Data and Processes, Using NSLDS Pushed Aggregate Data in the Packaging Process
- Preparing for Awarding and Packaging, Managing Aggregate Aid, Updating Aggregate Aid Information

Suggestions for Implementation

The re-introduction of the ability to award Year Round Pell leads Oracle to offer suggestions for implementing this update. Oracle suggests that you check the following pages in the order listed to confirm or modify your Pell Grant-related setup.

Definition and Use of a Student's Maximum (Max) Scheduled Award

Navigation: (Setup SACR, Install, Financial Aid Installation)

Max Scheduled Award is defined as the full-time, full-year Pell Grant Award for a student based on his or her Pell COA and EFC. The system uses this value when determining maximum Pell Grant eligibility.

Aid Processing Rule Setup

Navigation: (Set SACR, Product Related, Financial Aid, Aid year, Aid Processing Rule Setup)

The valid values for the Pell Calculation Start, Pell Calculation Midterm, and Pell Calculation Census fields have not changed with the introduction of Year Round Pell.

Valid Careers for Aid year

Navigation: (Set SACR, Product Related, Financial Aid, Aid year, Valid Careers for Aid year)

With the revised options for Year Round Pell available, you might want to review your Academic Career and Aid Processing Rule Set relationships. For example, you might want to create unique Pell Calculation Rule Sets that designate a different Pell Grant formula for each Academic Career

Valid Programs for Career and Aid year

Navigation: (Set SACR, Product Related, Financial Aid, Aid year, Valid Programs for Aid year)

With the revised options for Year Round Pell available, you might want to review your Academic Program and Aid Processing Rule Set relationships. For example, consideration should be given to whether a particular Academic Program will be adjusted or altered to support a Leading Summer term. If so, you might need to define a unique Aid Processing Rule Set to support that Academic Program.

Disbursement Plan/Split Code Usage and Considerations

Consider the following regarding Disbursement Plans and Split Codes:

For the Pell Eligibility Calculation setup, the system uses Disbursement Plans and Split Codes differently. This means that it uses Disbursement Plans to determine for which terms to consider the student's Pell Grant eligibility, but does not use the Split Code nor Split Code Formulas as part of its distribution spread determination. From a technical standpoint, however, 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 award Pell Grants.

For example, if you select a Disbursement Plan of "SA" representing Fall/Spring/Summer and a Split Code of "01" representing an even split across terms, the system uses the terms designated in "SA" Disbursement Plan but ignores the "01" Split Code. Instead, the system uses either (a) Pell Number of Terms or (b) Academic plus Non-Standard Base Weeks to determine each term's award amount and how the award is spread across the enrolled terms.

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

If the Academic Program supports a Leading Summer term, create a Disbursement Plan to reflect the following:

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

Example:

Old award:	Fall Term:	2,960.00
	Spring Term:	2,960.00
New award:	Leading Summer Term:	2,960.00
	Fall Term:	2,960.00
	Spring Term:	0.00

If the Academic Program supports a Trailing Summer term, create a Disbursement Plan to reflect the following:

Semester-based: Fall, Spring, Trailing Summer

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

Example:

Old award:	Fall Term:	2,960.00
	Spring Term:	2,960.00
New award:	Fall Term:	2,960.00
	Spring Term:	2,960.00
	Trailing Summer Term:	0.00

If the Academic Program supports both Leading and Trailing Summer terms, create a Disbursement Plan to reflect the following:

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, we recommend that you 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. The system does not award a Pell2 award in the same term that contains a Pell1 award.

Example: Leading Summer Term

Old award:	Fall Term:	2,960.00 (Pell1)
	Spring Term:	2,960.00 (Pell1)
New award:	Leading Summer Term:	2,960.00 (Pell1)
	Fall Term:	2,960.00 (Pell1)
	Spring Term:	2,960.00 (Pell2)

Example: Trailing Summer Term

Old award:	Fall Term:	2,960.00 (Pell1)
	Spring Term:	2,960.00 (Pell1)
New award:	Fall Term:	2,960.00 (Pell1)
	Spring Term:	2,960.00 (Pell1)
	Trailing Summer Term:	2,960.00 (Pell2)

Disbursement Plan

Navigation: (Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Plan Table)

With options for Pell Eligibility Calculation and Year Round Pell available, you should review whether you want to add Disbursement Plans to package Year Round Pell across award periods. When you define a new Disbursement Plan used to award Pell Grant, it must include all of the Academic Terms that were included in the Disbursement Plan that it is replacing.

Disbursement ID

Navigation: (Set Up SACR, Product Related, Financial Aid, Awards, Disbursement ID Table)

Review the term sequencing details of your Disbursement Plans for Year Round Pell packaging.

Disbursement Split Code

Navigation: (Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Split Codes)

Specify a default value as a placeholder. Packaging won't use this value when determining how to spread the

award.

Disbursement Split Cd Formula

Navigation: (Set Up SACR, Product Related, Financial Aid, Awards, Disbursement Split Cd Formula)

Specify a default value as a placeholder. Packaging won't use this value when determining how to spread the award.

Financial Aid Item Types

Navigation: (Set Up SACR, Product Related, Financial Aid, Financial Aid Item Types)

Consider the following regarding Disbursement Plans and Split Codes:

Take note of the “Additional Pell” checkbox on this page for Financial Aid Item Types with a Federal ID of “Pell”. Selecting this check box indicates that this Financial Aid Item Type represents a “Second Pell” (Pell2).

When Packaging encounters a Financial Aid Item Type with this attribute, it awards the Item Type if the student has enrollment (at least half-time) that qualifies the student to receive a Pell award that exceeds 100 percent of the Max Scheduled Award (a Pell2).

The Originate Pell Payment process:

- Sums multiple Pell Grant Item Types to produce a single Pell Grant award amount.
- Sets the Additional Eligibility Indicator to “True” if a Pell2 is part of the summation of Pell Grant Item Types.

If you intend to begin awarding Pell Grants in either the Leading or Trailing Summer terms, change the Default Disbursement/Split Code specified on the Financial Aid Item Type Disbursement Rules page (FA Item Type 5) to include both Academic and Non-Standard (Summer) terms. This is required so that the system can insert a Pell Grant award into Summer terms as necessary.

Aggregate Aid Limit

Navigation: (Set Up SACR, Product Related, Financial Aid, Awards, Aggregate Aid Limits, Aggregate Aid Limit)

Note these two fields to leverage the student’s (Pell) Total Percent Used in Packaging:

- **First Pell Percentage**: Enter 100.00 to ensure students are fully awarded a Pell1. If you enter any value less than 100.00, 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.

- **Second Pell Percentage**: Enter 150.00 to ensure students are fully awarded up to 50% of their Scheduled Award. 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.

Packaging Plan

Navigation: (Setup SACR, Product Related, Financial Aid, Awards, Packaging Plan)

If you intend to begin awarding Pell Grants in either the Leading or Trailing Summer terms, be sure to change the default Disbursement Plan/Split Code on the Pell Grant award rules to include both the Academic and Non-Standard terms.

Term Start and End Date

Navigation: (Financial Aid, Financial Aid Term, Manage FA Term)

When determining the Pell2 award, Packaging interrogates the term's start date and end date on FA Term. This is used to determine if the term meets the definition of a "crossover payment period" by the Federal Student Aid Handbook. For Packaging to determine if a term is a crossover payment period, these fields should be populated. If term start and end date are not populated for a term, Packaging treats the term as not being a crossover payment period.

Other Things to Know

Here are some additional pointers regarding Year Round Pell:

- Pell Eligibility Calculation: Because neither the Aid Processing Rule setup nor FA Installation setup is keyed by Aid year, Pell Eligibility Calculations can span across multiple Aid Years. You should consider creating unique Aid Processing Rule Sets that differ from Aid Years when YRP was not awarded so that you can continue to process in both years without impacting either year.

- If you attempt to 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 attempt to manually award a Pell Grant for less than the Max Scheduled Award, the system allows it.

- Any amount of Pell Grant you attempt to award using Professional Judgment is accepted. In other words, Pell1 or Pell2 can exceed the Max Scheduled Award, the Total Percent Used value, the Pell COA, etc.

- The system does not attempt to calculate a Pell Grant if neither a federal nor institutional application is present. However, the system does attempt to calculate a Pell Grant if the student has only an institutional application, but no ISIR, on record.

- It is important to note that Packaging does not award both a Pell1 and Pell2 in the same term – only in consecutive (or succeeding) terms.

- Pell Cost of Attendance (COA):

    - 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.