

# **Award/disburse Pell for a crossover term from the most beneficial aid year**

## **Trailer Schools**

### **Key Points**

- Pell aid period is used to assign an aid period consisting of terms for the next aid year to the student. The Pell aid period is then used to evaluate which of the aid years will provide the most beneficial award to the student for a crossover term. This allows a Pell award to be made from the upcoming aid year for the crossover term and have the amount properly reflected as estimated financial assistance (EFA) for the current year.
- Student must have an ISIR record in the system for both the current and upcoming aid years for both years to be evaluated. If an ISIR record does not exist for one of the aid years, no comparison will be made by the Pell process.
- The Pell process will evaluate the student's eligibility for a second scheduled award (at least half-time, has not received 200% of scheduled award) as part of the comparison to award Pell from the most beneficial aid year for the student.
- The Pell eligibility checks are used as part of the evaluation for both aid years, however verification does not need to be completed prior to determining the most beneficial aid year for Pell.

### **Setup**

- RTVAPRD
  - Define aid periods where the crossover term would be a header rather than a trailer. A Pell aid period must be set up for each aid period combination to include the crossover term as a header. Check the Pell Crossover indicator.
    - Examples:
      - Fall/Spring create aid period Summer/Fall/Spring
      - Fall/Spring/Summer create aid period Summer/Fall/Spring/Summer
      - Fall/Winter/Spring create aid period Summer/Fall/Winter/Spring
      - Fall/Winter/Spring/Summer create aid period Summer/Fall/Winter/Spring/Summer

NOTE: The Pell crossover indicator defines the aid period and for use in Pell processing only.

- RPRCRSS
  - Define crossover terms that will be used as a header in the upcoming academic year.
    - Examples:
      - Summer 2010 (Financial Aid Process Year on STVTERM = 0910) will need to be set up for 1011 Crossover Aid Year
      - Summer 2011 (Financial Aid Process Year on STVTERM = 1011) will need to be set up for 1112 Crossover Aid Year
- RORACYR
  - Define the number of academic year hours, by level, a student must complete prior to being considered for a second scheduled Pell award for the aid year.

NOTE: For 0910 you don't need to set anything up if you are not implementing the acceleration regulations early. Academic year hours need to be set up for aid years beyond 0910. If you are implementing the acceleration regulations for 0910, then 0910 and beyond need to be set up.

- **ROAINST**
  - On the Credit Hours Tab, define the number of credit hours, by level, the student has to be taking to be considered Full Time,  $\frac{3}{4}$  time and  $\frac{1}{2}$  time. You need to set up the crossover term in both the current aid year and the upcoming aid year.
    - Examples:
      - Summer 2010 term must be defined on ROAINST, Credit Hours tab, for both the 0910 and 1011 aid years.
      - Summer 2011 term must be defined on ROAINST, Credit Hours tab, for both the 1011 and 1112 aid years
- **RORTPRD/RFRDEFA/RFRASCH**
  - Defines what terms are to be processed for the aid period. Using aid period set up on RTVAPRD, an aid period with the crossover term indicator checked would have summer as a header rather than a trailer. A Pell aid period must be set up for each aid period combination to include the crossover term as a header.
    - Examples:
      - Fall/Spring also set up aid period Summer/Fall/Spring
      - Fall/Spring/Summer also set up aid period Summer/Fall/Spring/Summer
      - Fall/Winter/Spring also set up aid period Summer/Fall/Winter/Spring
      - Fall/Winter/Spring/Summer also set up aid period Summer/Fall/Winter/Spring/Summer
- **RPROPTS**
  - Used for packaging options. For Year Round Pell setup, you must ensure that both the Enrollment Cut Off Date Rules window and the Grant Options window are set up to include the crossover term in both the current aid year and the upcoming aid year.
    - The enrollment cut off date for the current aid year crossover term will get automatically populated when the crossover term is setup in the upcoming aid year.
- **ROAPELL**
  - Used to assign a Pell Aid Period to the student. The Pell aid period will be the aid period established for the upcoming year which includes the crossover term. This allows the Pell process to compare the upcoming aid year and the current aid year.
  - A Pell aid period should only be assigned to a student when a crossover term does not exist as part of the student's regular aid period in the current year; the Pell aid period would be assigned to the student in the next aid year.
  - Examples:
    - Student A
      - Student assigned Fall/Spring/Summer aid period for 0910
        - Pell Aid Period leave blank. Since Summer which is the crossover term is part of the current aid period, the Pell process will evaluate eligibility for the summer term.
      - Student assigned Fall/Spring aid period for 1011
        - Pell Aid Period assign the Summer/Fall/Spring aid period. This aid period has the Summer term defined with the crossover aid year of 1011. By assigning the Pell Aid Period of Summer/Fall/Spring, the Pell process will

compare the 0910 Pell award to the 1011 Pell award to determine which is the most advantageous for the Summer crossover term.

- Student B
  - Student assigned Fall/Winter/Spring/Summer aid period for 0910
    - Pell Aid Period leave blank. Since Summer which is the crossover term is part of the current aid period, the Pell process will evaluate eligibility for the summer term.
  - Student assigned Fall/Winter/Spring aid period for 1011
    - Pell Aid Period assign the Summer/Fall/Winter/Spring aid period. This aid period has the Summer term defined with the crossover aid year of 1011. By assigning the Pell Aid Period of Summer/Fall/Winter/Spring, the Pell process will compare the 0910 Pell award to the 1011 Pell award to determine which is the most advantageous for the Summer crossover term.

NOTE: Depending on when your institution awards crossover terms such as summer, you will need to either initially or later update the Pell Aid Period to include the crossover as a trailer. For example, when evaluating Student A for the most beneficial Pell for the Summer of 2011 (compare 1011 to 1112), you would need to update the Pell Aid Period to Summer/Fall/Spring/Summer for the 1011 aid year. This is necessary since the Pell process will look first to see if a Pell aid period exists for the student and if so, calculate Pell based on the terms which exist in the Pell aid period; without the Summer 2011 trailer term added to the Pell aid period for 1011, Pell would not be calculated in the comparison of 1011 to 1112 for Summer 2011. If no Pell aid period exists, the Pell process will use the regular aid period for calculating Pell.

Pell Processing Rule: If a Pell aid period exists, the Pell aid period will be used for determining the terms to schedule for Pell. If no Pell aid period exists, the regular aid period will be used.

NOTE: Use ROAPELL to manually place a student into a Pell Aid Period. Use RORPOST (Type code of AP)/RORBPST to place a batch of students into a Pell Aid Period.

## Day to Day Processing

- ROAPELL
  - Assign student(s) to Pell aid Period
    - Manually on ROAPELL
    - In batch via RORPOST/RORBPST
      - Type Indicator = AP
      - Code to Post = Pell Aid Period to be assigned to batch of students
- RPEPELL
  - The Pell process performs the comparison between the current aid year and the upcoming aid year to determine which aid year results in the most beneficial award for the student.

NOTE: SunGard Higher Education recommends running the Pell process in batch since both aid years will be automatically compared. When run online, the user must manually run the current aid year and the upcoming aid year.

- Batch Processing - RPEPELL
  - When the process is run in batch, the Aid Year Code in Parameter 01 (e.g. 0910) will be looked at for the scheduled award amount and then the process will look at the Next Aid Year Code (e.g. 1011) in Parameter 08 to determine which aid year would be the most beneficial.

- If the current aid year is most beneficial, then the crossover term amount will be awarded in the current aid year and a 0 award will be reflected for upcoming aid year for the crossover term.
  - If the upcoming aid year is most beneficial, then the crossover term amount will result in 0 for the current aid year and will be awarded for upcoming aid year.
- On-line – ROAIMMP, RBAABUD, RNANAXX, RNASUXX, RNAOVXX
    - The on-line process MUST be run for the current aid year and then the upcoming aid year (Just like RPEPELL would have 0910 as parameter 01 and 1011 as parameter 08, you would run the on-line processes for 0910 first then for 1011).
      - When run for the current aid year, the Pell process determines which aid year is most beneficial.
        - If the current aid year is most beneficial, then the crossover term amount will be awarded in the current aid year.
          - Nothing will be done in the upcoming aid year until the process is run for the upcoming aid year. Once the process is run for the upcoming aid year, a 0 award will result for the crossover term.
        - If the current aid year is not the most beneficial, then the crossover term amount will be 0 but nothing will be awarded for the upcoming aid year since the process has not yet been run. The process must be run for the upcoming aid year in order for the amount to get awarded. Once the process is run for the upcoming aid year, an award will result for the crossover term.
- RPEDISB
  - Just like the Pell process, the disbursement process will determine the most beneficial award at the time of disbursement.
    - Batch Processing - RPEDISB
      - Current aid year
        - Run disbursement process, when applicable, for each term in the aid year
      - Upcoming aid year
        - Run disbursement process, when applicable, for each term in the aid year
    - On-line – ROAIMMP
      - Current aid year
        - Run disbursement process, when applicable, for each term in the aid year
      - Upcoming aid year
        - Run disbursement process, when applicable, for each term in the aid year

NOTE: The disbursement process must be run for the crossover term in each aid year in order to do the comparison and to access the proper disbursement amount.

## What do the results look like?

- RPAAWRD/RPAAPMT
  - The award forms will display the results of the Pell process and Disbursement process. Depending on which aid year results in the most beneficial award will dictate the results displayed.
    - When current aid year is most beneficial award
      - Current Aid Year
        - Award Maintenance Tab – Summary Tab

- Crossover Pell Award = 0
    - Crossover Aid Year = Upcoming Aid Year
    - Pell Aid Period = null
  - Fund Awards by Term Tab
    - Crossover term = Term award amount
- Upcoming Aid Year
  - Award Maintenance Tab – Summary Tab
    - Crossover Pell Award = null
    - Crossover Aid Year = null
    - Pell Aid Period = Summer, Fall, Spring or Summer, Fall, Spring, Summer aid period
  - Fund Awards by Term Tab
    - Crossover term = 0
- When upcoming aid year is most beneficial award
  - Current Aid Year
    - Award Maintenance Tab – Summary Tab
      - Crossover Pell Award = Amount of the crossover term award from the upcoming aid year
      - Crossover Aid Year = Upcoming Aid Year
      - Pell Aid Period = null
      - Offered amount (Estimated Financial Assistance – EFA)
        - Reflects the amount of the crossover term award from the upcoming aid year
    - Fund Awards by Term Tab
      - Crossover term = 0
  - Upcoming Aid Year
    - Award Maintenance Tab – Summary Tab
      - Crossover Pell Award = null
      - Crossover Aid Year = null
      - Pell Aid Period = Summer, Fall, Spring or Summer, Fall, Spring, Summer aid period
      - Offered amount (EFA)
        - The crossover term amount shown on the Fund Awards by Term Tab is not reflected in the EFA since it was already counted in the current aid year.
    - Fund Awards by Term Tab
      - Crossover term = Amount of the crossover term for this upcoming aid year