Award/disburse Pell for a crossover term from the most beneficial aid year
Header Schools

Key Points

- Pell aid period is used to assign an aid period consisting of terms for the previous 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 previous 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 previous and current 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 trailer rather than a header. A Pell aid period must be set up for each aid period combination to include the crossover term as a trailer. Check the Pell Crossover indicator.
        - Examples:
            - Fall/Spring create aid period Fall/Spring/Summer
            - Summer/Fall/Spring create aid period Summer/Fall/Spring/Summer
            - Fall/Winter/Spring create aid period Fall/Winter/Spring/Summer
            - Summer/Fall/Winter/Spring create aid period Summer/Fall/Winter/Spring/Summer

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

- RPRCRSS
    - Define crossover terms that will be used as a trailer in the previous academic year.
        - Examples:
            - Summer 2010 (Financial Aid Process Year on STVTERM = 1011) will need to be set up for 0910 Crossover Aid Year
            - Summer 2011 (Financial Aid Process Year on STVTERM = 1112) will need to be set up for 1011 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, ¾ time and ½ time. You need to set up the crossover term in both the previous aid year and the current aid year.
        - Examples:
            - Summer 2010 term must be defined on ROAINST, Credit Hours tab, for both the 1011 and 0910 aid years.
            - Summer 2011 term must be defined on ROAINST, Credit Hours tab, for both the 1112 and 1011 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 trailer rather than a header. A Pell aid period must be set up for each aid period combination to include the crossover term as a trailer.
        - Examples:
            - Fall/Spring also set up aid period Fall/Spring/Summer
            - Summer/Fall/Spring also set up aid period Summer/Fall/Spring/Summer
            - Fall/Winter/Spring also set up aid period Fall/Winter/Spring/Summer
            - Summer/Fall/Winter/Spring 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 previous aid year and the current 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 previous 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 previous year which includes the crossover term. This allows the Pell process to compare the previous aid year and the current aid year.
    - A Pell aid period should only be assigned to a student when a crossover term does not exists 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 previous aid year.
    - Examples:
        - Student A
            - Student assigned Summer/Fall/Spring aid period for 1011
                - 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 0910
                - Pell Aid Period assign the Fall/Spring/Summer aid period. This aid period has the Summer term defined with the crossover aid year of 0910. By assigning the Pell Aid Period of Fall/Spring/Summer, 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 Summer/Fall/Winter/Spring aid period for 1011
    - 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 0910
    - Pell Aid Period assign the Fall/Winter/Spring/Summer aid period. This aid period has the Summer term defined with the crossover aid year of 0910. By assigning the Pell Aid Period of Fall/Spring/Summer, 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: 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.

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.

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 previous aid year and the current 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 previous aid year and the current aid year.

IMPORTANT: When running RPEPELL for 2 aid years simultaneously, Parameter 01 must be set to your previous aid year (e.g. 0910) and Parameter 08 must be set to your current aid year (e.g. 1011). If not run this way, it could result in the summer crossover term getting awarded in both aid years.

- Batch Processing - RPEPELL
    - When the process is run in batch, the Aid Year Code in Parameter 01 will be looked at for the scheduled award amount and then the process will look at the Next Aid Year Code 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 previous aid year for the crossover term.
        - If the current aid year is most beneficial, then the crossover term amount will result in 0 for the previous aid year and will be awarded for current aid year.

- On-line – ROAIMMP, RBAABUD, RNANAxx, RNASUxx, RNAOVxx

- The on-line process MUST be run for the previous aid year and then the current 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 previous aid year, the Pell process determines which aid year is most beneficial.
    - If the previous aid year is most beneficial, then the crossover term amount will be awarded in the previous aid year.
      - Nothing will be done in the current aid year until the process is run for the current aid year. Once the process is run for the current aid year, a 0 award will result for the crossover term.
    - If the previous aid year is not the most beneficial, then the crossover term amount will be 0 but nothing will be awarded for the current aid year since the process has not yet been run. The process must be run for the current aid year in order for the amount to get awarded. Once the process is run for the current 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
      - Previous aid year
        - Run disbursement process, when applicable, for each term in the aid year
      - Current aid year
        - Run disbursement process, when applicable, for each term in the aid year
    - On-line – ROAIMMP
      - Previous aid year
        - Run disbursement process, when applicable, for each term in the aid year
      - Current 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 = Previous Aid Year
          - Pell Aid Period = null
        - Fund Awards by Term Tab
          - Crossover term = Term award amount
      - Previous Aid Year
        - Award Maintenance Tab – Summary Tab

- - - - Crossover Pell Award = null
      - Crossover Aid Year = null
      - Pell Aid Period = Fall, Spring, Summer or Summer, Fall, Spring, Summer aid period
    - Fund Awards by Term Tab
      - Crossover term = 0

- When previous 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 previous aid year
      - Crossover Aid Year = Previous Aid Year
      - Pell Aid Period = null
      - Offered amount (Estimated Financial Assistance – EFA)
        - Reflects the amount of the crossover term award from the previous aid year
    - Fund Awards by Term Tab
      - Crossover term = 0
  - Previous 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 previous aid year