CHAPTER 1

Awarding Pell Grants

Bundle 13 / Bundle 20
Due to significant enhancements to Pell Grant awarding beginning with the 2010 aid year, we have added the Awarding Pell Grants chapter. The first section, Awarding Pell Grants for the 2009 and Prior aid years, has been moved from the Awarding Pell Grants section of the existing Managing Special Cases in Packaging chapter. Since there are no significant functional changes made to awarding Pell Grants for Aid Year 2009 and prior aid years, the text has only minor clarification edits. The second section, Awarding Pell Grants for the 2010 and Future Aid Years, has been added to reflect new Pell Grant awarding features effective with the 2010 aid year.

READ THIS!
Prior to your implementation of this bundle, it is imperative that you read the Enhancements to Pell Grant Administration guide document included in this bundle documentation. This document provides suggested steps for implementation, consolidates information, and provides references to updated chapters in the Financial Aid PeopleBook that will assist you with your implementation.

This chapter discusses how to:

• Award Pell Grants for the 2009 and prior aid years.
• Award Pell Grants for the 2010 and future aid years.

Awarding Pell Grants for the 2009 and Prior Aid Years

This section provides an overview of Pell Grant awarding for the 2009 and prior aid years and discusses how to:

• Define Pell eligibility calculation setup.
• Calculate Pell Grants.
• Reinstate a cancelled Pell Grant award.
• Award Pell Grants for post-baccalaureate teaching certificate candidates.

Understanding Pell Grant Awarding

This section discusses Pell Grant Awarding for the 2009 and prior aid years.
Note. Beginning with the 2010 aid year, the system calculates Pell Grant differently. This section discusses awarding Pell Grants for the 2009 and prior aid years. For information on awarding Pell Grants for 2010 and future aid years:

See Awarding Pell Grants, Awarding Pell Grants for the 2010 and Future aid years.

The Pell Grant awarding functionality automatically calculates students’ Pell Grant awards based on their primary EFC, Pell COA, Pell COA for less than half-time (Pell LTHT), and enrollment (FA Load or Current Load). The system calculates the Pell Grant for each term, then sums each term’s amount to give an annual Pell Grant award amount. As part of your setup, you can choose to use full-time enrollment, part-time enrollment, the student’s actual FA Load value, or the student’s Current Load value (which takes into account current and completed Open Entry/Open Exit session) as the enrollment value. You can also choose to calculate the student’s Pell Grant eligibility using a different default enrollment value at different points in the term: before the term’s start date, on or after the term’s start date but before the financial aid census date, and on or after the financial aid census date.

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.

**Defining Pell Eligibility Calculation Setup**

You must complete the Pell eligibility calculation (PEC) setup for your Pell Grants to be properly calculated. The PEC setup involves defining the default enrollment value to use when calculating the student’s Pell eligibility: before the term’s start date, on or after the term’s start date but before the financial aid census date, and on or after the financial aid census date. Having different default enrollment values for these three points in time gives you flexibility in projecting and awarding Pell Grants. You can calculate a student’s Pell Grant using a projected enrollment value for the period prior to the term start date, such as full time or half-time. Then when the student’s term begins, you can recalculate the student’s Pell Grant award using the student’s actual enrollment (FA Load or Current 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 is one of the fields you can lock using census-date locking. Current Load calculates the student’s enrollment load using the units from sessions the student is currently enrolled in as well as sessions within the term that the student has already completed. This field enables you to calculate the enrollment load of Open Entry/Open Exit students more accurately. Finally, 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.

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

The fields that define your PEC setup are the Academic Base Weeks, Non-Standard Base Weeks, Pell Calculation Start, Pell Calculation Midterm, Pell Calculation Census, and Pell Number of Terms fields.
Financial Aid Defaults Page

First, you must establish your PEC setup on the Financial Aid Defaults page. Because the values you enter on this page are used as installation level defaults, the values you enter on this page should be the values you want to use for most (or all as appropriate) of your undergraduate programs. For the Academic Base Weeks and Non-Standard Base Weeks fields, enter the information that represents the standard weeks of instruction for terms in the Academic Award Period (AAP) and Non-Standard Award Period (NSAP), respectively. In the Pell Number of Terms field, enter the number of terms in the academic year—2 for semesters, 3 for trimesters/quarters. This value equals the number of terms in the AAP, but depends upon your institution’s academic program business processes. The Packaging routine uses the Pell number of terms to split the Pell Grant evenly among terms when you choose either Full Time or Half Time for a Pell calculation field.

In the Pell Calculation Start field, enter Full Time, Half Time, Current Load, or FA Load. Entering Full Time or Half Time projects the student’s enrollment as either full-time or half-time prior to the student’s term start date. If you enter Enrollment Current Load or Enrollment FA Load, the Pell calculation uses actual enrollment information.

In the Pell Calculation Midterm field, enter Enrollment Current Load or Enrollment FA Load to use the student’s actual enrollment information or enter Full Time or Half Time to project the students’ financial aid load. If your students are enrolled in Open Entry/Open Exit sessions or your institution supports dynamic dating using Student Records, use Enrollment Current Load because this field value gives a precise picture of the student’s academic progress through multiple sessions in a term.

In the Pell Calculation Census field, select Enrollment FA Load. This field value directs the Pell calculation to use the financial aid load calculated on or after the census date.

Careers That Vary from Installation Level Defaults

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 assign it to both careers.

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 that has academic program weeks of instruction greater or less than the standard 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.

**Academic Programs That Vary from Career Level Defaults**

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. Then you assign aid processing rule sets to only 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.

**Individual Students Requiring Overrides to Default Values**

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.

**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.** For a complete description of the PEC Student Override page:

See Preparing for Awarding and Packaging, Reviewing the Student’s Packaging Status, Overriding Pell Eligibility Calculation Setup Values

**See Also**

lsfa, Managing Financial Aid Terms, Building Financial Aid Terms Online, Overriding Census Date Locking

**Calculating Pell Grants**

When the Packaging routine calculates the student’s Pell Grant (whether you are packaging the student using Manual Packaging, Auto Packaging, or Mass Packaging), it first determines the PEC setup values to use. Because PEC setup defaults can be at the program, career, or installation level, the Packaging routine checks for defaults in the following order to ensure that the proper aid processing rules are used:

1. Aid processing rule set associated with the student’s program.
2. Aid processing rule set associated with the student’s career.

**Note.** If the student has override values, those values take precedence over all other default values.
After determining the correct PEC values to use, the Packaging routine compares the current (system) date against the term start date (earliest session start date) and the financial aid census date. After the Packaging routine identifies the current date in relation to these dates, it calculates the student’s Pell Grant term by term using the enrollment specified in the appropriate Pell calculation field (Pell Calculation Start, Pell Calculation Midterm, or Pell Calculation Census). Using the Pell COA, Pell LTHT or alternate Pell COA, appropriate weeks of instruction, the student’s nine-month EFC, and the appropriate Pell Grant disbursement Schedule based on the enrollment value, the routine determines the term Pell Grant amount for the student.

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 award. For the Enrollment Current Load and Enrollment FA Load values, the routine disregards the split codes assigned to the Pell Grant financial aid item type and returns a split code of XX to indicate a custom split. For the Full Time and Half Time values, the routine derives a per term award amount by determining the annual Pell award using the appropriate Pell Grant disbursement schedule and dividing that amount by the Pell Number of Terms value.

Example

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 5,450.00 and the primary EFC is 154.00. According to the Federal Pell Grant Schedule, the student receives an annual award of 3,150.00 if enrolled full-time, an annual award of 2,363.00 if enrolled three-quarter time, and an annual award of 1,575.00 if enrolled half-time.

The student is first awarded a Pell Grant on March 1, 2000. 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:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pell Calculation Start</td>
<td>Full-Time</td>
</tr>
<tr>
<td>Pell Calculation Midterm</td>
<td>Full-Time</td>
</tr>
<tr>
<td>Pell Calculation Census</td>
<td>Current Load</td>
</tr>
</tbody>
</table>

The Packaging routine now compares the current date (March 1, 2000) against the term start date and census date to determine which enrollment value to use when calculating the student’s Pell Grant:

<table>
<thead>
<tr>
<th>Term</th>
<th>Term Start Date</th>
<th>FA Census Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall (0410)</td>
<td>09/17/00</td>
<td>10/20/00</td>
</tr>
<tr>
<td>Spring (0430)</td>
<td>01/23/01</td>
<td>03/10/01</td>
</tr>
</tbody>
</table>

Because the current date is before the term start date for both semesters, the Packaging routine uses the Pell Calculation Start value for enrollment, Full-Time. The student’s Pell Grant award is 3,150.00 for the aid year, with a term amount of 1,575.00 for both terms.
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 load value after the census date is three-quarter time in fall and is half-time in spring. All amounts are in:

<table>
<thead>
<tr>
<th>Current Date</th>
<th>Pell Calculation Field Used - Fall</th>
<th>Load</th>
<th>Fall Pell Award Amt</th>
<th>Pell Calculation Field Used - Spring</th>
<th>Load</th>
<th>Spring Pell Award Amt</th>
<th>Total Pell Award</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/01 /00</td>
<td>Pell Calculation Start</td>
<td>Full Time</td>
<td>1,575.00</td>
<td>Pell Calculation Start</td>
<td>Full Time</td>
<td>1,575.00</td>
<td>3,150.00</td>
</tr>
<tr>
<td>09/20 /00</td>
<td>Pell Calculation Midterm</td>
<td>Full Time</td>
<td>1,575.00</td>
<td>Pell Calculation Start</td>
<td>Full Time</td>
<td>1,575.00</td>
<td>3,150.00</td>
</tr>
<tr>
<td>10/25 /00</td>
<td>Pell Calculation Census</td>
<td>Current Load (3/4 Time)</td>
<td>1,182.00</td>
<td>Pell Calculation Start</td>
<td>Full Time</td>
<td>1,575.00</td>
<td>2,757.00</td>
</tr>
<tr>
<td>01/30 /01</td>
<td>Pell Calculation Census</td>
<td>Current Load (3/4 Time)</td>
<td>1,182.00</td>
<td>Pell Calculation Midterm</td>
<td>Full Time</td>
<td>1,575.00</td>
<td>2,757.00</td>
</tr>
<tr>
<td>03/25 /01</td>
<td>Pell Calculation Census</td>
<td>Current Load (3/4 Time)</td>
<td>1,182.00</td>
<td>Pell Calculation Census</td>
<td>Current Load (Half Time)</td>
<td>787.00</td>
<td>1,969.00</td>
</tr>
</tbody>
</table>

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

For the 2001 aid year and subsequent aid years, 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:

<table>
<thead>
<tr>
<th>Record</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISIR_STUDENT</td>
<td>DEGREE_CERTIF</td>
<td>The degree or certification the student is pursuing. The student must be pursuing a teaching credential.</td>
</tr>
</tbody>
</table>
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 the Packaging process evaluates the student for a Pell Grant for the 2001 aid year and subsequent aid years.

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 the Packaging process does not evaluate the student for a Pell Grant for the 2001 aid year and subsequent aid years.

### Awarding Pell Grants for the 2010 and Future Aid Years

This section provides an overview of Pell Grant awarding for the 2010 and future award years and discusses how to:

- Define Pell eligibility calculation setup.
- Define Aggregate Aid Limit Percentage Maximums for Pell Grant.
- Calculate Pell Grants.
- Repackage Pell Grants.
- Manually award Pell Grants.
- Award Pell Grants using professional judgment.
- Reinstates a cancelled Pell Grant award.
- Award Pell Grants for post-baccalaureate teaching certificate candidates.
Understanding Pell Grant Awarding

Note. Beginning with the 2010 aid year, the system calculates Pell Grant differently from 2009 and prior aid years. This section discusses awarding Pell Grants for the 2010 and future aid years. For information on awarding Pell Grants for 2009 and prior aid years:

See Awarding Pell Grants, Awarding Pell Grants for the 2009 and Prior Aid Years.

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

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)

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 Setting Up Student Budgets, 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

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
- 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 Awarding Pell Grants, Awarding Pell Grants for the 2010 and Future Aid Years, Defining Pell Eligibility Calculation (PEC) Setup

See Awarding Pell Grants, Awarding Pell Grants for the 2010 and Future Aid Years, Calculating Pell Grants, Pell Grant Formula Examples

See Awarding Pell Grants, Awarding Pell Grants for the 2010 and Future Aid Years, Calculating Pell Grants, Pell Grant Point in Time Examples

**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.

Since students can receive two maximum scheduled Pell Grant awards 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 Awarding Pell Grants, Awarding Pell Grants for the 2010 and Future Aid Years, Defining Aggregate Aid Limit Percentage Maximums for Pell Grants
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
- Non-Standard Base Weeks
- Pell Calculation Start
- Pell Calculation Midterm
- Pell Calculation Census
- Pell Number of Terms

Defining PEC at the Institution Level


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 Setting Up Your Financial aid Awarding Cycle, 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.

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Academic Base Weeks and Non-Standard-Base Weeks fields are used when calculating Pell eligibility for Formula 3 - FA Load or Formula 3 - Current Load.
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**Note.** Academic Base Weeks and Non-Standard-Base Weeks are added together to determine an Academic Program’s Weeks of Instruction. This Weeks of Instruction value 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 or Formula 3 - Current Load.

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**Pell Calculation Start**

Enter the calculation mode to use for Pell calculations made before the student’s academic term start date. Use these values for the 2010 and future aid years:

*Formula 1 — FA Load (For use only with 2010 and future aid years):* 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.

*Formula 1 — Full-time (For use only with 2010 and future aid years):* 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 (For use only with 2010 and future aid years):* 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 (For use only with 2010 and future aid years):* 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.

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**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.
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**Pell Number of Terms** — With the enhanced Pell Grant awarding features in this bundle, the existing Pell Number of Terms field is used to determine the number of disbursements created by the Pell calculation using Formula 1—FA Load and Formula 1—Full-time.

**READ THIS!**

Prior to your implementation of this bundle, it is imperative that you read the Enhancements to Pell Grant Administration guide document included in this bundle documentation. This document provides suggested steps for implementation, consolidates information, and provides references to updated chapters in the Financial Aid PeopleBook that will assist you with your implementation.

**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 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 Setting Up Your Financial aid Awarding Cycle, Establishing Defaults, Creating Aid Processing Rule Sets

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

See Setting Up Your Financial Aid Awarding Cycle, Establishing Careers and Programs, 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 Setting Up Your Financial aid Awarding Cycle, Establishing Defaults, Creating Aid Processing Rule Sets

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

See Setting Up Your Financial Aid Awarding Cycle, Establishing Careers and Programs, Defining Valid Programs for the 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 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.

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 Preparing for Awarding and Packaging, Reviewing the Student’s Packaging Status, 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 or Formula 3 - Current Load, you must populate both the Academic and Non-Standard Base Weeks fields.

---

**See Also**

Isfa, Managing Financial Aid Terms, Building Financial Aid Terms Online, Overriding Census Date Locking

---

### Defining Aggregate Aid Limit Percentage Maximums for Pell Grants

You must define 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 Setting Up Your Financial aid Awarding Cycle, Establishing Defaults

---

**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 200.00 to ensure students are fully awarded a Pell2. If you enter any value less than 200.00, 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.

---

### Calculating Pell Grants

The section discusses how Pell Grants are calculated and includes example calculations.
Chapter 1 Awarding Pell Grants

The system can award two full 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 Pell Grant award that has been used. Determining what percentage of a student’s Max Scheduled Award has been used is integral to how the system awards Pell Grant.

To accurately calculate a student’s remaining Pell eligibility, Packaging uses Percent Scheduled Used field on the Aggregate Aid Data page. This field is populated either by the NSLDS Data Push process or manually overridden.

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

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

For a complete description of the Aggregate Aid Data page:

See Preparing for Awarding and Packaging, Managing Aggregate Aid, Updating Aggregate Information
Percent Scheduled Used 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 200.0. 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).

Override Select this check box to manually override the Percent Scheduled Used value

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 200.0.

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 Percent Scheduled Used.

See Preparing for Awarding and Packaging, Managing Aggregate Aid, Updating Aggregate Aid Information

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

See Awarding Pell Grants, Awarding Pell Grants for the 2010 and Future Aid Years, 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
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 / 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
Awarding Pell Grants

Chapter 1

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: 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
Term 2 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
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 \times 1500.00 = 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

**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:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pell Calculation Start</td>
<td>Formula 1 — Full-time</td>
</tr>
<tr>
<td>Pell Calculation Midterm</td>
<td>Formula 1 — Full-time</td>
</tr>
<tr>
<td>Pell Calculation Census</td>
<td>Formula 1 — FA Load</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Term</th>
<th>Term Start Date</th>
<th>FA Census Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall</td>
<td>09/17/09</td>
<td>10/20/09</td>
</tr>
<tr>
<td>Spring</td>
<td>01/23/10</td>
<td>03/10/10</td>
</tr>
</tbody>
</table>

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.
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.

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

See Awarding Pell Grants, Awarding Pell Grants for the 2010 and Future Aid Years, Defining Pell Eligibility Calculation (PEC) Setup

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

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) 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)
- 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)

**Pell Grant Packaging Error Messages**

The following table lists and explains possible Pell Grant Packaging error messages:
<table>
<thead>
<tr>
<th>Message Number</th>
<th>Message Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>9022</td>
<td>PELL -Invalid Title IV eligibility indicator</td>
</tr>
<tr>
<td>9023</td>
<td>PELL - Not Title IV eligible</td>
</tr>
<tr>
<td>9026</td>
<td>PELL -Invalid NSLDS level</td>
</tr>
<tr>
<td>9027</td>
<td>PELL -Student is not an undergraduate, not PELL eligible</td>
</tr>
<tr>
<td>9033</td>
<td>PELL -Student has Bachelors degree, not PELL eligible</td>
</tr>
<tr>
<td>9136</td>
<td>Student Base Weeks or term count found to be 0 during PELL calculation</td>
</tr>
<tr>
<td>9148</td>
<td>PELL award cannot be assigned; there is no matching disbursement for term</td>
</tr>
<tr>
<td>9149</td>
<td>Not PELL eligible based on combination PELL Index and PELL COA</td>
</tr>
<tr>
<td>9150</td>
<td>Invalid FA Load Code; Must have a value of 'F', 'T', 'H', 'L' or 'N'</td>
</tr>
<tr>
<td>9151</td>
<td>Item Type, Term, Aggregate, and/or Plan limits are less than PELL award</td>
</tr>
<tr>
<td>9152</td>
<td>PELL Index (Federal EFC) exceeds PELL Index maximum</td>
</tr>
<tr>
<td>9161</td>
<td>Student Enrollment Weeks (or terms) total exceeds Base Weeks (or term count).</td>
</tr>
<tr>
<td>9185</td>
<td>Calculated PELL award exceeds aggregate eligibility; award rejected.</td>
</tr>
<tr>
<td>9214</td>
<td>Not Pell Eligible: The Student is a Graduate Student</td>
</tr>
<tr>
<td>9234</td>
<td>For 2010, Pell Calculation Start, Midterm and Census date entries are invalid</td>
</tr>
<tr>
<td>9236</td>
<td>Not eligible for 2nd Pell award since 1st Pell award was not awarded at 100%</td>
</tr>
<tr>
<td>9237</td>
<td>Not eligible for 2nd Pell award; disbursement terms overlap with 1st Pell award</td>
</tr>
<tr>
<td>9405</td>
<td>PELL award reduced by Aggregate limits</td>
</tr>
<tr>
<td>9420</td>
<td>Manual Pell award reduced; For 2010, manual Pell cannot exceed eligibility</td>
</tr>
</tbody>
</table>

**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.

Bundle 20 (8.9 Customers only)

In the 8.9 release, you can invoke the Pell Grant-specific attribute on the packaging plan setup to isolate and repackage an existing Pell Grant award. However, you are not able to specify both a Pell1 and a Pell2 item type on this plan. If you must repackage a student with both a Pell1 and a Pell2 award using this type of plan, we recommend that you create two Pell Grant-specific packaging plans: the first plan identifying your Pell1 item type and the second plan identifying your Pell2 item type. Be sure to populate the Packaging Rule 2 page of the Packaging Plan setup with a default Disbursement Plan/Split Code that spans both the Academic and Non-Standard Award Periods.

Manually Awarding Pell Grants

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:
<table>
<thead>
<tr>
<th>Record</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISIR_STUDENT</td>
<td>DEGREE_CERTIF</td>
<td>The degree or certification the student is pursuing. The student must be pursuing a teaching credential.</td>
</tr>
<tr>
<td>ISIR_STUDENT</td>
<td>FIRST_BACH_DEGREE</td>
<td>Indicates whether the student has a bachelor’s degree. The student can have earned a bachelor’s degree.</td>
</tr>
<tr>
<td>STUDENT_FA_TERM</td>
<td>NSLDS_LOAN_YEAR</td>
<td>The NSLDS loan year for the student. Eligible students cannot be graduate students.</td>
</tr>
</tbody>
</table>

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.