GUIDE

Oracle PeopleSoft Campus Solutions
Bundle 13/20 – June 2009

Financial Aid

Enhancements to Pell Grant Administration

Applications Release: Oracle PeopleSoft Enterprise 8.9 and 9.0
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1. Read This First

It is essential that schools that use Oracle PeopleSoft Campus Solutions to administer United States Department of Education Federal Pell Grants read this Guide to understand what changes have been made to the product’s support of Pell Grant administration as of the 2009-2010 Aid year.

Read this entire Guide before implementing Release 8.9 Bundle 20 or Release 9.0 Bundle 13.

Use this guide with the Campus Solutions Financial Aid PeopleBook updated chapters for this bundle to understand how to implement important new Pell Grant functionality.
2. Overview

The Higher Education Opportunity Act (HEOA) of 2008 reauthorized the Higher Education Act of 1965 and included an important new provision allowing the awarding up to two maximum Scheduled Pell Grants to an individual student in the same aid year. This change prompted a complete review of Campus Solutions functionality regarding Pell Grants.

This bundle includes new and enhanced functionality for awarding and reporting Pell Grants, including:

- Enhancements to Pell Formula 1 and Pell Formula 3 Calculations
- 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
- Enhancements to Common Origination and Disbursement Reporting

2.1 Enhancements to Pell Formula 1 and Pell Formula 3 Calculations

For the 2010 Aid year and beyond, there are four new Pell Grant calculation options available for the Install Setup, Career Override, Program Override, and Student Override. These are:

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

These options replace:

- Enrollment – FA Load
- Enrollment – Current Load
- Full-time
- Half-time

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

- Setting Up Your Financial Aid Awarding Cycle, Establishing Defaults
- Preparing for Awarding and Packaging, Reviewing the Student’s Packaging Status, Reviewing Pell Information
- Awarding Pell Grants, Awarding Pell Grants for the 2010 and Future Award Years

2.2 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 two maximum Scheduled Pell Grants in a single Aid year. This is sometimes referred to as “Year Round Pell”. The system is enhanced to award two full 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 and see:

- Setting Up Your Financial Aid Awarding Cycle, Establishing Defaults
- Setting Up Packaging Basics, Defining Financial Aid Item Types
- Awarding Pell Grants, Awarding Pell Grants for the 2010 and Future Award Years
2.3 Determining the Percentage of Scheduled Pell Grant Used

The system is enhanced to determine 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 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, Awarding Pell Grants for the 2010 and Future Award Years

2.4 Enhancements to Non-Standard Term Awarding

The system is enhanced to award Pell Grants across award periods to include Non-Standard Terms. You can now 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, Awarding Pell Grants for the 2010 and Future Award Years

2.5 Enhancements to NSLDS Data Push

The system is enhanced so that the NSLDS Data Push process now updates a new 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

2.6 Enhancements to Common Origination and Disbursement Reporting

The system is enhanced so that the Common Origination and Disbursement Process now includes an Additional Eligibility Indicator when reporting a Pell2 in the same Aid year as a Pell1 was reported.

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

- Processing Pell Payments, Managing Pell Origination
- Using Common Origination and Disbursement, Reviewing COD Data, Viewing a Student's Award Information
3. Suggestions for Implementation

The introduction of very significant changes to how the system administers Pell Grants leads Oracle to offer some suggestions for implementing this bundle. Oracle suggests that you do the following in the order listed:

Step 1 - Confirm Setup Related to Pell Grant Awarding
Step 2 - Update Pell Total Percent Used field
Step 3 - Repackage Pell Grant for Students with Discrepancies

3.1 Step 1 - Confirm Setup Related to Pell Grant Awarding

Please check the following pages to confirm or modify your Pell Grant-related setup. If a page has been modified as of this bundle, the word “MODIFIED” precedes the page name.

3.1.1 MODIFIED Financial Aid Defaults

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

The valid values for the Pell Calculation Start, Pell Calculation Midterm, and Pell Calculation Census fields have changed. Values have been added that can only be used for the 2010 Aid year and future Aid years. Existing values remain but can only be used for the 2009 Aid year and prior Aid years.

<table>
<thead>
<tr>
<th>Pell Calculation Start/Midterm/Census</th>
<th>Valid for use in which Aid years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Current Load</td>
<td>2009 and prior</td>
</tr>
<tr>
<td>Enrollment FA Load</td>
<td>2009 and prior</td>
</tr>
<tr>
<td>Formula 1 – FA Load</td>
<td>2010 and future</td>
</tr>
<tr>
<td>Formula 1 – Full-time</td>
<td>2010 and future</td>
</tr>
<tr>
<td>Formula 3 – Current Load</td>
<td>2010 and future</td>
</tr>
<tr>
<td>Formula 3 – FA Load</td>
<td>2010 and future</td>
</tr>
<tr>
<td>Full Time</td>
<td>2009 and prior</td>
</tr>
<tr>
<td>Half Time</td>
<td>2009 and prior</td>
</tr>
</tbody>
</table>

3.1.1.1 Pell Calculation Modes for the 2010 Aid year and Future Aid years

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

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. The system does not award a Pell2 until the student has been awarded a Pell1 in the amount of his or her Max Scheduled Award. In other
words, 100 percent of the student's Pell1 eligibility must be satisfied before the system considers the student for a Pell2 award.

### 3.1.1.1.2 Formula 1 – FA Load

In this mode, the system divides the Pell Grant award by the Pell Number of Terms from setup but is also sensitive to the student's Actual FA Load for each term. When using this mode, the system does not apply the designated Disbursement Plan/Split Code pattern to the award because doing so compromises the FA Load-sensitive calculated award amount.

Example:

Pell COA = 5,000  
EFC = 2,350  
Max Scheduled Award: 3,000  
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  
Term 1 Actual Award: 2,250 / 2 = 1,125  
Term 2 Actual Award: 2,250 / 2 = 1,125  
Term 3 Actual Award: 2,250 / 2 = 1,125 \[ \text{Æ reduced to remaining eligibility: 3,000 minus 2,250 = 750} \]

### 3.1.1.1.3 Formula 1 – Full-time

In this mode, the system divides the full-time Scheduled Pell Grant award by the Pell Number of Terms from setup and distributes it evenly beginning with the chronological first term of the Disbursement Plan. "Forced FT" refers to the fact that the system always uses Full-Time for the student's load across all terms regardless of the student's actual FA Load value.

Example:

Pell COA = 5,000  
EFC = 2,350  
Max Scheduled Award: 3,000  
Pell Number of Terms: 2  
Summer: Trailing  
FA Load Term 1: FT (forced FT)  
FA Load Term 2: FT (forced FT)  
FA Load Term 3: FT (Summer Term) (forced FT)  
Term 1 Actual Award: 3,000 / 2 = 1,500  
Term 2 Actual Award: 3,000 / 2 = 1,500  
Term 3 Actual Award: 3,000 / 2 = 0

### 3.1.1.1.4 Formula 3 – FA Load

In this mode, the system sums both the Academic and Non-Standard Base Weeks from setup 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 regardless of whether the term is assigned to the Academic or Non-Standard Award Period. This mode uses the FA Load value from Financial Aid 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.

Example
**3.1.1.5 Formula 3 – Current Load**

In this mode, the system sums both the Academic and Non-Standard Base Weeks from setup 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 regardless of whether the term is assigned to the Academic or Non-Standard Award Period. This mode uses the Current Load value from Financial Aid Term to determine which Federal Pell Grant disbursement schedule to use when it is calculating the student's eligibility for a Pell Grant. 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.

Example

Pell COA = 5,000  
EFC = 2,350  
Max Scheduled Award = 3,000  
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  
FA Load Term 2 = FT  
FA Load Term 3 = FT  
Term 1 Actual Award = 12 / 34 x 1,500 = 529.35  
Term 2 Actual Award = 10 / 34 x 3,000 = 661.73  
Term 3 Actual Award = 12 / 34 x 1,500 = 529.35  
Annual Award: 1,720.43  
Term 1 disb 529.35  
Term 2 disb 661.73  
Term 3 disb 529.35

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**3.1.2 MODIFIED 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 changed. See section 3.1.1 of this document for additional information.

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**3.1.3 Valid Careers for Aid year**

Navigation: (Set SACR, Product Related, Financial Aid, Aid year, Valid Careers for Aid year)
With the revised options for Pell Calculation and 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.

3.1.4 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 Pell Eligibility Calculation and 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.

3.1.5 Disbursement Plan/Split Code Usage and Considerations

Consider the following regarding Disbursement Plans and Split Codes:

1. With the enhancements to the Pell Eligibility Calculation setup, the system uses Disbursement Plans and Split Codes differently. This means that it:

   (a) continues to use Disbursement Plans to determine for which terms to consider the student’s Pell Grant eligibility, but

   (b) no longer uses 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.

2. If your institution intends to award Pell Grants in either the Leading or Trailing Summer, you must create new Disbursement Plans that encompass all terms in which the student might receive a Pell Grant. The terms selected for these Disbursement Plans should also include existing terms for which the student might have already been awarded a 2010 Pell Grant.

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

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

   Example:

   | Old award: | Fall Term: 2,675.00 | Spring Term: 2,675.00 |
   | New award: | Leading Summer Term: 2,675.00 | Fall Term: 2,675.00 | Spring Term: 0.00 |

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

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

Example:

Old award:  
- Fall Term: 2,675.00
- Spring Term: 2,675.00

New award:  
- Fall Term: 2,675.00
- Spring Term: 2,675.00
- Trailing Summer Term: 0.00

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

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

**Note!**

If…

- you do not intend to award Pell in either Leading or Trailing Summer, or
- your Disbursement Plan/Split Codes used for Pell already include the Leading or Trailing Summer term (depending on the Academic Program),

…then it is not necessary to create new Disbursement Plan/Split Codes.

3. 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.

Example: Leading Summer

Old award:  
- Fall Term: 2,675.00 (Pell1)
- Spring Term: 2,675.00 (Pell1)

New award:  
- Leading Summer Term: 2,675.00 (Pell1)
- Fall Term: 2,675.00 (Pell1)
- Spring Term: 2,675.00 (Pell2)

Example:

Old award:  
- Fall Term: 2,675.00 (Pell1)
- Spring Term: 2,675.00 (Pell1)

New award:  
- Fall Term: 2,675.00 (Pell1)
- Spring Term: 2,675.00 (Pell1)
- Trailing Summer Term: 2,675.00 (Pell2)

3.1.5.1 Disbursement Plan

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

### 3.1.5.2 Disbursement ID

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

With the revised options for Pell Eligibility Calculation and Year Round Pell available, you should review the term sequencing details of your Disbursement Plans for Year Round Pell packaging.

### 3.1.5.3 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.

### 3.1.5.4 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.

### 3.1.6 MODIFIED 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:

1. A new “Additional Pell” checkbox has been added to 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). This is the additional Pell Grant authorized by the HEOA.
   
   When Packaging encounters a Financial Aid Item Type with this attribute, it awards the Item Type if the student:
   - has received 100 percent of the Max Scheduled Award for Pell1 and
   - is at least half-time when being reviewed for 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.

2. 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.

3.1.7 MODIFIED Aggregate Aid Limit

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

Two new fields have been added to this page 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 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.

3.1.8 Packaging Plan

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

With the revised options for Pell Eligibility Calculation and Year Round Pell available, you should revise or add Packaging Plans for Year Round Pell packaging. 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.

3.2 Step 2 - Update the (Pell) Total Percent Used field

3.2.1 Changes to Aggregate Aid Data
There are new fields to support aggregate processing of Pell Grants

- Displayed on the Aggregate Aid Data page
  - 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).
  - 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.

- Internal Fields
  - Max Scheduled Award: Full-time, full-year Pell Grant award based on Pell COA and EFC. Note that this is an internal field and is not displayed on any pages.
  - Student's remaining Pell Grant eligibility: Internally calculated by Packaging. This is the Max Scheduled Award minus Percent Scheduled Used. Note that this is an internal field and is not displayed on any pages.

Determining what percentage of a student's Max Scheduled Award has been used is integral to how the system now awards Pell Grant. To accurately calculate a student's remaining Pell Grant eligibility, Packaging no longer uses a flat Incoming Aggregate award amounts for Pell Grant, but rather a new Incoming Aggregates Percent Scheduled Used field. This field is populated either by the NSLDS Aggregate Push process or manually overridden. Beginning now, you must regularly push NSLDS data to the Aggregate Tables in order for Packaging to calculate accurately the student's remaining Pell Grant eligibility against the Max Scheduled Award.

For purposes of the initial implementation of this feature, you must:
1. Ensure that you have the latest NSLDS data for all students and that this data has been pushed to the Aggregate Aid table. The NSLDS Data Push process has been updated to sum all of the 2010 Pell Grant transactions from other institutions to derive the Percent Scheduled Used field.

2. Update the Total Pell Percent Used by running a new process, Update Pell Percent Used. This process is designed to be used only for the implementation of this new feature and not indefinitely.

3. Repackage students with Pell Grant discrepancies.

3.2.2 Run Pell Percent Used Update

Because you have likely already made Pell Grant awards for the 2010 Aid year before receiving this bundle, all students have a Total Percent Used default value of 0.0000 for all existing 2010 Pell Grant awards. To populate the Total Percent Used for existing Pell Grant awards, we are delivering the Run Pell Percent Used Update process.

Note! It is important to understand that using the new Pell Eligibility Calculation rules for the 2010 and future aid years delivered in this bundle, Packaging might produce a different award amount or scheduled disbursement than what was calculated before installation of this bundle.

The Run Pell Percent Used Update process only populates the Total Percent Used field if both the existing Pell Grant award and scheduled disbursements are identical to the new Pell Grant award and scheduled disbursements as calculated by the Run Pell Percent Used Update process.

If there are differences in either the award amount or scheduled disbursements, the student is listed on the Run Pell Percent Used Update process Exception Log as a discrepancy, and the student's Total Percent Used field is not populated.

You should carefully review the results of the Exception Log and determine if the discrepancies are a result of a change in Pell Grant setup or if because of the student's data. If the discrepancies are student-related, you might need to populate student-specific data (e.g., aggregate percent). If the discrepancies are setup-related, review your setup and make adjustments as necessary.
If no adjustments are needed and you are satisfied with the way the student's Pell Grant award is being calculated based on those rules, running the student through any mode of packaging calculates the Total Percent Used field.

The run control parameters for the Run Pell Percent Used Update process are:

- Inherent as part of the run control selection is a SQL statement that selects the population of Pell Grant recipients who have been awarded a Pell Grant for 2010. This is done via a JOIN of STDNT_AWARDS, STDNT_AWRD_DISB, and ITEM_TYPE_FA by using ITEM_TYPE_FA.FEDERAL_ID='PELL' as part of the WHERE clause.

- Population Selection (9.0 only)
  - Equation Engine
  - PS Query: Include the bind record SFA_PKGPSU_BIND when creating the query.
  - External file

- Academic Career (8.9 only): Specify the Academic Careers for which students have been awarded a Pell Grant

- ID Selection (8.9 only):
  - All students
  - One student: You can specify only an ID of a student who has been awarded a Pell Grant.
  - Students in list: You can specify only IDs of students who have been awarded a Pell Grant.

- Aid year = 2010 (read only)

- Academic Institution

Below is an example of the Exception Log:
### A/Y 2010 PELL DIFFERENCE REPORT

**Empid Name**

FAPKPILO286  Stamelrigt, Stacey

<table>
<thead>
<tr>
<th>Pell Methodology</th>
<th>Max Sched Award</th>
<th>Total Percent Scheduled Used</th>
<th>Formula 1 FA Load</th>
<th>Incoming Amount</th>
<th>Incoming Percent Used</th>
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</thead>
<tbody>
<tr>
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<td>2650.00</td>
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<td>0540</td>
<td>0.00 2010 Sum</td>
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</table>

**New and Old Award Amount differ (PELL1 or PELL2)**

Pell awards differ: Incoming Amount > 0.00
and/or Incoming Percent > 0.00

### A/Y 2010 PELL DIFFERENCE REPORT

**Empid Name**

FAPKPILO287  Stairell, Alicia

<table>
<thead>
<tr>
<th>Pell Methodology</th>
<th>Max Sched Award</th>
<th>Total Percent Scheduled Used</th>
<th>Formula 1 FA Load</th>
<th>Incoming Amount</th>
<th>Incoming Percent Used</th>
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<tbody>
<tr>
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<th>Carser</th>
<th>Award</th>
<th>DPlan Term Desc</th>
<th>Term</th>
<th>Disb01 Term Desc</th>
<th>Term</th>
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<td>--</td>
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<td>1800.00 2010 Sum</td>
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<td>0530</td>
<td>0.00 2010 Spr</td>
<td>0540</td>
<td>0.00 2010 Sum</td>
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</tbody>
</table>

**New and Old Award Amount differ (PELL1 or PELL2)**

Pell awards differ: Incoming Amount > 0.00
and/or Incoming Percent > 0.00

Error detected while processing EMPLID = FAPKPILO287
ACAD-CAREER = UGEO
ITEM-TYPE = 9000000000C100
Message Set Number = 14460+ and Message Number = 09185+
Calculated PELL award exceeds aggregate eligibility; award rejected.

### A/Y 2010 PELL DIFFERENCE REPORT

**Empid Name**

FAPKPILO288  Stalace, Alejandro

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**New and Old Award Amount differ (PELL1 or PELL2)**

Pell awards differ: Incoming Amount > 0.00
and/or Incoming Percent > 0.00
Here are some reasons for why the student might be listed on the Exception Log:

- The original Pell Grant award was calculated using an Incoming aggregate award amount. Now, the system no longer uses the reported amount but rather the reported Percent Scheduled Used value.
- The student might have transferred in from a higher- or lower-cost institution that warranted a different Pell Grant award.
- The student is now being awarded with a different Pell Grant formula.
- The student is ineligible for a Pell2.
- The original Pell Grant award was calculated using the "Full-time" Pell Eligibility Calculation rule, but the disbursement spread was dictated by the Disbursement Plan/Split Code tied to the Pell Grant award and not by the Pell Eligibility Calculation rule tied to the Academic Program [Max Scheduled award divided by Pell Number of terms, or Weeks of Instruction divided by (Academic plus Non-Standard) Base Weeks multiplied by award].
- 'Enrollment FA/Current Load' modes did not include Non-Standard Base Weeks in 'Weeks of Instruction in Program's Academic Year
- The student had a Pell Grant award added using Professional Judgment prior to implementing this bundle. The Professional Judgment attribute is ignored when running the Run Pell Percent Used Update process so that the process can accurately calculate a Pell1 or Pell2 based on the remaining eligibility dictated by the Total Percent Used value. If comparing the existing PJ award to the new award results in a difference (award amount or scheduled disbursements), you must remove the Professional Judgment attribute on Pell Grant awards and repackaging the student in order to have the Total Percent used field calculated.
- Award amounts equal, but Scheduled Disbursements Differ

The process returns the following messages to aid in diagnosing the problem:

- New and Old Award Amount differ (Pell1 or Pell2)
- Pell2 not awarded because Pell1 Percent Scheduled Used < 100.0
- Award Amounts equal, but Scheduled Disbursements Differ by Term Amount or Term position.
- Pell1 New and Old award differ: Note: Incoming Amount > 0.00 and/or Incoming Percent > 000.0
- PJ award and new award amount differ – remove PJ attribute and repackaging student
- 9022: PELL -Invalid Title IV eligibility indicator
- 9023: PELL - Not Title IV eligible
- 9026: PELL -Invalid NSLDS level
- 9027: PELL -Student is not an undergraduate, not PELL eligible
- 9033: PELL -Student has Bachelors degree, not PELL eligible
- 9136: Student Base Weeks or term count found to be 0 during PELL calculation
- 9148: PELL award cannot be assigned; there is no matching disbursement for term
- 9149: Not PELL eligible based on combination PELL Index and PELL COA
- 9150: Invalid FA Load Code; Must have a value of 'F', 'T', 'H', 'L' or 'N'
- 9151: Item Type, Term, Aggregate, and/or Plan limits are less than PELL award
- 9152: PELL Index (Federal EFC) exceeds PELL Index maximum
- 9161: Student Enrollment Weeks (or terms) total exceeds Base Weeks (or term count).
- 9185: Calculated PELL award exceeds aggregate eligibility; award rejected.
9214: Not Pell Eligible: The Student is a Graduate Student
9234: For 2010, Pell Calculation Start, Midterm and Census date entries are invalid
9236: Not eligible for 2nd Pell award since 1st Pell award was not awarded at 100%
9237: Not eligible for 2nd Pell award; disbursement terms overlap with 1st Pell award
9405: PELL award reduced by Aggregate limits
9420: Manual Pell award reduced; For 2010, manual Pell cannot exceed eligibility

If you receive more exceptions that anticipated, you should check all new and revised setup to ensure they are correct.

If the Update Pell Percent Used process encounters a student with a system error, the student is not processed and is written to the Exception Log as a system error. Examples of system errors include missing award period data, award amount present but no disbursements present, bad FA Term record, etc.

3.3 Step 3 - Repackage Pell Grant for Discrepancies

Once you have reviewed all the exceptions from the Run Pell Percent Used Update process log and are satisfied with the new award amount and scheduled disbursements, you can repackage the exception students using either manual packaging, auto packaging, mass packaging, repackaging (online or batch), or Professional Judgment.

3.3.1 Repackaging Considerations for Release 8.9

In 8.9, you can invoke the Pell Grant-specific attribute on the packaging plan setup to isolate and repack a Pell Grant award. However, you are not be able to specify both a Pell1 and a Pell2 item type on this plan. If you must repack 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.

3.3.2 Repackaging Considerations for Release 9.0

In 9.0, if you …

1. have existing awards with a Disbursement Plan/Split Code that includes only Academic terms, and

2. now 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 Grant 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 Grant Item Types that require a Disbursement Plan/Split Code change.

If your institution does not intend to award Pell Grants in the Leading or Trailing Summer terms – in other words, no change in Disbursement Plan/Split Codes – then you can use the Repackaging Rule Validate Item Type for Pell Grant item types.
4. Other Things to Know

Here are some additional pointers regarding Year Round Pell:

- **Pell Eligibility Calculation:** Because neither the Aid Processing Rule Set nor FA Installation setup is keyed by Aid year, Pell Eligibility Calculations can span across multiple Aid years. Because of the 2010 changes made to this area, you should consider creating unique 2010 Aid Processing Rule Sets that differ from 2009 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. Whether or not this is allowed is still under negotiation at the Department of Education when the Year Round Pell feature was developed. Oracle will be monitoring this question for possible changes to this feature.

- **Pell 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.

- The Update Pell Percent Used process considers students who have existing Pell Grant awards (non-zero amount), but you might have students that are Pell Grant eligible but (a) have a zero Pell Grant award (award was canceled or declined), or (b) have not yet been packaged a Pell Grant award. You can package (or repackage) these students in case they are Pell Grant eligible using the enhanced Pell Eligibility Calculation rules. The following SQL statements identify these populations for you:

  - **Students with Zero Pell Grant Awards**
    ```sql
    SELECT A.EMPLID, A.INSTITUTION
    FROM PS_STDNT_AWARDS A, PS_ITEM_TYPE_FA B
    WHERE A.AID_YEAR = '2010'
    AND A.OFFER_AMOUNT = 0
    AND A.AID_YEAR = B.AID_YEAR
    AND A.ITEM_TYPE = B.ITEM_TYPE
    AND B.SETID = A.SETID
    AND B.FEDERAL_ID = 'PELL'
    AND B.EFFDT =
      (SELECT MAX(B_ED.EFFDT) FROM PS_ITEM_TYPE_FA B_ED
       WHERE B_SETID = B_ED.SETID
       AND BITEM_TYPE = B_ED.ITEM_TYPE
       AND B.AID_YEAR = B_ED.AID_YEAR
       AND B_ED.EFFDT <= SYSDATE)
    ORDER BY 1, 2
    ```

  - **Pell Grant Eligible but no Pell Grant Award**

  Query SQL:
SELECT A.EMPLID, A.INSTITUTION
FROM PS_ISIR_CONTROL A
WHERE A.EFFDT =
    (SELECT MAX(A_ED.EFFDT) FROM PS_ISIR_CONTROL A_ED
     WHERE A.EMPLID = A_ED.EMPLID
     AND A.INSTITUTION = A_ED.INSTITUTION
     AND A.AID_YEAR = A_ED.AID_YEAR
     AND A_ED.EFFDT <= SYSDATE)
AND A.EFFSEQ =
    (SELECT MAX(A_ES.EFFSEQ) FROM PS_ISIR_CONTROL A_ES
     WHERE A.EMPLID = A_ES.EMPLID
     AND A.INSTITUTION = A_ES.INSTITUTION
     AND A.AID_YEAR = A_ES.AID_YEAR
     AND A.EFFDT = A_ES.EFFDT)
AND A.AID_YEAR = '2010'
AND A.PELL_ELIGIBILITY = 'Y'
AND NOT EXISTS (SELECT 'X'
FROM PS_STDNT_AWARDS B, PS_ITEM_TYPE_FA C
WHERE A.EMPLID = B.EMPLID
AND A.INSTITUTION = B.INSTITUTION
AND A.AID_YEAR = B.AID_YEAR
AND B.AID_YEAR = C.AID_YEAR
AND B.ITEM_TYPE = C.ITEM_TYPE
AND C.SETID = B.SETID
AND C.EFFDT =
    (SELECT MAX(C_ED.EFFDT) FROM PS_ITEM_TYPE_FA C_ED
     WHERE C.SETID = C_ED.SETID
     AND C.ITEM_TYPE = C_ED.ITEM_TYPE
     AND C.AID_YEAR = C_ED.AID_YEAR
     AND C_ED.EFFDT <= SYSDATE)
AND C.FEDERAL_ID = 'PELL')
ORDER BY 1, 2