

# SCHEDULED PELL: MAX, MIN, AND IN- BETWEEN

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Scheduled Pell Grant Award Determination

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**BETTER  
FAFSA<sup>®</sup>**  
**BETTER FUTURE**

**Federal Student Aid**

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# BETTER FAFSA® BETTER FUTURE SERIES

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- ✓ 6/6: Better FAFSA® Better Future Overview and Timeline
- ✓ 6/8: Protecting Federal Tax Information (FTI) at Your Institution
- ✓ 6/13: ISIR vs. ISIR
- ✓ 6/15: Professional Judgment, Dependency Status, and Verification
- ✓ 6/20: Q&A Session 1
- ✓ 6/22: Student Aid Index Part 1
- ✓ 6/27: Student Aid Index Part 2
- 7/6: Scheduled Pell: Max, Min, and In-Between
- 7/11: The FAA's Role in FAFSA Simplification
- 7/13: Q&A Session 2
- Summer: FAFSA Demonstration

# AGENDA

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1. Pell Grant Eligibility
2. Maximum Scheduled Pell Grant
3. Calculated Scheduled Pell Grant
4. Minimum Scheduled Pell Grant
5. Limitations and Special Rules
6. Case Studies
7. Special Situations
8. Annual Awards and Enrollment Intensity
9. Resources

# PELL GRANT ELIGIBILITY

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# OVERVIEW

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- The Scheduled Pell Grant is the student's maximum Pell Grant eligibility for full-time, full-year enrollment.
- The Act modified the Scheduled Pell Grant determination process.
- FAFSA<sup>®</sup> data will be used to determine a Scheduled Pell Grant award in one of three ways:
  1. Max Pell
  2. Calculated Scheduled Pell
  3. Min Pell

# CHANGES TO PELL ELIGIBILITY

- Beginning with the 2024–25 award year, the Department will no longer publish a Federal Pell Grant Payment and Disbursement Schedule.
- Instead, Scheduled Pell Grant Eligibility will be determined in one of three ways:

1

## Maximum Pell Grant

Non-tax filers; or

Tax filers, based on:

- AGI
- Poverty guidelines
- Family size

2

## Calculated Scheduled Pell Grant

- Maximum Published Scheduled Pell Grant *minus* Calculated SAI

3

## Minimum Pell Grant

Based on:

- AGI
- Poverty guidelines
- Family size

# OTHER CHANGES

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- Pell Grant Annual Awards and disbursement amounts will now be calculated using “Enrollment Intensity” (a percentage value) rather than enrollment status (e.g., half-time or full-time).
- The Act eliminated the requirement for a student to be enrolled half time to receive more than one full Scheduled Award during an award year. (year-round Pell)
- More information on these changes will be provided in the future.

# MAXIMUM SCHEDULED PELL GRANT

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# MAX PELL – DEPENDENT STUDENTS

## CRITERIA FOR MAXIMUM SCHEDULED PELL GRANT

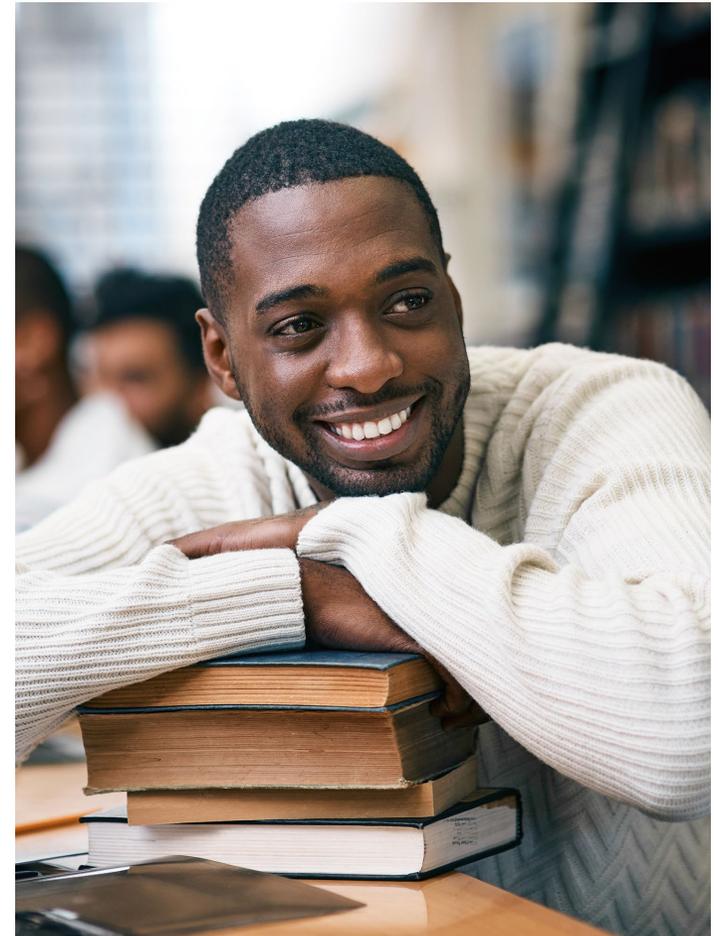
Parent not required to file federal income tax return

OR

Single parent with AGI  $> 0$  and  $\leq 225\%$  of poverty guideline for family size and state of residence

OR

Parent NOT single parent and has AGI  $> 0$  and  $\leq 175\%$  of poverty guideline for family size and state of residence



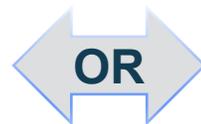
# MAX PELL – INDEPENDENT STUDENTS

## CRITERIA FOR MAXIMUM SCHEDULED PELL GRANT

Student (and spouse) not required to file federal income tax return



Student is single parent with AGI  $> 0$  and  $\leq 225\%$  of poverty guideline for family size and state of residence



Student NOT single parent and has AGI  $> 0$  and  $\leq 175\%$  of poverty guideline for family size and state of residence

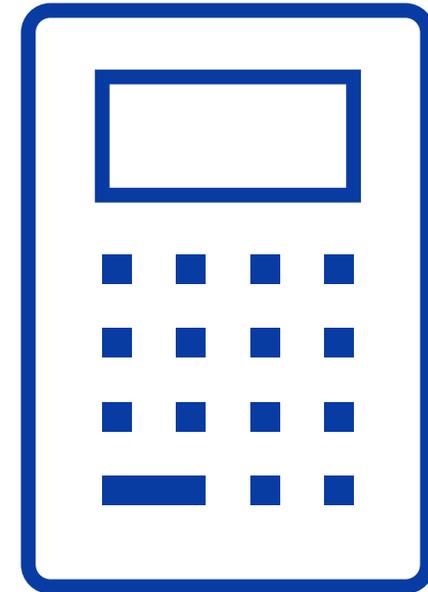


# MAX PELL – STUDENT AID INDEX

## FOR MAX PELL GRANT ELIGIBLE STUDENTS

Students eligible for Max Pell will be assigned an SAI in one of two ways:

- Non-tax filers:
  - SAI = -1500 if not required to file federal tax return
- Tax filers:
  - SAI = 0 **or** the calculated SAI, whichever is less, but not lower than -1500



# CALCULATED SCHEDULED PELL GRANT

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# CALCULATED SCHEDULED PELL GRANT

- Students not eligible for an automatic Max Pell Grant may be eligible for a Calculated Scheduled Pell Grant
- Published Maximum Pell Grant *minus* Student Aid Index (SAI) = Calculated Scheduled Pell Grant, rounded to the nearest \$5

## Example:

- Max Pell = \$7,850 (just an example – actual number not yet published)
- SAI = 1,002
- Calculated Scheduled Pell =  $\$7,850 - 1,002 = \$6,848 \rightarrow$  Rounded to \$6,850

# MINIMUM SCHEDULED PELL GRANT

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# MIN PELL – DEPENDENT STUDENTS

## CRITERIA FOR MINIMUM SCHEDULED PELL GRANT



Student's parent is a single parent with an AGI  $\leq$  325% of the poverty guideline for family size and state of residence



Student's parent is **NOT** a single parent and has AGI  $\leq$  275% of the poverty guideline for family size and state of residence

# MIN PELL – INDEPENDENT STUDENTS

## CRITERIA FOR MINIMUM SCHEDULED PELL GRANT



Student is a single parent, and the AGI is less than or equal to 400% of the poverty guideline for family size and state of residence



Student is a parent and is **NOT** a single parent, and has AGI  $\leq$  350% of the poverty guideline for family size and state of residence



Student is not a parent, and the student's (and spouse's if applicable) AGI is  $\leq$  275% of the poverty guideline for family size and state of residence

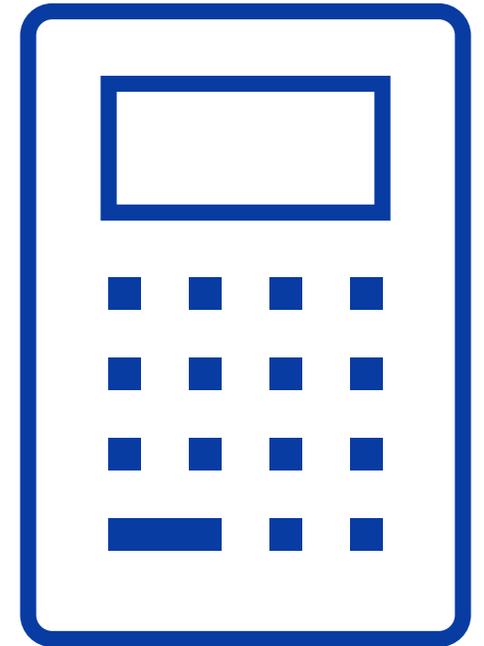
# LIMITATIONS

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# LIMITATIONS AND SPECIAL RULES

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- Published Max and Min Pell amounts will always be in \$5 increments.
- Calculated Scheduled Pell amounts must be rounded to the nearest \$5.
- Scheduled Pell cannot exceed COA. If Scheduled Pell > COA, award Scheduled Pell = COA and truncate cents, if applicable. Do not round.
- If Calculated Scheduled Pell < Published Min Pell, the student is not eligible for a Calculated Scheduled Pell. However, they may be eligible for a Min Pell based on AGI, household size, and poverty thresholds.



# CASE STUDIES

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# MAX PELL CASE

## STUDENT A

- Valid SAI: -1500
- COA: \$38,000
- Pell Eligible: Yes
- Max Pell: Yes
- Is COA > Max Pell: Yes
- Scheduled Pell = Max Pell (\$7,850)

NOTE: *For all scenarios in this presentation, we will use a fictitious maximum Pell Grant of \$7850 and a fictitious minimum Pell Grant of \$785.*



# MAX PELL

## STUDENT B

- Valid SAI: -367
- COA: \$35,000
- Pell Eligibility Flag: Yes
- Max Pell: Yes
- Is COA > Max Pell: Yes
- Scheduled Pell = Max Pell (\$7,850)

*NOTE: For all scenarios in this presentation, we will use a fictitious maximum Pell Grant of \$7850 and a fictitious minimum Pell Grant of \$785.*



# MAX PELL

## STUDENT C

- Valid SAI: 0
- COA: \$7,354.50
- Pell Eligibility Flag: Yes
- Max Pell: Yes
- Is COA > Max Pell: No
- Scheduled Pell = COA → \$7,354

NOTE: *For all scenarios in this presentation, we will use a fictitious maximum Pell Grant of \$7850 and a fictitious minimum Pell Grant of \$785.*



# MIN PELL

## STUDENT D

- Valid SAI: 7,100
- COA: \$1,200
- Pell Eligibility Flag: Yes
- Max Pell: No
- Min Pell: Yes
- Is COA > Min Pell: Yes
- Scheduled Pell = Min Pell → \$785

*NOTE: For all scenarios in this presentation, we will use a fictitious maximum Pell Grant of \$7850 and a fictitious minimum Pell Grant of \$785.*



# MIN PELL

## STUDENT E

- Valid SAI: 8,000
- COA: \$15,000
- Pell Eligibility Flag: Yes
- Max Pell: No
- Min Pell: Yes
- Is COA > Min Pell: Yes
- Scheduled Pell = Min Pell → \$785

*NOTE: For all scenarios in this presentation, we will use a fictitious maximum Pell Grant of \$7850 and a fictitious minimum Pell Grant of \$785.*



# IN-BETWEEN PELL

## STUDENT F

- Valid SAI: 1,002
- COA: \$10,000
- Pell Eligibility Flag: Yes
- Max Pell: No
- Min Pell: No
- Calculated Pell =  $\$7,850 - 1,002 = \$6,848 \rightarrow$  Round to \$6,850
- Is COA > Calculated Pell: Yes
- Scheduled Pell = \$6,850

NOTE: For all scenarios in this presentation, we will use a fictitious maximum Pell Grant of \$7850.



# IN-BETWEEN PELL

## STUDENT G

- Valid SAI: 237
- COA: \$7,000
- Pell Eligibility Flag: Yes
- Max Pell: No
- Min Pell: No
- Calculated Pell =  $\$7,850 - 237 = \$7,613 \rightarrow$  Round to \$7,615
- Is COA > Calculated Pell: No
- Scheduled Pell = COA  $\rightarrow$  \$7,000

NOTE: *For all scenarios in this presentation, we will use a fictitious maximum Pell Grant of \$7850.*



# ONE MORE CASE

## STUDENT H

- Valid SAI: 500
- COA: \$10,000
- Pell Eligibility Flag: No
- Max Pell: Doesn't matter
- Min Pell: Doesn't matter
- Scheduled Pell = None

NOTE: *For all scenarios in this presentation, we will use a fictitious maximum Pell Grant of \$7850 and a fictitious minimum Pell Grant of \$785.*



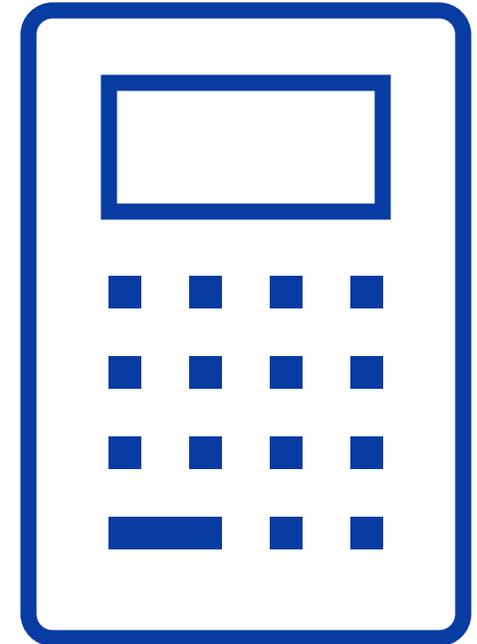
# SPECIAL CASES

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# CHANGES TO IASG AND CFH PROGRAMS

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- There are eligibility changes to the Iraq and Afghanistan Service Grant (IASG) and Children of Fallen Heroes Award (CFH).
- All students who meet these new eligibility criteria will be awarded a Max Pell, regardless of calculated SAI.
- There will no longer be a separate funded "Iraq and Afghanistan Service Grant" program, although schools will still use "IASG" and "CFH" indicators in FSA systems when a student meets those conditions for a Max Pell.
- The remainder of the student's aid package should be based on the calculated SAI.



# IASG AND CFH ELIGIBILITY CRITERIA

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- No longer DOD match
- Initial ISIR will come in without the IASG or CFH indicators set. School will need to evaluate and set the indicator in the FAFSA Partner Portal.
- New generated ISIR will then result in a Pell-eligible flag.
- Some previously eligible recipients who don't meet new criteria will be grandfathered.
- More info and operational guidance forthcoming for these programs.

# IASG PELL CASE

## STUDENT ALPHA

- Valid SAI: 2,000
- COA: \$25,000
- Pell Eligibility Flag: Yes
- IASG Flag: Yes
- Scheduled Pell = Max Pell → \$7,850

NOTE: *For all scenarios in this presentation, we will use a fictitious maximum Pell Grant of \$7850 and a fictitious minimum Pell Grant of \$785.*



# CFH PELL CASE

## STUDENT BETA

- Valid SAI: 70,000
- COA: \$25,000
- CFH Flag: Yes
- Pell Eligibility Flag: Yes
- Scheduled Pell = Max Pell → \$7,850

*NOTE: For all scenarios in this presentation, we will use a fictitious maximum Pell Grant of \$7850 and a fictitious minimum Pell Grant of \$785.*

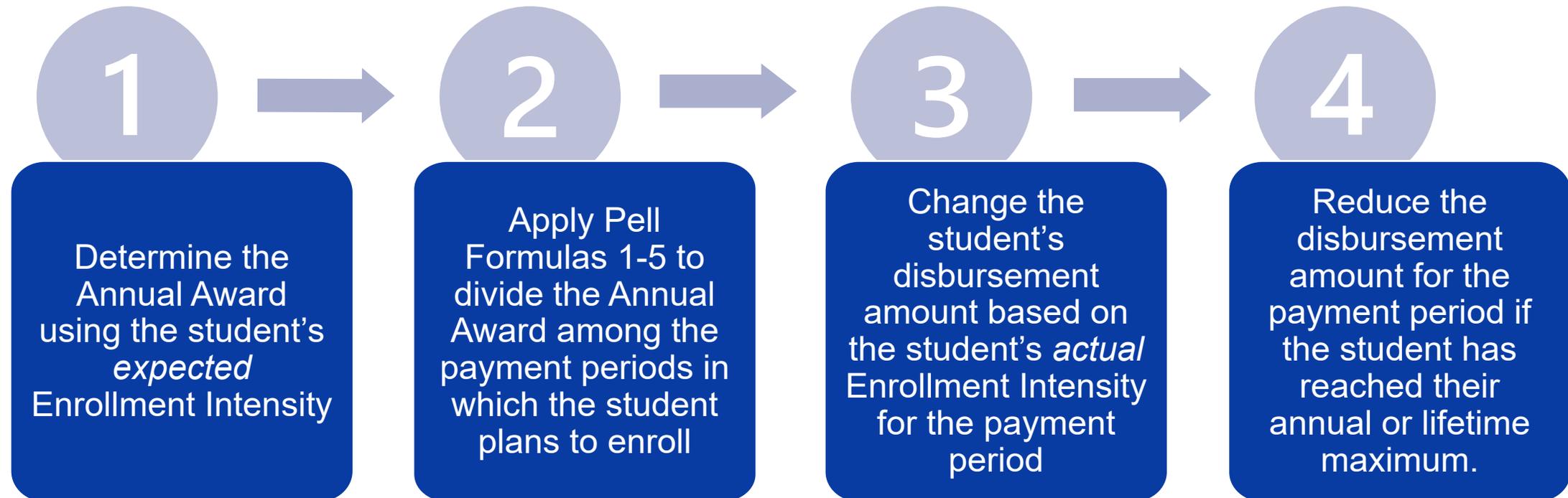


# ANNUAL AWARDS AND ENROLLMENT INTENSITY

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# ANNUAL AWARDS AND DISBURSEMENTS

Once a Scheduled Pell Grant award is determined, schools will follow these steps to calculate a student's final Pell Grant Annual Award and disbursement amounts:



# ENROLLMENT INTENSITY

## STANDARD TERM PROGRAMS

- Number of enrolled credits ÷ Credits required for full-time enrollment
- Round to nearest whole percent using standard rounding rules
  - $7 \div 12 = 0.58333 \rightarrow 58\%$

Enrolled Credit Hours	Enrollment Category	Enrollment Intensity
12 (or more)	Full-Time	100%
11	Three-Quarter Time	92%
10		83%
9		75%
8	Half-Time	67%
7		58%
6		50%
5	Less-than-Half-Time	42%
4		33%
3		25%
2		17%
1		8%

# ENROLLMENT INTENSITY – CASE STUDY

## STUDENT DELTA

- Scheduled Pell = Max Pell (\$7,850)
- Standard 2-term academic calendar (Fall and Spring)
- Full-time Enrollment = 12 Credit Hours

### Semester Disbursement Schedule

	Fall	Spring
<b>Credit Hours</b>	7	11
<b>Enrollment Intensity</b>	$7 \div 12 = 0.58333 \rightarrow 58\%$	$11 \div 12 = 0.9167 \rightarrow 92\%$
<b>Annual Pell Calculation</b>	$(\$7,850 * 58\%) \div 2$	$(\$7,850 * 92\%) \div 2$
<b>Annual Pell Award</b>	\$2,277	\$3,611

NOTE: For all scenarios in this presentation, we will use a fictitious maximum Pell Grant of \$7850 and a fictitious minimum Pell Grant of \$785.

# RESOURCES

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- [2024–25 Draft Student Aid Index \(SAI\) and Pell Grant Eligibility Guide](#)
- [The FAFSA Simplification Act](#)
- [2022 Federal Student Aid Training Conference: GS#5. Federal Update: FAFSA® Simplification](#)

# KNOWLEDGE CENTER

## [FAFSA Simplification Information](#)

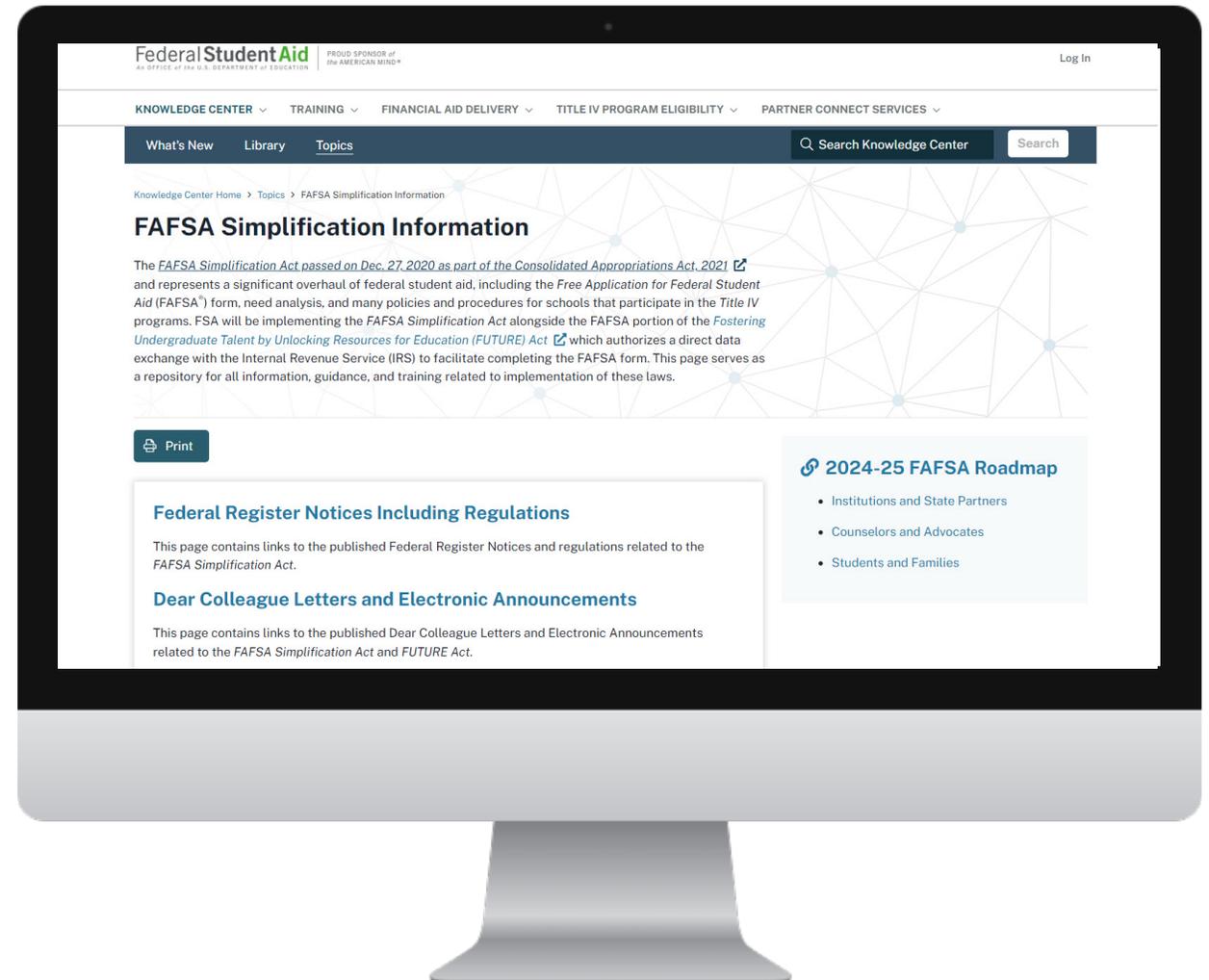
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# THE FAA'S ROLE IN FAFSA® SIMPLIFICATION

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**THURSDAY, JULY 11**

Join us as we discuss the FAA's role in implementing the FAFSA Simplification Act including working with partners, updating policies, procedures, and operations to align with all the changes, and assisting the aid applicant.

For a complete list of upcoming webinars, visit the [FSA Training Center](#).



# FEEDBACK SURVEY



<https://www.surveymonkey.com/r/WWPGMIB>

*Survey open until July 6, 2024*

# QUESTIONS?

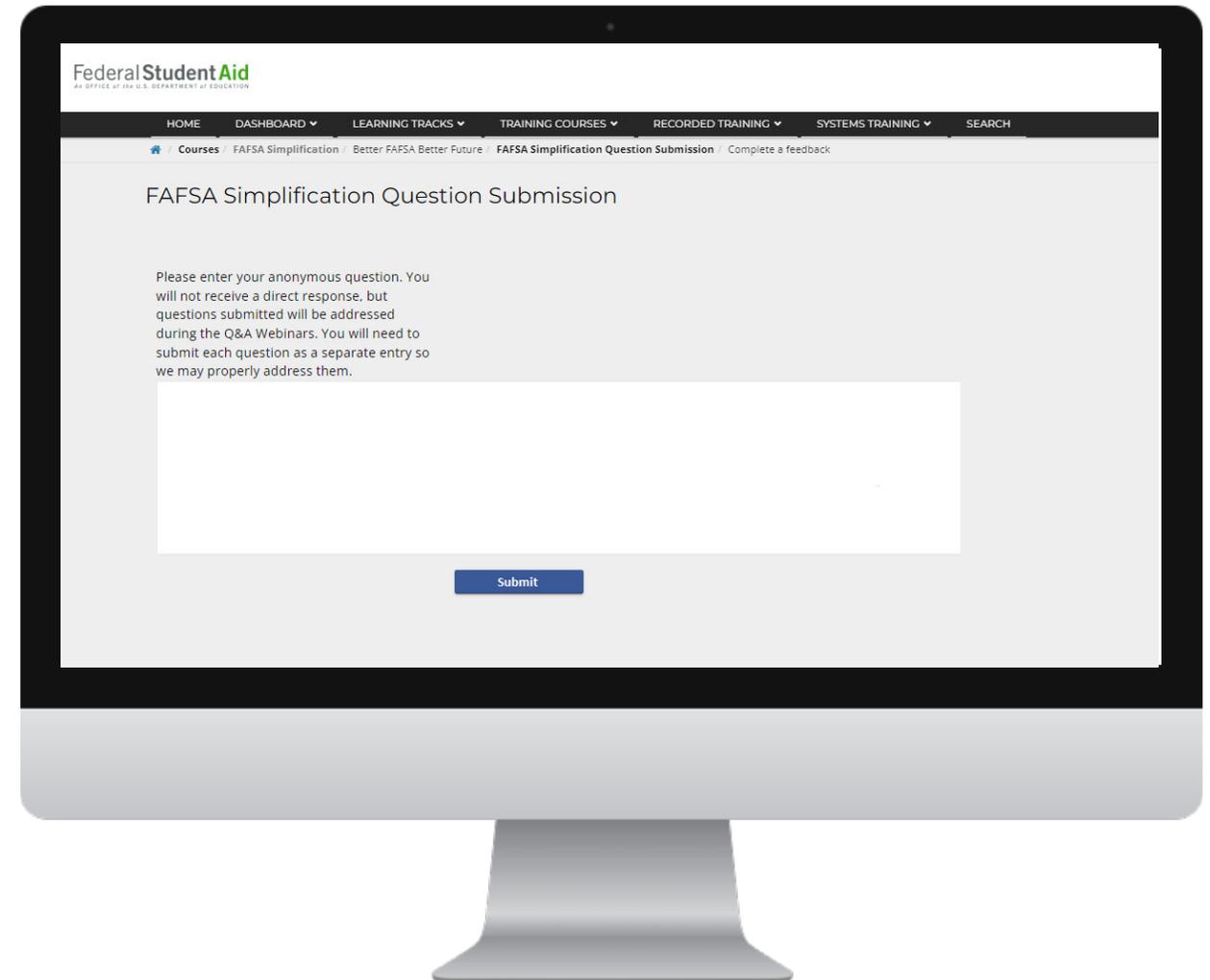
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# HAVE MORE QUESTIONS?

You may submit questions not answered during today's webinar on the FSA Training Center's [FAFSA Simplification Training and Resources page](#).

We will address as many submitted questions as possible during our dedicated Q&A webinars on June 20 and July 13.



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