

SUMMER TERMS

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Summer Term Setup

- Must know beginning and end dates of summer enrollment period
- If mini-sessions:
 - May choose to combine mini-sessions into a single term or treat each mini-session as an individual term
 - Must be consistent for all students in a program

Summer Enrollment Status

- Undergraduate regulatory minimum FT = 12 credits per term
 - 24 semester & 36 quarter credits per academic year
- If registrar defines summer FT at < 12 credits per term, FAO may use regulatory minimum
- If FAO chooses to use lower enrollment for FT
 - Must calculate reduced FT enrollment standard for non-standard term
 - Calculated FT standard must be used for all FSA purposes

Summer Enrollment Status

- If summer mini-sessions are combined into a single term, enrollment status is based on enrollment in all mini-sessions in the term
 - Student is not required to be enrolled in all mini-sessions
 - If enrolled in 1 mini-session, considered enrolled for the entire summer term
- If summer mini-sessions are not combined into a single term, enrollment status is based on enrollment in each mini-sessions

Cross-over Payment Periods

- Summer terms are often cross-over periods
 - When a payment period falls into two award years
 - begins before July 1 and ends on or after July 1

Handling Cross-over Periods

- A School's policy may:
 - Designate the cross-over period as always part of the prior award year
 - Designate the cross-over period as always part of the upcoming award year
 - State that the award year designation will be made on a student-by-student basis
 - Address specific circumstances

Cross-over Periods: Pell Grant

- Can make a payment out of either year with a valid ISIR for that award year
 - Unless more than 6 months is in a given award year
- Grant eligibility might have been exhausted prior to summer term
 - Determine if any remaining eligibility for that award year
 - If none remains decide to use next award year if in best interest of student and policy allows

Cross-over Periods: Campus-based

- Award may be made based on an award year EFC that is different from:
 - The EFC used to award summer Pell
 - The award year allocation from which campus-based funds are drawn
- A student's eligibility for campus-based funds & FFEL or DL funds for the same enrollment period must be based on the same EFC

Campus-based Summer Policy Restrictions

- A school may not have a summer packaging policy that ignores any of the campus-based programs or specifies that campus-based funds will not be awarded for the summer
- When packaging SEOG for the summer, first priority must be given to student with the lowest EFCs and summer Pell grant eligibility, regardless of the award year used to pay summer Pell

Cross-over Periods: FFEL & DL

- A school may use either prior or upcoming award year's ISIR for a cross-over loan
 - But a student's eligibility for campus-based & loan funds for the same enrollment period must be based on the same award year's ISIR

Summer EFCs

- The EFC used to award the campus-based, and FFEL and DL funds must reflect the number of months in which the student actually is enrolled in the award period or loan period
 - Alternate EFCs on ISIR
 - If not even number of months may round up or down as long as don't exceed 12-month EFC in 12-month period

Calculating Summer COA

- The same COA must be used for loan and campus-based funds
- COA must only reflect expenses related to the period student actually attends
- If mini-session are combined, a single COA is calculated, but it includes only costs for the mini-sessions in which the student enroll
- If mini-sessions are not combined, a separate COA is calculated for each mini-session the student attends

Combined Mini-Sessions

- If a term-based school offers a series of mini-sessions that overlap two award years they can be combined and treated as one term
 - Not required to combine
- When combined into a single term (i.e. payment period), the weeks of instructional time in the term are the weeks from the beginning of the first mini-session to the date the last mini-session ends
 - Enrollment status must be calculated based on the total number of credits the student is projected to take for all sessions

Combined Mini-Sessions

Semester-Sixteen Weeks			
Module I	Module II	Module III	Module IV
4 Weeks	4 Weeks	4 Weeks	4 Weeks
Module I		Module II	
8 Weeks		8 Weeks	

Combined Mini-Sessions Enrollment Status

- Project enrollment status for a student on the basis of the credits the student has:
 - pre-registered or registered to take for all sessions,
 - committed to take for all sessions in an academic plan or enrollment contract, or
 - committed to take for all sessions in some other document

Combined Mini-Sessions

- A student cannot be paid more than the amount for one payment period for completing any combination of the mini-sessions
- A student does not begin attendance in all of the mini-sessions, recalculation of prior disbursements is required for Pell and campus-based aid

Summer Terms and SAYs

- Summer terms are generally not considered to be part of the SAY, but for loan limit purposes they may be treated as “trailers” or “headers” to the SAY
- The annual loan limit applies to the SAY, plus the summer trailer or header
 - Once the calendar period associated with all of the terms in the SAY and the summer header or trailer (if any) has elapsed, a student regains eligibility for a new annual loan limit

Summer Terms and SAYs

- School has the option to establish a policy that designates its summer term as either a trailer or header to the SAY for all students
- May also choose to make different designations for different educational programs, or for different students, as long as you ensure that there is no overlap in academic years

Standard Terms and BBAYs

- For standard term, credit hour programs offered in a traditional academic year calendar, a BBAY must include the same number of terms as the SAY
- Any mini-sessions (summer or otherwise) that run consecutively within a term **must** be combined and treated as a single term

Standard Terms and BBAYs

- BBAY must meet the minimum Title IV requirements for an academic year
 - BBAY that includes a summer term may include fewer than 30 weeks of instructional time or fewer credit hours than the minimum number required for an SAY
 - Because a summer term is recognized as academically equivalent to a standard term when used as one of the terms in a BBAY

Combined Mini-sessions FWS

- FWS student attending any of the mini-sessions may earn FWS wages at any time throughout that term
 - May apply those earnings towards the student's financial need for the mini-session(s) attended and/or the next period of enrollment
 - Must base the student's financial need for attending the summer term on the period when the student is actually enrolled in the mini-sessions
 - The amount of FWS wages a student may earn at any given point in the term does not depend on whether or not the student is enrolled in a mini-session at that point in time

Disbursement Rules

Terms Made Up of Modules

- When a student is attending a modular program, but won't attend the first module, the date when classes begin for making disbursements is the starting date of the first module that the student will actually attend
- The earliest the school can pay a student who is scheduled to begin attendance in the second of three 5-week modules that make up the payment period, is 10 days before the first day of the second module
 - Or 30 days after the second module begins, if the student is a first-time, first-year borrower

Delivering Funds to Students

- For summer mini-sessions
 - If the mini-session has fewer than 30 days, a school may disburse funds to a 1st-time borrower on the last day of the mini-session if the student:
 - Attends no other mini-session in the combined term; or
 - Will not attend the next mini-session in a series of non-combined mini-sessions

FFEL and DL Disbursements

- If school is subject to multiple disbursement rules, loan must be disbursed in 2 equal disbursements
- The second disbursement for a combined term must be scheduled no earlier than the calendar mid-point between the first and last scheduled days of classes in the loan period
 - If the student enrolls in only one mini-session, the student may receive the second disbursement at the calendar mid-point even though the midpoint falls after the student completes the mini-session
 - If a student enrolls for only one mini-session that begins after the mid-point, the loan's disbursement should be scheduled for the beginning of the mini-session the student attends and both disbursements may be made at the same time

Pell & Campus-based Disbursements

- For combined mini-sessions, funds may be disbursed in a single disbursement
- For combined mini-sessions, funds for the entire payment period may be paid:
 - During the first mini-session based on the student's projected enrollment for the term;
or
 - After the student has begun attendance in all scheduled classes

Enrollment Status Changes

- Pell grant must be recalculated if student does not begin attendance in all registered classes and enrollment status changes
 - For combined mini-sessions, a school may make this determination when the student ceases to attend scheduled classes or at the beginning of the final mini-session
- For enrollment status changes that occur after the student begun attendance in all classes, a school is not required to recalculate a student's Pell award unless it is the school's policy

Withdrawal

- To calculate the return, the school must establish the period of enrollment for which the student was charged
 - If a school charges for the entire summer up-front, the period for which the student has been charged starts with the first mini-session the student actually begins enrollment
 - If a school charges for each mini-term separately, the period for which the student has been charged is the individual mini-session

Withdrawal

- The school must also establish the student's withdrawal date
- For the combined summer mini-sessions, as student is not considered to have withdrawn if s/he completed at least one course during one session
 - If a student enrolls but does not complete a course in an early mini-session, the school may wait until the beginning of the final mini-session to determine whether the student has withdrawn

Withdrawal

Standard-term Programs w/ Modules

- Program characteristics:
 - Some or all of the courses in the program are offered in modules, i.e., sequentially, rather than concurrently
 - The modules may overlap
 - The institution has chosen to have two or more modules make up the standard term (semester, trimester, or quarter)
 - For example, in each 15-week semester, courses are offered in three five-week modules
 - Students can begin attendance at the beginning of any one of the modules in a term
 - Students may skip one or more modules within the term
 - Students enroll up-front for courses in all of the modules they plan to attend for the entire term; however, some students may subsequently add or drop a course in a later module

Withdrawal

Standard-term Programs w/ Modules

- School must determine whether R2T4 calculation is required
 - If so, must also determine the length of the payment period
 - Among the variables a school must consider are whether the student has completed at least one course and if not, whether the student intends to return for another module within the term

Withdrawal

- If a student withdraws from an institution after completing at least one course in one module within the term, the student is not considered to have withdrawn
Return of Title IV aid does not apply
 - recalculation may apply

Withdrawal

Standard-term Programs w/ Modules

- If a student withdraws from the institution before completing at least one course in one module, the student is considered to have withdrawn and the requirements for the Return of Title IV aid apply
 - unless the institution has obtained a confirmation from the student that the student intends to continue in the program by attending a module later in the term
- For confirmation, a school may not rely upon the student's previous registration
 - Confirmation from student must be obtained at the time of or after the student's withdrawal

Withdrawal

- If a student indicates an intention to continue in a subsequent module in the term but does not return for that module, the student would be considered to have withdrawn and withdrawal date would be the withdrawal date that would have applied if the student had not indicated an intention to attend a module later in the term
- Date of Determination is the date the institution determined the student did not return in subsequent module

Withdrawal

- When a student withdraws without completing at least one course in one module, the number of completed days begins on the first day of the first module the student attended in the term, and includes only the student's actual days of attendance
- The payment period includes all of the modules the student was scheduled to attend in the term