

Basics of Determining Academic Calendars

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Agenda

- Types of academic calendars
- Academic calendars and Pell Grants
- Academic calendars and Direct Loans (DL)
 - Scheduled Academic Year (SAY)
 - Borrower-Based Academic Year (BBAY)
- Standard term considerations
- Nonstandard term considerations
- Non-term considerations



Academic Calendar Types

Title IV aid is awarded based on the type of calendar in which a program is offered. There are three types:

- Standard term
- Nonstandard term
- Non-term
 - Clock-hour programs
 - Credit-hour programs

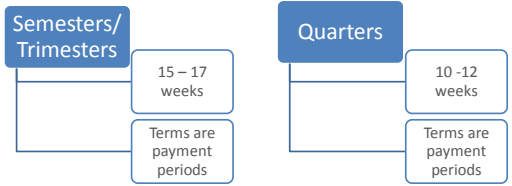


Minimum Academic Year Definitions

	Minimum number of weeks of instruction	Minimum number of hours
Programs that measure progress in clock hours	26	900
Programs that measure progress in semester or <i>trimester</i> credit hours	30	24
Programs that measure progress in quarter credit hours	30	36

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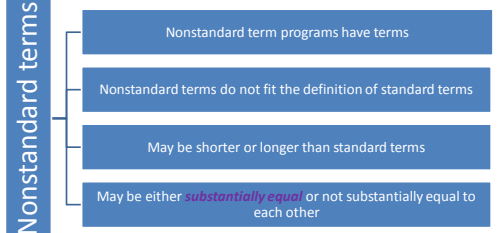
Standard terms



For terms to remain standard, undergraduate full-time enrollment must be defined as a minimum of 12 credit hours

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Nonstandard terms



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Nonstandard Terms

- Awarding a type of credit not associated with the corresponding type of term will make terms nonstandard
- For most Title IV programs, the nonstandard term is the payment period...
 - ...except in the Direct Loan Program when nonstandard terms are *not substantially equal and at least nine weeks in length (SE9W)*, in which case payment periods work like in non-term programs



Non-term

- All clock-hour programs are non-term for Title IV purposes
- Non-term programs may also be credit-hour
- There are no terms to use as payment periods
- If a program has any terms that *overlap*, it is considered non-term for Title IV purposes



Non-term

- Payment periods are determined by student completing half the hours *and* half the weeks of instruction in program's defined Title IV academic year
 - Programs shorter than one academic year
 - If greater than half of an academic year, divide into two equal payment periods
 - If half an academic year or shorter, one payment period
 - Programs longer than one academic year but shorter than two
 - If remainder is half an academic year or shorter, remainder is final payment period
 - If greater than half an academic year, remainder is divided into two equal payment periods



Academic Calendars and Pell Grants

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Academic Calendars and Pell Grants

Pell Grant Formulas

Standard terms	Nonstandard terms	Non-term
<ul style="list-style-type: none"> Primarily use Formula 1 12 credits is always full-time 	<ul style="list-style-type: none"> Must use Formula 3 Enrollment status determined by formula 	<ul style="list-style-type: none"> Must use Formula 4 Awards always taken from <i>full-time</i> Pell schedule
<ul style="list-style-type: none"> Small number of schools use Formula 2 		
<ul style="list-style-type: none"> All term-based programs <i>may</i> use Formula 3 		

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Academic Calendars and Direct Loans

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Academic Calendars and Direct Loans

- The academic year is the period of time to which the annual Direct Loan limit applies
 - Scheduled Academic Year (SAY) or Borrower-Based Academic Year (BBAY)
- The academic calendar may or may not be same as the defined academic year for Title IV purposes

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Scheduled Academic Year (SAY)

- Standard term programs may use SAY
 - SE9W nonstandard terms may also use SAY
- School's calendar establishes the "year" for Direct Loans
- SAY includes normal terms that are in defined academic year and also accounts for summer term
 - Summer is categorized as header or trailer

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Borrower-Based Academic Year (BBAY) 1

- BBAY1 is for credit-hour programs using a Scheduled Academic Year (standard terms or SE9W terms)
- Standard-term or SE9W nonstandard-term programs with an SAY may also use BBAY1
- Programs may combine SAYs and BBAY1s

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BBAY2 and BBAY3

- BBAY2 must be used for credit-hour programs that do not have a Scheduled Academic Year but are using standard terms or SE9W terms
- Non-term credit- and clock-hour programs must use BBAY3
- Nonstandard-term programs must use BBAY3 if
 - Terms are not SE9W or
 - Standard terms and nonstandard terms are mixed in same program without an SAY

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Standard Term Considerations

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Advantages of Standard Terms

- Use of Pell Grant Formula 1
- Consistency in disbursement rules across programs
 - Payment period is always the term for all Title IV programs (except FWS)
- Flexibility with SAY and BBAY1
 - Schools may originate single-term loans
- Treatment of summer terms
 - Both Pell Grant and Direct Loan programs allow for treatment of summer as a standard term

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Standard Term Flexibilities

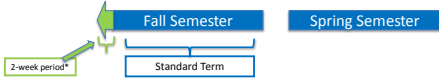
- Courses may be offered traditionally
 - All courses begin and end on first and last day of term respectively
- Courses may be offered 'nontraditionally'
 - Compressed coursework (modules) offered in sequence or overlapping within the term
 - For R2T4 purposes, all courses that do not span the entire length of the term are considered modules

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Standard Term Flexibilities

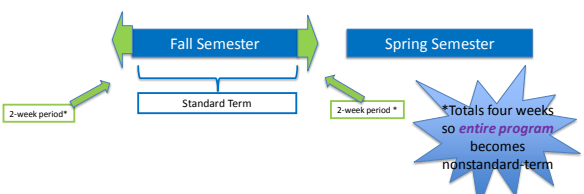
- Class(es) in an academic program may begin before the official start of standard term and/or finish after official end date
 - The result would typically be a nonstandard term...but a 'tolerance' of a total of two (2) weeks is permitted and allows term to remain standard



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Oops!



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Oops!



Since the terms overlap the entire program becomes non-term. This would also be the case if just one class in a term extends into another term.

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Standard Term Flexibilities

- A short session between standard terms (e.g., intersession) would typically be treated as a separate nonstandard term
 - The entire program of study would then be nonstandard-term
- School must fund intersession



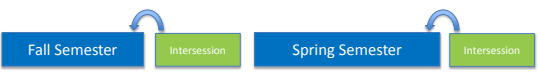
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Standard Term Flexibilities

Standard-term programs can remain standard if an intersession is *attached* to a standard term.

Intersessions do not have to fall between other terms, nor are schools limited to one intersession in any given year.



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Study Abroad

- When home and host schools have written agreement...
 - No effect on definition of program's academic calendar if coursework taken at host school through the agreement does not transpire in exact time frame or overlaps the home school's normal terms
 - Credits for coursework taken at host school are included in home school enrollment status for the term that occurs in a reasonably similar time frame as host school's coursework
- When home school offers its own study abroad program...
 - Subject to the same restrictions and requirements for academic calendars as any other coursework

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Consortium Agreements

- School that awards Title IV aid should do so based on its own academic calendar
- Earliest disbursement date is 10 days before *earlier* of the start date at either home or host school
- Program's academic year is not affected if coursework taken at host school overlaps/does not take place in same time frame as home school's normal terms

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Clinical Work and Standard Terms

- In some types of programs, students take coursework in a standard-term calendar until progressing to required clinical work outside the classroom
- The Department considers 'clinical work' to apply to...
 - Medically related fields
 - Programs preparing educators
- Clinical work may not coincide with school's standard terms

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Clinical Work and Standard Terms

- Schools may allow clinical work to be treated as standard-term, if *all* the following apply:
 - All students in program must participate in practicum or clinical experience and its completion is requirement for graduates to apply for licensure or authorization to practice occupation those students intend to pursue
 - School has little or no control over length or start/end dates of practicum or clinical experience. This may be result of constraints imposed by outside licensing bodies, or need to accommodate schedules of entities with which students are being placed (e.g., school districts and hospitals)
 - Credit-hours associated with practicum or clinical experience must be associated with term in which most of training occurs, even if starting and ending dates do not exactly align with term dates and/or overlap with another term exists

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Clinical Work and Standard Terms

- Policies and procedures manual must explain how this aspect of Title IV administration is handled
- Academic year and loan period for Direct Loans should be determined using *actual* training dates and loans should reflect cost of attendance and Expected Family Contribution for *actual* training period
 - If a clinical period falls within the two-week tolerance outside the regular term dates, schools may use the regular dates
- Return of Title IV funds (R2T4) calculations are *always* based on payment period or period of enrollment that reflects *actual* training dates

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Nonstandard Term Considerations

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Three Types of Nonstandard Terms

Substantially equal and at least 9 weeks (SE9W)

Substantially equal (SE)

Not substantially equal (NSE)

- *Substantially equal* means no term is more than two weeks of instructional time longer than any other term in program

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Nonstandard SE9W Terms

Pell Grants

- Must use Formula 3
- Terms are the payment periods

Direct Loans

- May use single-term loan period
- May use SAY or BBAY1 if program has a Scheduled Academic Year
- If no SAY, must use BBAY2
- Terms are the payment periods

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Nonstandard SE Terms

Pell Grants

- Must use Formula 3
- Terms are the payment periods

Direct Loans

- May not use single-term loan period (unless remainder of program)
- Must use BBAY3
- Student completes AY when student has completed weeks and hours in defined Title IV AY
- **Terms are the payment periods**

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Nonstandard NSE Terms

Pell Grants
<ul style="list-style-type: none"> • Must use Formula 3 • Terms are the payment periods

Direct Loans
<ul style="list-style-type: none"> • May not use single-term loan period (unless remainder of program) • Must use BBAY3 • Student receives 2nd disbursement upon completion of half the weeks and hours in loan period <ul style="list-style-type: none"> • Student completes AY when student has completed weeks and hours in defined Title IV AY

Payment periods for Pell Grants and Direct Loans may not align!



Non-term Considerations



Non-term Payment Periods

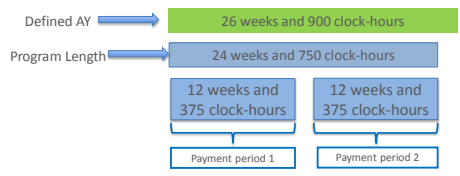
In a non-term program the definition of a program's Title IV academic year becomes especially critical, because there are no terms to use for payment periods.

Students' successful completion – of half the weeks in the academic year, and half the hours – determines payment periods.





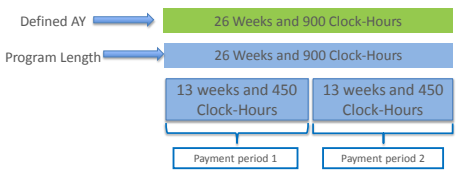
Programs Shorter Than One Year



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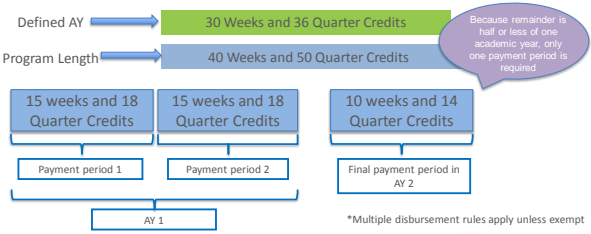
Programs of One or Multiple Years



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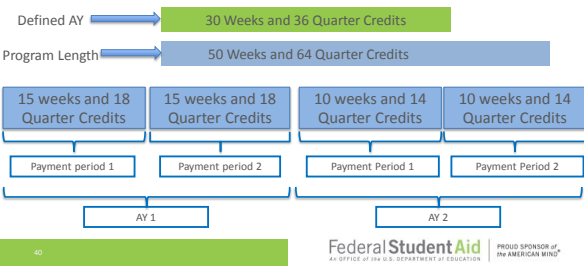
Programs Longer Than One Year But Shorter Than Two



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Programs Longer Than One Year But Shorter Than Two



Non-term Formulas

Pell Grants	Direct Loans
<ul style="list-style-type: none"> Must use Formula 4 Payment periods driven by student's successful completion of both weeks and hours 	<ul style="list-style-type: none"> Must use BBAY3 Minimum loan period is lesser of <ul style="list-style-type: none"> Length of program BBAY Remaining portion of program Payment periods driven by student's successful completion of both weeks and hours

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Primary Resources

- *FSA Handbook: Volumes 3 and 4*
- *FSA Training Conference presentations:*
<https://fsaconferences.ed.gov>

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

This feedback tool provides a means to identify areas for improvement and support an effective process for listening to our customers. Additional feedback can be directed to Mark Gerhard at Mark.Gerhard@ed.gov.

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Questions?





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