

# Fostering Independence Through Education Annual Report for Academic Year 2021-2022

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*August 2022*



**COMMONWEALTH OF PENNSYLVANIA  
DEPARTMENT OF EDUCATION**

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## Introduction

Act 16 of 2019 (Act 16) added Article XXVI-K Fostering Independence Through Education (FosterEd) to the Pennsylvania Public School Code of 1949 (24 P.S. § 26-2603-K). The statute requires institutions of higher education (IHEs), as defined by the Act, to provide a waiver of tuition and mandatory fees to Pennsylvania resident students who have been in foster care and meet certain eligibility requirements. FosterEd intersects with Act 1 of 2022: Assisting Students Experiencing Education Instability as a pathway for students in foster care to access postsecondary education without additional barriers.

Under Act 16, IHEs include the following:

- A community college operating under Article XIX-A of the Public School Code (24 P.S. § 19-1901-A et seq.);
- A university within the State System of Higher Education;
- The Pennsylvania State University, the University of Pittsburgh, Temple University, Lincoln University, or any other institution designated as state-related by the Commonwealth;
- Thaddeus Stevens College of Technology;
- A college established under Article XIX-G (24 P.S. § 19-1901-G et seq.);
- An IHE located in and incorporated or chartered by the Commonwealth and entitled to confer degrees as provided under 24 Pa.C.S. § 6505 (relating to power to confer degrees) and as provided for by the standards and qualifications prescribed by the State Board of Education under 24 Pa.C.S. Ch. 65 (relating to private colleges, universities, and seminaries);
- A private school licensed under the Private Licensed Schools Act of 1986 (24 P.S. § 6501 et seq.); and
- A foreign corporation approved to operate an educational enterprise under 22 Pa. Code Ch. 36 (relating to foreign corporation standards) (22 Pa. Code § 36.1 et seq.).

FosterEd is jointly administered by the Pennsylvania Department of Education (PDE), Pennsylvania Department of Human Services (DHS), the Pennsylvania Department of Labor & Industry (L&I), and Pennsylvania Higher Education Assistance Agency (PHEAA).

To determine and maximize the effectiveness of the program, Act 16 requires PDE, in conjunction with DHS, to collect information from IHEs and annually report the following information by August 31 to the chair and minority chair of the Education Committee of the Senate, the Education Committee of the House of Representatives, the Health and Human Services committee of the Senate, and the Children and Youth Committee of the House of Representatives:

- The number of students receiving the Pennsylvania Chafee Education and Training Grant (Chafee ETG) under the Foster Care Independence Act of 1999;

- The number of students who apply for the program;
- The number of students participating in the program;
- The number of students who are participating in the program and have unmet financial need;
- Recommendations on how to improve outreach to students who are or are potentially eligible for the program;
- Impediments to retaining students who are eligible under section 2602-K(c); and
- Recommendations on ways in which to improve delivery of services to students who are eligible for the program under section 2602-K(c) and to address the identified impediments.

Act 16 requires IHEs to provide the above data and information to PDE by June 30 each year. IHEs submit data electronically using PDE's electronic Higher Education Reporting system. This reporting website allows IHEs to submit all mandatory reporting to PDE in a single submission.

## Statutory Requirements

Beginning with the 2020-2021 academic year, IHEs must provide eligible students with tuition waivers for the balance of tuition and mandatory fees for undergraduate courses after the eligible student has been awarded all federal and state grants and other grants and scholarships for which the student qualifies.

An eligible student is defined as an individual who is a current resident of the Commonwealth and eligible for the Chafee ETG program under the Foster Care Independence Act of 1999 (Public Law 106-169, 113 STAT.1882) as administered by the Department of Human Services.

Students may receive the waiver for a total of five years or until the individual reaches 26 years of age, whichever occurs first.

Act 16 requires IHEs to do the following:

- Through a designated point of contact (POC), provide technical assistance to eligible students under section 2602-K (c) of the Public School Code (24 P.S. § 2602-K(c)) in completing admissions applications and financial aid applications:
  - Assist students in obtaining verification of eligibility for the program from the courts, the county agency, or DHS;
  - Assist eligible individuals in accessing available federal and state financial aid resources and identifying further scholarship and grant opportunities, in consultation with the institution's financial aid department;

- Serve as the primary contact for all eligible individuals applying to or attending the institution who are eligible under section 2602-K (c) of the Public School Code (24 P.S. § 2602-K(c));
- Provide all individuals applying to or attending the institution who voluntarily disclose that they are eligible under section 2602-K (c) of the Public School Code (24 P.S. § 2602-K(c)) with information and referrals for on-campus support services and resources, including admissions, housing, financial aid, health, mental health, tutoring, career, academic advising, and other services;
- Provide all eligible individuals applying to or attending the institution with information and referrals as available for off-campus support services, including transitional housing and medical insurance and services; and
- Post POC information on the publicly accessible website of the institution.
- Disseminate the information prepared under section 2602-K(a)(1) of the Public School Code (24 P.S. § 2602-K(a)(1)) to recipients of a Chafee ETG under the Foster Care Independence Act of 1999 and post the information on the institution's publicly accessible website.
- To improve retention, report to PDE by June 30, 2021, and June 30 each year thereafter all of the following:
  - The number of students receiving the Pennsylvania Chafee ETG under the Foster Care Independence Act of 1999;
  - The number of students who apply for the program;
  - The number of students participating in the program;
  - The number of students who are participating in the program and have unmet financial needs;
  - Recommendations on how to improve outreach to students who are or are potentially eligible for the program;
  - Impediments to retaining students who are eligible under section 2602-K (c) of the Public School Code (24 P.S. § 2602-K(c)); and
  - Recommendations on ways in which to improve delivery of services to students who are eligible for the program under section 2602-K (c) of the Public School Code (24 P.S. § 2602-K(c)) and to address the identified impediments.

## Program Data

Numerical data for this annual report is taken from information submitted by the IHEs during the Higher Education Reporting cycle, which occurs annually from January to March. To meet the August 31 deadline for the submission to the General Assembly, the data provided in last year's

report was estimated until the institutions were able to complete the reconciliation of numbers with PHEAA and include any enrollment changes after March 1. In this year's report, the 2020-2021 data is now reconciled and accurate, while the 2021-2022 data is estimated for the previously mentioned reasons.

Data on retention also is a lagging indicator and cannot be produced until numbers are fully reconciled for the 2021-2022 academic year.

In the 2020-2021 academic year, the first year of the program, reconciled data showed that 96 IHEs reported having students eligible for the FosterEd program. At those institutions:

- 499 students received a Pennsylvania Chafee ETG under the Foster Care Independence Act of 1999 and applied for the waiver under the FosterEd program;
- 186 students participated in the program.

Although the majority met the eligibility criteria, often applicants did not participate in the program because they received enough aid from other sources to meet their tuition cost and mandatory fees. As a result, those who did not participate but were eligible were labeled ineligible by PHEAA to maintain their eligibility for future FosterEd tuition waivers. While the student may have received a Chafee grant, but were deemed ineligible to for the FosterEd waiver due to having all tuition and mandatory fee costs met, they may still have an unmet need due to the costs associated with room and board, books, transportation, and other expenses not defined under tuition and mandatory fees.

## 2020-2021 Student Program Participation by Sector<sup>±</sup>

Sector	Received Chafee Grant/ Applied for Tuition Waiver	Received Tuition Waiver	Unmet Financial Need <sup>**</sup>
Community Colleges	134	18	79
PASSHE	129	16	51
State-Related	77	42	39
Thaddeus Stevens	0	0	0
Rural Regional College	0	0	0
Private IHEs	122	83	82
Private Licensed Schools	37	27	8
Education Enterprise <sup>***</sup>	2	2	0
<b>Total</b>	<b>499</b>	<b>186</b>	<b>261</b>

<sup>±</sup>The 2020-2021 data reflects reconciled information reported to PHEAA in June 2021.

<sup>\*\*</sup>Unmet Financial Need includes costs associated with room and board, books, transportation, and other expenses as reported by the IHE; these numbers are supplied by the reporting IHEs and include participating and nonparticipating students.

<sup>\*\*\*</sup>An Education Enterprise is an out-of-state IHE that is authorized to operate at a physical location in Pennsylvania.

## 2021-2022 Student Program Participation by Sector\*

Sector	Received Chafee Grant/ Applied for Waiver	Received Tuition Waiver	Unmet Financial Need**
Community Colleges	131	4	72
PASSHE	120	11	42
State-Related	103	52	50
Thaddeus Stevens	0	0	0
Rural Regional College	0	0	0
Private IHEs	112	61	66
Private Licensed Schools	38	27	16
Education Enterprise***	2	2	2
<b>Total</b>	<b>505</b>	<b>155</b>	<b>248</b>

\*The data are estimates. Final AY 2021-2022 data will be reported in the 2022-2023 Annual Report.

\*\* Unmet Financial Need includes costs associated with room and board, books, transportation, and other expenses as reported by the IHE; these numbers are supplied by the reporting IHEs and include participating and nonparticipating students.

\*\*\*An Education Enterprise is an out-of-state IHE that is authorized to operate at a physical location in Pennsylvania.

NOTE: The above charts should not be compared at this time until reconciliation is complete and shown in next year's report due to the 2020-2021 chart reflecting reconciled data and the 2021-2022 chart reflecting estimated data.

## Program Activity

In the 2021-2022 reporting year, DHS, PHEAA and PDE expanded efforts to ensure consistent and accessible forms and information. PHEAA disseminated 1,845 student brochures at sites across the commonwealth and built up its offerings across PHEAA.org.

- Students: [PHEAA.org/FosterEd](https://www.pheaa.org/FosterEd)
- Schools: [PHEAA.org/FosterEd School Page](https://www.pheaa.org/FosterEd/SchoolPage)
  - [2021-2022 FosterEd Program Guidelines](#)
  - [2021-2022 The Role of the FosterEd POC Presentation](#)
- Other Resources
  - [Department of Human Services County Agency List](#)
  - [Department of Education Year End Reporting](#)

PHEAA participated in multiple conferences and training events during the 2021-2022 year where FosterEd was a topic of discussion:

- July 2021: 2021 Mid-Atlantic Association of Career Schools Conference;
- October 2021: 2021 Pennsylvania Association of Student Financial Aid Administrators (PASFAA) Fall Conference;



- November 2021: The Role of the FosterEd POC;
- April 2022: Foster Care to College Quarterly Networking Meeting;
- April 2022: 2022 PASFAA Spring Training; and
- June 2022: 2022-23 PASFAA Don Raley Institute: Overview of the PHEAA-Administered Programs.

In addition, ongoing visits and sessions were conducted throughout the 2021-2022 reporting year, including:

- Individual training sessions: one-on-one training sessions/visits with IHEs conducted by PHEAA staff;
- Monthly secondary and postsecondary newsletters containing information regarding the FosterEd program;
- Four social media posts throughout the year;
- April 2021: Overview of FosterEd and Chafee ETG for the School District of Philadelphia;
- June 2021: Pennsylvania Association for College Admissions Counseling (PACAC) conference on Unique Student Populations, presented with PDE;
- June 2021: Overview of FosterEd and Chafee ETG for the Milton Hershey School; and
- 36 high-school counselor workshops on the financial aid process, which included FosterEd materials.

During the 2021-2022 reporting year, DHS Office of Children, Youth, and Families (OCYF), in collaboration with The Child Welfare Resource Center (CWRC) conducted the following activities:

- Information about FosterEd is included in every Quarterly Administrative Update (set of written updates) that is sent out to the Statewide Adoption and Permanency Network/Independent Living (SWAN/IL) network;
- During OCYF's announcements at the SWAN/IL Quarterly Meetings held across the state in October 2021 and April 2022, information about Chafee ETG and FosterEd was provided;
- In October 2021, DHS provided information on FosterEd during the Paving the Way to Educational Success Conference;
- In December 2021, OCYF sent information out on the IL listserv that the Chafee ETG application had been extended for the 2021-2022 academic year, information about FosterEd was included;

- During OCYF’s announcements at the SWAN/IL Winter Statewide (January 2022) and Summer Statewide Meetings (June 2022), information about Chafee ETG and FosterEd was provided;
- For Foster Care Month in May, 2022, DHS and the Center for Schools and Communities put out a newsletter to all county children and youth agencies and K-12 school staff that included a section on FosterEd;
- Spoke to youth present at Statewide Youth Advisory Board (YAB) meetings held in September 2021, November 2021, January 2022, March 2022 and May 2022;
- Spoke to youth and IL Coordinators about Chafee ETG and FosterEd at the YAB Summit held on June 16, 2022;
- For every Chafee ETG question received from a youth/young adult and/or parent, information is always included about FosterEd and the website; and
- OCYF continues to collaborate with PHEAA to validate youth/young people for Chafee ETG so they are also eligible for FosterEd.

In addition, information about FosterEd is available at the YAB website: [www.payab.pitt.edu](http://www.payab.pitt.edu).

## **Recommendations on How to Improve Outreach to Eligible Students**

Of the IHEs that responded with recommendations, the majority focused on ensuring that student eligibility and outreach are conducted via the Free Application for Federal Student Aid (FAFSA®). IHEs also recommended expanding engagement with the following:

- Direct training for high schools;
- Partnering with community-based organizations, foster care agencies, and group homes;
- Providing training to admissions and financial aid counseling staff;
- Including a question about foster care in the institution’s admission application; and
- Highlighting the POC familiar with the program.

Several comments note that partnerships with community-based organizations (CBOs) are an efficient and effective tool for outreach. For example, “many students who are potentially eligible for this program may already be working with community-based organizations. Working with CBOs could be a good way to identify students who are eligible for this program.”

Others recognized the need for more strategic communication. Ideas include:

- Adding information to the IHE’s website, catalogs, and admission materials;
- Outreach via social media; and

- Developing a comprehensive plan with the IHE’s marketing/communications office.

Other recommendations include:

- Better communication with PHEAA;
- Direct outreach to foster parents and families;
- Expansion of the recruitment process;
- Direct emails to students; and
- Inclusion of undocumented refugee minors who are in the custody of federal agencies.

Most comments point to a coordinated, systematic approach: “Recommendations to improve outreach would be to have overall more evidence-based training for personnel supporting this population of students. These are students with complex trauma, who enter the complex world of postsecondary education, which alone is a lot to deconstruct and manage. Likewise, it’s a lot to be equipped to support these students. Additionally, high school guidance counselors and/or principals should be encouraging their students who may be eligible for the program to speak to the college’s Point of Contact. Colleges can also include the question on the application, so that the students are identified from the beginning of the college admissions process, which would allow for continuous outreach right away.”

One IHE reported on the specific actions it took: “We assigned dedicated staffing to assist with managing this population. The first position is partially funded through Perkins and the position is Perkins Career Coach. This person is collaborating with the Office of Financial Aid to seek out potential students through the FAFSA submissions. We are reaching out to the students who indicated yes to the following: At any time since you turned 13, were both your parents deceased, were you in foster care or were you a dependent or ward of the court? The second action was to appoint a Point of Contact within our office to assist with both recruitment and retention and counseling referrals. ... She is a trained and functional social worker ... and holds the title of Financial Aid and Records Officer.”

## **Recommendations on How to Improve Delivery of Services**

Of the recommendations provided by IHEs for service delivery, the majority focused on the following:

- Coordinating services, from financial aid to housing, food security, transportation, health care, etc.;
- Simplifying the application process;
- Providing more information during admissions sessions;
- Providing additional training for faculty and staff;

- Designating a Point of Contact (note: this a requirement under the Act); and
- Maximizing the campus' student success services.

Again, a whole-systems approach worked best for many IHEs: “Once [the student is] admitted to the university, the primary contact person will notify Financial Aid, Counseling Services, and the Student Success Coaches that the student has been admitted. Financial Aid will reach out to the student to assist and assure the student has completed the FAFSA, applied for the Chafee ETG, has completed all requirements necessary for financial aid and answer any financial aid questions. Counseling Services will address the various campus and community resources available, and the Student Success Coaches will follow up with the student on academic advising and tutoring.”

In addition, “students benefit from a case-management approach, where they can build relationships and work closely with college counselors and advisors to receive the support and resources they need to be successful. Coordination and communication with community and campus supports for students also helps to assure students are connected and accountable for their academic progress.”

## **Impediments to Retaining Students**

Similar to the 2020-2021 report, IHEs identified the primary impediments to retention as the following:

- Unmet financial needs such as textbooks and room and board;
- Lack of academic preparedness; and
- Lack of access to basic living needs.

That students in this population have significant financial need was echoed by numerous institutions: “Key impediments to retention include basic needs such as access to food and housing outside of the academic year and between semesters.”

The timing of support is equally important, notably “students not finding out about eligibility in a timely manner as applications are not available for Chafee until April of each year,” as well as lack of information-sharing within the institution due to privacy considerations. For example, one respondent noted, “Student Affairs hopes in the future there's a carve-out that would allow information disclosed on the FAFSA to be shared with others within the university who have a need-to-know in order to support student retention.”

As reported by IHEs, students face specific obstacles in accessing and completing their postsecondary education:

- Food insecurity;
- Lack of transportation;
- Limited resources for students to attend summer/winter programs;

- Limited mental health supports;
- Lack of social support;
- Limited support to assist students with financial planning; and
- Difficulty with acquiring documentation for FosterEd eligibility.

One IHE reports that, because many students arrive on campus without knowledge of the support systems available to them, they “may not understand what they need to do, when they need to do it, and how to do what is required. Some are afraid to ask for assistance because they believe the tasks are too overwhelming for them to complete. Many wait too long to reach out for assistance or complete tasks resulting in missed financial aid deadlines and time to catch up when behind in their courses.”

Many IHEs note that preparation for postsecondary education needs to occur before the student even begins the application process. Suggestions include “improving pre-college support services to provide information starting early in high school about program and eligibility to pursue postsecondary education with financial resources for any college, university, or school.”

According to the IHEs that provided comments, student success relies on a constellation of issues such as “covering the cost of living during periods of times when school is not in session; academic support that is crucial to keep students on track to graduate within the necessary time frame; outside resources to assist in covering educational expenses such as room and board; and feeling of being overwhelmed with the amount of responsibility and committing to their success.”

One IHE adds, “We have been increasing our capacity to serve underprepared and at-risk students for greater academic success through increasing tutoring and monitoring. We are now a TRIO institution.”

## Conclusion

PDE, DHS, and PHEAA continue to use data and recommendations provided in the 2021-2022 Higher Education Report to enhance the FosterEd program and increase awareness and participation for the 2022-2023 academic year.

- Comments and recommendations from the 2021-2022 Higher Education Report reveal that many IHEs remain unaware of statutory requirements such as assigning a Point of Contact to coordinate all FosterEd related activities. PDE will issue a Dear Colleague letter in the fall reminding IHEs and other postsecondary institutions of their responsibilities under the Act.
- During 2021-2022, PHEAA and DHS distributed over 1,800 brochures. In the 2022-2023 academic year, brochures again will be distributed to include foster care agencies, group homes, homeless shelters, and children and youth servicers. Brochures also will be distributed to high-school guidance counselors.
- Due to the lag time between IHE submission of the Higher Education Report to PDE in March and data reconciliation with PHEAA in June, PDE and PHEAA will work together

to simplify the annual data-gathering and reporting elements to ensure a more seamless process for IHEs.

- PHEAA continues to train POCs at IHEs. PHEAA has two upcoming FosterEd training sessions in fall 2022; one targeted to IHEs and the other will focus on professionals working with children and youth in foster care. Additionally, PHEAA will host over two dozen counselor workshops, highlighting FosterEd.
- DHS recognizes the need for continued education to both public and private child welfare agencies about the FosterEd program. Education about the FosterEd program will continue to occur at DHS sponsored meetings and conferences and supported through DHS partnerships with the Pennsylvania Child Welfare Resource Center and Pennsylvania's Youth Advisory Board.
- All agencies will continue to encourage institutions to share their POC information with the Center for Schools and Communities at [pafostercare@csc.csiu.org](mailto:pafostercare@csc.csiu.org). The Center for Schools and Communities anticipates providing information to institutions and creating a network of service providers.

# Appendix A: FosterEd Brochure



The Fostering Independence Tuition Waiver Program provides tuition waivers at postsecondary institutions for eligible youth who are or have been in foster care.

The Fostering Independence Tuition Waiver Program, created by Act 16 of 2019, seeks to remove barriers in accessing a postsecondary education for youth who are or have been in foster care. This allows eligible foster youth to complete their studies, graduate with less debt, and have the opportunity to build a network of support.

The program is being administered collaboratively by the Pennsylvania Higher Education Assistance Agency (PHEAA) in conjunction with the PA departments of Education, Human Services, and Labor & Industry.

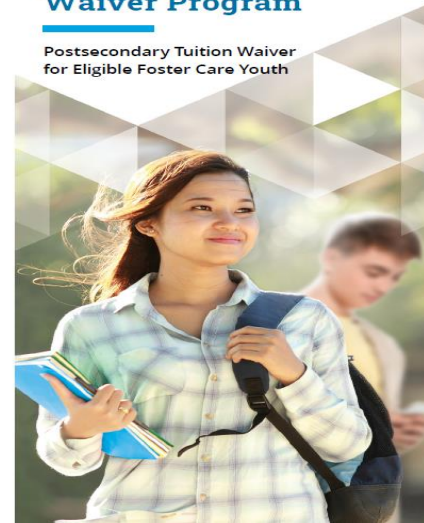


The information contained in this document is believed to be accurate at the time of printing.  
GR-FITEB 122820



## Fostering Independence Tuition Waiver Program

Postsecondary Tuition Waiver for Eligible Foster Care Youth



### Am I Eligible?

To be eligible for the tuition waiver, students must meet the following criteria:

- Be a Pennsylvania resident
- Have not reached age 26 by July 1 immediately prior to the upcoming academic year for which the FosterEd waiver is received
- Have graduated from high school or received a Commonwealth Secondary School Diploma
- Be eligible for services under Pennsylvania's John H. Chafee Foster Care Program for Successful Transition to Adulthood
- Be identified as a youth in foster care or a youth discharged from foster care at age 16 or older OR exited foster care on or after age 16 to adoption or permanent legal custodianship
- Be enrolled as an undergraduate, at least half time in a postsecondary institution that is approved by the U.S. Department of Education for Title IV student assistance programs
- Have unmet cost for the PA Chafee Education and Training Grant (Chafee ETG), as determined by the postsecondary institution.
- Maintain satisfactory academic progress, as determined by the postsecondary institution
- Not be in default on a federal student loan

### How to Participate

Eligible foster youth must take the following steps:

- File a Free Application for Federal Student Aid (FAFSA®)
- Submit a Chafee ETG Application (visit [PHEAA.org](http://PHEAA.org) for additional info)
- Enroll in an eligible PA postsecondary institution



### FAQs

**What is a Fostering Independence Tuition Waiver?**  
An eligible student's remaining tuition and mandatory fees will be eliminated after all federal and state gift aid is applied.

**Does the tuition waiver cover room and board?**  
No, the tuition waiver applies only to tuition and mandatory fees. It does not cover room and board.

**Will the tuition waiver cover existing education debt?**  
No, the tuition waiver will only be applied to tuition and mandatory fees charged for the current academic year.

**Do I need to fill out a specific application?**  
Yes, you must submit a FAFSA® and a PA Chafee ETG application. You also may be required by your institution to apply for state aid. Your Point of Contact will be able to assist you in identifying further scholarship and grant opportunities.

**How long does the tuition waiver apply?**  
The tuition waiver may be applied up to 5 academic years defined as 10 semesters or the equivalent, whether or not consecutive, until age 26.

**Is there anyone at my postsecondary institution who can help?**  
Each school has a Point of Contact available to support eligible students throughout their college careers with the following:

- Assistance in completing admissions and financial aid applications
- Obtaining verification of eligibility
- Providing referrals for on- and off-campus resources and support services

For additional information visit [PHEAA.org/FosterEd](http://PHEAA.org/FosterEd)

## Appendix B: 2021-2022 Program Guidelines



2021-22 Program Guidelines

# Fostering Independence Through Education Tuition Waiver Program





# Document Changes

## Document Version Control

Version	Date	Description
1.0		2020-21 Initial Publication
2.0	09/01/21	2021-22 Annual Updates

## Summary of Changes

Section	Change
Title Page	Program name amended to Fostering Independence Through Education Tuition Waiver Program
I.B.i.c. My File Gateway	Section added
II. Student Eligibility	File a PA State Grant Form or PA State Grant Summer Application, if applicable, for the terms for which the waiver is being requested
III. B. i. Waiver Listing	<ul style="list-style-type: none"> <li>Section added</li> <li>Minimum Enrollment tables inserted</li> <li>Institutions may choose to waive charges in addition to tuition and mandatory fees</li> </ul>
III. B. ii. Denial Listing	Section added
IV. A. ii. Certification	<ul style="list-style-type: none"> <li>Graduation date added</li> <li>Waiver calculation example added</li> <li>More detailed guidance added throughout</li> </ul>
IV. B. Reconciliation Waiver Listing	Section added
V. Annual Reporting Requirements	Renamed
VI. A. Record Retention	Such records must be retained for at least 5 years from the date the institution completes certification of the Reconciliation Waiver Listing (PageSet FCFSXH510)
VI.B.i. Program Review	<ul style="list-style-type: none"> <li>Program Review Findings increased from 6 to 7, one revised:                             <ul style="list-style-type: none"> <li>Institution did not follow published institutional policy with regard to SAP and unmet cost</li> </ul> </li> <li>Waiver amount credited to the student account does not match what was reported to PHEAA</li> </ul>
Appendices A & B	2020-21 appendices deleted; new Appendix A, PageCenter Reports
Appendix B, FosterEd Waiver Listing	<ul style="list-style-type: none"> <li>Previously Appendix C</li> <li>Legend 2, reason 06 added – No PA State Grant application</li> </ul>
Appendix C, FosterEd Student Certification Best Practices	<ul style="list-style-type: none"> <li>Previously Appendix D</li> <li>Clarifications and bullets added</li> </ul>
Appendix D, FosterEd Denial Listing	<ul style="list-style-type: none"> <li>Previously Appendix E</li> <li>New image of Denial Listing</li> <li>New list of denial reasons</li> </ul>

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## 2021-22 Program Guidelines

# Fostering Independence Through Education Tuition Waiver Program

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## Introduction

In 2019, the Commonwealth of Pennsylvania passed Act 16, as amended by Act 91, creating the Fostering Independence Through Education Tuition Waiver (FosterEd) Program. FosterEd provides tuition waivers at postsecondary institutions for eligible youth who are or have been in foster care. The program is being administered collaboratively by the Pennsylvania Higher Education Assistance Agency (PHEAA) in conjunction with the PA Departments of Education (PDE), Human Services (DHS), and Labor & Industry (L&I).

Under this program, postsecondary institutions in Pennsylvania are required to designate a Point of Contact (POC) and waive all institutional charges for tuition and mandatory fees that remain after all federal, state, and other gift aid has been applied to the accounts of all eligible students.

The 2021-22 program guidelines provide postsecondary institutions with the requirements for participation and administration of FosterEd for this program year. PHEAA will publish updates to this document if additional changes become necessary.

## I. Institution Participation

Postsecondary institutions in Pennsylvania approved by the U.S. Department of Education (ED) for Title IV funding must provide the waiver to all eligible students. Eligible students are those who self-identify to the school and are subsequently determined as eligible or those students identified by PHEAA via a Waiver Listing (PageSet FCFSXGZ210).

To administer the FosterEd Program, institutions need the following:

### A. Point of Contact

Each institution is required to designate one or more staff as a Point of Contact (POC) for individuals eligible for FosterEd. It is the responsibility of the institution to determine who is most qualified.

#### i. POC Responsibilities

The POC shall have or ensure the delegation of the following duties:

- Serve as the primary contact for all eligible individuals applying to or attending the institution.
- Provide all applicants with information and referrals for on-campus support services and resources, including but not limited to:
  - Admissions
  - Housing

- Financial aid
- Health
- Mental health
- Academic advising
- Tutoring
- Career services
- Provide all applicants or students with information and referrals as available for off-campus support services, including transitional housing, medical insurance, and services.
- Assist students in obtaining verification of foster care status on or after age 16, as specified in “II. Student Eligibility Requirements” on Page 6. There are four possible sources of verification:
  - A copy of a court order that verifies that the youth was in foster care from the local Court of Common Pleas; or
  - A statement (verbal or written) from the County of Placement Office (County Children and Youth Agency) or Department of Human Services (a list of County Children and Youth Agencies can be found in the PA Department of Human Services Provider directory); or
  - A statement from a private provider agency that delivers child welfare services that the youth was in foster care; or
  - A statement from an attorney, guardian ad litem, or court-appointed special advocate verifying the person’s relationship to the student and that the youth was in foster care.
- Document that eligibility was obtained, or the reason that eligibility was denied, and the source of this verification.
  - Eligibility may be verified via documentation, email, or phone call.
  - Eligibility verified by any method should be documented by the POC in the student’s file.
  - The student is not required to obtain verification but may provide a form of acceptable documentation.
  - Verification of eligibility must be shared with PHEAA, if not already on file, by submitting an email to [FosterEd@pheaa.org](mailto:FosterEd@pheaa.org) within 30 days of obtaining eligibility.
- Assist students in accessing available federal and state financial aid resources and in identifying further scholarship and grant opportunities.
  - Resources to support students in applying for additional aid can be found at [PHEAA.org](http://PHEAA.org).

## ii. Contact Information for the POC

Must be posted on the publicly accessible website of the institution, and should be shared with PHEAA for the purposes of program administration. The FosterEd POC and FAA form is available at [PHEAA.org](http://PHEAA.org) and may be submitted to [FosterEd@pheaa.org](mailto:FosterEd@pheaa.org).

## B. Access to PHEAA Documents & Reports

### i. Business Partner Access Management System

Business Partner Access Management System (BPAMS) is the web interface designed to manage requests for access to PHEAA systems. With this application, business partners, their users, requesters, and their Authoritative Sources can submit requests for access to PHEAA systems.

All institutions must have a signed and executed Remote Access Agreement (RAA) and Authoritative Source Form on file. Questions regarding the remote access agreement (RAA) can be directed to [SGSP\\_BPAMS\\_Processing@pheaa.org](mailto:SGSP_BPAMS_Processing@pheaa.org).

All institutions are required to review and maintain access requests for their users.

Once processed, the forms grant access to the following PHEAA systems and School Portal (Alec<sup>SM</sup>):

**a. PageCenter**

PageCenter is a secure report repository. Each institution will have its own mailbox within PageCenter to which all reports and listings will be delivered and divided into separate applications. FosterEd reports will be in the "STEP" application.

**b. Document Library**

Document Library is an online repository, storing and organizing documents, such as program guidelines, memoranda, etc.

**c. My File Gateway**

My File Gateway is a web-based product that allows for the sharing and transferring of files between PHEAA and the institution through secure mailboxes. Users can upload to and download from only those mailboxes to which they have access.

For additional resources on how to access and use PHEAA systems, visit [PHEAA.org/training](https://www.pheaa.org/training). Specific documents can be found by selecting "State Grant and Special Program Resources," then "General SGSP Resources."

## II. Student Eligibility Requirements

To be eligible for a FosterEd waiver, a student must:

- Be a current resident of Pennsylvania at the start of and during the term for which the waiver is awarded
- Have not reached age 26 by July 1 immediately prior to the upcoming academic year in which the waiver will be awarded
- Have graduated from high school or have received a Commonwealth Secondary School Diploma
- Be eligible for services under Pennsylvania's John H. Chafee Foster Care Program for Successful Transition to Adulthood
  - Be identified as a youth who is in foster care or was discharged from foster care on or after attaining age 16, OR has exited foster care on or after age 16 to adoption or permanent legal guardianship
- Be enrolled as an undergraduate, on at least a half-time basis, in a postsecondary institution that is approved by ED for Title IV student assistance programs in Pennsylvania
- Have unmet cost for the PA Chafee Education and Training Grant (Chafee ETG), as determined by the postsecondary institution
- Maintain federal satisfactory academic progress, as defined by the institution
- Not be in default on a federal student loan or owe a refund on other Title IV aid
- File a Free Application for Federal Student Aid (FAFSA®) for the academic year for which the waiver is being requested
- File an application for Chafee ETG by May 1, 2022
- File a PA State Grant Form or PA State Grant Summer Application, if applicable, for the terms for which the waiver is being requested

- Have not previously received a waiver for 5 years (consecutive or not), defined as 10 semesters or the equivalent, for undergraduate study

**NOTE:** A student may be eligible for Chafee ETG but not receive an award for reasons including, but not limited to, missing the application deadline, funding limitations, or reaching the maximum Chafee ETG award counter. A student may still be eligible for FosterEd in these situations.

An eligible student who transfers to another institution should contact PHEAA immediately at [FosterEd@pheaa.org](mailto:FosterEd@pheaa.org); the student should also communicate with the POC at the transfer institution.

### III. Waiver Determination Process

#### A. PHEAA Responsibilities

PHEAA is responsible for the initial FosterEd eligibility checks and confirming a student:

- Is a resident of Pennsylvania
- Has not reached age 26 by July 1 immediately prior to the upcoming academic year for which the FosterEd waiver would be received
- Has graduated from high school or received a Commonwealth Secondary School Diploma
- Is eligible for services under Pennsylvania’s John H. Chafee Foster Care Program for Successful Transition to Adulthood
- Is not in default on a federal student loan or does not owe a refund on other Title IV aid
- Has filed the required applicable year FAFSA
- Has submitted a complete Chafee ETG application
- Has not previously received a waiver for 5 academic years (consecutive or not), defined as 10 semesters or the equivalent

Once it is determined a student meets the above criteria, the student will appear on the FosterEd Waiver Listing (PageSet FCFSXGZ210) of the institution the student is attending. The Waiver Listing (PageSet FCFSXGZ210) is made available to postsecondary institutions via their PageCenter mailbox and is updated on a biweekly basis. A student who does not meet the eligibility criteria will appear on the FosterEd Denial Listing (PageSet FCFSXH321) with the reasons for denial.

#### B. Institution Responsibilities

##### i. Waiver Listing

Upon receipt of the Waiver Listing (PageSet FCFSXGZ210) from PHEAA, the institution must confirm a student:

- Is enrolled at least half time in undergraduate courses in an approved program of study.

Credit Enrollment Minimums

Academic Period	Semester Schedule	Quarter Schedule Using Semester Credits	Quarter Schedule Using Quarter Credits
Full-time Term	12 credits	8 credits	12 credits
Full-time Year	24 credits	24 credits	36 credits
Half-time Term	6 credits	4 credits	6 credits
Half-time Year	12 credits	12 credits	18 credits

### Clock Hour Enrollment Minimums

Academic Period	Two Payment Periods	Three Payment Periods
Full-time	Minimum of 450 clock hours of instruction per payment period	Minimum of 300 clock hours of instruction per payment period
Half-time	Minimum of 225 clock hours of instruction per payment period	Minimum of 150 clock hours of instruction per payment period

- Has “unmet cost” as determined by the postsecondary institution (the difference between a student’s cost of attendance, as defined by the Federal Student Aid handbook, and all federal or federally-supported gift aid)
  - The federal Expected Family Contribution (EFC) is not used when determining eligibility
- Has made satisfactory academic progress, as determined by the postsecondary institution

Upon receipt of the Waiver Listing (PageSet FCFSXGZ210) from PHEAA for FosterEd, the institution must confirm if a student should complete additional applications for state or federal grants.

- The Waiver Listing (PageSet FCFSXGZ210) provided by PHEAA will indicate whether a student has applied for the PA State Grant.
- The POC shall assist students in identifying further scholarship and grant opportunities, in consultation with the institution’s financial aid department, but eligibility for the waiver is not contingent upon receiving additional sources of aid.

Once the institution determines a student meets the requirements in the Student Eligibility section, the institution must then:

- Waive or apply a credit for all institutional charges for tuition and mandatory fees which remain after all other scholarships and grants have been applied on a term-by-term basis
  - Other scholarships include all gift aid, defined as student aid that is not required to be earned or repaid
  - Institutions may choose to waive charges in addition to tuition and mandatory fees.
- Refund any payments received on a student’s account from the student for tuition or mandatory fees within 30 days from the generation date of the Waiver Listing (PageSet FCFSXGZ210) provided by PHEAA

**NOTE:** An institution should not delay conditional aid packaging or preliminary crediting of a student account for tuition and mandatory fees for a student who meets all institutional eligibility checks when the institution has verification of the student’s foster care eligibility.

An institution may not withhold a FosterEd waiver if a student meets all requirements listed in the Student Eligibility section, unless a student declines the waiver.

It is not an eligibility requirement that a student be PA State Grant eligible nor receive other sources of gift aid.

An institution may not reduce the waiver by the amount of gift aid a student might have received but did not, regardless of the reason.

**Example:**

A student applies for and is eligible for the FosterEd waiver in the amount of \$10,687. The student applied for the PA State Grant but was denied because the application was late. The school, in the original packaging of the waiver, assumed the student would receive the PA State Grant and,

therefore, decreased the waiver value by the PA State Grant maximum award. The school will now have to repackage the student without the assumed PA State Grant award, increasing the waiver by the assumed award.

## ii. Denial Listing

Upon receipt of the Denial Listing (PageSet FCFSXH3210 – see “Appendix D” on Page 21), the institution must review the denial reasons for each student. The POC must work with students on the Denial Listing (PageSet FCFSXH3210) with a correctable denial to help students become FosterEd eligible. Correctable denial reasons include, but are not limited to:

- Eligibility pending DHS review
- No FAFSA or FAFSA is incomplete
- Incomplete Chafee ETG application

## IV. Waiver Certification Process

### A. Waiver Listing

Institutions with FosterEd eligible students are required to certify student eligibility and waiver amounts for tuition and mandatory fees each term by returning the certified Waiver Listing (PageSet FCFSXGZ210).

Institutions are also required to return a Reconciliation Waiver Listing (PageSet FCFSXH510) at the end of each academic year.

#### i. Mandatory Fees

Mandatory fees are defined as either charges that are typically assessed to all students at the beginning of a term or fees that are required as a part of a student’s academic program or credential completion. The following categories of fees must be waived, notwithstanding the particular labels that institutions may assign:

- Fees for student activities, any health services, technology, facilities and capital improvements, and orientation
- Fees specific to an academic program or any of its required elements, such as lab, software, and materials fees (includes uniforms or other required items)
- Other fees, such as college or comprehensive fees, should be waived if they are assessed to students at the institution at the beginning of the term or as part of the institutional bill

**NOTE:** Institutions must waive or apply a credit for any other fees not listed above that meet the definition of mandatory.

Eligible FosterEd recipients are provided to institutions on the Waiver Listing (PageSet FCFSXGZ210) which is made available via PageCenter on a biweekly basis.

Institutions are required to certify FosterEd eligibility within 30 days of a student appearing on a Waiver Listing (PageSet FCFSXGZ210) or within 30 days of the term starting, whichever comes later. The Waiver Listing (PageSet FCFSXGZ210) provides student detail and summary information, as well as a Certification Page to be signed by an authorized school official.

#### ii. Certification

The institution must complete the following fields for each student:



- **Graduation Date** – Should be submitted in MMDDYYYY format. If the actual date of the student’s graduation cannot be determined, a reference to expected month and year is sufficient.
- **Enrollment Status** – The FosterEd recipient must be enrolled on at least a half-time basis for each term a FosterEd waiver is received. The Waiver Listing (PageSet FCFSXGZ210) enrollment status field must be populated with one of the following codes:
  - 1 – Full time
  - 2 – At least half time
  - C – Not enrolled/withdrawn (not charged)
  - E – Enrolled less than half time
- **Academic Progress** – In order to receive a FosterEd waiver, a student must make satisfactory academic progress, as defined by the institution. A student granted academic progress due to an appeal to retain other financial aid should be considered as meeting academic progress for FosterEd.
- **Approved Program of Study** – The eligible FosterEd recipient must be enrolled in a Federal Title IV approved undergraduate certificate, diploma, or degree (associate or bachelor’s degree) program of study during each term for which a FosterEd waiver is received.
- **Waiver Amount** – The amount of tuition and mandatory fees to be waived based upon the total tuition and mandatory fees minus federal, state, and other gift aid, as defined in the Student Eligibility section. The waiver amount should include aid awarded by the institution on the sole basis of FosterEd eligibility. Institutional aid awarded on the basis of other eligibility criteria as part of a student’s financial aid package is considered gift aid and should not be included. If a student is currently not enrolled or has withdrawn and has not been charged, a zero should be entered and the related reason should be notated in the “Comments” section of the Waiver Listing (PageSet FCFSXGZ210).

#### Examples of Calculating a Student’s Annual Waiver

Student	Cost of Attendance	Tuition and Mandatory Fees	Total Amount of Gift Aid	Amount to be Waived Annually
A	\$32,608	\$18,564	\$11,485	\$7,079
B	\$25,259	\$13,457	\$12,787	\$670
C	\$10,467	\$8,160	\$8,160	\$0

- **Reasons for Waiver Value of Zero (if applicable)** – Any waiver with a zero dollar balance must be accompanied by an explanation. This free form area allows institutions to provide the reason for a zero dollar balance. Some examples include “no unmet cost” or “student declined waiver.”

**NOTE:** Signed and dated documentation should be obtained for any eligible student opting to decline FosterEd. Institutions should establish their own internal documentation process and retain these records as part of ongoing program administration.

### iii. Withdrawals or Enrollment Changes

Student status adjustments should be handled as follows:

- If a student’s change in status results in adjustments to charges and financial aid, the amount of the waiver would be increased or decreased to cover charges for all remaining tuition and fees.
- If a student withdraws or drops to less-than-half-time status prior to charges being applied to the student account, the student is ineligible for the waiver for that term.

- If a student ceases at least half-time enrollment or becomes ineligible after the waiver for the term has been applied, the waiver should remain in place.
- Students who withdraw, transfer, or become ineligible should be identified to PHEAA via the FosterEd Waiver Listing (PageSet FCFSXGZ210).

## B. Reconciliation Waiver Listing

Reconciliation for the FosterEd Program is scheduled for mid-June. A FosterEd Reconciliation Waiver Listing (PageSet FCFSXH510) will only be generated in the PageCenter mailbox for an institution that has previously completed certification for all students on its Waiver Listings (PageSet FCFSXGZ210).

Institutions must review and confirm a student's record matches the final status reported on the Reconciliation Waiver Listing (PageSet FCFSXH510). Changes must be noted on the Reconciliation Waiver Listing (PageSet FCFSXH510) and returned to PHEAA with a completed certification page. If the institution determines there are no changes, the completed certification page must be returned by the institution. The institution must return its certification of the Reconciliation Waiver Listing (PageSet FCFSXH510) within 30 days of generation.

If the institution determines that there are changes to a student's eligibility status after reconciliation, the institution should contact FosterEd staff to request another Reconciliation Waiver Listing (PageSet FCFSXH510).

## V. Annual Reporting Requirements

Annually, all institutions of higher education must report the following information directly to PDE:

- Number of students receiving a Chafee ETG (found at the end of the biweekly waiver listings)
- Number of students who apply for the FosterEd Program (equivalent to number who applied for the Chafee ETG Program, and can be found at the end of the biweekly waiver listings)
- Number of students participating in the program that received a FosterEd waiver (found at the end of the biweekly waiver listings)
- Retention rate of students participating in the program (not applicable for 2021-22 academic year)
- The number of participating students with remaining unmet financial need
- Recommendations on how to improve outreach to students who are or may potentially be eligible for participation
- Recommendations on how to improve delivery of services to eligible students
- Impediments to retaining eligible students

### A. How to Report

To report the required information to PDE, the data must be submitted to [collab.pde.pa.gov/OPHE/HigherEdReporting/SitePages/Home.aspx](https://collab.pde.pa.gov/OPHE/HigherEdReporting/SitePages/Home.aspx).

#### i. Login Directions

Institutions should use their PA Login information to access the report. A user's Keystone Login will **NOT** work.

An institution that is not registered with a PA Login from the previous year should:

- Register for a new username and password at [palogin.state.pa.us/Login/User/RegisterNew](https://palogin.state.pa.us/Login/User/RegisterNew).

- Once a new username is established, access must be granted. Send the username and email address to [ra-highereducation@pa.gov](mailto:ra-highereducation@pa.gov) with the subject line "Request Access." **DO NOT** send your password.

## ii. Deadline

The deadline for reporting required information is March 1, 2022. Other general questions should be directed to PDE at [ra-highereducation@pa.gov](mailto:ra-highereducation@pa.gov).

## VI. Retention of Records & Program Review

### A. Record Retention

In accordance with these guidelines, institutions are required to retain, for possible review and audit by PHEAA, all records necessary for the certification of student waiver eligibility and the crediting of FosterEd waivers to student accounts. Such records must be retained for at least 5 years from the date the institution completes certification of the Reconciliation Waiver Listing (PageSet FCFSXH510).

### B. Program Review

As part of the Program Review process, PHEAA may conduct further examinations of student accounts and records as it deems necessary. Findings in the Program Review may result in adjustments to the applied waiver or be considered in combination with other PHEAA-administered program findings to determine if four or more administrative findings have been identified. Four or more administrative findings indicate a high error rate, and a follow-up Program Review will be scheduled for the next academic year. Review [PHEAA.org/ProgramReview](https://www.pheaa.org/ProgramReview) for more details.

#### i. Program Review

Below are examples of Program Review Findings for FosterEd:

- POC not designated or POC contact information incorrect or missing from institution's public website
- Student not certified on the Waiver Listing (PageSet FCFSXGZ210) by the deadline
- Institution did not refund student payment within the required time frame
- Waiver amount credited to student account is insufficient
- Required documentation not on file for the student who declines the waiver
- Institution did not follow published institutional policy with regard to SAP and unmet cost
- Waiver amount credited to the student account does not match what was reported to PHEAA

# Appendix A

## PageCenter Reports

# FosterEd PageCenter Reports



## PageCenter Reports

The following PA Fostering Independence Tuition Waiver (FosterEd) Program reports are placed in the institution's PageCenter mailbox:

- **FosterEd Waiver Listing (PageSet FCFSXGZ210)** – The Waiver Listing (PageSet FCFSXGZ210) provides certification data for those students who have been identified by PHEAA as FosterEd Eligible. The Waiver Listing (PageSet FCFSXGZ210) is placed in the PageCenter mailbox of the institution and will include those students who listed the institution on their Chafee Education and Training Grant (Chafee ETG) application. The Waiver Listing (PageSet FCFSXGZ210) serves as the school's certification roster and must be returned to PHEAA to complete the FosterEd certification process.
  - The Waiver Listing (PageSet FCFSXGZ210) is accessed in PageCenter via the secure school portal at [PHEAA.org](https://www.pheaa.org).
  - The most recent version of the Waiver Listing (PageSet FCFSXGZ210) is automatically placed on PageCenter biweekly. The following are student status change indicators:
    - A pound sign (#) next to a student's name indicates the student was not on the previous Waiver Listing (PageSet FCFSXGZ210).
    - An asterisk (\*) next to the student's name indicates that there has been a status change from the previous Waiver Listing (PageSet FCFSXGZ210).
  - Once a Waiver Listing (PageSet FCFSXGZ210) has been certified and returned, the institution does not need to return subsequent Waiver Listings (PageSet FCFSXGZ210) for the same academic year to PHEAA if there are no status changes needed.
- **FosterEd Denial Listing (PageSet FCFSXH3210)** – The Denial Listing (PageSet FCFSXH310) is generated on a biweekly basis, listing all students who have been identified by PHEAA as FosterEd ineligible. The Denial Listing (PageSet FCFSXH310) is placed in the PageCenter mailbox of the institution and will include those students who listed the institution on their Chafee ETG application. The Denial Listing (PageSet FCFSXH310) serves to help identify those students who are attending the institution that may need assistance in completing documentation to become FosterEd eligible. Correctable denial reasons include:
  - No FAFSA\* or FAFSA Incomplete
  - No PA State Grant Application
  - Student Loan in Default
  - Student is not a PA Resident
- **FosterEd Reconciliation Waiver Listing (PageSet FCFSXH510)** – The annual Reconciliation Waiver Listing (PageSet FCFSXH510) provides the school with a final opportunity to report ineligible students or changes to a student status and reports a student's final eligibility status for FosterEd in accordance with the school's records. The Reconciliation Waiver Listing (PageSet FCFSXH510) must be returned within 30 days of receipt; if there are no changes to the Reconciliation Waiver Listing (PageSet FCFSXH510), the institution is only required to sign and return the Certification Page.
- **Institution Outstanding Items Report** – The Outstanding Items Report provides schools and employers with a list of outstanding rosters, reports, and refunds due to PHEAA across most PHEAA-administered programs. The report generates nightly, using PageSet LWT41LWT41R3 in the institutions Grants application folder.
- **SGSP Institutional Contacts Report** – The SGSP Institutional Contacts Report, available via multiple applications within an institution's PageCenter mailbox, is designed to ensure that the delivery of important program communication is sent to the appropriate staff by providing a monthly list of the current institutional contacts on file for PHEAA-administered programs. So that the correct personnel at your institution can receive information needed to resolve operational and processing issues and find out about PHEAA-developed

resources and events, it is critical that your institution regularly review the contacts listed and email the appropriate program inbox with any corrections and adjustments. Review subsequent reports to confirm that the updates were made. You may also contact PA State Grant & Special Programs staff for confirmation and additional details.

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# Appendix B

## FosterEd Waiver Listing

# FosterEd Waiver Listing



00123400(1)		FOSTERING INDEPENDENCE WAIVER PROGRAM 2021-22 WAIVER LISTING				DOC ID TFWL
Attn: Financial Aid Admin. & Point-of-Contact						
PENNSYLVANIA INSTITUTION NAME						
STUDENT LISTING						
123-45-6789(2)		EXPECTED GRADUATION DATE:				(4)
ABCDEFG SMITH(3)		WAIVER COUNTER: 0,500/5,000				(5)
		FILED PA STATE GRANT FORM: Y				(6)
TERM	ENROLLMENT STATUS (7)	ACADEMIC PROGRESS (8)	DEGREE PROGRAM (9)	WAIVER VALUE (10)	ADDITIONAL COMMENT (11)	
FALL	FULL	Y/N	Y/N	\$0	INELIGIBLE	
SPRING	FULL	Y/N	Y/N	\$0	INELIGIBLE	
Number of students receiving a PA Chafee Education and Training Grant:					0 (12)	
Number of students who completed a PA Chafee Education and Training Grant Application:					0 (13)	
Number of students who received the Fostering Independence Tuition Waiver:					0 (14)	
Total amount of fees waived:				\$0 (15)		

## Legend 1 – Waiver Listing Codes

# Indicates the student was not on the previous PA Fostering Independence Tuition Waiver (FosterEd) Listing

\* Indicates that there has been a status or award change since the previous FosterEd Waiver Listing

**NOTE: Bold codes and definitions are required fields.**

- Institution's OE code
- Student's SSN
- Student's name
- **Expected/actual student graduation date; in MMDDCCYY format; if the exact graduation day is unknown, use the last day of the month**
- Number of terms student has received the waiver out of 5 years, defined as 10 semesters or the equivalent
- Indicates if a student has filed a PA State Grant Form
- Provides specific fall, winter, or spring term enrollment status from Legend 3
- Student must maintain Title IV satisfactory academic progress; circle "Y" if Yes, "N" if No ("Y" for a freshman)
- **Student must be enrolled in an approved Federal Title IV certificate, diploma, or degree program of study; circle "Y" if Yes, "N" if No**



- This waiver amount is populated by the institution and is the total amount of tuition and fees remaining after all gift aid has been applied. The waiver amount should include any institutional aid awarded on the sole basis of FosterEd eligibility
- **Comments populated by the school, explaining zero dollar waiver amount**
- Number of students who received PA Chafee Education and Training Grant (Chafee ETG) for the current academic year
- Number of students who applied for the Chafee ETG for the current academic year (equivalent to number of FosterEd applicants)
- Number of students who received the FosterEd waiver for the current academic year
- Total amount of tuition and fees waived

## Legend 2 – Ineligible Reason Codes

**NOTE:** The list below indicates all reasons a student may be ineligible for FosterEd. It is important to understand that not all reasons will appear on your Waiver Listing, but they will appear on student status letters.

- 01 Student does not meet the age requirement
- 02 Student does not meet residency requirement
- 03 No FAFSA® or FAFSA is incomplete
- 06 No PA State Grant application
- 05 Title IV Educational loan in default status or a refund on Title IV aid is due
- 08 No unmet cost for tuition or fees
- 09 School is not an eligible Federal Title IV postsecondary institution
- 13 Student refusal of waiver
- 14 Eligibility pending DHS review
- 18 Student is not enrolled
- 20 Maximum eligibility
- 22 Student is not eligible per DHS or County Children & Youth Agency
- 24 Student is not enrolled in an approved Federal Title IV certificate, diploma, or degree (associate or bachelor's degree) program of study
- 25 Student did not make academic progress
- 26 Student is enrolled less than half time

## Legend 3 – Enrollment Status

- 1 Full time (a minimum of 12 credit hours or 450 clock hours)
- 2 Half time (at least 6 credit hours but less than 12 credit hours or the equivalent)
- E Less than half time
- C Not enrolled/withdrawn (no charges)

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# Appendix C

## FosterEd Student Certification Best Practices

# FosterEd Student Certification Best Practices



The PA Fostering Independence Tuition Waiver (FosterEd) Listing is a biweekly report generated to the STEP application of an institution's PageCenter mailbox. This report provides a list of students who have submitted a Chafee ETG application, listed the institution as first choice when filing the FAFSA®, have been identified by the Pennsylvania Department of Human Services (DHS) as eligible foster youth, and are eligible for FosterEd according to the waiver determination process outlined in the program guidelines.

## Best Practices

Waiver Listings are printed, completed, and returned via fax to 717-720-3786 by the institution, to be manually processed by PHEAA staff. Follow the best practices below to facilitate efficient student certification.

### DO

- Provide information in these fields:
  - Graduation Date
  - Waiver Amount
- Correct Enrollment Status information
- Indicate if a student declines the waiver or does not have unmet need for the waiver in the "Additional Comments"
- Send one completed signed and dated Waiver Listing
- Only send subsequent program year Waiver Listings if there are changes/updates (pages with changes and Certification Page only)
- Leave fields blank for students not yet certified but expected to be certified during the program year
- Review the FosterEd Program Guidelines for field definitions, descriptions, and additional certification information
- Allow 7-10 business days for processing

### Don't

- Leave Blank fields for students who are being certified
  - Degree Program (circle "Y" or "N")
  - Academic Progress (circle "Y" or "N")
  - Certified Amount
- Leave blank the comments field if the Waiver Amount is zero
- Indicate "\$0" in the certified amount if intending to certify
- Send Waiver Listings with no changes
- Send duplicate Waiver Listings or duplicate information
- Leave blank fields for students who are being certified
- Certify for terms a student has not yet started

0022000111 FOSTERED INDEPENDENCE WAIVER PROGRAM 2021-22 WAIVER LISTING  
 (Date: Financial Aid Office, a Point of Contact) PHEAA  
 PENNSYLVANIA INSTITUTION NAME

123-45-6789  
 ANCESTRY SMITH

REPORTED GRADUATION DATE: 12/31/2022  
 WAIVER AMOUNT: \$4,000.00  
 FILED PA STATE GRANT FORM: X

TERM	ENROLLMENT STATUS	ACADEMIC PROGRAM	DEGREE PROGRAM	WAIVER VALUE	ADDITIONAL COMMENTS
FALL 2021	FULL	Y	Y	\$4,000	
SPRING 2022	FULL	Y	Y		

0022000111 FOSTERED INDEPENDENCE WAIVER PROGRAM 2021-22 WAIVER LISTING  
 (Date: Financial Aid Office, a Point of Contact) PHEAA  
 PENNSYLVANIA INSTITUTION NAME

123-45-6789  
 ANCESTRY SMITH

REPORTED GRADUATION DATE: 12/31/2022  
 WAIVER AMOUNT: \$0.00  
 FILED PA STATE GRANT FORM: X

TERM	ENROLLMENT STATUS	ACADEMIC PROGRAM	DEGREE PROGRAM	WAIVER VALUE	ADDITIONAL COMMENTS
FALL 2021	FULL			\$0.00	
SPRING 2022	FULL				

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# Appendix D

## FosterEd Denial Listing

# FosterEd Denial Listing



00123400 - PHEAA UNIVERSITY		3/10/21		
The following students are not eligible for the FOSTERING INDEPENDENCE TUITION WAIVER PROGRAM for the 2021-22 academic year.				
The students and their denial reason are listed below.				
SSN	STUDENT NAME	DOB	COUNTY	DENIAL REASON
123456789	STUDENT A	12/15/2020	DAUPHIN	PENDING DHS REVIEW
234567890	STUDENT B	1/8/2001	BERKS	NO FAFSA

## Denial Reasons

**NOTE:** The list below indicates all reasons a student may be ineligible for the PA Fostering Independence Tuition Waiver (FosterEd) Program. It is important to understand that not all reasons will appear on your Denial Listing (PageSet FCFSXH3210), but they will appear on student status letters.

- Application was not signed
- Does not meet the age requirement
- Does not meet residency requirement
- No FAFSA® or FAFSA is incomplete
- Title IV Educational loan in default status or a refund on Title IV aid is due
- School is not an eligible Federal Title IV postsecondary institution
- Eligibility pending DHS review
- Maximum eligibility
- Student is not eligible per DHS
- No financial need for the grant
- Complete address was not provided
- No academic progress
- County of placement was not provided
- Student not enrolled
- Enrolled less than half time

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Created in 1963 by the Pennsylvania General Assembly, the Pennsylvania Higher Education Assistance Agency (PHEAA) has evolved into one of the nation’s leading student aid organizations. Today, PHEAA is a national provider of student financial services, serving millions of students and thousands of schools through its loan guaranty, loan servicing, financial aid processing, outreach, and other student aid programs.

PHEAA’s earnings are used to support its public service mission and to pay its operating costs, including administration of the Pennsylvania State Grant and other state-funded student aid programs. As the only major federal loan servicer with a nonprofit public service mission, PHEAA devotes its energy and resources to help ease the financial burden of higher education for its primary stakeholders—Pennsylvania students and families.

PHEAA conducts its student loan servicing operations nationally as FedLoan Servicing and American Education Services (AES). PHEAA operates its digital technology division as Avereo. For more information, visit [PHEAA.org](https://www.pheaa.org).

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**Gubernatorial Appointment**  
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**Secretary of Education**  
PA Dept. of Education – Vacant

## Pennsylvania Higher Education Assistance Agency

1200 North Seventh Street, Harrisburg, PA 17102-1444 • 1-800-692-7392

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## Appendix C: The Role of the FosterEd POC (November 2021)



### Agenda

#### Housekeeping

PA State Grant & Special Programs (SGSP) staff introduce themselves, explain how to acquire program materials, and review agenda items

#### Background

PHEAA staff provides high-level information on the history of the program, as well as institutional and student eligibility requirements

#### Point of Contact (POC) Responsibilities

Presenters discuss the legislatively defined responsibilities of the POC and share resources that are available to support the POC

#### Wrap-Up

Panelists will issue reminders, provide additional resources, and share responses to questions posed during the session by attendees

*This content has been abridged and does not supersede current program policy. For complete guidance on program administration, please refer to the appropriate year FosterEd Program Guidelines.*



## Background

- Enacted into law under Act 16 of 2019
  - Jointly administered by PHEAA and the PA departments of Education (PDE), Human Services (DHS), and Labor & Industry (L&I)
- Program created to remove barriers in accessing postsecondary education for youth who are or have been in foster care
  - Waives tuition and mandatory fees for eligible students in the foster care system
    - Program legislation amended by Act 91 of 2019 to require students to apply for federal and state grants
  - Assists students in completing studies, reducing student loan debt, and building a network of support
- No Commonwealth appropriation
  - Student's tuition and mandatory fees must be waived
    - Waiver will not need repaid even in cases of eligibility changes

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## Institutional Participation



Program legislation provides details regarding institutional participation. Questions should be directed to your Legal Department.

- A participating institution:
  - Must be located in Pennsylvania, have federal Title IV eligibility, and complete a Remote Access Agreement (RAA)
  - Must identify a POC and publicly publish their contact information
    - Share with PHEAA via [POC & FAA Contact Form](#)
  - Should notify PHEAA when institutional changes occur (e.g., name, location, status, etc.)

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## Student Eligibility

- Student must:
  - Be a resident of Pennsylvania
  - Meet the program's age requirement (under the age of 26)
  - Possess a high school diploma or Commonwealth Secondary School Diploma
  - Be eligible for services under Pennsylvania's John H. Chafee Foster Care Program for Successful Transition to Adulthood
    - Be identified as a youth in foster care or a youth discharged or adopted from foster care on or after attaining age 16 or has exited foster care on or after age 16 due to permanent legal guardianship
  - File a FAFSA® and application for the Chafee Education and Training Grant (Chafee ETG) Program by May 1
    - Chafee ETG application not required for renewal applicants
    - Student does **not** have to be awarded Chafee ETG funds
  - File a PA State Grant Form or PA State Grant Summer Application, if applicable
    - Student does not need to be eligible for PA State Grant

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**Non-federal gift aid (e.g., loans, PA State Grant awards, PA Targeted Industry Program awards, etc.) is not included in the unmet costs calculation for the Chafee ETG Program.**

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## Student Eligibility

- Student must:
  - Have unmet costs for the Chafee ETG Program
    - Unmet costs = student's cost of attendance – federal gift aid
  - Enroll as an undergraduate, on at least a half time basis in an approved federal Title IV certificate, diploma, or degree program of study at an eligible PA institution
  - Maintain satisfactory academic progress, as determined by the institution
  - Not be in default on a federal student loan or owe a refund on other Title IV aid
  - Have not previously exhausted the FosterEd award counter (defined as 10 semesters or the equivalent)

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## Student Eligibility

- Students will establish FosterEd eligibility via one of two ways:

### Option 1

1. Student applies/renews Chafee ETG eligibility directly with PHEAA
2. PHEAA runs eligibility checks and advises the student and school
3. Eligible students presented on biweekly Waiver Listing

### Option 2

1. Student self-identifies to school's POC
2. Student and school verify student's eligibility and advise PHEAA; Student applies/renews Chafee ETG eligibility
3. PHEAA runs eligibility checks and advises the student and school
4. Eligible students presented on biweekly Waiver Listing

## Point of Contact

- POC is primary contact for prospective and eligible FosterEd students
  - Will support both admitted students and students applying to the institution
- Each institution must determine who is most qualified for the role
  - May name multiple individuals
  - May delegate duties to other campus individuals/offices
  - Contact information for POC must be publicly available and posted online
    - Will be a program review finding if not published



## POC Responsibilities

- Assists students in obtaining verification of foster care status if student self identifies or is listed on FosterEd Denial Listing
  - Acceptable sources for verification:
    1. Court order that verifies that the youth was in foster care from the local Court of Common Pleas
    2. A statement (verbal or written) from the County of Placement Office or Department of Human Services
    3. A statement from a private provider agency that delivers child welfare services that the youth was in foster care
    4. A statement from an attorney, guardian ad litem, or court-appointed special advocate verifying the person's relationship to the student and that the youth was in foster care
  - Document verification source, date, and method in institutional records
  - Report eligibility verifications to PHEAA via email

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## POC Responsibilities

- Provides students with information and referrals for support services
  - Referrals may be for on-campus or off-campus assistance
    - Services needed may vary between students (e.g., transitional housing, academic advising, religious services, career services, etc.)
    - Students may not understand what/how/when to do things (e.g., finding medical insurance)
  - Connect students with Act 101 or TRIO programs on campus, if applicable
  - Support students transferring by connecting them with POC at the new institution

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## POC Responsibilities

- Assist students in accessing available federal and state financial aid resources and in identifying further scholarship and grant opportunities
  - Different types of financial aid available
  - Waivers are not contingent upon receiving additional aid sources
  - Students not required to apply for PA State Grant if attending a non-approved institution or enrolled in a non-approved program of study
    - Encourage students to consider other PHEAA-administered programs (e.g., PA Targeted Industry Program)
  - Waivers do not cover existing loan debt, room, board, and non-mandatory fees
  - PHEAA offers free FAFSA events and other events to explore covering funding gaps



**The PA State Work-Study Program is an opportunity for students to earn while they learn! Your institution could become an approved employer and support your FosterEd students. Learn more at [PHEAA.org/SWSP](https://www.pheaa.org/SWSP).**

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## Denial Listing

- Contains applicants/renewals who have not met the eligibility criteria
  - Generates on a biweekly basis
  - Only includes students that have listed your institution on their Chafee ETG application
    - Advise transfer students to report new institution to PHEAA immediately
- POC must routinely review report to determine whether waiver eligibility may be attained
- Report provides the reason the applicant was denied and the county where the student received services
  - Most common ineligibility reasons include: application not signed, no PA State Grant application, missing or incomplete FAFSA, and no eligibility per DHS
  - Changes in eligibility must be reported to PHEAA

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## POC Responsibilities

- Jason B., Marissa M., and Benny C. are attending PHEAA College
  - Jason has recently aged out of foster care and relocated to the area to attend college
  - Marissa is a senior scheduled to graduate in Spring 2022 and has completed both the FAFSA and Chafee ETG application
  - Benny is on the Denial Listing due to an incomplete FAFSA, incomplete address, and is ineligible per DHS. Benny is also considering transferring to another PA institution in Spring 2022



### Questions

- What are some things that the POC will want to discuss with Jason?
- How can the POC support Marissa as the student prepares for graduation?
- What should the POC review with Benny to establish FosterEd eligibility?
  - If Benny intends to transfer, what items should the POC discuss with this student?

## POC Responsibilities

### Answers

- Jason: POC will want to initiate conversations with Jason to establish FosterEd eligibility
  - POC may need to assist with completing the FAFSA and other forms of financial aid
  - Other services/referrals may be needed once the POC makes contact with Jason (e.g., disability services, tutoring, etc.)
- Marissa: POC may wish to discuss post collegiate plans including housing, loan repayments, further schooling, etc.
  - POC should discuss internships and work-study opportunities
- Benny: The POC should:
  - Advise Benny to complete the FAFSA and report a complete address to PHEAA
  - Gather information from Benny about the time spent in foster care to verify the youth was eligible for foster care services in PA
  - Review Benny's transfer plans and connect the student with the POC at new institution to discuss financial aid, housing, admissions, and other services at the new institution



## Waiver Listings

- Available biweekly (on Tuesdays) in PageCenter
- Contains students who have been determined as initially eligible by PHEAA
- Certify student eligibility within 30 days of student appearing on Waiver Listing or beginning of the term, whichever is later
  - Waiver amount must cover remaining balance of the student's tuition and mandatory fees, after gift aid is applied
    - Gift aid includes institutional aid awarded based on other (non-FosterEd) criteria, as well as federal grants (e.g., Pell), state grants, scholarships, etc.
  - Refund any student payments that were applied to tuition or mandatory fees within 30 days
- Waivers must be designated as FosterEd on the student account
- Should be included in the conditional aid packaging when the institution has verification of the student's foster care eligibility



**Institutions are encouraged to use other aid to cover charges not waived under FosterEd, as appropriate.**

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## Waiver Listings

- Submit additional listings when changes/updates need to be reported
  - Student withdraws or drops to less than half-time before charges are applied, the student is ineligible
  - Student ceases at least half-time enrollment or becomes ineligible after the waiver has been applied, the waiver should remain in place
  - Report if student refuses the waiver and retain documentation
  - Waiver adjustments may be required due to financial aid increases or decreases
- Waiver value may exceed the total cost of tuition and mandatory fees
- Waivers cannot be withheld or reduced due to expectation of additional gift aid

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## Waiver Certification Example

- Students Chunk and Taylor are attending PHEAA Career and Technical Center and are listed on the Fall 2021 FosterEd Waiver Listing

Chunk		Taylor	
<b>Costs</b>		<b>Costs</b>	
Tuition	\$19,250	Tuition	\$34,765
Mandatory Fees	\$2,650	Mandatory Fees	\$2,650
Room & Board	\$0	Room & Board	\$8,971
<b>Total Costs</b>	<b>\$21,900</b>	<b>Total Costs</b>	<b>\$46,386</b>
<b>Gift Aid</b>		<b>Gift Aid</b>	
Federal Pell Grant	\$2,100	Federal Pell Grant	\$3,100
PA Targeted Industry Program Grant	\$2,500	Chafee ETG Award	\$3,000
<b>Total Resources</b>	<b>\$4,600</b>	<b>Total Resources</b>	<b>\$6,100</b>

- The minimum amount the institution must waive for:
  - Chunk = \$17,300 (\$21,900 - \$4,600)
  - Taylor = \$31,315 (\$37,415 - \$6,100)
- The school may elect to waive up to the total amount charged for each student
  - This could allow the students' gift aid to be applied towards other expenses (e.g.,<sup>17</sup> room, board, transportation, etc.)

- Additional resources for students and schools

<a href="http://StudentAid.ed.gov">StudentAid.ed.gov</a>	ED's site providing information on preparing for and funding education
<a href="#">Education Planner</a>	Provides advice to help students prepare for college and a career
<a href="#">MySmartBorrowing</a>	Interactive tool where students create different scenarios to see how career and college choices may affect college borrowing
<a href="#">YouCanDealWithIt</a>	Helps students learn to manage money, student loans, a budget, and credit card
<a href="#">PA DHS Provider Directory</a>	Contains a list of County Children and Youth Agencies
<a href="#">PAFosterCare.org</a>	Features POC directories

## Resources & Tips

The screenshot shows the PHEAA website's 'Available Counselor Resources' section. It includes a list of resources such as 'Learn About Financial Aid Opportunities', 'Federal Student Aid Account (FSA ID)', 'How to File FAFSA', 'CROFTER 391 PLAN ASSISTANCE', 'Scholarship Search', and 'Funding for Higher Education'. There is also a 'Check out PHEAA's Toolkit for Counselors/Partners!' banner with a hand icon pointing to it. Below the banner are two promotional cards: 'PA Student Aid Guide 2021-22' and 'Order Publication Materials'.

## Resources & Tips

- Flag students who have a FAFSA comment with Code 166 and share FosterEd and Chafee ETG information
- Incorporate the program into your school's admissions materials
- Employ social media to reach current and prospective students
- Identify local support services and contacts
  - Share brochures with local schools and relevant agencies and organizations
  - Develop FAQ documents that can be readily available
- Coordinate regular check-ins with current FosterEd students

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## Reminders

- Encourage students to submit their FosterEd application as soon as possible
  - 2021-22 Chafee ETG deadline is December 31
  - Discuss application deadlines/processes for other financial aid programs (e.g., PA State Grant, PA Targeted Industry Program, etc.)
- Chafee ETG student eligibility flexibilities provided through the Consolidated Appropriations Act (CAA) of 2021 do not impact FosterEd
  - FosterEd eligibility does not change to match Chafee ETG changes (e.g., age 27, academic progress exemption, etc.)
- Share program feedback and recommendations with PDE via annual reporting
- Retain records associated with eligibility verification, certification, and crediting for at least five (5) years

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## Join Us Next Time!



### Spring 2022 Webinar Series to be announced by January!

- Session descriptions and registration information will be available on [PHEAA.org/SGSPtraining](https://PHEAA.org/SGSPtraining)
- Recordings and presentation slides from the other Fall 2021 sessions available on training webpage



Have a specific session that you would like to see featured? Send us an email via the [program mailbox](#) with the subject line: Training Topic.

## Resources

### Web

- [PHEAA.org](https://PHEAA.org)
- [Alec](#)

### SGSP Staff

- Email: [fostered@pheaa.org](mailto:fostered@pheaa.org)
- Phone: 800-443-0646

### Events

- Webinar Series
- Conferences
- Workshops

### Print Materials

- Brochures
- Calendars
- FAQs

Connect with PHEAA socially!

