



Louisiana Association of
Student Financial Aid
Administrators



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Monitoring Satisfactory Academic Progress

LASFAA Fall Conference

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Federal Student Aid
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Federal Student Aid

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Satisfactory Academic Progress

- SAP regulations consolidated into 34 CFR 668.34
 - Administrative capability 668.16 now only refers to policy
 - Student eligibility in 668.32 still includes as eligibility requirement
 - Satisfactory progress in 668.34 now contains all elements of SAP
- New, but have been in effect since July 1, 2011

Satisfactory Academic Progress

- Consolidates SAP regulations into 34 CFR 668.34
- 34 CFR 668.34 is easier to understand if you break it down into 3 portions:
 - First, Section (a)
 - Next, Section (b)
 - Finally, Section (c) OR (d)
-Not both sections-

Why Break it Down Into 3 Sections?

- Section (a) explains what you must do and what your policy must contain to be considered reasonable
- Section (b) defines important terms used in assessing SAP
- Section (c) OR (d) will apply to you and shows when and how you must assess SAP depending on if you assess SAP once a year OR once every payment period

Satisfactory Academic Progress

- SAP is a Title IV requirement for student eligibility
- A student who is not making SAP is no longer eligible for Title IV aid
- As is the case in many Title IV rules, there ARE exceptions

SAP Policy

- SAP policy required elements include
 - Measurement of student's progress at each evaluation
 - GPA that a student must achieve at each evaluation
 - Qualitative standard
 - Pace of progression to ensure completion within the maximum time frame
 - Quantitative standard

SAP Policy

- SAP policy required elements include
 - How GPA and pace of completion affected by
 - Incompletes
 - Withdrawals
 - Repetitions
 - Transfers of credit from other schools
 - At a minimum, school must count transfer hours, accepted toward completion of student's program, as both hours attempted and hours completed

SAP – Qualitative Element

- HEA Requirement that student must have 2.0 on a 4.0 scale, or its equivalent, after two years
 - For programs greater than two academic years
- End of second academic year
 - Regardless of how many credits earned or grade level

SAP – Quantitative Element

- Quantitative element has two components
 - Maximum timeframe
 - Period of time that student has to complete the program of study and still be making SAP
 - Pace of Progression
 - An ongoing measure that ensures student is on track to complete program in the maximum timeframe

Maximum Time Frame

- For undergraduate programs of study, must be no longer than 150% of published length of educational program
 - For credit hour programs, as measured in credit hours attempted
 - More precisely defined than in the past
 - For clock hour programs, as measured in cumulative clock hours required to complete and expressed in calendar time

Change of Major

- Still in place is the longstanding policy that schools may set their own SAP policy dealing with changes of major as they relate to maximum time frame
- SAP policy may limit the number of times that a student may change majors and have the maximum time frame recalculated

Pace of Progression

- School's policy must specify
 - Pace of progression required to ensure student completes within maximum time frame and that pace is measured at each evaluation
 - Pace calculated by dividing cumulative hours student successfully completed by cumulative hours student has attempted
 - Remedial coursework may be excluded

How Often Is SAP Evaluated?

- For programs of study that are one academic year or less in length, school must evaluate SAP at end of each payment period
- For programs of study longer than one academic year
 - School must evaluate at least annually to correspond with end of a payment period
 - School **may** evaluate at end of each payment period

Definitions

- Financial Aid Warning
- Financial Aid Probation
- Appeal
- Academic Plan
- All defined for Title IV purposes NOT academic purposes

School Options

- F/A Warning status may be used by schools that measure at end of each payment period
- F/A Probation status may be used by schools who have an appeal process
- Academic Plan is a tool that schools with an appeal process may choose to implement
- Appeal process may be used by schools, if they wish

School Options

- Financial Aid Warning
- Financial Aid Probation
- Academic Plan
- Appeal
- School may choose to implement one, several, all or none of these options

SAP - Warning

- Financial Aid Warning
 - You cannot use this status unless you evaluate SAP at the end of each payment period
 - School may establish when it is used in policy
 - Status assigned to a student who fails to make SAP
 - No appeal necessary for this status
 - Student is not making SAP while in this status
 - Student may continue to receive Title IV aid for **one** payment period

SAP - Probation

- Financial Aid Probation
 - Status assigned by an institution to a student who fails to make SAP and who has successfully *appealed* and has had eligibility for Title IV aid reinstated (i.e. appeal approved)
 - Institution may impose conditions for student's continued eligibility to receive Title IV aid
 - Student is not making SAP in this status
 - Student may receive T4 aid in this status for **one** payment period

SAP - Probation

- While student is on financial aid probation, status must be checked each payment period even if non-probationary students are checked less frequently
- If it appears that student can return to SAP status after one payment period, school may choose to implement an academic plan or not

SAP - Probation

- If it appears that student will take multiple payment periods to reach the status of SAP, the school may implement an academic plan immediately
- The first payment period under the academic plan is probationary
- Subsequent payment periods under the academic plan are not probationary and the student is making SAP under the provisions of the academic plan
- Conversely, if the student is not meeting the provisions of the academic plan, he or she is not making SAP and is, therefore, ineligible for T4

Probation & Appeals

- FA Probation always follows a successful appeal
- The probationary period granted as a result of the appeal is limited to one payment period

SAP - Appeal

- Process by which a student who is not meeting institution's SAP policy petitions for reconsideration of eligibility for Title IV aid, due to unusual circumstances
 - Appeal policy must specify the conditions under which a student may appeal
 - Student's appeal must include
 - Why he or she failed to make SAP
- AND
- What has changed that will allow student to make SAP in the future

If School Decides to Grant the Appeal

- Two things can happen
 - School has determined that the student
 - Will be able to make SAP standards by end of next payment period and decides to put the student into probation with no academic plan
 - This is the probationary payment period
 - Probation may still have requirements

OR

- Will be placed on academic plan (AP) that will ensure student is able to meet SAP standards by a specific point in time in the future
 - The first payment period of the AP is the probationary payment period

Academic Plan

- AP must have a point in time identified when student will be making SAP as defined by the School's SAP Policy
- This cannot be 20 years down the road but it could be beyond the maximum timeframe if the school wishes and allows in its policy
- Point in time may be the successful conclusion of the program of study



Academic Plan

- The AP is that student's SAP policy
- If student fails to meet the requirements of the Academic Plan, the student is not making SAP
- Not making SAP = Loss of Title IV eligibility

Probation Then an AP

- School granted appeal and determined the student could be back on track in one payment period
 - Placed student into probation, no AP
- End of probation, student is still not making SAP
 - Student is ineligible
 - Cannot be placed automatically on AP
 - Student could appeal again...



Probation Then an AP

- This is the student's second appeal
- School must review information stating
 - Why the student failed to make SAP at the end of the probation payment period
 - What had changed that caused the student to not make SAP during the probationary payment period
 - Why the student will be able to meet SAP under the terms of the academic plan
- If appeal is granted in this situation
 - Student goes immediately on AP, but the first payment period will still be considered probationary
 - Not second probation but the first associated with this appeal

Summary

- Let's summarize what happens depending on whether...
 - The school checks SAP at the end of each payment period
- OR
- The school checks SAP less frequently
 - e.g. once a year

Evaluate Each Payment Period

- At an institution that evaluates SAP **each payment period**, if student loses eligibility for Title IV aid
 - Student may be placed on Financial Aid Warning for **one** payment period
 - After the warning period, if student is not making SAP, the student may be allowed to appeal the loss of Title IV eligibility



Evaluate Each Payment Period

- At an institution that evaluates SAP **each payment period**, if student loses eligibility for Title IV aid (cont'd)
 - If the appeal is successful, the student may be
 - placed on Financial Aid Probation for one payment period
- OR
- placed immediately on an academic plan and the first payment period will be probationary

Evaluate Each Payment Period

- At an institution that evaluates SAP **each payment period**, if student loses eligibility for Title IV aid (cont'd)
- After Financial Aid Probation, if the student was not placed on an academic plan
 - Student must be making SAP
- OR
- Student must successfully appeal again in order to be placed on an academic plan
 - The first payment period of the AP would be probationary
- OR
- Student loses Title IV eligibility

Does Not Evaluate Each Payment Period

- At an institution that evaluates SAP **less often than each payment period**, if a student loses eligibility for Title IV aid
 - School cannot use the automatic F/A Warning status
 - Student, after a successful appeal, may be
 - Placed on Financial Aid Probation for one payment period
OR
 - Placed immediately on an academic plan with the first payment period being probationary

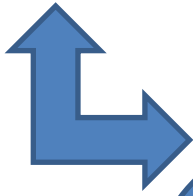
Does Not Evaluate Each Payment Period

- At an institution that evaluates SAP **less often than each payment period**, if a student loses eligibility for Title IV aid
 - After Financial Aid Probation, if the student was not placed on an academic plan
 - student must be making SAP
 - OR
 - Student must successfully appeal again in order to be placed on an academic plan, and the first payment period will be probationary
- OR
- Student loses Title IV eligibility

If School Implements All Options

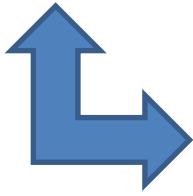
- School exercises its option to evaluate SAP at the end of every payment period
- School chooses to have a warning status
- School chooses to have an appeal process
- School chooses to have a probationary status
- School chooses to use an academic plan

PAYMENT PERIOD



NOT MAKING SAP

WARNING For 1 PP



NOT MAKING SAP



APPEAL

School grants appeal & believes student will be making SAP in 1 payment period



School grants appeal but believes student will not be making SAP in 1 payment period

School does not grant appeal



Probation



No Title IV



Probation

Acad. Plan

PROBATION & NOT
PLACED ON AN
ACADEMIC PLAN



NOT
MAKING SAP



School does not grant appeal



School grants appeal



No Title IV



Probation

Acad. Plan

No Lifetime Limitation on SAP Statuses

- One warning payment period means not two consecutive warning payment periods
- May be multiple warning payment periods throughout student's academic career

No Lifetime Limitation on SAP Statuses

- One probation payment period means not two consecutive probation payment periods linked to the same appeal
- May be multiple probation payment periods throughout student's academic career

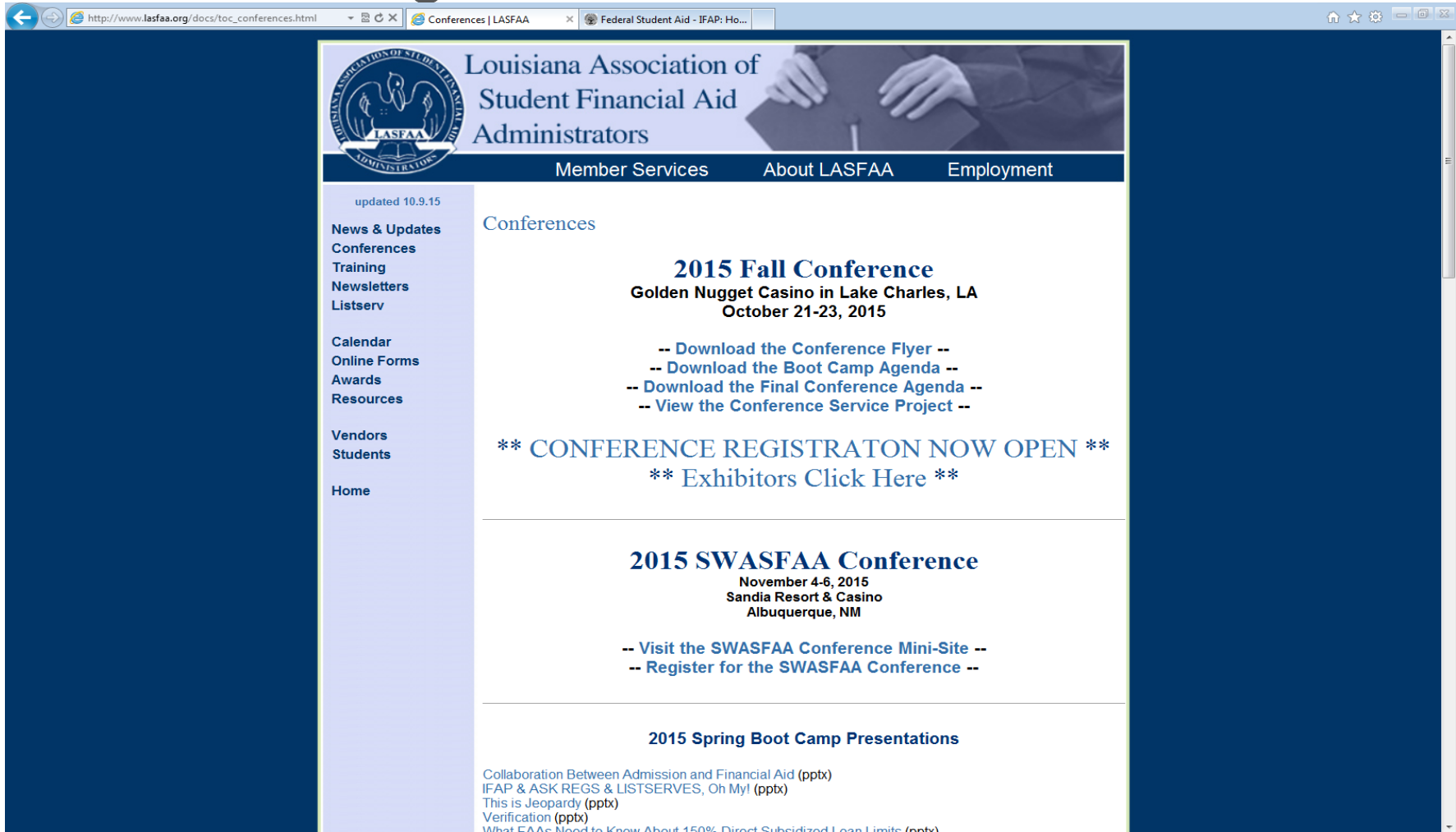
No Limitation on SAP Statuses

- School may allow one appeal or multiple appeals or NO appeals
- School may craft academic plan as it sees fit
 - May choose to limit the # or not
 - Student should take ownership of the academic plan and understand its requirements

SAP - Notifications

- Required SAP notifications
 - Institution must notify student of results of SAP review that impacts the student's eligibility for Title IV aid
 - Institution must describe how a student who has failed SAP reestablishes eligibility for Title IV aid
 - If the institution has an appeal process, must describe the specific elements required to appeal the loss of Title IV eligibility due to a lack of SAP

ED presentations will be available at www.lasfaa.org



The screenshot shows a web browser window displaying the LASFAA website. The browser's address bar shows the URL http://www.lasfaa.org/docs/toc_conferences.html. The website header features the LASFAA logo on the left and the text "Louisiana Association of Student Financial Aid Administrators" on the right. Below the header is a navigation menu with links for "Member Services", "About LASFAA", and "Employment".

The main content area is titled "Conferences" and features three sections:

- 2015 Fall Conference**
Golden Nugget Casino in Lake Charles, LA
October 21-23, 2015
 - Download the Conference Flyer --
 - Download the Boot Camp Agenda --
 - Download the Final Conference Agenda --
 - View the Conference Service Project --
- ** CONFERENCE REGISTRATON NOW OPEN ****
 - ** Exhibitors Click Here **
- 2015 SWASFAA Conference**
November 4-6, 2015
Sandia Resort & Casino
Albuquerque, NM
 - Visit the SWASFAA Conference Mini-Site --
 - Register for the SWASFAA Conference --

At the bottom of the page, there is a section for "2015 Spring Boot Camp Presentations" with a list of presentation titles:

- Collaboration Between Admission and Financial Aid (pptx)
- IFAP & ASK REGS & LISTSERVES, Oh My! (pptx)
- This is Jeopardy (pptx)
- Verification (pptx)
- What EAAs Need to Know About 150% Direct Subsidized Loan Limits (pptx)

Training Feedback

To ensure quality training we ask all participants to please fill out an online session evaluation

<https://s.zoomerang.com/s/KevinCampbell-TX>

Survey feedback is a tool to help us improve our training, justify training/travel expenditures and to listen to our customers

Please provide any comments regarding this training or the trainer to:

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Thank You, LASFAA!



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Questions about this Session?



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