



Designation as an Eligible Institution for Titles III & V Programs Office of Postsecondary Education

This presentation is meant as a guide only.
Please refer to the official application booklet for detailed instructions.



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Objectives

- ✓ What is Eligibility?
- ✓ Who can apply for eligibility?
- ✓ How are eligibility decisions made?
- ✓ What is the Eligibility Matrix?
- ✓ How does eligibility affect non-federal cost-share?
- ✓ How do I determine if I am eligible?
- ✓ How do I submit an application and/or exemption?
- ✓ What happens next?
- ✓ Questions?

What is Eligibility?

- ✓ This process identifies an institution of higher education (IHE) as:
 - ✓ Eligible to apply for funding under Titles III and V of the Higher Education Act of 1965, as amended by the Higher Education Opportunity Act of 2008 (HEA).
 - ✓ Eligible for certain non-Federal cost-share waivers.
- ✓ Eligibility does not designate nor certify any institution as a particular type of institution such as an HSI.

Who can apply for Designation of Eligibility?

A public or private non-profit IHE that:

- ✓ Is accredited by a nationally-recognized accrediting agency or association and
- ✓ Awards at least a two-year degree and
- ✓ Provided required data into the Integrated Postsecondary Education Data System (IPEDS) database for the academic year immediately preceding the most recent complete academic year (base year).

Who should apply for Designation of Eligibility?

- ✓ All Institutions of Higher Education (IHE) who meet the previous requirements.
- ✓ Applicants planning to apply for a grant under the SIP, HSI, PPOHA, ANNH, NASNTI, AANAPISI, or PBI Programs.
 - ✓ An institution must be deemed an eligible IHE to be considered for funding under these programs.
 - ✓ You MUST apply for eligibility even if you have a current Titles III, V, or VII grant.
- ✓ Applicants requesting a waiver of the non-Federal cost share requirements under any of the following programs:
 - ✓ The Federal Work-Study program (FWS);
 - ✓ Federal Supplemental Educational Opportunity Grants program(FSEOG);
 - ✓ TRIO Student Support Services program (SSS); and
 - ✓ Undergraduate International Students and Foreign Language program (UISFL).

What is a branch campus?

An accredited (branch) campus that:

- ✓ Is geographically apart from, and independent of, the main campus;
- ✓ Is permanent in nature;
- ✓ Offers courses for credit and programs leading to an associates or bachelors degree;
- ✓ Has its own faculty and administrative or supervisory organization; and
- ✓ Has its own budgetary and hiring authority.

What two variables determine Eligibility?

✓ **Needy Students:**

- ✓ At least 50 percent of an institution's degree-seeking students received financial assistance under: the Federal Pell Grant, Federal SEOG, or the Federal Work Study Programs. Or, the percentage of an institution's undergraduate degree-seeking students who were enrolled at least half-time and received Federal Pell Grants exceeds the average percentage of the same at similar (type and control) institutions.

✓ **Core Expenses per FTE:**

- ✓ Core Expenses are regular operational expenditures of postsecondary institutions (excluding auxiliary enterprises, independent operations, and hospital expenses). These are then divided by the FTE (12-month undergraduate enrollment for the academic year). This measure is then compared to the average value for other similar (type and control) institutions. The Core Expenses per FTE measure must be lower than the average for the institutional group.

What about Titles III and V program requirements?

✓ **Grant Specific Requirements**

- ✓ ANNAPISI – Asian and Pacific Islander UG enrollment equal to or greater than 10%
- ✓ ANNH - Native American UG enrollment less than 20% and Pacific Islander UG enrollment equal to or greater than 10%
- ✓ NASNTI - Native American UG enrollment equal to or greater than 10%
- ✓ HSI, HSI Stem and PPOHA – Hispanic FT UG enrollment equal to or greater than 25%
- ✓ MSEIP – Total minority enrollment except Asian equal to or greater than 50%
- ✓ PBI and PBI-MA – Black enrollment equal to or greater than 40%, at least 1,000 undergraduate students, and meets the additional requirements list in the PBI statute.

Eligibility Matrix (EM)

- ✓ The computation of eligibility is conducted annually at the time that IPEDS data is provisionally released for the academic year immediately preceding the most recent complete academic year.
- ✓ Provisional release data occur generally in the fall of the year so it is anticipated that the EM computation and release will occur around January/February of each year.
- ✓ These data generate a provisional EM.

Eligibility Matrix (EM)

- ✓ The criteria derived from applicable legislation and regulations were applied to enrollment and financial data from IPEDS and FSA files to determine eligibility for each institutional program.
- ✓ The process resulted in the following six categories:
 - ❑ Code 1: Institution is ineligible – doesn't meet minority student enrollment requirements for the program.

Eligibility Matrix (EM)

- ❑ Code 2: Institution is ineligible – there are no program participants in a key category (e.g. graduate students for HBCU-MD, PPOHA, PBI-MA), the institution has no Pell grant recipients or needy students, has only religious vocational programs, or is not a legislatively-designated institution (i.e. not an HBCU or TCCU).

Eligibility Matrix (EM)

- ❑ Code 3: Institution is ineligible – they have a current grant for another IS program, and therefore by law may not simultaneously have two types of these grants.
- ❑ Code 4: Institution is potentially eligible on minority grounds but would need to apply for eligibility or request a waiver of Pell and/or ‘needy student’ criteria.
- ❑ Code 5: Institution is potentially eligible to apply for a grant for this program.
- ❑ Code 6: Institution is a current grantee of this program.
- ❑ Code 0: Branch Campus; IPEDS data not available.

Eligibility Matrix (EM)

- ✓ There are a number of institutions that are not eligible to receive grants from the Office of Postsecondary Education - Institutional Service.
 - ✓ For-profit institutions are not included in the EM structure.
 - ✓ Institutions with only religious-vocational programs, on the other hand, are included in the EM structure, since they may (and, with some frequency, do) establish non-vocational program offerings.
 - ✓ The Department will periodically review institutions noted as religious-vocational in the EM structure and will provide a means by which institutions may notify the Department of their change in status.

Update to Non-Federal Cost-Share Waivers

- ✓ An IHE that submits an application, and is designated as an eligible institution, will receive a waiver of certain non-Federal cost-share requirements for one year or for the duration of their Titles III or V grant, if awarded, under the Federal Supplemental Educational Opportunity Grants (FSEOG) and the Federal Work Study program (FWS).
- ✓ Qualified institutions will receive FWS and FSEOG waivers for one year even if they do not receive a grant under the Titles III or V Programs.

Update to Non-Federal Cost-Share Waivers

- ✓ Cost-Share waivers for the Federal Work-Study program and the Federal Supplemental Education Opportunity Grants are administered through Federal Student Aid.
- ✓ Questions pertaining to these Cost-Share waivers must be directed to the Campus-Based Call Center:
 - ✓ 1-800-848-0978
 - ✓ CODSupport@ed.gov

Non-Federal Cost-Share Waivers

- ✓ If the institution receives a grant from the UISFL or SSS program, you may receive a waiver or reduction of the required non-Federal share for institutions for the duration of the grant.
- ✓ Questions pertaining to the UISFL cost-share waiver must be directed to:
 - Ms. Tanyelle Richardson
 - Email: Tanyelle.Richardson@Ed.Gov
- ✓ Questions pertaining to the SSS cost-share waiver must be directed to:
 - Dr. Reshone Moore
 - Email: Reshone.Moore@Ed.Gov

Check Eligibility

- ✓ Visit <HTTPS://HEPIS.ed.gov>,
- ✓ Login to the system using your email address and password,
 - ✓ If you are not sure whether you have an account or not, click the “new user” button on the homepage and follow the prompts.
- ✓ Check your eligibility by clicking on “View pre-Eligibility Information,” button,
- ✓ If your institution meets the “needy student” and “core expenses” requirements, you will be able to print your letter by clicking the “View/Print Your Eligibility Letter” button.
- ✓ If your institution does not meet the requirements, you will be able to enter an application and /or apply for a waiver.

Logging In

HEP IS

Higher Education Programs: Institutional Service

[HEP IS Home](#) | [About](#) | [Help](#) | [FAQs](#) | [Contact Us](#)

Welcome to the HEPIS Web Portal

- GEA Grant Eligibility Application
- IS APR Titles III & V Annual Performance Reporting System
- EFRS Endowment Financial Reporting System
- FIPSE Reporting System

System Status and Important Dates

Grant Eligibility Application system: Open

Open 12/13/2021 to 01/21/2022

Titles III/V Annual Performance Reporting system: Closed

Open 02/08/2021 to 04/09/2021 04/16/2021 (extended)

Titles III/V Interim Reporting system: Closed

(first year grantees only) Open 04/01/2021 to 04/30/2021

Endowment Financial Reporting System: Open

Open from 7/24/2020 to April 2021 (exact closing date TBA)

Fund for the Improvement of Postsecondary Education:

Closed

System open dates to be announced

Returning User? Login Below.

Email:

Password:

[Forgot your password?](#)

[Need Help?](#)

Login

New to HEP IS?
Click the button below to get started

New User

- Enter your username and password to login.
- If you need a new account, click the **New User** button.
- Shared email addresses and personal email address are not permitted

Check Eligibility

The screenshot displays the HEP IS website interface. At the top, a dark blue header contains the text "HEP IS" in large white letters, with "Higher Education Programs: Institutional Service" below it. A navigation bar below the header lists links: "HEP IS Home", "About", "Help", "FAQs", "Contact Us", "Account", and "Logout". Below the navigation bar, a light gray box displays the text "Welcome test@statecollege.edu". The main content area is titled "GEA - Grant Eligibility Application" and contains the text "Your Institutions in the GEA system:". Below this text is a table with three columns: "OPEID", "Institution Name", and "Enter System". The table contains one row with the following data: OPEID: 0000000, Institution Name: Community State College University, and Enter System: two buttons labeled "LETTER" and "GO".

OPEID	Institution Name	Enter System
0000000	Community State College University	<input type="button" value="LETTER"/> <input type="button" value="GO"/>

- If you are eligible, click the **LETTER** button to download a PDF copy.
- If you are not eligible, click the **GO** button to enter the system.

Check Eligibility

Welcome test@statecollege.edu


Community State College University

OPEID: 00000000

Please verify and/or update your institution details.

Verify/Update Institution Details

Your Eligibility Determination

Type	Status	What it means	Details
Pre-eligibility	 Eligible: No	An application needs to be submitted in order to be considered for eligibility. Based on the information in the Integrated Postsecondary Education Data System (IPEDS), has been designated as an ineligible institution for FY 2018 under Title III and Title V programs of the Higher Education Act of 1965, as amended by the Higher Education Opportunity Act of 2008 (HEOA). However, if you feel this decision is incorrect and that your institution does qualify as eligible, you have the option of filling out an online application. Once submitted, this application will instantly determine your institution's eligibility based on your updated numbers.	View Letter View Data
Application	Needed	Based on your data, you are ineligible, but able to fill out an application to apply for eligibility.	Begin Application
Exemption	N/A	You do not need to submit an exemption	N/A

- Click the **VIEW DATA** button to review your pre-eligibility data.

Check Eligibility

Eligibility Letter

Click between the tabs to see your eligibility determination and view/download/print your eligibility letter.

Welcome test@statecollege.edu

Community State College University

OPEID: 00000000


Eligibility Letter

Eligibility Information

Eligibility

Your Eligibility Calculation for FY 2018

	Eligibility Threshold	Your Eligibility Calculation
Pell Grant Recipient Percent of Half-time to Full-time Undergrads	38%	24% Should be >= eligibility threshold
Core Expenses per Full-time Equivalent	\$30,044	\$24,187 Should be <= eligibility threshold

 Eligible: No

[Begin Application](#)

- Click the **BEGIN APPLICATION** button to apply for eligibility.

Submitting the Application

- ✓ Applications for eligibility should be completed and submitted electronically at:

[HTTPS://HEPIS.ed.gov/](https://HEPIS.ed.gov/)

- ✓ Note: The notice inviting applications (NIA), as published in the Federal Register on **December 16, 2021** contains instructions for applicants unable to submit their application electronically.

Before you get started

- ✓ Read the entire application package available by visiting <HTTPS://HEPIS.ed.gov/> and clicking on the “Help” link at the top of the page..
- ✓ Have the following information:
 - ✓ Institution/campus OPEID number
 - ✓ Total institutional enrollment for fall 2019
 - ✓ Minority enrollment for fall 2019
 - ✓ Number of Pell recipients for fall 2019
 - ✓ Number of students enrolled at least half-time in a degree program for fall 2019
 - ✓ Total Core Expenses for 2019-2020

Total Institutional Enrollment

- ✓ Institution's 2019 fall semester head count of enrolled undergraduate and graduate students.
 - ✓ Do not include international students who are ineligible to participate in Title IV need-based financial assistance programs.
 - ✓ Do not include high school students who are enrolled in dual enrollment and who are ineligible to participate in Title IV need-based financial assistance programs.

Need-Based Financial Assistance

Title IV need-based financial assistance:

- ✓ Determine the institution's total 2019 fall semester, unduplicated, student head count of degree-seeking students who received any of the following Title IV need-based assistance:
 - ✓ Federal Pell Grant;
 - ✓ Federal Work Study;
 - ✓ Federal Perkins Loan; or
 - ✓ Federal Supplemental Educational Opportunity Grant.

Need-Based Financial Assistance

- ✓ To compute the unduplicated student head count, count, only once, each student who received Title IV need-based assistance, regardless of the number of need-based programs in which the student participated.

Half-Time Enrollment

Enrollment of half-time, up to and including, full-time undergraduate students:

- ✓ Determine the institution's total **2019** fall semester undergraduate head count of students who were enrolled at least half time in degree programs at your institution.
 - ✓ Do not include international students who are not eligible for Title IV need-based financial assistance.
 - ✓ Do not include high school students enrolled in dual enrollment who are not eligible for Title IV need-based financial assistance.

Core Expenses

- ✓ Since 2004, the National Center for Education Statistics (NCES) has calculated Core Expenses per FTE for Postsecondary Institutions.*
- ✓ The Department determined that the Core Expenses measure is statistically similar to the former E&G per FTE.

*Note: Please review the definition for Core Expenses that's located in the application booklet.

Core Expenses

- ✓ Institutions applying for Eligibility must use the Core Expenses reported to the Integrated Postsecondary Education Data System (IPEDS) for academic year 2019-2020.

Core Expenses

- ✓ Determine the Institution's Core Expenses for 2019-2020.
 - ✓ Do not include federal student financial aid. If it is included, you may deduct it from your Core Expenses
- ✓ Average Core Expenses per FTE student.
 - ✓ The system will do this calculation for you.

2019-2020 Average Pell Grant and Core Expenses per FTE Student

Type of Institution	2019-2020 Average Pell Grant Percentage	2019-2020 Core Expenses per FTE Student
Two-year, Public	32	\$15,641
Two-year, Non-profit, Private	54	\$18,412
Four-year, Public	35	\$34,275
Four-Year, Non-profit, Private	35	\$42,922

Needy Student Requirement

Your institution meets the needy student requirement if:

- ✓ At least 50% of your 2019 fall, unduplicated student head count of undergraduate and graduate students received financial assistance under one or more of the following programs:
 - ✓ Federal Pell Grant;
 - ✓ Federal Work-Study; or
 - ✓ Federal Supplemental Educational Opportunity Grant programs (Part III, 1.B)

OR

Needy Student Requirement

- ✓ The percentage of your 2019 fall semester, undergraduate, degree-seeking students who were enrolled on at least a half-time basis, and received Federal Pell Grants, exceeded the average percentage of undergraduate degree students who were enrolled on at least a half-time basis, and received Federal Pell Grants, at comparable institutions that offered similar instruction. (Part III, 1.D)

Application

Application for FY 2022

Enter your information in the fields below to see your determined eligibility.

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OPEID: 00000000

1. Application 2. Eligibility Determination

Step 1: Application

Institutional Enrollment (Fall 2017 Headcount)

1. Total Institutional Enrollment

2. Total Minority Enrollment

Institutional Statistics (Fall 2017)

1. Needy Student Requirement

A. Enrollment of Undergraduate and Graduate Degree Students

B. Recipients of Title IV Need-Based Financial Assistance
(Include only Pell Grant, Supplemental Educational Opportunity Grant, College Work Study, and Perkins Loan)

C. Enrollment of Half-Time up to and including Full-Time Undergraduate Degree Students

D. Pell Grant Recipients

2. Core Expenses (formerly known as Educational & General Expenditures) Requirement

A. Undergraduate Full-Time Equivalent Fall 2017 Enrollment

a. Total number of full-time undergraduate students

b. Total credit hours for all part-time undergraduate students

- Complete and submit the application when ready.
- Applications are reviewed *automatically*.
- Results will be displayed onscreen immediately after submission.

Ineligible

- ✓ If deemed “ineligible” based on system calculations, institutions may choose to submit for an exemption (request a waiver).
- ✓ In the case of the application and system, we will refer to the waivers as exemptions in order to alleviate confusion about the Federal Cost-Share Waiver and the “waivers” for eligibility. Please note that officially these are still waiver requests.

Exemptions

- ✓ Institutions that are unable to meet the needy student enrollment requirement, or the average Core Expenses requirement, may apply for an exemption*,
 - ✓ The applicant **MUST** address the exemption in its entirety and include all the required documentation, evidence, and data pertaining to the exemption as instructed in the application.
- * See application booklet for exemption instructions and required information.

Exemption Options

- ✓ There are six (6) exemption options for the needy student enrollment requirement.
- ✓ There are five (5) exemption options for the average Core Expenses per FTE requirement.
- ✓ An institution may choose to respond to one or more exemption options.
- ✓ Exemption options are detailed in the application booklet.

Exemption Request

Exemption

Prepare a separate narrative for each exemption option you select below that provides the required evidence for that option, and demonstrates that the exemption(s) applies to your particular institution.

The narrative must contain compelling evidence. Mere statements of fact may not be enough to support your request. You may also upload supporting documents for each option.

You must respond to all components of the exemption option and provide supporting documentation (relevant studies, recent reports and/or data, etc.) to justify your request for an exemption.

Check here to confirm that you have read and understand the statements above.

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Community State College University

OPEID: 00000000

1. Needy Student Requirement2. Core ExpensesReview and Submit

Step 1: Needy Student Requirement

Section 1

Select each box that applies and upload your supporting documents.

- A. At least 50% of degree students are recipients of need-based Title IV financial support.
- B. Enrollment exceeds the threshold for percentage of student receiving Pell grants for the fall 2017-2018 academic term.
- C. Requesting a exemption of the needy student requirement (Section 607.3(b) and Section 603.3(b) option(s)):
 - 1. The State provides more than 30 percent of the institution's budget and the institution charges not more than \$99.00 for tuition and fees for an academic year.
 - 2. At least 30 percent of the students served by the institution in the base year were students from low-income families.

- Select an Exemption option for Needy Students, Core Expenses, or both.
- Provide the necessary information and submit your request.
- Requests are reviewed *manually* after the system officially closes.

Helpful Hints

- ✓ Please upload supporting documents in the following formats: Microsoft Word, Excel, PDF, GIF, or JPEG.
- ✓ Supporting Documentation and **Data, Data, Data**
- ✓ All passwords are user specific. Please do not share your password.
 - ✓ The System opened on **December 13, 2021**
 - ✓ Username: Your email address

More Information

- ✓ The official FY **2022** Designation as an Eligible Institution Application Booklet and the Notice (NIA) for this program can be found online at:

<https://www2.ed.gov/about/offices/list/ope/itudes/eligibility.html>

*Note: This presentation does NOT supersede reading and following the instructions in the application booklet and the NIA is the official document for the rules in this application.

2022 Eligibility Application Deadline

Deadline:

January 21, 2022

11:59pm

Contact Information

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Important! Do not wait until the last day to submit your application!