

Academic Calendars and TIV Aid

**KASFAA Conference**  
**Academic Calendars**  
**and**  
**Title IV Aid**

**Standard, Nonstandard and**  
**Non-term programs**


David Bartlett | April 2017  
U.S. Department of Education

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**Three Main Academic Calendars**

- Standard term
- Non-standard term
- Non-Term
  - Clock-hour
  - Credit-hour



*Often referred to as program types*

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## Academic Calendars and TIV Aid

## Standard Term

- Semesters
  - 15-17 weeks
- Trimesters
  - 15-17 weeks
- Quarters
  - 10-12 weeks
- Terms are the payment period for all Title IV programs
  - Summer may be an exception

**Full-Time must be 12 hours  
for undergraduate programs**

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## Non-standard Term

- Non-standard term programs have terms
- Non-standard terms are terms that do not fit the definition of standard terms
- Non-standard terms may be shorter or longer than standard terms
- Non-standard terms may be substantially equal to each other or may not be substantially equal to each other
  - Substantially equal means no more than 2 weeks difference in length

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## Academic Calendars and TIV Aid

## Non-standard Term

- Non-standard terms may look like standard terms but are non-standard due to awarding a type of credit not usually associated with that type of term
  - For example, a standard quarter but student earns semester credits
- For most Title IV programs, the non-standard term is the payment period
- An exception occurs in the Direct Loan Program when the non-standard terms are not substantially equal
  - Payment periods work exactly like non-term programs, but only for DL

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## Non-Term

- All clock-hour programs must be non-term for Title IV
- Non-Term programs may be credit-hour
- There are no terms to use as payment periods
- Payment periods are determined by student completing  $\frac{1}{2}$  of the hours AND  $\frac{1}{2}$  of the weeks of instruction in the program's defined academic year for Title IV
  - Or the program if less than an AY
  - Or the period that remains in a program if remainder is less than an AY
    - If remainder is  $\frac{1}{2}$  of the AY or less, the remainder is the final payment period
    - If greater than  $\frac{1}{2}$  of the AY, the remainder is divided into two equal payment periods
- If a program has terms that overlap each other, the program is non-term for Title IV

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## Academic Calendars and TIV Aid

## Calendars and Pell Formulas

- Standard term
  - Primarily use Formula 1
    - 12 hours is always full-time
  - Small number of standard-term programs use Formula 2
  - All term-based programs may use Formula 3
  - Few traditional programs use Formula 3

$$\chi^2 = \sum \frac{(O - E)^2}{E}$$

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## Calendars and Pell Formulas

- Non-standard term
  - Must use Formula 3
    - Enrollment status is determined by the formula
- Non-term
  - Must use Formula 4
  - All awards are taken from the full-time Pell Payment Schedule

$$E_P = \frac{\% \Delta Q}{\% \Delta P}$$

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## Academic Calendars and TIV Aid

## Calendars and Academic Year for DL

- Academic year in this context is the academic year used for annual loan limits in the Direct Loan Program
  - i.e., when the borrower can borrow the next loan for the next year's academic work
- Scheduled Academic Year (SAY) or Borrower-Based Academic Year (BBAY)
- May or may not be the same as the defined AY for Title IV

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## Calendars and Academic Year for DL

- Standard term
  - Usually uses a scheduled academic year (SAY) for DL
  - The school's schedule or calendar establishes what the "year" is for DL
  - SAY includes the normal terms that are in the defined academic year and also accounts for the summer term
    - Summer is categorized as a header or a trailer
  - EXCEPTION: SE9W non-standard terms may use SAY

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## Academic Calendars and TIV Aid

## Calendars and Academic Year for DL

- Standard term programs and BBAY1
  - BBAY1 is for credit-hour programs using a scheduled academic year with standard terms or SE9W terms
  - Standard terms with a scheduled academic year may use BBAY1
  - May combine SAYs and BBAY1s
  - SE9W non-standard term programs with a scheduled academic year may use BBAY1

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## Calendars and Academic Year for DL

- Standard term programs and BBAY2
  - BBAY2 must be used for credit-hour programs that do NOT have a scheduled academic year but are using standard terms or SE9W terms



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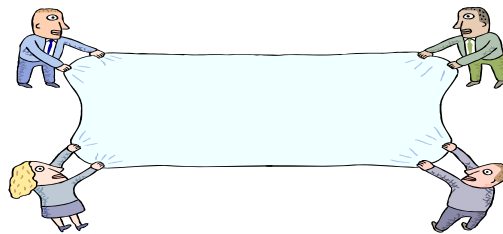
## Academic Calendars and TIV Aid

## Calendars and Academic Year for DL

- Non-Term: Credit-hour or Clock-hour programs
  - Must use BBAY3
  - Non-standard term programs must use BBAY3 if the following is true:
    - Terms are not SE9W *or*
    - Standard terms and non-standard terms are mixed in the same program without an SAY

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## Modules: Flexibilities and Considerations Depending on Program Type

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## Academic Calendars and TIV Aid

## Standard Term Flexibilities

- A traditional semester, trimester, or quarter
  - May be offered traditionally—example:
    - All courses begin and end on the first and last day of the term respectively
  - May be offered nontraditionally—examples:
    - Courses offered consecutively/sequentially within the term
    - Compressed coursework (modules, mini-terms, etc.)\*
    - For R2T4 purposes, it should be remembered that all courses that do not span the entire length of a term are considered modules

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## Modules and Nonstandard Calendars

- In a nonstandard term calendar, modules will fall into two types:
  1. The first is where the modules, themselves, will be freestanding nonstandard terms
    - If substantially equal in length, meaning no term is different by more than two weeks, the nonstandard terms will be the payment period for all Title IV programs except FWS
    - If not substantially equal, the nonstandard terms will be the payment period for all Title IV programs except FWS and DL
      - DL will be disbursed as if the calendar was nonterm

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## Academic Calendars and TIV Aid

## Modules and Nonstandard Calendars

- In a nonstandard term calendar, modules will fall into two types:
  2. The second is where the modules, themselves, will not be freestanding nonstandard terms
    - The modules will be contained within the nonstandard terms that make up the academic calendar
    - In most cases, the nonstandard term will be the payment period for most Title IV programs
    - Modules in a nonstandard term calendar work very much like modules in a standard term calendar

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## Advantages of Standard vs Nonstandard Terms

- Standard terms may use Federal Pell Grant Formula 1
- Consistency in disbursement rules across programs
  - Payment period is always the term for all Title IV programs
- Flexibility with SAY and BBAY 1
  - May always use SAY without SE9W considerations
  - May always use BBAY 1: allows alternating BBAY and SAY as long as overlap does not exist
  - May originate single-term loans without SE9W considerations
- Treatment of summer terms
  - Both the Pell Grant and DL programs allow for treatment of summer as a standard term (with conditions)

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## Academic Calendars and TIV Aid

## Modules and Nonterm Calendars

- In a nonterm calendar, modules have very little impact
- There are no terms to be affected by modules
- Student completes a payment period by successfully completing hours, clock or credit, and completing weeks of instruction
- Whether the instruction is presented in modules or not generally does not affect the payment periods
- It is possible that a school may not be able to determine if hours have been successfully completed until the conclusion of a module

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## Modules: Changing Patterns in Education

- Short term and sequential course enrollment
- Courses are often offered in modules (usually 1-8 weeks in length)
- Programs with modules may -
  - compose an entire program; or
  - be offered in conjunction with other full-term length courses

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## Academic Calendars and TIV Aid

## **Modules: Changing Patterns in Education**

- Used in Standard and Non-Standard Term and Non-Term Settings
- Sometimes involve overlapping terms
- Courses offered as modules may begin in one term and end in another term
- Enrollment can begin at beginning of any module
- Students may skip one or more modules

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## **Modules - Operating Principles**

1. Schools may combine a series of modules into a single term
2. Enrollment can begin at beginning of any module
3. Students may skip one or more modules within the term
4. Loan period includes entire term

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## Academic Calendars and TIV Aid

## **Modules - Operating Principles**

5. Up-front enrollment (registered courses) should support aid eligibility and award amount
6. Cost of attendance excludes periods of non-attendance
7. Student must begin attendance in all credits or recalculation required (except Direct Loans)

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## **Module - Operating Principles**

8. For loans, student must commence attendance or is ineligible for entire term
9. No disbursement can be scheduled during period of non-enrollment
10. Earliest attendance dictates first disbursement; payment period begins with module that includes first date of attendance

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## Modules - Operating Principles

- 11. Change in enrollment status to less-than-half-time results in cancellation of subsequent loan disbursements



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## Things to Avoid if Standard Terms are to Remain Standard



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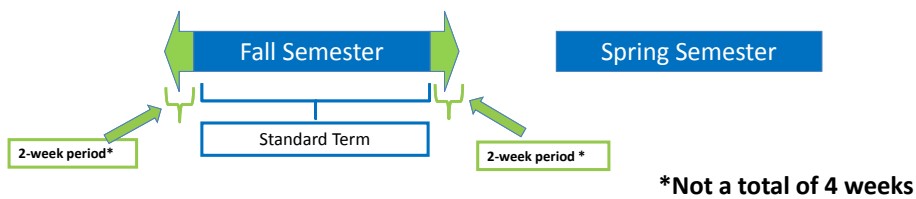
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## Standard Terms: 2 Week Tolerance

- Standard term but a class in an academic program may begin before the established start of the standard term and/or finish after the established end of the term
- Result is typically a non-standard term
- An allowance of a TOTAL of 2 weeks is permitted and allows the term to remain standard
  - Green arrows in graphic



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## Standard Terms Using Tolerance

- Schools with traditional calendars often encounter situations that can affect whether their standard terms will remain standard
- Use of the 2-week allowance
  - ENG 101 uses the 2 weeks prior to fall
- Result here is that the standard term remains standard



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## Standard Terms Using Tolerance

- Schools with traditional calendars often encounter situations that can affect whether their standard terms will remain standard
  - Use of the 2-week allowance
  - MTH 101 uses 1 week prior and 1 week following fall
  - Result here is that the standard term remains standard

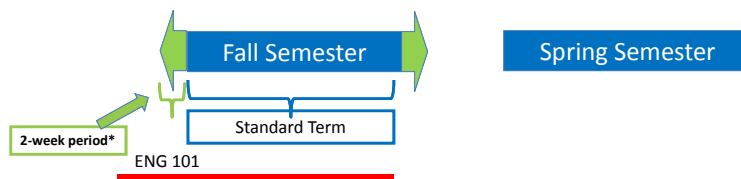


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## Standard Terms: What to Avoid

- Standard term but class in an academic program may begin before established start of the standard term and/or finish after the established end of the term
  - Result is typically a non-standard term
  - ENG 101 is starting before the standard term and before the two week allowance
  - Result is that the *entire program becomes non-standard term*



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## Standard Terms: **What to Avoid**

- Schools with traditional calendars often encounter situations that can affect whether their standard terms remain standard
- Use of the 2-week allowance
- HST 101 uses the 2 weeks following fall
- MTH 101 uses 1 week prior and one week following fall
- Both classes are part of the same program of study
- Result here is that the standard *term becomes non-standard* due to more than the 2-week allowance being used

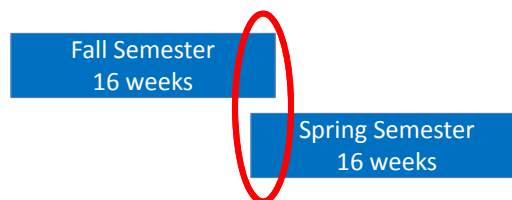


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## Standard Terms: **What to Avoid**

- Schools with traditional calendars often encounter situations that can affect whether their standard terms will remain standard
- Standard term but the terms overlap with each other
- *Overlapping terms create a non-term environment*



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## Academic Calendars and TIV Aid

## Standard Terms: **What to Avoid**

- Schools with traditional calendars often encounter situations that can affect whether their standard terms will remain standard
- Standard term but single class in 1 standard term overlaps with the other standard term
- Overlapping terms *create a non-term environment* requiring a non-term calendar

Fall Semester

Spring Semester

MTH 101

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## Standard Terms: **Staying Standard**

- Schools with traditional calendars often encounter situations that can affect whether their standard terms will remain standard
  - Standard term but with a short session between standard terms that the school chooses to treat as a free-standing payment period
    - Result is that the intersession is a non-standard term due to its brevity
    - Result is that the entire program of study is treated as non-standard
- OR
- Intersession can be attached to either Fall or Spring creating a payment period with modules
    - Even though the combined payment period comprised of the intersession and the standard term appears to create a non-standard term, this payment period is allowed to be treated as a standard term

Fall Semester

Intersession

Spring Semester

***School must fund the intersession regardless of how treated***

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## Academic Calendars and TIV Aid

## Regulations for Different Calendars

- Regulations are not set up, nor has extensive guidance been developed, for a program that drifts from one calendar to the next during the program
- Generally, a program is offered using ONE calendar not a combination
- The Department has issued guidance stating that *one non-standard term in a program generally makes the program non-standard*, except for those exceptions discussed earlier

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## Calendars with Terms That are not Standard

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## Academic Calendars and TIV Aid

## Three Types of Non-Standard Terms

- Non-standard terms that are substantially equal and at least 9 weeks (SE9W)
- Non-standard terms that are substantially equal (SE)
- Non-standard terms that are NOT substantially equal (NSE)
  - Substantially equal means no term is more than 2 weeks of instructional time longer than any other term in the program

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## Non-Standard Terms That Are SE9W

- Pell
  - Must use Formula 3
  - Terms are the payment periods
- DL
  - Can use as a 1-term loan period
  - Can use Scheduled Academic Year or BBAY 1 if the program has a scheduled academic year
  - If no scheduled academic year, must use BBAY 2
  - Terms are the payment periods
  - Student completes academic year (AY), for DL annual loan limit purposes, when AY is scheduled to end, or BBAY calendar time has elapsed

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## Academic Calendars and TIV Aid

## Non-Standard Terms That Are SE

- Pell
  - Formula 3
  - Terms are the payment period
- DL
  - Cannot use term as a 1-term loan period
  - Must use BBAY 3
  - Terms are the payment period
  - Student completes academic year, for DL annual loan limit purposes, when student has successfully completed hours and weeks in the Title IV academic year definition

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## Non-Standard Terms That Are NSE

- Pell
  - Formula 3
  - Terms are the payment period
- DL
  - Cannot use 1-term loan period unless remainder of program
  - Must use BBAY 3
  - Terms are NOT the payment period
  - Student receives 2nd DL disbursement when successfully complete half of the credits and weeks in the loan period
  - Student completes AY, for DL annual loan limit purposes, when successfully complete hours and weeks in Title IV AY definition

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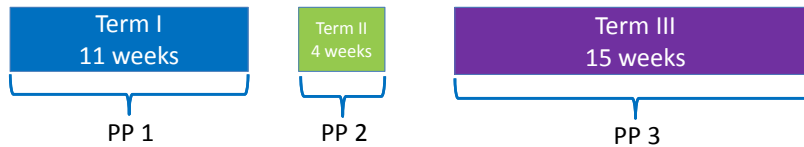
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## Disbursements for Non-Standard Terms That Are NSE

- Pell and other Title IV *except DL*
- Title IV Defined Academic Year is 24 semester credits and 30 weeks of instruction



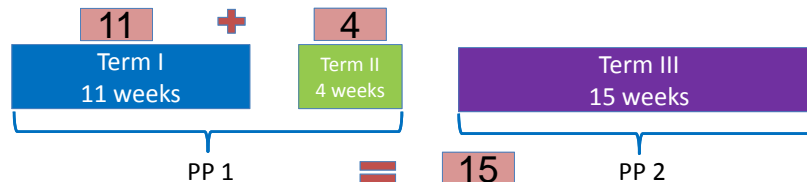
- Each non-standard term is the payment period
- Pell Formula 3 will determine the amount of a Pell disbursement based on the weeks in the payment period

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## Disbursements for Non-Standard Terms That Are NSE

- DL
- Title IV Defined Academic Year is 24 semester credits and 30 weeks of instruction



- PP 1 is completed when the student successfully completes ½ of the credits and ½ of the weeks of instruction in the Loan Period/AY definition
- This example assumes the student has 12 credits successfully completed when the student completes 15 weeks, it may be later...
- R2T4 is calculated differently due to different payment periods

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## Academic Calendars and TIV Aid

**Clock-Hours,  
Credit-Hours,  
No Terms,  
OH MY!**



## Calendars with No Terms

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## Non-Term Calendar

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- The defined Academic Year (AY) for Federal Student Aid plays an important role
- Not the same concept as the AY used for DL Annual Loan Limits
- Defined AY has two EQUALLY important components
  - Weeks of Instruction
  - Hours (Clock or Credit)
- Statute establishes the minimum
- School defines its AY for each program of study

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## AY Minimums Established in HEA

	Minimum Number of Weeks of Instruction	Minimum Number of Hours
Programs that measure in clock-hours	26	900
Programs that measure in semester credit-hours	30	24
Programs that measure in trimester credit-hours	30	24
Programs that measure in quarter credit-hours	30	36

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## Payment Periods

- In a program that uses terms, the term is generally the payment period for Title IV purposes

In a non-term calendar, there are no terms

The student's completion of weeks of instruction AND successful completion of hours, clock or credit, determine the student's payment period



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## Academic Calendars and TIV Aid

## Program is Less than AY

- Program is divided into two equal payment periods
- Each payment period has half of the weeks of instruction and half of the hours contained in the entire program
- Example:
  - Program is 24 weeks and 750 clock-hours
  - Payment periods are 12 weeks and 375 clock-hours
  - Student must achieve both weeks and hours for the payment period to end

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## Program is One AY or Multiple AYs

- Each AY as defined by the school is divided into two equal payment periods
- Each payment period has half of the weeks of instruction and half of the hours contained in the AY as defined by the school
- Example
  - Program is 30 weeks and 24 semester credit-hours
  - Payment periods are 15 weeks and 12 semester credit-hours
  - Student must achieve both weeks and hours for the payment period to end

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## Academic Calendars and TIV Aid

## Program is Greater than One AY But Less than Two AYs

- First year of the program is divided into two equal payment periods
- Each payment period has half of the weeks of instruction and half of the hours contained in the AY as defined by the school which is 30 weeks of instruction and 24 semester credit-hours in example
- Example:
  - Program is 40 weeks and 33 semester credit-hours
  - Payment periods for the first AY are 15 weeks and 12 semester credit-hours
  - Student must achieve both weeks and hours for the payment period to end
  - But we still have weeks and hours remaining in the program...

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## Program is Greater than One AY But Less than Two AYs

- Program is 40 weeks and 33 semester credit-hours
- The remaining portion of the program is 10 weeks and 9 semester credit-hours
- 40 weeks in program – 30 weeks in first AY = 10
- 33 semester credit-hours in program – 24 in first AY = 9
- **If the remaining portion is ½ of the AY or less, the remaining portion constitutes one final payment period in the program**
- **If the remaining portion is greater than ½ of the AY, using BOTH weeks and hours, the remaining portion is divided into two equal payment periods using both weeks and hours**
- In this example, we have one final payment period – 10 weeks of instruction and 9 semester credit-hours

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## Non-Term Calendars

- Pell
  - Must use Pell Formula 4
  - Payment periods driven by successful completion of weeks & hours
- DL
  - Must use BBAY 3
  - Loan Period is the least of:
    - Length of the program
    - The BBAY
    - The remaining portion of the program
  - Payment periods driven by successful completion of weeks & hours

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## Resources

### Research and Customer Care Center

800-433-7327

fsa.customer.support@ed.gov



### Reach FSA

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*COD*  
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*NSLDS*  
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*Foreign Schools Participation Division*  
*Research and Customer Care Center*  
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## Academic Calendars and TIV Aid

## Questions?

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Contact me with follow-up questions about this session:

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