

TITLE 23: EDUCATION AND CULTURAL RESOURCES
SUBTITLE A: EDUCATION
CHAPTER XIX: ILLINOIS STUDENT ASSISTANCE COMMISSION

PART 2736
SILAS PURNELL ILLINOIS INCENTIVE FOR ACCESS (IIA) PROGRAM

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AUTHORITY: Implementing Section 36 and authorized by Section 20(f) of the Higher Education Student Assistance Act [110 ILCS 947/36 and 20(f)].

SOURCE: Emergency rules adopted at 20 Ill. Reg. 10397, effective August 1, 1996, for a maximum of 150 days; adopted at 20 Ill. Reg. 15067, effective November 15, 1996; old Part repealed, new Part adopted at 21 Ill. Reg. 11110, effective July 18, 1997; amended at 22 Ill. Reg. 11095, effective July 1, 1998; amended at 24 Ill. Reg. 9144, effective July 1, 2000; amended at 25 Ill. Reg. 8402, effective July 1, 2001; amended at 26 Ill. Reg. 10033, effective July 1, 2002; amended at 27 Ill. Reg. 10358, effective July 1, 2003; amended at 28 Ill. Reg. 9147, effective July 1, 2004; amended at 30 Ill. Reg. 11661, effective July 1, 2006.

Section 2736.10 Summary and Purpose

- a) The Silas Purnell Illinois Incentive for Access (IIA) Program provides grant assistance to freshmen who have a limited ability to pay for college. The purpose of the program is to provide access and retention for this population and, possibly, to reduce their loan debt.
- b) This Part establishes rules which govern the IIA Program. Additional rules and definitions are contained in General Provisions, 23 Ill. Adm. Code 2700.

(Source: Amended at 28 Ill. Reg. 9147, effective July 1, 2004)

Section 2736.20 Applicant Eligibility

- a) A qualified applicant shall be:
 - 1) a citizen or eligible noncitizen;

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- 2) a resident of Illinois;
 - 3) an undergraduate student;
 - 4) officially classified by the institution as a freshman;
 - 5) enrolled at an ISAC-approved institution of higher learning;
 - 6) enrolled in an eligible degree or certificate program (see 23 Ill. Adm. Code 2735.20(a)(4));
 - 7) enrolled on at least a half-time basis throughout the institution's tuition refund/withdrawal adjustment period;
 - 8) making satisfactory academic progress as determined by the institution; and
 - 9) with limited personal or family financial resources available for expenditure toward educational expenses, as defined by current federal student financial aid methodology (i.e., an Expected Family Contribution (EFC) of \$500 or less).
- b) A qualified applicant shall not have previously received a baccalaureate degree.
- c) Notwithstanding any other provision of this Section, in calculating an applicant's class level standing for purposes of determining eligibility to receive benefits under this program, an institution shall exclude credit hours earned by the applicant through Advanced Placement or other similar proficiency exams.

(Source: Amended at 28 Ill. Reg. 9147, effective July 1, 2004)

Section 2736.30 Program Procedures

- a) An applicant applies for an IIA grant by using the form which the United States Department of Education (ED) designates as the application form for federal student financial aid. (See 20 USCA 1070a.) This is also the application form used for the Monetary Award Program (MAP) grant. (See 23 Ill. Adm. Code 2735.30(a).)
- 1) An applicant must authorize ED to release his/her data to ISAC.

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- 2) An applicant, spouse and/or parents of the applicant, as applicable, are required to submit financial information on the application regarding income, asset value and non-taxable income (e.g., Temporary Assistance for Needy Families, public aid, veterans' or Social Security benefits). This information shall be kept confidential.
 - 3) A recipient must report to the institution all additional gift assistance, such as tuition waivers and scholarships.
 - 4) An applicant must file his/her application by the deadline date established by ISAC.
- b) A qualified applicant may receive one grant in an amount not to exceed \$1,000, subject to appropriation, for an applicant with an EFC of \$0; or an amount not to exceed \$500, subject to appropriation, for an applicant with an EFC of \$500 or less, but more than \$0.
 - c) The application must be complete at the time the grant is awarded. ISAC must have accurate data to properly determine an applicant's eligibility. If changes or corrections are necessary after receipt of corrected data, ISAC shall recalculate awards for those applicants whose applications are not in agreement with their financial records.
 - d) It is the responsibility of IIA grant applicants to gain admission to approved Illinois institutions. Illinois institutions are not obligated to admit IIA applicants.
 - e) IIA grant payment is subject to the limit of dollars appropriated to ISAC by the Illinois General Assembly. If funds are insufficient to pay all claims, grants will be awarded according to the date the completed applications were received until funds have been expended.
 - f) ISAC must submit a written evaluation of the IIA Program to the Governor, the General Assembly and the Board of Higher Education, including a report of the progress made toward the goal of increasing the access and retention rates for IIA grant recipients. Therefore, ISAC may collect data from institutions to comply with this requirement.
 - g) IIA grants are applicable to any expense that is used to calculate the applicant's cost of attendance.

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- h) The IIA grant shall not pay for academic programs intended to prepare a student for the General Educational Development (GED) test or for a high school diploma. (See, e.g., 23 Ill. Adm. Code 215.)
- i) The IIA grant shall not pay for audit courses, credit-by-examination and/or life experience, or noncredit course offerings (except qualifying remedial courses). Such course work cannot be used to meet the half-time requirement. Remedial courses shall be eligible for IIA payment provided the student has been accepted into an eligible degree/certificate program and is taking the remedial courses as a part of that program. Payment shall not be made for more than the equivalent of one year of remedial course work (i.e., 30 semester hours or 45 quarter hours). Repeat courses are eligible for IIA payment.
- j) An institution is obligated to provide IIA recipients the same facilities and instruction, on the same terms, as those provided to other students.

(Source: Amended at 28 Ill. Reg. 9147, effective July 1, 2004)

Section 2736.40 Institutional Procedures

- a) Claims for IIA-eligible students shall be submitted by the institution of record after the institution of record certifies to ISAC that the applicant meets the criteria listed in Section 2736.20, Applicant Eligibility.
- b) IIA grants are paid directly to the institution of record in two disbursements consisting of payments in an amount not to exceed \$500 each term.
- c) Notwithstanding the provisions of other ISAC-administered programs, the total amount of a student's gift assistance may not exceed the cost of attendance used to calculate Title IV aid for that student. If a student is receiving both MAP and IIA and the gift assistance exceeds the cost of attendance, IIA should be used first and MAP should be reduced to prevent an overaward. For the purposes of this calculation, federal veterans benefits are not counted as gift assistance.
- d) For institutions with concurrent registration opportunities:
 - 1) the recipient must indicate his/her institution of record on the financial aid application;
 - 2) the institution of record shall distribute the appropriate share of the award to the other institutions. Payment by ISAC will not be made to more than

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- one institution;
- 3) concurrent registration is limited to ISAC-approved institutions of higher learning; and
 - 4) the recipient's academic records at the institution of record must document the total number of credit hours for which the student is enrolled.
- e) If a qualified applicant withdraws from enrollment after the expiration of the tuition refund/withdrawal adjustment period, the qualified applicant shall receive the IIA grant payment for that term.
- f) Institutional Processing of Payments
- 1) Institutions may submit their payment requests beginning ten days prior to the start of classes for the term for which they are requesting payment.
 - 2) To provide sufficient time for processing and vouchering through the State Comptroller's Office in Springfield, all payment requests must be received by ISAC no later than July 1.
 - 3) Payment requests received after August 1 for the prior academic year will be processed as time and available funds permit. However, final action may require an institution to obtain payment for approved claims through the Illinois Court of Claims. (See the Court of Claims Act [705 ILCS 505].)
 - 4) Within 30 days after receiving payment of any IIA funds, the institution shall credit the recipient's account for the appropriate term.
 - 5) IIA award payments in the name of one recipient cannot be applied to another recipient at the same institution.
 - 6) Following receipt of IIA payments from ISAC for the term, an institution is required to reconcile its records. If the institution determines that refunds are due, they are to be processed and returned to ISAC no later than 60 days following the end of the academic term. Should the payment arrive after the end of the term, the institution will have 60 days following the receipt of payment to complete the reconciliation process and return any funds due.

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- 7) If the institution does not submit refunds as required by this Section, ISAC will deduct outstanding refunds from subsequent institutional IIA payments.

(Source: Amended at 30 Ill. Reg. 11661, effective July 1, 2006)