HOW TO USE THE EASE SUMMER PELL CALCULATOR

Paying for summer courses is complex and students often do not know how much funding is available to them. The EASE Summer Pell calculator can simplify the aid process. Use this tool to send personalized messages with custom estimates that inform students how much Pell Grant funding they may have available for summer courses.[1]

STEP 1

Confirm that the workbook you downloaded matches your college's financial aid year classification.

There are separate workbooks for:

- **Trailer** colleges, for whom the financial aid year **ends** with the summer semester, and

- **Header** colleges, for whom the financial aid year **starts** with the summer semester

The Workbook Overview sheet in each workbook shows its intended college financial aid year classification.

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[1]Summer Pell Grant estimates should only be used to demonstrate potential awards for students and not a promise of financial aid. A student's Federal Pell Grant Lifetime Eligibility is not included as a factor in this estimation. The amount of Federal Pell Grant funds over a student's lifetime is limited by law to the equivalent of the maximum six years (600%) of scheduled Pell Grant funding. For more information on Pell Grant Lifetime Eligibility see: https://studentaid.ed.gov/sa/types/grants-scholarships/pell/calculate-eligibility.

STEP 2

Confirm data from the current financial aid year.

You can check this on the Workbook Overview sheet, as shown in the screenshot below.

If the data need to be updated, consult the [Data Spreadsheet Instructions](#).

STEP 3

Create a student report dataset.

Generate a report from your school's student information system with the fields listed below, and if possible, in the order listed below. There should be one row per student:

- Last name

- First name

- Email address

- Expected Family Contribution (EFC)

- Credits attempted in the fall**

- Credits attempted in the spring**

**Fall and spring attempted credits are only relevant for trailer colleges.

STEP 4

Fill in the student-level inputs.

Paste your student report dataset into the Student Spreadsheet Excel sheet starting in the first column at left (column A), as shown below:

Student-level inputs (paste from a student database)					
Last name	First name	Email address	EFC	Fall credits attempted	Spring credits attempted
Example	Student 1	example@mdrc.org	0	12	8
Example	Student 2	example2@mdrc.org	5000	0	0
Example	Student 3	example3@mdrc.org	6500	0	10
Example	Student 4	example4@mdrc.org	2000	0	10

STEP 5

Fill in financial aid year.

- At trailer colleges, this is the fall semester that began the academic year (for example, for summer 2020, fill in 2019).

- At header colleges, this is the summer semester (for example, for summer 2020, fill in 2020).

STEP 6

View the estimator's output.

The "output" columns in green in the Student Spreadsheet Excel sheet will automatically populate based on your students' data, as shown below.

Pell Estimates: Trailer Colleges			
Pell Estimate if Enrolled Full Time (in summer)	Pell Estimate if Enrolled 3/4 Time (in summer)	Pell Estimate if Enrolled 1/2 Time (in summer)	Pell Estimate if Enrolled <1/2 Time (in summer)
$ 3,097.50	$ 2,323.13	$ 1,548.75	$ -
$ 622.50	$ 466.88	$ 311.25	$ -
$ -	$ -	$ -	$ -
$ 2,122.50	$ 1,591.88	$ 1,061.25	$ 530.63
Please input data	Please input data	Please input data	Please input data
Please input data	Please input data	Please input data	Please input data
Please input data	Please input data	Please input data	Please input data

STEP 7

Send messages to students.

Use this output in combination with the MailMerge function in Microsoft Word to send students messages 4 and 5. Download templates.

I strongly recommend you take at least [recommended number of courses] summer [course/courses], because this is financial aid you **do not have to pay back**. Don't miss out on the opportunity to take advantage of your funding and get ahead in your education.

Your grant award will depend on how many summer courses you take. Use this chart* to determine how many courses you should plan to take this summer:

If you take...	You may receive up to...
1 to 5 credits	[remaining Pell]
6 to 8 credits	[1/2-time Pell award]
9 to 11 credits	[3/4-time Pell award]
12 or more credits	[Full-time Pell award]

Note about debugging:
The first step to resolving any errors is downloading a new version from the MDRC website. If problems persist, please contact MDRC at information@mdrc.org.

HOW TO REUSE THE DATABASE IN SUBSEQUENT YEARS.

In order to reuse this report, follow two steps:

STEP 1

Clear the student data by highlighting input cells and pressing the *backspace* key. It is crucial to use the **backspace** key instead of the **delete** key in order to maintain the integrity of the formulas. Therefore, the *delete* option has been removed as part of the worksheet's protection settings.

	Last name	First name	Email address	EFC	Fall credits attempted	Spring credits attempted	Financial Aid Year
1	Student-level inputs (paste from a student database)						Annual inputs (same for all students)
2							
3	Example	Student 1	example@mdrc.org	0	15	15	2019
4	Example	Student 2	example2@mdrc.org	5000	0	0	2019
5	Example	Student 3	example3@mdrc.org	6500	8	15	2019
6	Example	Student 4	example4@mdrc.org	2000	0	10	2019
7							
8							
9							
10							

	Last name	First name	Email address	EFC	Fall credits attempted	Spring credits attempted	Financial Aid Year
1	Student-level inputs (paste from a student database)						Annual inputs (same for all students)
2							
3							
4							
5							
6							
7							
8							
9							
10							

STEP 2

Follow the Data Spreadsheet Instructions to update the underlying Pell Grant data.