

HIGHER EDUCATION PROGRAMS INSTITUTIONAL SERVICE SYSTEM

GRANT ELIGIBILITY APPLICATION USER GUIDE



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ELIGIBILITY QUICK SHEET

This page provides a quick overview of the HEPIS Grant Eligibility Application (GEA) system and how to use it. We recommend you review the entire User Guide to learn more about how each part of the system works so you can fully understand the Institutional Services grant eligibility application process.

1. **Log in to <https://hepis.ed.gov> via Login.gov.**

See **Sections II & III** of this user guide for more details about logging into the system.

2. **Check to see if your institution has been determined eligible for an Institutional Services grant based on 2023 data extracted from IPEDS; if so, print your *Eligibility Letter*.**

See **Section V, Section VI, and Section VIII** of this user guide for more about checking your eligibility status and printing your Eligibility Letter.

3. **If your institution is not deemed eligible based on IPEDS data, you may provide additional information to become eligible by completing an *Eligibility Application*.**

See **Section VIII** of this user guide for more information about the Application.

4. **If your institution is not determined to be eligible based on your Application you may choose to submit an *Exemption Request*, which will be reviewed by Department staff and will be granted or denied based on their determination.**

See **Section IX** of this user guide for more information about Exemption Requests.

For complete details about this entire process, please read this **User Guide** and the **Application, Instructions and blank ED Form 1049**, both of which are available at <https://hepis.ed.gov/help>.

I. About the Grant Eligibility Application System

The Grant Eligibility Application (GEA) system is used to determine if an institution is eligible to apply for a new Institutional Services grant in the next fiscal year.

Institutions are eligible to apply for grants if they meet specific statutory and regulatory eligibility requirements. An Institution of Higher Education (IHE) that is designated as an Eligible institution may also receive a waiver of certain non-Federal cost-sharing requirements for one year. If an institution is eligible, they may download their Eligibility Letter from the GEA system.

An institution is determined to be eligible one of three ways: **Pre-eligibility** based on IPEDS data, an **Application**, or an **Exemption Request**.

1. Pre-eligibility. The GEA system is populated with data extracted from IPEDS survey data maintained by the National Center of Education Statistics (NCES). An institution is determined to be *pre-eligible* if their Pell Grant recipients are EQUAL TO OR ABOVE the current year's threshold and their Core Expenses are EQUAL TO OR BELOW the current year's threshold. The thresholds are calculated annually based on that year's IPEDS data, and will be displayed in the GEA system. Due to reporting timeline constraints, the most recent IPEDS data is always two years old. Therefore, if an institution is not deemed pre-eligible via the IPEDS data extract, there is an alternative.

2. Application. If an institution does not meet the pre-eligibility requirements, they may choose to complete and submit an Application. The *Application* provides an institution with the opportunity to provide additional and/or updated information that may cause their numbers to meet the threshold requirements, and therefore be determined eligible. Applications are evaluated instantly by the GEA system, so you'll know immediately if you're successful or not. If an institution's application is denied, there is one last option available to you.

3. Exemption Request. If an institution's Application fails to meet the eligibility requirements, they may choose to complete and submit an Exemption Request. (Note: You cannot submit an Exemption Request without first submitting an Application, and if your application is successful you do not need to submit an Exemption Request.) The *Exemption Request* provides an institution with the opportunity to provide further details and/or information that may explain why they do not meet threshold, statutory, or regulatory requirements, and to justify why they should be granted eligibility despite that. Exemption Requests are reviewed by Department staff on a case-by-case basis after the GEA system closes, so you may have to wait a while to learn if you're successful or not. Exemptions will be granted or denied based on the Department staff's determination.

The GEA system generally opens in the late fall or early winter and remains open for approximately 60 days. Exact opening and closing dates will always be advertised on the home page of the HEPIS website (<https://hepis.ed.gov>).

For more information please see: <https://www2.ed.gov/about/offices/list/ope/itudes/eligibility.html>

II. HEPIS Home Page

After accepting a standard disclaimer regarding usage of a Federal website, you will be able to access the HEPIS system home page.

HEP IS
Higher Education Programs: Institutional Service

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

Welcome to the HEPIS Web Portal

News and Alerts

10/3/2025 - Fiscal Year 2026 system opening and submission deadline dates have been posted below for most systems. Please check back frequently for updates.

2026 System Status and Important Dates

- Closed** Grant Eligibility Application system
System Opens TBD; Submission Deadline TBD
2025 Eligibility Letters are still available
- Open** IS Annual Performance Reporting system
Collection Starts 12/04/2025; Reports Due 01/30/2026
- Closed** IS Interim Reporting system
(First Year Grantees ONLY)
Collection Starts 04/01/2026; Reports Due 05/01/2026
- Open** Endowment Financial Reporting System
System Opened 7/24/2020; stays open for catch-up reporting

Fund for Improvement of Postsecondary Education

- Open** TPSID (P407A), TPSID-CC (P407B), PPSID-NTAD (407C), PSSG (P116M), & RDI (P116H):
Collection Starts 12/04/2025; Reports Due 01/30/2026
- Open** ALL OTHERS:
Collection Starts 1/29/2026; Reports Due 5/1/2026

Returning User? Login Below.


[Login](#)

New to HEP IS? [Request Account](#)

[Login Instructions](#)

Find blank forms and guides
[Download blank forms and user guides for HEP IS systems.](#)

Search the FIPSE Public Website
[Click here to view information regarding FIPSE grant information](#)

[About HEP IS](#) | [Privacy Policy](#) |  | [Contact Us](#)

1. Main Menu Links:

- HEPIS Home** - return to the home page
- About** - learn more about the HEPIS website and each of its subsystems.
- Help** - access User Guides, blank forms, and other helpful resources
- FAQs** - review answers to frequently asked questions
- Contact Us** - fill out a contact form to request assistance from the Help Desk (staffed Mon-Fri, 9 am-5 pm Eastern time; telephone support is not available)

- System Status and Important Dates** - look here for important information about when various HEPIS subsystems are opening and closing.

3. **Find blank forms and guides** - another link to the *Help* page described above
4. **Login**
 - a. **Login button** - in this system your username is your email address
 - b. **Request Account** - remember not to share your password with anyone; additional users require their own accounts linked to their own email addresses
 - c. **Login Instructions** - to request a link via email to reset your password

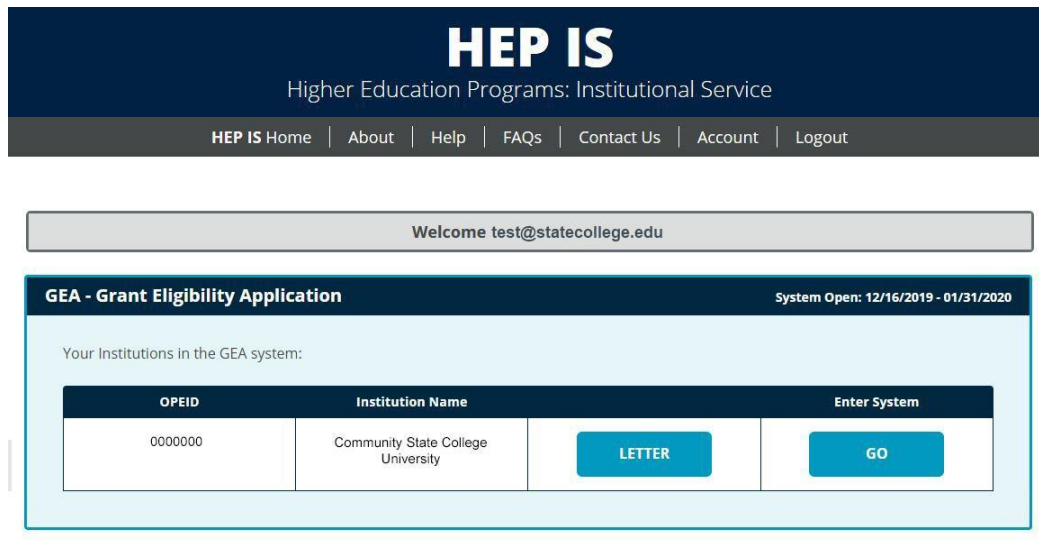
A. Logging In

The Federal Government has transitioned to a new Single Sign-On (SSO) login and Multifactor Authentication (MFA) process that is managed by the Login.gov service.

For details about logging in and requesting new accounts, see Appendix A.

III. HEP IS Landing Page

After you successfully log into the system, you will be on the HEPIS Landing Page.



Your landing page may look different from the one displayed above. It will show you the Institution and Grants (if applicable) that your account has the rights to access.

The main menu has two additional links now that you're logged in:

1. **Account** - click here to change your password and manage your two-factor authentication method(s)
2. **Logout** - click here to end your user session and logout of the system

To download your Eligibility Letter, click the **LETTER** button. If that button is inactive or greyed out, it means your institution is currently not deemed to be eligible. If the system is still open, you should enter the system, review the data downloaded from IPEDS to determine your eligibility, and decide if you want to submit an Application and/or an Exemption Request, as needed.

To enter the Grant Eligibility Application system, click the **GO** button.

IV. GEA Home Page

The GEA home page will show you your eligibility at a glance. As you can see below, there is a red “X” in the Status column of the Pre-eligibility row. This means that our test institution is not eligible based on their data imported from NCES.

The screenshot shows the GEA (Grant Eligibility Application) Home Page. The header includes the GEA logo and navigation links: About, Help, FAQs, Contact Us, Account, and Logout. The main content area is titled "GEA Home" and displays a welcome message for "test@statecollege.edu" at "Community State College University" with OPEID: 00000000. A prominent notification banner states "Please verify and/or update your institution details." with a red circle containing the number 1 and a "Verify/Update Institution Details" button. Below this is a table titled "Your Eligibility Determination for FY 2018".

Type	Status	What it means	Details
Pre-eligibility	Eligible: No	<p>An application needs to be submitted in order to be considered for eligibility.</p> <p>Based on the information in the Integrated Postsecondary Education Data System (IPEDS), [redacted] has been designated as an ineligible institution for FY 2026 under the Higher Education Act of 1965, as amended by the Higher Education Opportunity Act of 2008 (HEA).</p> <p>However, if you feel this decision is incorrect and that your institution does qualify as eligible, you have the option of filing out an online application. Once submitted, this application will instantly determine your institution's eligibility based on your updated numbers.</p>	View Letter 2 View Data 3
Application	Needed	Based on your data, you are ineligible, but able to fill out an application to apply for eligibility.	Begin Application 4
Exemption	N/A	You do not need to submit an exemption.	N/A

From the GEA home page you can perform the following tasks:

1. **Verify/Update Institution Details** - every year the first thing you should do is review your Institution details and make any updates necessary (see Section VI)
2. **View Letter** - view and download your Eligibility Letter (see Section VIII)
3. **View Data** - view your eligibility data as determined from NCES (see Section VII)
4. **Begin Application** - if not determined to be pre-eligible, begin your eligibility application (see Section IX)

Note: the **Begin Exemption Request** button in the last row of the table will be available only if and when a user needs it (see Section X, if applicable).

V. Institution Details

Each year you should verify and update your Institution details.

GEA
Grant Eligibility Application

About | Help | FAQs | Contact Us | Account | Logout

GEA Home / Institution Details

Institution Details

Update your institution and contact information below.

Welcome test@statecollege.edu

Community State College University
OPEID: 00000000

Primary Information

Address 1: Address 2:

City: State: Zip:

DUNS: Religious: Type: Control:

Contact Person

First Name: MI: Last Name:

Title:

Email: Phone: Ext:

Data Entry Person

First Name: Last Name:

Email: Phone: Ext:

The sample above is blank, but your Institution's details will be pre-populated for you. Please verify that all information is correct, including the names and contact information for the primary Contact Person (required) and an Additional Data Entry Person (optional).

Click **Save** when done making updates.

VI. NCES Eligibility Data

Click the **View Data** button on the GEA Home Page, or click the Eligibility Letter option on the left menu then the Eligibility Information tab to see the data that was extracted from NCES to determine your eligibility status.

REMEMBER: DUE TO REPORTING TIMELINES THE DATA EXTRACTED FROM NCES IS TWO YEARS OLD. Therefore your eligibility for FY 2020, for example, is determined based on your Institution's data from FY 2018 (i.e., school year 2017-18).

The screenshot shows the GEA Grant Eligibility Application interface. The top navigation bar includes 'About', 'Help', 'FAQs', 'Contact Us', 'Account', and 'Logout'. The left sidebar contains 'GEA Home', 'Application', 'Exemption', 'Eligibility Letter', and 'Institution Details'. The main content area is titled 'Eligibility Letter' and includes a welcome message for 'test@statecollege.edu' at 'Community State College University' (OPEID: 00000000). The 'Eligibility Information' tab is active, displaying a table with the following data:

	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

Below the table, a red 'X' icon indicates 'Eligible: No' and a 'Begin Application' button is visible.

There are two important points of data on this screen:

1. Pell Grant recipient percentage, and
2. Core Expenses per FTE.

Each of these values has a *Threshold* (3) that must be met in order for your Institution to be determined eligible. The threshold varies from year to year, and on school type (2yr/4yr) and control (public/private).

Your Eligibility Calculation (4) shows your Institution's data for the FY noted in the table header (current fiscal year minus two years, again, due to NCES reporting timelines). As seen above, Pell Grant

percentage should be **greater** than or equal to the threshold, and Core Expenses should be **less** than or equal to the threshold. This text will display in **green** if your Institution passes the test, or in **red** if it doesn't.

If your institution passes *both* of these tests, then it is determined to be **eligible** based on NCES data. This means you're done! You may now download your Eligibility Letter (see Section VIII).

If your institution fails *either one or both* of these tests, it is determined to be **ineligible** based on NCES data. You now have the option of filling out an Application where you can provide additional data that may change your eligibility status.

Click the **Begin Application** button to proceed (see Section IX).

VII. Eligibility Letter

Click the **View Letter** button on the GEA Home Page or click the Eligibility Letter option on the left menu then the Eligibility Letter tab to view and download your Eligibility Letter.

Your Eligibility Letter can be used to apply for new Institutional Services grants and can also be used to show eligibility for a waiver of the non-Federal cost share matching requirements.

The screenshot displays the GEA Grant Eligibility Application web interface. At the top, the GEA logo and 'Grant Eligibility Application' are visible, along with navigation links for About, Help, FAQs, Contact Us, Account, and Logout. A left-hand navigation menu includes options for GEA Home, Application, Exemption, Eligibility Letter, and Institution Details. The main content area shows the 'Eligibility Letter' page for 'Community State College University' (OPEID: 00000000). A welcome message for 'test@statecollege.edu' is displayed. Below this, there are two tabs: 'Eligibility Letter' (selected) and 'Eligibility Information'. The 'Eligibility Letter' tab contains two buttons: 'Download your 2018 Eligibility Letter' and 'Print your 2018 Eligibility Letter'. The main content area displays a letter from the U.S. Department of Education, Office of Post Secondary Education, dated 2019-12-06. The letter informs the institution that it was unable to be designated as an eligible institution under section 312 of the Higher Education Act of 1965 as amended by the Higher Education Opportunity Act of 2008 (HEA). It also provides information about the review process for FY 2026 and instructions on how to submit an application or waiver request.

If you've submitted an Application and an Exemption Request and you're ultimately deemed ineligible, as our sample Institution is here, your letter will include the determination made by Department staff in the space indicated in the image above.

VIII. Application

The Application provides an institution with the opportunity to provide additional and/or updated information that may cause their numbers to meet threshold requirements, and therefore be determined eligible.

All fields on the Application are required.

The screenshot shows the GEA Grant Eligibility Application interface. At the top, the GEA logo and "Grant Eligibility Application" are displayed. Below this is a navigation bar with links for "About", "Help", "FAQs", "Contact Us", "Account", and "Logout". A sidebar on the left contains a user profile icon, "GEA Home", and a menu with "Application" (highlighted), "Exemption", "Eligibility Letter", and "Institution Details". A "HEP" button with a left arrow is also present. The main content area shows the user is logged in as "test@statecollege.edu" and is at "Community State College University" with OPEID: 00000000. The application is for "Application for FY 2020". The interface is divided into two tabs: "1. Application" (active) and "2. Eligibility Determination". Under "Step 1: Application", there are sections for "Institutional Enrollment" and "Institutional Statistics". The "Institutional Enrollment" section has a field for "1. Total Institutional Enrollment (Fall 2023 Head Count)". The "Institutional Statistics" section includes "1. Needy Student Requirement" with fields for "A. Fall 2023 Head Count Enrollment of Undergraduate and Graduate Degree Students", "B. Fall 2023 Recipients of Title IV Need-Based Financial Assistance", "C. Fall 2023 Enrollment of Half-Time up to and including Full-Time Undergraduate Students", and "D. Fall 2023 Pell Grant Recipients". There are also two "Needy Student Calculation" fields: "Needy Student Calculation 1: Percentage of Fall 2023 Degree-Seeking Students who were Recipients of Need-Based Financial Support" and "Needy Student Calculation 2: Percentage of Federal Pell Grant Recipients at the Applicant Institution".

(continued on next page...)

2. Core Expenses Requirement

A. Undergraduate Full-Time Equivalent Fall 2023 Enrollment: ?

a. Total Full-Time Undergraduate Students: ?

b. Total Number of Credit Hours for all Part-Time Undergraduate Students:

Part-time undergraduate credit hours / 12

TOTAL UNDERGRADUATE FTE: Full-Time + (Part-Time / 12)

B. Graduate Full-Time Equivalent Fall 2023 Enrollment: ?

a. Total Full-Time Graduate Students: ?

b. Total Number of Credit Hours for all Part-Time Graduate Students:

Part-time graduate credit hours / 12

TOTAL GRADUATE FTE: [Full-Time + (Part-Time FTE / 12)] * 2.5

C. Total 2023-2024 Core Expenses: ?

D. Average 2023-2024 Core Expenses per FTE [C / (A + B)]: ?

Submit Application

To the best of my knowledge and belief, all data in this application are true and correct. The governing body of the applicant has duly authorized this document and the applicant will comply with the required assurances, we meet the accrediting requirements.

To confirm the above statement and submit your eligibility application, click "Submit Application" button. Please note that once you submit your application, it is no longer updatable.

Submit Application

To submit your application, complete all fields and check the box near the bottom confirming that all data in this application is true and correct to the best of your knowledge. Then click the **Submit Application** button.

If the data you supply changes your Pell Grant percentage or your Core Expenses and satisfies the threshold requirement, you will be informed immediately. This means you're done! You may now download your Eligibility Letter (see Section VIII).

If not, you will have the option to fill out and submit an Exemption Request (see Section X).

For more information about the Application and the data requested on it, please see the "Application, Instructions and blank ED Form 1049 in PDF format" link on the Help page.

IX. Exemption Request

The Exemption Request provides an institution with the opportunity to provide further details and/or information that may explain why they do not meet threshold requirements and justify why they should be granted eligibility despite the numbers submitted.

Exemption requests are reviewed by Department staff and will be granted or denied based on their determination.

The screenshot displays the GEA (Grant Eligibility Application) web interface. The header includes the GEA logo and navigation links: About, Help, FAQs, Contact Us, Account, and Logout. The left sidebar contains a navigation menu with options: GEA Home, Application, Exemption, Eligibility Letter, and Institution Details. The main content area is titled "Exemption" and contains the following text:

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.

Welcome test@statecollege.edu
Community State College University
OPEID: 00000000

1. Needy Student Requirement | 2. Core Expenses | Review 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

(continued on next page...)

3. The institution substantially increases the higher education opportunities for low-income students who are also educationally disadvantaged, underrepresented in postsecondary education, or minority students

4. The institution substantially increases the higher education opportunities for individuals who reside in an area that is not included in a "metropolitan statistical area" as defined by the Office of Management and Budget and who are unserved by other postsecondary institutions

5. The institution is located on or within 50 miles of an Indian reservation, or a substantial population of Indians and the institution will, if granted the exemption, substantially increase higher education opportunities for American Indians

[Save & Continue to Core Expenses](#)

It's very important that you read the instructions at the top of this page. You will not be able to submit your form unless you've checked the box indicating that you've read and understand the instructions.

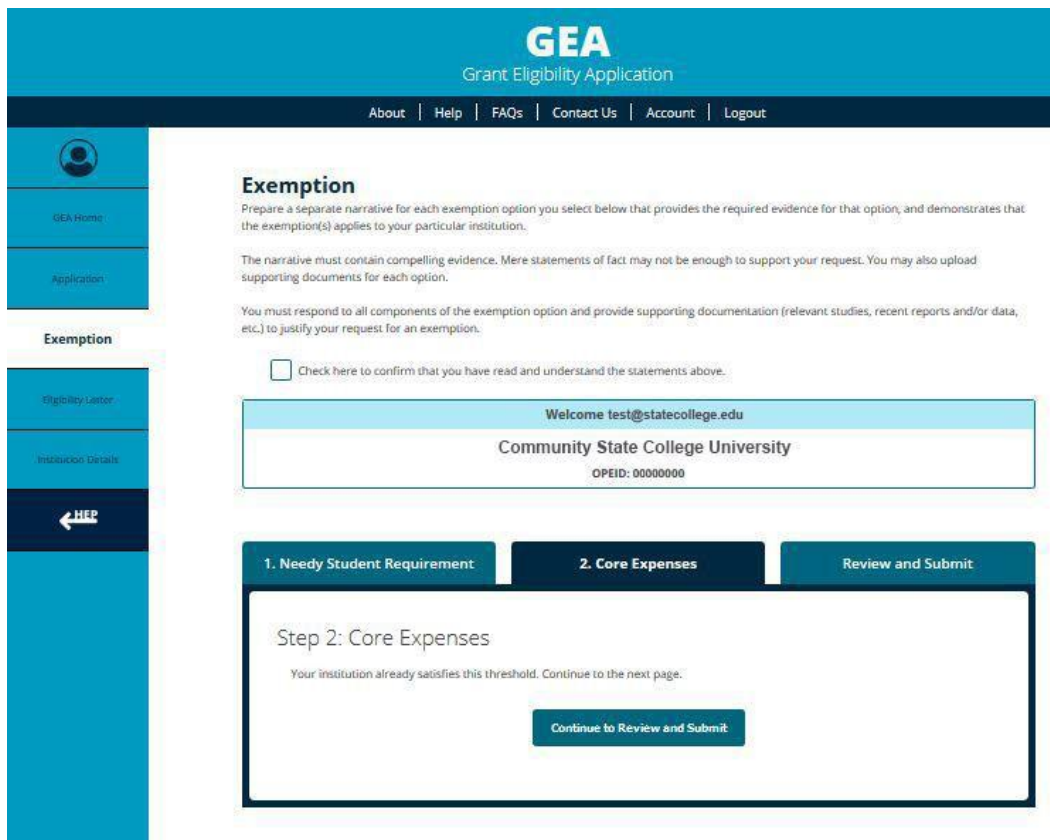
As you can see above, the sample Institution failed the Needy Student requirement both in their NCES data and in their Application. Now they are requesting an Exemption for this requirement, which is represented by the green check mark at the top of the form.

There are five options which an Institution could choose as the basis for their Needy Student exemption request. To read them in full, please refer to the **Application, Instructions and Blank ED Form 1049** found on the Help page.

You must select at least one option, but you may select more than one if appropriate. Click the check box next to the option or options you wish to respond to.

Whichever option(s) you select, you must answer each question that will appear when you click the appropriate check box. As noted in the instructions at the top of the form, you must also provide supporting documentation (relevant studies, recent reports, and/or data, etc.) to justify your exemption request.

Our sample Institution satisfied the Core Expenses requirement, therefore does not need to submit an exemption request for this category.



Based on your scenario, you may be asked to provide an exemption request for one, the other, or both categories. If you do not have to submit a request, the system will not prompt you for the information.

On the Review and Submit page you will have the opportunity to review and edit your responses, if necessary, as seen in the following excerpt from the page. Just click the **Edit** button (1) in the appropriate field as seen below if you need to edit your response.

← HEP

1. Needy Student Requirement
2. Core Expenses
Review and Submit

Review and Submit

Needy Student Requirement

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 an 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

Provide evidence that the state provided more than 30 percent of your institution's budget for the base year.

Provide evidence that your institution charged not more than \$99.00 per student for tuition and fees for the base year.

1. Identify the resources provided by the state, citing specific dollar amounts.

Response here...

File

2. Show actual tuition and fees charged per student.

Response here...

File

3. Enter the 2017-2018 posted tuition and fees.

Response here...

File

Submit your Exemption Request when you are satisfied with your responses.

Your Eligibility Letter will be ready for download after Department staff has had a chance to review and evaluate your request. Your letter will include a synopsis of their evaluation.

X. Help

The following GEA Resources are available on the system's Help page:

1. **GEA User Guide v 2.3** in PDF format (*i.e., this document*)
2. **Application, Instructions and Blank ED Form 1049** in PDF format
3. **Blank ED 1049 only** in PDF format

The Help Desk can be contacted via the Contact Us link on the main menu or by emailing them directly at hepis.helpdesk@thetactilegroup.com.