

USING THE NEW DIGITAL PROCESS FOR COMPLETING PRE-SCHOLARSHIP AGREEMENTS (PSA) AND EXIT CERTIFICATIONS (EC) IN THE PERSONNEL DEVELOPMENT PROGRAM DATA COLLECTION SYSTEM (PDPDCS)

What is the difference between the digital forms and the previous Pre-Scholarship Agreement (PSA) and Exit Certification (EC) process?

The text in the forms remains the same; however, the new process allows project directors to enter their scholar's contact and grant information directly into the secure PDPDCS website using the digital PSA and export an EC prior to a scholar's exit from the program. The scholar can then review and confirm the forms online, through the PDPDCS. Regardless of the method chosen, Institutions of Higher Education (IHEs) are required to provide and have scholar's sign the PSA and ECs according to the regulations in 34 CFR § 304.23.

How has the process for submitting PSAs and ECs changed?

Project directors will be able to work directly with scholars through the PDPDCS. If any information about the scholar is incorrect, that will be noted upon review. Once finalized, the PSA will be imported into the scholar record and can be downloaded as a redacted PDF. When the scholar is ready to exit, project directors will be able to generate the EC using the PDPDCS.

What are the benefits of using the digital PSA and EC scholar forms?

The digital forms will:

Avoid errors entering the scholar's social security number and contact information since the PSA will automatically pre-fill sections A, B, and C of the scholar record;

- Avoid funding amount and service obligation discrepancies between the PDPDCS and the EC since the EC is pre-filled with data from the PDPDCS;
- Save time and effort because project directors will no longer need to print and upload forms;
- Lower security risks since Personally Identifiable Information (PII) will be automatically redacted in the finalized PSA; and
- Archive the forms in the PDPDCS so they can be accessed or downloaded at any time.

Is the previous PDF upload process still available?

Yes, this option will still be available to project directors, however the digital process is strongly encouraged. An uploaded PSA will not populate the scholar record. Both agreements must be completed with the scholar's signature and have the scholar's SSN redacted before it is uploaded.

How are the digital forms signed?

Scholars and project directors will digitally sign the forms within the PDPDCS.

Steps to using the digital PSA and EC:

Step 1: The project director creates the digital PSA or EC in the PDPDCS, completes all related fields, and then submits the form for scholar review.

Step 2: The scholar receives an email to view the PSA or EC and creates a PDPDCS account or logs into their previously created PDPDCS account.

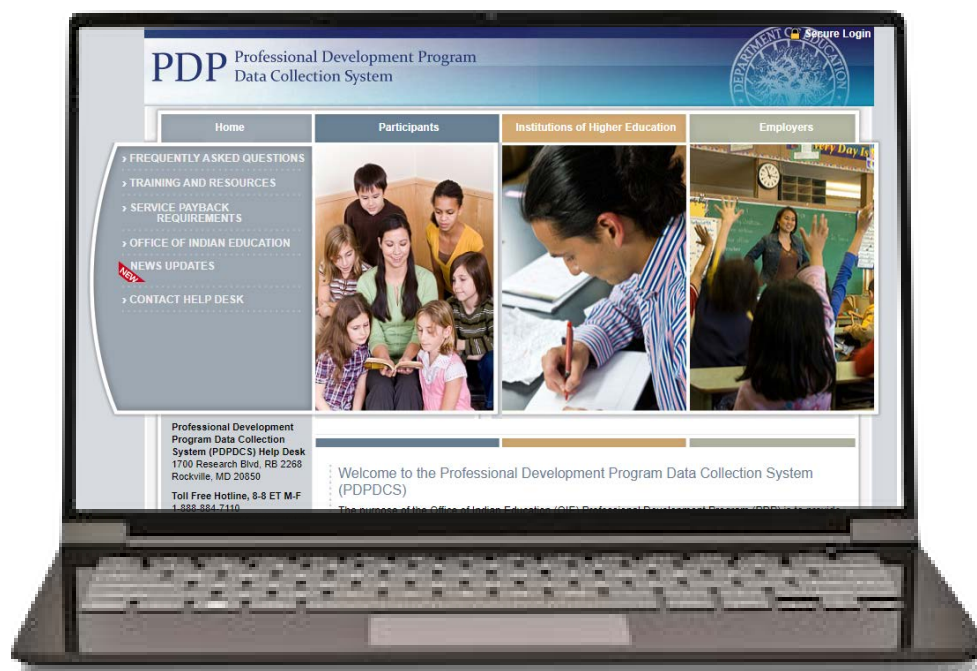
Step 3: The scholar reviews the digital PSA or EC and can then disagree or agree with the information their project director submitted in the form.

Step 4: If the scholar disagrees, they will have the opportunity to make comments or propose changes to the PSA or EC in a comment box within the system for the project director's review.

Step 5: Once the scholar and project director agree with the PSA or EC content, both parties will digitally sign it, and the form will be finalized.

Step 6: A final PSA will be used to create the scholar record in the PDPDCS. The EC will be generated from the scholar record. Both signed forms will be available to grantees and scholars for download as PDFs.

Step 7: Contact the Help Desk if an issue or discrepancy is identified after the form is signed and finalized. The Help Desk is available by email (serviceobligation@ed.gov) or by phone 1-800-285-6276.



To create a digital PSA for a new scholar:

SCHOLAR INFORMATION

Below is a chart summarizing the entry status, completion status, and service obligation status for all scholar records entered for each grant.

To begin the process to add a new scholar to a grant, select the link to "Add New Pre-Scholarship Agreement and Scholar Record (digital version)" or "Add New Scholar Record and Pre-Scholarship Agreement (PDF upload version)".

To monitor the status of all pending pre-scholarship agreements and to create new scholar records for each agreement that has been finalized, select the link to "View Pending and Approved Pre-Scholarship Agreements".

To view a list of all scholar records created in the system for each grant and their record entry, program completion, and service payback status, as well as definitions for the options under each status type, click on the "View All Scholar Records" link.

Grant Award Number: S200K083456

[Add New Scholar Record and Pre-Scholarship Agreement \(digital version\)](#)
[Add New Scholar Record and Pre-Scholarship Agreement \(PDF upload version\)](#)
[View Pending and Approved Agreements](#)
[View All Scholar Records](#)

To create a digital EC for a completing or exiting scholar after selecting exited status:

I. SCHOLAR STATUS

You have indicated that the scholar is no longer enrolled in Section I, Item 1. To begin the exit process for your scholar, please select one of the options below. If you are not ready to begin the exit process for your scholar, please select an enrolled status in Item 1.

PDF version of Exit Certification (Default)
 Prepare digital Exit Certification

[Prepare Exit Certification](#)

Please indicate the appropriate program status of the scholar below. You must complete all subquestions for the option selected.

1. * Scholar program status:
Select the most appropriate option below.

The scholar is still enrolled in the program and is currently receiving OSEP funding.
 The scholar is still enrolled in the program but is no longer receiving OSEP funding.
 The scholar exited/graduated/completed the program.

* Please enter the date of exit/graduation/completion.
 (mm/dd/yyyy)

Please note: The Exit Certification must be completed, signed and uploaded into PDPDCS within 30 days of exit from the program.

The scholar exited without graduating/completing the program.

Using the Pending and Approved Agreements Page

- Select "View Pending and Approved Agreements" after logging into the PDPDCS. Select "View PSA" or "View EC" to review any pending forms. The final, redacted form is available for download by clicking the "Download PSA" or "Download EC" link in the agreement column.
- There are 5 statuses within the Agreements tables:
 - Saved for Later: This flagged status indicates a drafted form, not yet submitted to the scholar for review.
 - Pending Scholar Signature: This status indicates the form has been submitted to the scholar for review.
 - Pending Grantee Review: Forms in this flagged status have been reviewed by the scholar and disputed. The form will contain an explanation from the scholar in the message log on the form page.
 - Pending Grantee Signature: This status indicates the form has been signed by the scholar and is ready for final review and signing by the grantee.
 - Approved (DATE): This status indicates a signed, finalized, active PSA or EC.

To access the "View Pending and Approved Agreements" page after logging into the PDPDCS:

SCHOLAR INFORMATION

Below is a chart summarizing the entry status, completion status, and service obligation status for all scholar records entered for each grant.

To begin the process to add a new scholar to a grant, select the link to "Add New Pre-Scholarship Agreement and Scholar Record (digital version)" or "Add New Scholar Record and Pre-Scholarship Agreement (PDF upload version)".

To monitor the status of all pending pre-scholarship agreements and to create new scholar records for each agreement that has been finalized, select the link to "View Pending and Approved Pre-Scholarship Agreements".

To view a list of all scholar records created in the system for each grant and their record entry, program completion, and service payback status, as well as definitions for the options under each status type, click on the "View All Scholar Records" link.


Grant Award Number: T211D112321

[Add New Scholar Record and Pre-Scholarship Agreement \(digital version\)](#)
[Add New Scholar Record and Pre-Scholarship Agreement \(PDF upload version\)](#)
[View Pending and Approved Agreements](#)
[View All Scholar Records](#)

To review scholar PSA or EC statuses and access pending or approved forms:

Pre-Scholarship Agreements

The section below displays the status of all Pre-Scholarship Agreements that are either pending further action or that have been finalized. Any agreement with a status of 'Pending Grantee Review' or 'Pending Grantee Signature' is awaiting your review or feedback. All finalized Pre-Scholarship Agreements are available for download in PDF format.




Name	Agreement	Status	Date Last Modified
Matt Flora	Download PSA 	Approved 2/12/2021	2/12/2021
Marle Gibbon	View PSA	Saved for Later 	6/8/2021
Roberta Gregson	Download PSA 	Approved 1/5/2021	1/5/2021
Joan Little	View PSA	Pending Scholar Signature	1/4/2021
Michelle Pape	Download PSA 	Approved 1/5/2021	1/5/2021
Tamara Thompson	View PSA	Pending Scholar Review	1/5/2021
Tim Williams	View PSA	Pending Grantee Signature 	2/15/2021

Exit Certifications

The section below displays the status of all Exit Certification agreements that are either pending further action or that have been finalized. Any agreement with a status of 'Pending Grantee Review' is awaiting your review or feedback.

Agreements in the highlighted row(s), if applicable, are digital agreements pending further action to replace a previously approved agreement that has been voided. Once finalized, the new agreement will replace the previous agreement and your scholar will be notified.

All finalized EC agreements are available for download in PDF format.

Name	Agreement	Status	Date Last Modified
Michelle Barnes	Download EC 	Approved	4/30/2021
Vince Coleman	View EC	Pending Scholar Signature	6/22/2021
Jim Dandy	View EC	Saved For Later 	6/8/2021
Dan Sweets	Download EC 	Approved	6/4/2021

For any other questions, please contact the Help Desk:

The Help Desk is available Monday – Friday 8:00 AM – 8:00 PM EST.

Email: serviceobligation@ed.gov

Phone: 1-800-285-6276