



## USING THE NEW DIGITAL PROCESS FOR COMPLETING PAYBACK AGREEMENTS (PA) AND EXIT CERTIFICATIONS (EC) IN THE PAYBACK INFORMATION MANAGEMENT SYSTEM (PIMS)

### What is the difference between the digital forms and the previous Payback Agreement (PA) and Exit Certification (EC) process?

The new process allows project directors to enter their scholar's contact and grant information directly into the secure PIMS. The digital PA form will capture this information to create a scholar record during enrollment and then project directors complete and sign an EC when a scholar exits. The scholars also review and sign the agreements online through the PIMS. Regardless of the method chosen, Institutions of Higher Education (IHEs) are required to provide scholars with PA and EC forms according to the regulations in 34 CFR § 386.34.

### How has the process for submitting PA and EC forms changed?

Project directors will be able to work directly with scholars through the PIMS to create the scholar record. If any information about the scholar is incorrect, scholars will note that upon their review. Once finalized, the PA will be imported into the scholar record and can be downloaded as a redacted PDF. When the scholar exits, project directors will be able to generate the EC using the PIMS.

### What are the benefits of using the digital PA and EC forms?

The digital agreements will:

- Avoid errors entering the scholar's social security number and contact information since the PA will automatically pre-fill sections A, B, and C in the scholar record;
- Save time and effort because project directors will no longer need to print and upload agreements;
- Lower security risks since Personally Identifiable Information (PII) will be automatically redacted in the finalized PA; and
- Archive the agreements in the PIMS so they can be securely accessed or downloaded at any time.

### Can project directors still upload a PDF of the PA or EC?

Yes, this option will still be available to project directors until August 1, 2022. Project directors can download the required PA and EC forms on the [RSA PIMS - Agreements \(ed.gov\) page](#). An uploaded PA or EC will not pre-fill the scholar record; the form must be completed with the scholar's signature and have the social security number redacted before it is uploaded.

### How are the digital agreements signed?

Scholars and project directors will digitally sign the PA and/or EC within the PIMS.

## Steps to use the digital PA and EC:

1. The project director creates the digital PA or EC in the PIMS, completes all related fields, and then submits the agreement for scholar review.
2. The scholar receives an email to view the digital agreement and creates a PIMS account or logs into their previously created PIMS account.
3. The scholar reviews the digital PA or EC and can then disagree or agree with the information their project director submitted in the agreement.
4. If the scholar disagrees, they will have the opportunity to make comments or propose changes to the agreement in a message log within the system for the project director's review.
5. Once the scholar and project director agree with the PA or EC content, both parties will digitally sign it, and the agreement will be finalized.
6. A final PA will be used to create the scholar record in the PIMS. The EC will be generated from the scholar record. Both signed agreements will be available to grantees and scholars for download as PDFs.

## To create a digital PA for a new scholar:

**SCHOLAR INFORMATION**

Below is a summary of the scholar records entered for each grant. To add a new scholar to a grant, click on the "Add New Scholar" link. To view a list of all scholars entered into 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: A123B156789

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

## To create a digital EC for a completed or exited scholar:

**G. SCHOLAR STATUS**

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

To begin the exit process for your scholar, please select one of the options below:

PDF version of Exit Certification (Default)  
Please complete Sections G and H. In Section I, please upload a copy of the completed, signed, and redacted Exit Certification for this scholar. The grantee representative and scholar must complete and sign the document.

Prepare digital Exit Certification

If you are not ready to begin the exit process for your scholar, no selection is required and you may proceed and complete any other updates you have at this time.

## For any other questions, please contact the Help Desk:

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

**Email:** [RLTTHelpDesk@ed.gov](mailto:RLTTHelpDesk@ed.gov)

**Phone:** 1-800-832-8142