Return of Title IV Aid (R2T4)
Business Process Guide

2022 Huron Engagement

Return to Title IV processing is delivered functionality within Campus Solutions (CS). Staff at each campus can quickly and easily calculate a student's return or post withdrawal disbursement with just a few clicks. The delivered process is recommended for a few reasons.

1. All of the calculations are done within the same system instead of calculating using a separate method. This allows for faster access to the worksheet when counseling students.
2. Because the calculations are stored on PS tables, more data is readily available for query to compare or create reports.
3. Communications are made much easier using the communications generation process to send out notifications electronically to the students.

Historically, campuses attempted to use the delivered functionality but found the calculation to be incorrect due to the calendar created by HR. If the calendar cannot be adjusted, functionality does exist to simply adjust the days in the enrollment session. This process is further covered later in this document.

Contents

1. Setup R2T4

Navigation: Setup SACR > Product Related > Financial Aid > Application Processing > Define Rules for Return

1. The first tab is **Title IV Funds** and it is rather straightforward. This page houses all Federal item types that could be used to process an R2T4. The Auto Populate button will fill in the table below with financial aid item types that have a source listed as 'Federal'. If you choose to populate the table by using this functionality, please review the item types before proceeding to the next step.

   The system automatically selects the check box for 50 percent grant protection for certain funds. You cannot change that check box; however, you can change the fed funds percentage value. The default is 100%, but you can modify this if you have a fund, such as SEOG, that might be matched by your state or another agency. Confirm that

2. The second tab is Institutional Charges.

   You have the option of selecting the source of the charges for the student. The first is **Use Actual Charges** where you select the Item Type Groups and Charge Type. Or, you can select **Use Budget Charges**. Use Actual Charges takes charges directly from the student's account. Use Budget Charges uses the tuition and fees amount from the student's Cost of Attendance. This is decision to be made by the institution. During the demo, we noticed the T&F pulled into the worksheet was off by $3. A simple solution on the FA side would be to use budget charges and make sure the budgets are setup to match the charges $1 for $1 at every enrollment level.

Click Save. The R2T4 setup is now complete and calculations can be completed.

2. Identify Students

Navigation: Reporting Tools > Query > Query Manager or Query Manager

R2T4_REQUIRED2 - This query can be used to identify students who require a calculation.

R2T4_MIDPOINT- This query contains students with grades of F, FW, NP, NC, and not P, CR, or I.

3. Review Student Status

Navigation: Financial Aid > View Financial Aid Status

1. Review the student's financial aid status. Are there any issues that could impact the calculation like open checklist items, SAP status, UEMs, EFC status, verification status, or any relevant comments regarding the student's attendance.

2. In the event a student is deceased, complete the R2T4 and return the school portion of any unearned funds. Do not offer any post-withdrawal disbursements and make no attempt to collect the student's portion of unearned funds. Update the notes appropriately.
3. If the student was selected for verification and the only items outstanding are verification related, the student may be eligible for a post withdrawal disbursement. Confirm that the student had a valid ISIR with an official EFC prior to withdrawing and the student's verification documentation was submitted within 120 days of withdrawing (or before the verification deadline for the aid year).

4. Review Enrollment History

For each student on the roster, you will need to review their enrollment for the term to determine their scheduled start and end dates, last date of attendance, and FA Load.

> **Navigation:** Reporting Tools > Query > Query Viewer

> Run (insert query) and enter the student's ID and term when prompted. Review the results to determine the following:

1. ***What session/s did the student begin attendance in?*** Compare the **Start Date** and **Drop Dt** columns. You will enter all the sessions the student began attendance in on the Return TIV Sessions page. Count any class the student dropped on or after the **Start Date**, but not classes the student dropped before the **Start Date**.
2. ***Which courses was the student enrolled in on the Census Date?*** This will determine the student's Pell eligibility.
   a. *If the student dropped all their classes the census date*, base the Pell eligibility on all the courses in which they actually began attendance.
   b. *If the student was enrolled on the census date*, base the Pell eligibility on their enrollment as of the census date. Do not include courses the student dropped before or added after the census date.
   c. *If the student was not enrolled on the census date, but added classes afterwards*, base the Pell eligibility on the day they first enrolled. Do not adjust for classes they added or dropped after this date.

   Note that classes in which a student never began attendance (i.e., they dropped the class before the start date) should never be counted towards Pell eligibility, even if the student was enrolled in that class in the census date.
3. ***What was the student's last date of attendance?*** This is the latest Drop Dt for a class in which the student actually began attendance.

5. Recalculating Pell Awards

1. For R2T4 calculation purposes, Pell eligibility should be based on the student's enrollment on the census date. However, classes the student never started should never be counted towards the student's FA Load for Pell, even if the student was enrolled in those classes on the census date.
   a. *If the student was enrolled on the census date,* their FA Load is based on the courses they were in on the census date and actually started.
   b. *If the student was enrolled before the census date, and dropped all their classes before census,* Pell eligibility should be based on all the classes they started before the census date.
   c. *If the student wasn't enrolled prior to census, and added all their classes afterwards,* Pell eligibility should be based on their enrollment on the start date of their first class. Again, do not count classes the student was enrolled in on this date but never started.

   If the student's current Pell award is not correct, adjust it to the correct amount for this FA Load.

2. If the student is not full time, confirm that they're still Pell-eligible based on their EFC and FA Load. Often, students with EFCs at the higher end of the Pell-eligible range are Pell-eligible if enrolled full-time, but not at lesser FA Loads.

Recalculating SEOG Eligibility

Adjust the student's SEOG award for this term to the amount they had been offered just prior to their withdrawal. If the SEOG was not awarded until after their last date of attendance, reduce the award to zero for that term. If the SEOG was awarded prior to withdrawing, but the award was canceled before they withdrew, do not add this amount back. If you're not sure when the SEOG was first awarded or canceled, check the Award Activity page.

6. Calculate Session Information

Navigation: Financial Aid > Return to Title IV Funds > Return TIV Session

Click **Add a New Value** and enter the fields as shown in the demonstrative below.

Click Add.

Return TIV Session

| Find an Existing Value | Add a New Value |

ID █████████

*Academic Institution PCCD1

*Aid Year 2022

Term 1222

Program Type (Credit/Clock Hr) Credit Hour Program

Add

1. The sessions the student is enrolled in will automatically populate under Session Details as shown here. If the student has a '1' session row, delete the rest of the rows using the (–) symbol leaving only one row remaining.

2. Check the Session Begin and End date. In most cases, they will match the first day of the first class and last scheduled class day of the last day the student began attendance in (regardless of sessions).

| Return TIV Session | Return TIV Session Notes |

ID █████████

Institution PCCD1 Peralta Community College Dist

Academic Career UGRD Undergraduate

Term 1222 2022 Spring

Term Begin Date 01/24/2022

Term Ending Date 05/27/2022

Aid Year 2022

Program Type Credit Hour Program

Calculate All

Last Updated

Session Details   Personalize | Find | View All | ⊡ | 🖩   First ◀ 1-2 of 3 ▶ Last

| Details 1 | Details 2 | Details 3 | |

Session		Session Begin Date	Session End Date		
1 1	Regular Academic	01/24/2022	05/27/2022	+	−
2 DOE	Dynamic / Open Entry/Exit	01/24/2022	05/27/2022	+	−

View after correcting sessions

3. Click on the Details 2 tab. Select *Withdraw* form the **Status** menu. Then, enter the student's last date of attendance in the **Date of Withdrawal** field.
4. Click the Calculate All button and you will see the fields under Period Summary populate.

Click Save.

7. Create R2T4 Worksheet

Navigation: Financial Aid > Return to Title IV Funds > Create Worksheet

Click Add a New Value and enter the fields as shown in the demonstrative below.

Return of TIV Worksheet HERA

| Find an Existing Value | Add a New Value |

ID [REDACTED]

*Academic Institution PCCD1

*Aid Year 2022

Term 1222

Program Type (Credit/Clock Hr) Credit Hour Program

Add

1. Update the **Institutional Determination Dt** to match the **Date of Withdrawal** field. These dates should almost always match for official withdrawals. The exception to this of course is for unofficial withdrawals. If you check the **"Undetermined Withdrawal Date"** box, the 50% point in the semester will be used in the calculation.
2. If the student was not enrolled in any full term classes, click the **Use Session Calculation Date** box to use session dates from the previous step.
3. Verify that the **Start Date & End Date** are correct and then click **Calculate All.**

4. Click the **Return of Funds Worksheet** tab. The calculations are now populated on this page. Compare the disbursed fields with those fields on the **Student Awards** page to ensure they are accurate. Also, verify the institutional charges are correct by viewing the student's financial account. Fields that have a blue **Detail** link can be edited for the purposes of the calculation. If any changes are made, click **Calculate** to recalculate this page. This will come in handy if you must adjust the total number of days in the semester to override the calendar delivered by HR.

5. Click on the "**Detail**" link for *O. Amount Due from School* to see the breakdown of loan and/or grant funds that your school must return to the Department of Education.

6. Click on the "**Detail**" link for *U. TIV Grant Return Amt* to see the breakdown of grant funds that will be returned to the Department of Education on behalf of the student.

7. Navigate to the award entry panel and make all necessary adjustments to the original award based on the details you just reviewed.

8. Click the **Student/School Return** tab. Check the *Student Notified* box.
9. Set the *Notification Date* value to the date the R2T4 communication was assigned to the student.
10. Change the *School Return Status* to Complete
11. Set the *Funds Return Date* to the same date the calculation was completed

12. In the event there was a figure greater than zero in the **TIV Aid to Disburse** field, you would need to complete this action on the **Post-Withdrawal Disbursement** tab.
13. The **PWD Detail** link would list the aid the student is eligible for.
14. Record the date the PWD disbursement notification was sent and set a deadline for 14 days after. The other fields below are available to track student response information.
15. Click on the **Return TIV Aid Notes** tab to record any notes about this return.

Click Save.

Return TIV Aid	Return of Funds Worksheet	Student/School Return	**Post-Withdrawal Disbursement**	Return TIV Aid Notes

ID ▓▓▓▓▓

Institution PCCD1   Peralta Community College Dist   **Aid Year** 2022

Term 1222   2022 Spring   **Program Type** Credit Hour Program

[Calculate]

Date of Withdrawal 03/15/2022   **Institutional Determination Dt** 03/15/2022

Post-Withdrawal Disb Status [▾]   **Date Form Completed** 06/14/2022

Part I, II, III

J. TIV Aid to Disburse (Box1)   0.00   **Total PWD Credited (Box 2)**   0.00

Part IV Allocation of PWD

PWD Detail   **Box 1**   0.00   –   **Box 2**   0.00   =   **Box 3**   0.00

Part V, VI

PWD Notification Sent [   ] 📅

Response Deadline [   ] 📅

Date Response Received [   ] 📅   ☐ Response Received   ☐ Not Received

    ☐ Late Response Not Accepted

Date Direct Disb Mailed   **Grant** [   ] 📅   **Loan** [   ] 📅

[💾 Save] [📧 Notify]   [📋 Add] [🔄 Update/Display]

8. Notify the Student

The following items must be mentioned in the communication to the student regarding their R2T4.

o   Documentation of R2T4 calculation
o   Amount of Title IV funds required to be returned by the student (if there are any).
o   Requirement of Exit Loan Counseling and web address where it can be accessed.
o   Reminder that the loan servicer will be in touch with the student and/or parent (Parent Plus Loan)
o   Reminder to contact Business Office to discuss remaining balance on student's account (if applicable)

Return to the first tab **Return TIV Aid.**

1. Click the communication 🖼 button.

2. Input the **Communication Key** and related fields.

3. Click Save.

Templates

Official Withdrawal Template

fld_DATE

fld_NAME_DISPLAY
fld_ADDRESS1
fld_ADDRESS2
fld_CITY, fld_STATE fld POSTAL
fld_COUNTRY_DESCR

Dear fld_FIRST_NAME,

Our records indicate that you withdrew or stopped attending our institution on **fld_RTRN_TIV_WSTAT_DT**. Students who receive financial aid and completely withdraw from the college must repay all or a part of their financial aid according to the policy explained below.

Financial aid recipients who receive federal student aid who withdraw or stop attending before the 60% point in time of the semester enrolled will have the percentage and amount of Title IV unearned assistance calculated by the university. The federal formula used to determine the less than 60% portion of enrollment requires that the number of the calendar days in the period of enrollment for which the assistance is awarded be divided into the number of calendar days completed in that period as of the day the student withdrew.

After completing the Federal Return to Title IV Aid calculation, $**fld_SCHL_RTN_WK_1 + $ fld_SCHL_RTN_WK_2** has been refunded to the Federal Stafford Loans programs and $**fld_SCHL_RTN_WK_5**to the Pell grant program from your student account.

Loan Exit counseling is a federal requirement (34CFR682.604g) of all student loan borrowers who have graduated, withdrawn, or fallen below half-time. For your convenience, this is available online at

www.studentloans.gov. Failure to complete your exit interview will result in placing a hold on your academic transcripts and other educational records.

Please contact _____ at _____ to verify your total amount due and to make payment arrangements. A student who has an account balance because of a 'Return of Title IV Calculation' will not be allowed to receive future educational financing until the funds are returned in full to _____.

Sincerely,

Financial Aid Advisor

Unofficial Withdrawal Template

fld_DATE

fld_NAME_DISPLAY
fld_ADDRESS1
fld_ADDRESS2
fld_CITY, fld_STATE fld POSTAL
fld_COUNTRY_DESCR

Dear fld_FIRST_NAME,

Our records indicate that you earned all Fs during the fall semester. Students who receive financial aid and fail to successfully complete any courses are considered as an unofficial withdrawal and must repay part of their financial aid. This is calculated based off of the date of the mid-point of the semester according to the policy explained below:

Financial aid recipients who receive federal student aid who withdraw on or

before the 60% point in time of the semester enrolled will have the percentage

and amount of Title IV unearned assistance calculated by the university.

The federal formula used to determine the less than 60% portion of enrollment

requires that the number of the calendar days in the period of enrollment for

which the assistance is awarded be divided into the number of calendar days

completed in that period as of the day the student withdrew.

After completing the federal Return to Title IV Aid calculation, $fld_TOT_TIV_AID_RTRN has been refunded to the Federal Direct Unsubsidized Loan program from your student account.

Loan Exit counseling is a Federal requirement (34CFR682.604g) of all student loan borrowers who have graduated, withdrawn, or fallen below half-time. For your convenience, this is available online at http://www.studentloans.gov. Failure to complete your exit interview will result in placing a hold on your academic transcripts and other educational records.

Please contact _____ at _____ to verify your total amount due and to make payment arrangements. The Business Office is located _____. A student who has an account balance as a result of a 'Return of Title IV Calculation' will not be allowed to receive future educational financing until the funds are returned in full to _____.

Sincerely,

Financial Aid Advisor

Post Withdrawal Disbursement

fld_DATE

fld_NAME_DISPLAY
fld_ADDRESS1
fld_ADDRESS2
fld_CITY, fld_STATE fld POSTAL
fld_COUNTRY_DESCR

Dear fld_FIRST_NAME,

Our records indicate that you last attended or withdrew from our college on **fld_RTRN_TIV_WSTAT_DT**. Students who withdraw and were eligible for financial aid that did not disburse may be entitled to a portion of the undisbursed earned financial aid. The policy for calculating the amount of earned financial aid is listed below:

> Financial aid recipients who receive federal student aid who withdraw on or before the 60% point in time of the semester enrolled will have the percentage and amount of Title IV earned assistance calculated by the college. The federal formula used to determine the less than 60% portion of enrollment requires that the number of the calendar days in the period of enrollment for which the assistance is awarded be divided into the number of calendar days completed in that period as of the day the student withdrew.

After completing the federal Return to Title IV Aid calculation, you are eligible to receive **$fld_POSTWD AMOUNT** in **Federal Pell Grant and/or Federal Direct Sub/UnSub Loan funds.**

If you agree to the post-withdrawal disbursement, these funds will be credit to your student account. You can reject all or a portion of these funds.

If you would like to accept the entire or a portion of the funds proceeds, please complete the information below and send your response with in **A MONTH AFTER LETTER DATE** – 3/3/2021 to the following address:

If you have questions regarding your financial aid, you may call our office at _____

Sincerely,

Office of Financial Aid

I, _____ (insert your name), would like to receive a post-withdrawal disbursement of

$_____ (insert grant amount not to exceed $38.03 in __Pell__ Federal funds. I understand that the amount

will be credited to my student account.

_____   _____

 SIGNATURE   DATE