

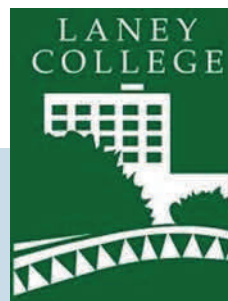


# **ADMISSIONS & RECORDS/ FINANCIAL AID**

Training Documentation

Term Withdrawal Processing

Academic Year 2014



[

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## OBJECTIVES

This document describes one type of term withdrawals processed by the Peralta Community Colleges: a term withdrawal which keeps a transcript record of the drops for the term and uses the appropriate adjustment calendar. The process for a cancellation is slightly different as it generally originates on the Student Financials side. Although, a cancellation does not keep a transcript record of the drops, the system will calculate a refund of student charges as a 100% credit for the term.

## CONTACTS

Adela Esquivel-Swinson, Interim Associate Vice Chancellor, Ext. 7374

Charlotte Smith, District A&R Officer, Ext. 7370

Joyce Brown-Willis, A&R Systems Technology Analyst, Ext. 7365

Dominique Benavides, FA Systems Technology Analyst, Ext. 7379

## OVERVIEW

Using the delivered term withdrawal/cancellation process allows the system to properly record enrollment for National Student Clearing House reporting, student account maintenance and student financial aid processing. **If students go to A&R to withdraw from all of their classes the staff will manually do the Term Withdrawal Process on the Term History page in PeopleSoft.**

## SECURITY

This withdrawal process is managed and executed in the Admissions and Records offices. The tuition calculation process is managed and executed in the Student Financials offices. The financial aid term/return to Title IV process (not described herein) is managed and executed in the Financial Aid offices.

# POLICIES

**Currently**, withdrawing from a term is an automatic customized process. When a student drops all of their classes online or if an instructor drops a student from their last class the customized withdrawal process will be triggered. It is the student's responsibility to withdraw from the term. If the student does not withdraw, he/she may be charged and could receive an "F" grade that will appear on their permanent record.

Students can drop/withdraw from classes online or at the Admissions and Records Office on campus. The student may completely withdraw without intervention by a Peralta Community College staff member.

## Withdrawal

A withdrawal reported to the District Admissions and Records Office prior to Census Day, on or before the last day to drop classes and receive a refund, shall not be noted on the student's academic record.

A "W" symbol will be recorded on the student's transcript upon withdrawal after the last day to drop classes.

The academic record of a student who has not withdrawn from class nor been dropped by an instructor within the time allowed by this policy must reflect a grade other than "W" as awarded by the instructor. The "W" symbol shall not be used to determine academic probation but only to determine progress probation.

***NOTE: The system automatically assigns the "W" grade to affected classes when the student is withdrawn from the term.***

# SET UP STEPS

Refer to page 5 of the "Admissions & Records / Student Financials Business Process Guide: Withdrawal Processing" Document provided by Robbie Deleur on 12/13/13.

The set up steps will not need to change.

# PROCESS STEPS - ADMISSIONS & RECORDS

**Step 1: Term Withdrawal** - Do not do “Quick Enroll” when a student requests to drop all their classes. Instead, you must do a “Term Withdrawal” which will withdraw a student from all of their classes.

Menu Path: Records and Enrollment > Student Term Information > Term History

The screenshot shows a web application interface for processing a term withdrawal. At the top, there is a navigation bar with tabs: Term Statistics, Cumulative Statistics, Term Withdrawal (selected), Session Withdrawal, Academic Standing, and Student Grade Review. Below the navigation bar, the student's name 'Peralta Bubba' and ID '10178874' are displayed. The main form area is titled 'Academic Career: Undergraduate'. It contains several fields for data entry: 'Academic Institution' (Peralta Community College Dist), 'Term' (2014 Fall), 'Academic Level - Term Start' (Freshman), 'Pro-Rata Eligible' (checkbox), '\*Withdrawal \ Cancel' (dropdown menu set to 'Withdrew'), 'Withdrawal \ Cancel Reason' (dropdown menu set to 'Student Request'), 'Withdrawal \ Cancel Date' (date field set to 03/03/2014), 'Last Date of Attendance' (date field set to 03/03/2014), and 'Override Withdrawal Schedule' (text field). A yellow button labeled 'Post Term Withdrawal' is prominently displayed. To the right of the dropdowns, there is a checkbox for '\*Tuition Calc Required:'. At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'. A footer bar contains links to various statistics and review pages.

Term Statistics | Cumulative Statistics | **Term Withdrawal** | Session Withdrawal | Academic Standing | Student Grade Review | Student Special GPA

**Step 2: Complete the following fields:**

**\*Withdrawal\Cancel** = Withdrew

**Withdrawal\Cancel Reason** = Student Request

**Withdrawal\Cancel Date** = Date the classes are dropped

**Last Date of Attendance** = Date the classes are dropped

**Step 3: Click the “Post Term Withdrawal Button”**

**Step 4: Click “Save”**

**This completes the “Process Steps - Admissions & Records”.**

## EXPECTED PROCESS RESULTS:

After the Withdrawal Process is successful, the students account should resemble the screens below:

Menu Path: Records and Enrollment > Student Term Information > Term History > Term Withdrawal Tab > Success

Message results when clicking the [Success](#) link in the Term Withdrawal page:

### Term Withdrawal Run Status

|                                |            |                                |                     |
|--------------------------------|------------|--------------------------------|---------------------|
| Term Withdrawal Request ID:    | 0000001158 | Seq Nbr:                       | 1                   |
| EmplID:                        | 10009963   | Peralta,Buba A                 |                     |
| Academic Career:               | UGRD       | Undergraduate                  |                     |
| Academic Institution:          | PCCD1      | Peralta Community College Dist |                     |
| Term:                          | 1134       | 2013 Fall                      |                     |
| Withdrawal \ Cancel:           | WDR        | Withdrew                       |                     |
| Withdrawal \ Cancel Reason:    | STDT       | Student Request                |                     |
| Withdrawal \ Cancel Date:      | 11/01/2013 |                                |                     |
| Last Date of Attendance:       | 11/01/2013 | Source:                        | SR Withdrawal Panel |
| Term Withdrawal Detail Status: | Success    | Header Status:                 | Success             |

### Message Log

Find | View All First 1 of 1 Last

|                       |                                                            |           |         |
|-----------------------|------------------------------------------------------------|-----------|---------|
| Message Sequence:     | 1                                                          |           |         |
| Last Update DateTime: | 02/07/14 9:50:13AM                                         | Severity: | Message |
| Message Text          | Success (14650,60)                                         |           |         |
| 14650 60              |                                                            |           |         |
| Explanation           | The withdrawal process request has completed successfully. |           |         |

Cancel

Student's Unofficial Transcript:

|                                                       |          |                        |                                |            |
|-------------------------------------------------------|----------|------------------------|--------------------------------|------------|
| ID:                                                   | 10009963 | Buba Peralta           | <a href="#">Report Manager</a> |            |
| <b>Peralta Unofficial Transcript</b>                  |          |                        |                                |            |
| Peralta Community College District                    |          |                        |                                |            |
| 333 East Eighth Street                                |          |                        |                                |            |
| Oakland, CA 94606                                     |          |                        |                                |            |
| United States                                         |          |                        |                                |            |
| Name                                                  | :        | Buba Peralta           |                                |            |
| Student ID:                                           | :        | 10009963               |                                |            |
| Birthdate                                             | :        | 1902-02-02             |                                |            |
| Address                                               | :        | 333 East 8th Str       |                                |            |
|                                                       |          | Oakland, CA 94606-0000 |                                |            |
|                                                       |          | United States          |                                |            |
| Print Date                                            | :        | 2014-01-31             |                                |            |
| - - - - - Beginning of Undergraduate Record - - - - - |          |                        |                                |            |
| 2013 Fall                                             |          |                        |                                |            |
| <b>ALAMEDA</b>                                        |          |                        |                                |            |
| ART                                                   | 1        | INTRO TO ART HISTORY   | 3.00                           | 0.00 W     |
| <b>Undergraduate Career Totals</b>                    |          |                        |                                |            |
| CUM GPA :                                             | 0.000    | CUM TOTALS :           | 0.00                           | 0.00 0.000 |

## EXPECTED PROCESS RESULTS (CONT.):

If the Automated Withdrawal Process is successful, the students account should resemble the screen(s) below:

Menu Path: Campus Community > Student Services Ctr (Student):

Buba Peralta ID: 10009963

student center general info admissions transfer credit academics finances

Institution / Career / Program [edit program data](#)

PCCD1 - Peralta Community College Dist  
UGRD - Undergraduate  
EXMPT - Exempt - Non-matriculation

Program: EXMPT Exempt - Non-matriculation  
Student Career Nbr: 0  
Status: Active as of 01/01/1969  
Admit Term: 1032 2003 Spring  
Expected Graduation:  
Approved Load: Part-Time  
Load Determination: Base On Units  
Level Determination: Base On Units  
Plan: IM078 OTHER  
Requirement Term: 1032 2003 Spring

Term Summary [edit term data](#)

PCCD1 - Peralta Community College Dist  
UGRD - Undergraduate  
1134 - 2013 Fall  
1084 - 2008 Fall  
1083 - 2008 Summer  
1032 - 2003 Spring

**2013 Fall**  
Eligible to Enroll: Yes  
Primary Program: EXMPT Exempt - Non-matriculation  
Academic Standing Status: Data unavailable  
Progress Probation Status: Credit History and Collection

**Withdrawal/Cancel**  
Withdrawal/Cancel: WDR Withdraw  
Date: 11/01/2013  
Reason: STDT Student Request

**Level / Load**  
Academic Level - Projected: Freshman  
Academic Level - Term Start: Freshman  
Academic Level - Term End: Freshman  
Approved Academic Load: Part-Time  
Academic Load: No Unit Load

**Classes**

Enrolled Dropped Wait Listed

| Class                             | Description                      | Units | Grading | Grade | Status |
|-----------------------------------|----------------------------------|-------|---------|-------|--------|
| <a href="#">ART 1-02 (40075)</a>  | INTRO TO ART HISTORY (Lecture)   | 3.00  | Graded  | W     | ⊗      |
| <a href="#">ART 2-81 (44430)</a>  | HISTORY OF WESTERN ART (Lecture) | 3.00  | Graded  |       | ⊗      |
| <a href="#">ASTR 1-A1 (40209)</a> | INTRO TO ASTRONOMY (Lecture)     | 3.00  | Graded  |       | ⊗      |
| <a href="#">BUS 1B-A1 (40122)</a> | MANAGERIAL ACCTG (Lecture)       | 4.00  | Graded  | W     | ⊗      |

This completes the “Process Steps - Admissions & Records”.



# PROCESS STEPS - FINANCIAL AID

**Step 1: Tuition Calculation** - When a student withdraws, the Tuition Calculation Required flag is set to Y. This allows the student record to be picked up in the next regularly scheduled tuition calculation process. The Time of the Tuition Calculation Process is recorded and the process sets the "TIV" service indicator ("Return to Title IV Calc Reqd.")

Menu Path: Student Financials > Tuition and Fees > Tuition Calculation

## Tuition Calculation

Buba Peralta ID: 10009963 [Academic Information](#) [Display Student's Accounts](#)

View All First 1 of 1 Last

Academic Career: Undergraduate

Find | View All First 1 of 4 Last

|                                                             |                                                        |
|-------------------------------------------------------------|--------------------------------------------------------|
| <b>Academic Institution:</b> Peralta Community College Dist | <b>Business Unit:</b> Peralta Community College Dist   |
| <b>Term:</b> F13 Semester                                   | <b>Billing Career:</b> Undergraduate                   |
| <b>Primary Program:</b> Matriculating                       | <b>Campus:</b> Berkeley City College                   |
| <b>Override Billing Units:</b> <input type="checkbox"/>     | <b>Projected Bill Units:</b> <input type="text"/>      |
| <b>Override Init Enrl Fee:</b> <input type="checkbox"/>     | <b>Override Init Add Fee:</b> <input type="checkbox"/> |
| <b>Tuition Residency:</b> 0.000                             |                                                        |
| <b>Override Tuition Group:</b> <input type="text"/>         | <b>Tuition Group:</b> PCCD TUITION GROUP               |
| <b>Tuition Calc Required:</b> <input type="checkbox"/>      | <b>Tuition Calc Date Time:</b> 12/02/2013 1:57AM       |

[Calculate Tuition and Fees](#) [Display Tuition and Fees](#) [Display Errors / Warnings](#)

**Step 2: Update Financial Aid Term** - The next scheduled run of the FA Term process will insert a row displaying the service indicator code. The presence of this code prevents a student refund from being generated until after the return to Title IV aid programs process is completed.

Menu Path: Financial Aid > Financial Aid Term > Maintain Student FA Term

FA Term Acad Level Statistics Financial Aid Info Records/Term Info **Withdrawal Info**

Buba Peralta 10009963

Term Information Find | View All First 2 of 2 Last

**Institution:** Peralta Community College Dist **Term:** F13 Semester

Student Data Find | View All First 1 of 1 Last

|                                                  |                                       |
|--------------------------------------------------|---------------------------------------|
| <b>Effective Date:</b> 12/02/2013 <b>Seq:</b> 1  | <b>Status:</b> Active                 |
| <b>Academic Career:</b> Undergraduate            | <b>Primary Program:</b> Matriculating |
| <b>Academic Plan:</b> BUS General Business       | <b>Academic Sub-Plan:</b>             |
| <b>Withdrawal/Cancel:</b> Withdrew               |                                       |
| <b>Withdrawal/Cancel Reason:</b> Student Request |                                       |
| <b>Withdrawal/Cancel Date:</b> 09/13/2013        | <b>Refund Scheme:</b>                 |
| <b>Last Date of Attendance:</b> 09/13/2013       | <b>Refund Classification:</b>         |
| <b>Refund Percentage:</b>                        | <b>Refund SetID:</b>                  |
| <b>Tuition Calc Date Time:</b> 12/02/13 12:46AM  | <b>Service Indicator Code:</b>        |
| <b>Tuition Group:</b> PCCD GROUP                 | <b>Service Indicator Date Time:</b>   |



# PROCESS STEPS - FINANCIAL AID (CONT.)

## Manage Service Indicators

Buba Peralta

10009963



Display:

Effect

Negative

Institution

Peralta Community College Dist

Refresh



[+ Add Service Indicator](#)

| Service Indicator Summary                           |                              |                              |             |            |                        |          |                      |            |          |
|-----------------------------------------------------|------------------------------|------------------------------|-------------|------------|------------------------|----------|----------------------|------------|----------|
| Personalize   Find   View All     First 1 of 1 Last |                              |                              |             |            |                        |          |                      |            |          |
| Code                                                | Code Description             | Reason Description           | Institution | Start Term | Start Term Description | End Term | End Term Description | Start Date | End Date |
| TIV                                                 | Return to Title IV Calc Reqd | Return to Title IV Calc Reqd | PCCD1       | 0000       | Begin Term             |          |                      | 12/02/2013 |          |

[+ Add Service Indicator](#)

## Your Holds

### Hold Item

Buba Peralta

Return to Title IV Calc Reqd

#### Reason and Contact

**Description:** Peralta Community College Dist

**Start Term** Begin Term - Srvc Indicatr Use

**Start Date** 12/02/2013

**Reason:** Return to Title IV Calc Reqd

**Department:** Financial Aid

**Contact:**

#### Instructions

The student has withdrawn from all classes for the term; pursuant to federal regulations a Return to Title IV Funds calculation must be performed before any credit balance refund may be made to the student.

If the student attempts to reenroll into classes online after being withdrawn from the term, the customized withdrawal process will reverse and make the "Withdrawal/Cancel field blank on the Term Withdrawal and remove the student's "TIV" hold (if applicable).

**This completes the "Process Steps - Financial Aid".**