



Electronic Access Conference
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2001

Student Financial Assistance

THE U.S. Department of
EDUCATION



Session 24

Make the Most of the Return of Title IV Funds for Windows Software





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Welcome

- Introductions



- Questions?

- Evaluations



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Agenda

- Basics of Getting Started
- Entry
- View Return Arrangements
- Reports
- Browse Student
- Questions



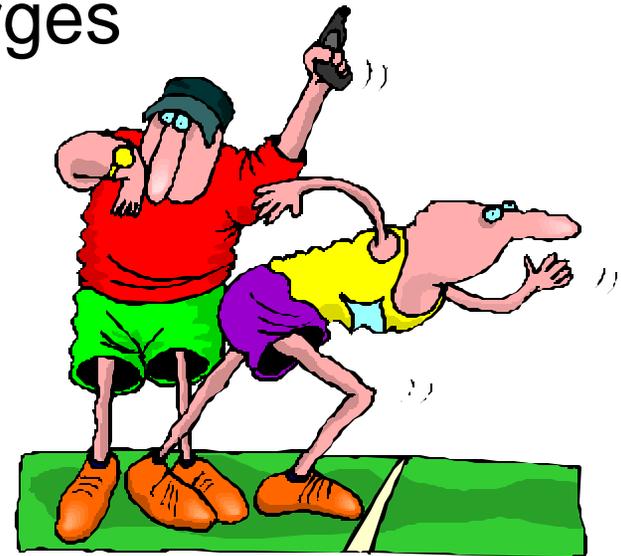
Getting Started

■ Setups

- Security/System
- Program Institutional Charges
- School Calendar Profile
- User Data

■ Entry

- Demo Tab
- R2T4 Tab





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PLAIN Simple

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Setup--Program Institutional Charges

■ Institutional Charges Code

- User defined, unique code
- Associates charges with School Calendar Profile

■ Year

- Fiscal year
- Filters by year, 2000-2010

■ Program Title/Type

- User defined



■ Entry of Charges

- Create default charges
- Modify at tab level



Program Institutional Charges

User Modified: SALLY

Date Modified: 09/25/2000

Institutional Charges Code: JNDFT

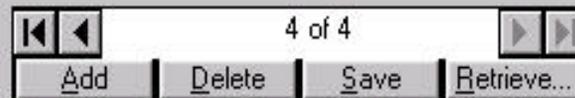
Year: 2001

Program Title: UNDERGRADUATE FULL-TIME

Program Type:

Description	Amount
TUITION AND FEES	\$ 1575.00
ROOM	\$ 3300.00
BOARD	
COMPUTER LAB FEE	\$ 200.00

Total: \$5,075.00



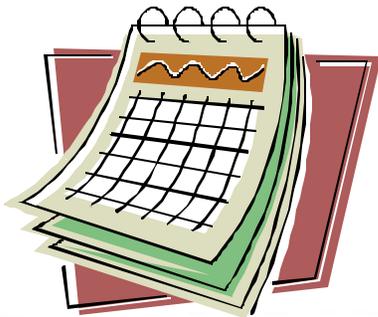
OK

Cancel

Help

Setup--School Calendar Profile

- School Calendar Profile Code
 - User defined, unique code
- Profile Title
 - User defined



- Institutional Charges Code
 - Select with ellipsis
- Year
 - Should be same as defined in charges
 - Determines which charge codes are available



Setup--School Calendar Profile

- Credit Hour Schools
 - Define Payment Period beginning/ending date
 - Define scheduled breaks
- Clock Hour Schools
 - Define hours for particular Pay Period/Period of Enrollment

School Calendar Profile

User Modified: SALLY

Date Modified: 09/25/2000

School Information

School Calendar Profile Title: UNDERGRADUATE FULL-TIME

School Calendar Profile Code: UNDFT_ Payment Period or Period of Enrollment Start Date: / /

Institutional Charges Code: UNDFT_ Payment Period or Period of Enrollment End Date: / /

Credit Hour Program: [] Year: 2001

Clock Hour Program: [x] Total Clock Hours in Period Selected: 900

All calculations of return of Title IV for students in this program are based on the (select one): Number of Days in the Payment Period:

Payment Period: [] Number of Allowable Break Days:

Period of Enrollment: [x] Net Days in the Payment Period:

Scheduled Break Days

Starting Date	Ending Date	Description
---------------	-------------	-------------

8 of 8

Add Delete Save Retrieve...

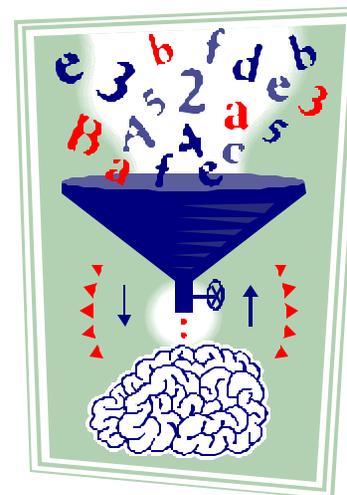
OK Cancel Help

Setup--User Data

- Define School Specific Fields
 - Used to collect additional data about withdrawal students

4 Field Types Available

Date
Numeric
Text
Yes or No





Entry--Demo Tab

- Required Fields
 - Original SSN

- Student ID Field
 - Available under File/Open to sort by



Entry--R2T4 Tab

- Models the Two Worksheets Available on the IFAP Web Site
- Yellow Highlighted Fields Required to Save
- Net Amount Disbursed vs. Net Amount that could have been Disbursed
- Calculation
 - Step 2-C >60% No Return Due



STEP 1: Student's Title IV Aid Information

School Calendar: SCHEDB Year: 2001
 Profile Code: _____
 Date Form Completed: ___/___/___
 Date of the institution's determination that the student withdrew: 09/26/2000
 Withdrawal Type: [dropdown] Grade level: [dropdown]
 Leave of Absence: [checkbox]
 Period used for calculation: payment period period of enrollment

	Net Amount Disbursed	Net Amount That Could Have Been Disbursed		Amount Disbursed	Amount That Could Have Been Disbursed
Unsubsidized FFEL/Direct Stafford Loan	\$ 2400.00		Pell Grant	\$ 1000.00	
Subsidized FFEL/Direct Stafford Loan	\$ 2640.00		FSEOG	\$ 300.00	
Perkins Loan	\$ 500.00				
FFEL/Direct PLUS					

A. Total Title IV aid disbursed (NOT aid that could have been disbursed) for the payment period or period of enrollment: **A \$6840.00**
 B. Total of Title IV aid disbursed plus the Title IV aid that could have been disbursed for the payment period or period of enrollment: **B \$6840.00**

Step 2: Percentage of Title IV Aid Earned

Check this box if school is not required to take attendance and student withdrew without notification. 50% will be entered in Box C. **C 37.9%**
 C. Withdrawal date: 09/26/2000
 Payment period/period of enrollment start date: 08/14/2000 end date: 12/18/2000

For a credit-hour program: Determine the calendar days completed in the payment period or period of enrollment divided by the total calendar days in the payment period or period of enrollment (exclude scheduled breaks of 5 days or more that the student was on approved leaves of absence).
 44 divided by 116 = %

For a clock-hour program: Determine the clock hours completed in the payment period or period of enrollment divided by the total clock hours in the payment period or period of enrollment = %

Calculation 1: clock hours in the payment period or period of enrollment [] divided by [] = %

Calculation 2: Determine the clock hours completed in the payment period or period of enrollment divided by the clock hours scheduled to be completed as of the date the student withdrew [] divided by [] = %

Determine the scheduled clock hours as of the date the student withdrew divided by the total clock hours in the payment period or period of enrollment [] divided by [] = %



STEP 3: Amount of Title IV Aid Earned by the STUDENT **STEP 5: Amount of Unearned Title IV Aid Due from the SCHOOL**

D. 14.3% x \$0.00 = D \$0.00 G. Institutional charges for the payment period or period of enrollment G \$1,475.00

STEP 4: Total Title IV Aid to be Disbursed or Returned H. Percentage of Title IV aid unearned (100% - Box C) H

E. Box D Box A
This is the amount of the post-withdrawal aid. Stop here and go to the post-withdrawal tracking sheet.

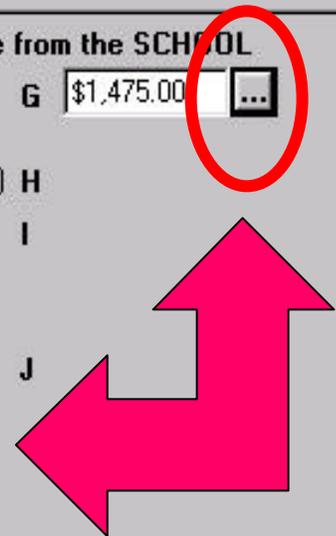
F. Box A Box D
This is the Amount of Title IV aid that must be returned.

STEP 6: Return of Funds by the SCHOOL

The school must return the unearned aid from the following sources, in order, up to the total net amount of unearned aid.

	Amount
Unsubsidized FFEL/Direct Stafford Loan	
Subsidized FFEL/Direct Stafford Loan	
Perkins Loan	
FFEL/Direct PLUS	

Description	Amount
TUITION AND FEES	\$ 1475.00
ROOM	
BOARD	

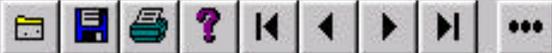


Modify the Institutional charges on student's record here.



Entry--Additional Tabs

- Post Withdrawal Tab
 - R2T4 tab-step 4E > \$0
- Notes Tab
- User Data Tab
 - 4 Pre-defined fields
 - GPA
 - Major
 - Over Payment Status
 - Withdrawal Reason



From Step 4-E.

Amount of Post-Withdrawal Disbursement

L. Amount from Box E of "Treatment of Title IV Funds When a Student Withdraws" Worksheet

L \$806.52

Post-Withdrawal Disbursement Credited to Student's Account

M. Total outstanding charges on student's account

M |

N. Total amount of post-withdrawal disbursement credited to student's account

Amount of post-withdrawal disbursement credited for tuition, fees, room and board (if student contracts with the institution)

Amount of post-withdrawal disbursement credited for other current charges

+

Amount of post-withdrawal disbursement credited for minor prior year charges

+

Total Amount Credited to Account N \$

O. Student and/or parent authorization to credit account for other current charges or minor prior year charges (if necessary) obtained on

P. If a post-withdrawal disbursement of loan funds is credited to account, date of notification to student and/or parent

Post-Withdrawal Disbursement Offered to Student/Parent

Q. Total amount of post-withdrawal disbursement (Box L) - amount of post-withdrawal disbursement credited to student's account (Box N) = Total amount to offer to student/parent

Q \$

R. Notification sent to student and/or parent on

S. Response received from student/parent on

Response not received

T. Amount accepted

T

U. Accepted funds sent on

Entry done by user on all other fields.

Post-Withdrawal Disbursement Made From

	Amount
Pell Grant	
FSEOG	
Other Title IV programs (grants)	

	Amount
Subsidized FFEL/Direct Stafford Loan	
Unsubsidized FFEL/Direct Stafford Loan	
Perkins Loan	
FFEL/Direct PLUS	
Other Title IV programs (loans)	

Using R2T4

- View Return Arrangements
- Reports
- Browse Student





View--Return Arrangements

Student Overpayment (2 tabs)

- Students to be Notified
 - Step 8 > zero
 - 45 days
- Students Notified
 - Completed
 - Not Completed

Student Overpayment



Students To Be Notified

Students Notified

Social Security	Student Last Name	Student First Name	School Calendar Profile	Year	Date Student Notified	Days Remaining (45)	Date Student Responded	Repayment Arrangement
999999999	CASE	TRAINING	CLOCK	2001	09/26/2000	44		

Arrangement Status

Not Completed

Completed

Repayment Arrangement

1 - To pay in full

2 - To make arrangements that are satisfactory with the school

3 - To make arrangements with the Dept of Education

4 - No payment arrangement made

5 - Student responded, but did not make satisfactory arrangements

6 - Student did not respond

OK

Cancel

Help

View--Return Arrangements



- School Return Arrangements
 - 30 days begins with date of Institution's determination that the student withdrew
 - All modifiable fields must be completed before Days Remaining discontinues countdown



Reports

- Within the Student's Record
 - Return Of Title IV Funds Worksheet
 - Return Of Title IV Funds Notes
 - Return Of Title IV Funds Summary
 - Post-Withdrawal Disbursement Tracking Sheet
 - Print All

Reports

- With the Student's Record Closed
 - Student Listing
 - Withdrawal Type (Blank, 1-6 or All)
 - Return Arrangements
 - Students To Be Notified report
 - Students Notified report
 - School Return Arrangement report
 - Arrangement Status (Completed/Not Completed/All)



Browse Student (Information)

- Browse Student
 - Student Data
 - Demo data
 - R2T4 Worksheet data
 - Post Withdrawal data
 - View Arrangements data
 - User Data
 - Basic Grid Functionality



For Assistance

- CPS/WAN Technical Support
 - 800-330-5947
 - cpswan@ncs.com
 - Types of questions answered:
 - Installations
 - Setup
 - Entry
 - Print





For Assistance

- ED Customer Service Call Center
 - 800-433-7327
 - sfa.customer.support@ed.gov
 - Types of questions answered:
 - Policy
 - Return of Title IV Funds Calculation Questions



Questions?

**THANK
YOU!**

Don't forget your Evaluation



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