



Session 26

**Come See the New Return to Title IV
(R2T4) on the Web Product**

Presenter: Tammy Martin



Agenda

- Overview
- Application
- Demo
- Questions



Overview

- Benefits
 - No software installation necessary
 - Ability to counsel students from any office on campus
 - No need for redistribution of software if change to calculation
 - Easy to Use!
 - Like functionality



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Home



Help



FAQs



Return of Title IV Funds

[Student Record Status](#)

[Create New Record](#)

[Find Existing Record](#)

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Welcome to Return of Title IV Funds on the Web (R2T4)

Return of Title IV Funds (R2T4) is non-year specific software that processes, calculates, manages and stores the return of Title IV aid calculation record. The following links are available for your information.

Before You Start

Overview

- [What is R2T4?](#)

Gather the following:

- [Student's Withdrawal Information](#)
- [Student's Title IV Aid Information](#)
- [Student's Program Information](#)
- [Student's Account Information](#)
- [School Information](#)

Using R2T4

Setup the School screens:

- [Institutional Charges](#)
- [School Calendar](#)
- [User-Specified Fields](#)

Student records:

- [Create a new student](#)
- [Find an existing student](#)

Follow Up

Overpayment Notification and Tracking reports:

- [Students Notified](#)
- [School Portion of R2T4 to be Returned](#)
- [Student Repayment Arrangement\(s\) - Completed](#)
- [Student Repayment Arrangement\(s\) - Not Completed](#)
- [Notification Tracking Status](#)
- [Students With a Post-Withdrawal Disbursement - Not Completed](#)
- [Student Listing](#)
- [Student Records To Be Referred to the Department of Education](#)





Application

- Navigation Bar (8 Options)
 - Student Record Status
 - Select to view status of student record(s)
 - Create New Record
 - Select to create a new student record
 - Find Existing Record
 - Select to update/view an existing student record
 - Institutional Charges
 - Select to define the institutional charges profile(s)
 - Note: Need at least 1 defined per award year



Application

- Navigation Bar (cont)
 - School Calendar
 - Select to define the school calendar profile(s)
 - Note: At least 1 institutional profile must be defined prior to creating for any award year
 - User-Specified Fields
 - Select to define up to 10 School User-Specified fields
 - Note: 5 fields will be available that are already defined
 - Reports
 - Select to view one of 6 reports
 - Data Export
 - Select to export/browse student data



Tip #2

The screenshot shows a web browser window displaying the FSA (Federal Student Aid) portal. The page title is "Search for School Calendar Profile - FSA Access to IPEDS Online - U.S. Department of Education - Marshall, Internet Explorer 6.0.0.6002". The browser's address bar shows "http://www.fsa.gov/ipeds". The page features a navigation menu on the left with options: "Student Record Status", "Create New Record", "Edit Existing Record", "Institutional Changes", "School Calendar", "View Specialized Fields", "Reports", and "Data Export". The "School Calendar" option is highlighted. The main content area is titled "Search for School Calendar Profile" and includes the following text: "You can search for school calendar profiles by providing information in the following search criteria. If you do not have the information for a field, leave it blank. Select [Search](#) to continue." Below this text are three input fields: "Award Year" with a dropdown menu, "School Calendar Profile Code" with a text input field, and "Keywords in School Calendar Profile Title" with a text input field. At the bottom of the search area, there is a link: "If you want to add a school calendar profile, select [Add](#) to continue." At the very bottom of the page, there are buttons for "Search" and "Add", and a footer with links for "FSA SCHOOL PORTAL", "RETURN TO FSA MENU", and "EXIT".

- When searching and/or creating School Calendar Profiles, make sure you enter the correct Award Year.



Return of Title IV Funds

- Student Record Status
- Create New Record
- Find Existing Record
- Institutional Charges
- School Calendar**
- User-Specified Fields
- Reports
- Data Export

School Calendar Profile Information

| School Information | |
|--------------------------------------|----------------------|
| Award Year | 2004 |
| School Calendar Profile Code | SCP04 |
| School Calendar Profile Title | SCHOOL CAL 2004 |
| Institutional Charges Code | SCP04 |
| Program Type | Credit Hour-Standard |
| Calculations of R2T4 based on | Payment Period |
| Payment Period* Start Date | 09/01/2004 |
| Payment Period* End Date | 12/31/2004 |
| Number of Days in the Payment Period | 122 |
| Number of Allowable Break Days | 0 |
| Net Days in the Payment Period | 122 |
| Mod. User | 545-01-0001 |
| Mod. Date | 03/11/2004 |

**Or Period of Enrollment depending on Calendar Period*



Application

- Creating New Record/Find Existing Record
 - Tab(s) Available:
 - Overview
 - Demographic Data
 - R2T4 Record(s)
 - Post-Withdrawal Record
 - Notes
 - User Data



Return of Title IV Funds

- Student Record Status
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Enter Social Security Number

Please enter the Social Security Number of the record you want to create.

Social Security Number:

Need help with this page?



Return of Title IV Funds

- Student Record Status
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- School Calendar
- User-Specified Fields
- Reports
- Data Export

Post Withdrawal Notes User Data

Overview **Demographics** R2T4

Student Information

Last Name:

First Name:

Middle Initial:

Social Security Number: 444-44-4444

Date of Birth:
Please enter this date in "mmddyyyy" format. For example, 08171975

Driver's License Number:

Driver's License State:

School Cross Reference:

Student ID:

Permanent Address

Address:

Return of Title IV Funds

- Student Record Status
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Post Withdrawal Notes User Data

Overview Demographics **R2T4**

Return of Title IV Fund Worksheet
Record 1 of 1

Printing this page requires that you have Adobe Acrobat software installed on your computer. Select this link if you do not have [Adobe Acrobat Reader](#) and would like to find out how to obtain it.

Step 1: Student and School Title IV Aid Information

| | |
|--|-----------------------------------|
| Name: | Dan J. Jones |
| Social Security Number: | 123-44-5678 |
| Award Year: | 2004 |
| School Calendar: | SCP04 |
| Is the school required to take attendance by an outside entity? | No |
| Withdrawal Type: | Began official withdrawal process |
| Grade Level: | |
| Leave of absence days: | |
| Date Form Completed: | |
| Date of the school's determination that the student withdrew: | 03/11/2004 |
| Parent used for calculation: | Parental Request |

- Institutional Charges
- School Calendar
- User-Specified Fields
- Reports
- Data Export

Step 1: Student and School Title IV Aid Information

Name: Dan J. Jones

Social Security Number: 123-44-5678

Award Year: 2004

School Calendar: SCP04 [Calendar Profile](#)

Is the school required to take attendance by an outside entity? No

Withdrawal Type: Began official

Grade Level: Select

Leave of absence days:

Date Form Completed:
 Please enter this date in "mmddyyyy" format. For example, 08171975 for August 17, 1975.

Date of the school's determination that the student withdrew:
 Please enter this date in "mmddyyyy" format. For example, 08171975 for August 17, 1975.

School Calendar - FAA Access to CPS Online - U.S. Department of Education

| Award Year | Profile Code | Title | Period Start Date | Period End Date |
|------------|--------------|-----------------|-------------------|-----------------|
| 2004 | All04 | All Students | | |
| 2004 | SCP04 | SCHOOL CAL 2004 | 09/01/2004 | 12/31/2004 |

[Close Window](#)

| | Net Amount Disbursed | Net Amount That Could Have Been Disbursed |
|--|----------------------|---|
| Unsubsidized FFEL/Direct Stafford Loan | \$ 1000 | \$ 2500 |

August 17, 1975. 103112004

| | Net Amount Disbursed | Net Amount That Could Have Been Disbursed |
|--|----------------------|---|
| Unsubsidized FFEL/Direct Stafford Loan | \$ 1000 | \$ 2500 |
| Subsidized FFEL/Direct Stafford Loan | \$ | \$ |
| Perkins Loan | \$ | \$ |
| FFEL/Direct PLUS | \$ | \$ |

| | Amount Disbursed | Amount That Could Have Been Disbursed |
|-------------------------|------------------|---------------------------------------|
| Pell Grant | \$ 3050 | \$ |
| FSEOG | \$ 400 | \$ |
| Other Title IV programs | \$ 1000 | \$ 0 |

Add Programs

A. Total Title IV Aid Disbursed: \$ 5450
This is a display of the entered value

B. Total of Title IV Aid Disbursed plus the Title IV Aid that could have been disbursed: \$ 7950
This is a display of the entered value

Other Title IV Programs - FAA Access to CPS Online - U.S. Department of Education - Microsoft Inter...

| | Disbursed | Disbursed |
|------|-----------|-----------|
| LEAP | \$ 1000 | \$ |
| | \$ | \$ |
| | \$ | \$ |

Step 2: Percentage of Title IV Aid Earned

Withdrawal Date:
Please enter this date in "mmddyyyy" format. For example, 08171975 for August 17, 1975. (credit hour only)
10052004

Clock hours completed: (clock hour only)
[]



Tip #3

- For a quick 'summary' report of Steps 6 & 8 (school and student return information) click on [Print](#) under the Print Summary column on the 'Overview' tab

The screenshot shows the FSA Return of Title IV Funds web application. The browser window title is "1729438.FS.Fin.1.School - FSA Access to Title IV Data - U.S. Department of Education - Microsoft Internet Explorer powered by MSN". The page has a blue header with the FSA logo and navigation icons. A left sidebar contains a menu with options like "Student Return Status", "Create New Record", "Fast Forward Record", "Add/Remove Changes", "School Lookup", "New Search/Ref/Links", "History", and "Data Export". The main content area is titled "Return of Title IV Funds" and has tabs for "Overview", "Demographics", and "RTI4". The "Overview" tab is active, showing "Student information" for Dan J. Jones, with fields for Name, Social Security Number (123-44-1678), and Student ID. Below this is a "Records" section with a table of RTI4 records. The table has columns for RTI4 Award Year, RTI4 School Code/ID, RTI4 Last Modified, Print Withdrawal Last Modified, Dates Last Modified, User Date Last Modified, and Print. One record is shown for the year 2004 at school SCP04, last modified on 01/30/2004, with a "Print" link in the final column. At the bottom of the page, there are buttons for "Add RTI4 Record" and "New Search", and a footer with "FSA SCHOOL FORM" and "RETURN TO TAA MENU".



Home Help FAQs [Department of Education Logo]

Return of Title IV Funds

- Student Record Status
- Create New Record
- Find Existing Record
- Institutional Charges
- School Calendar
- User-Specified Fields
- Reports
- Data Export

Post Withdrawal Notes User Data

Overview Demographics R2T4

Notes for Dan J. Jones
Record 1 of 1

| Notes | | | | |
|-------|-----------|-----------|-----------|------|
| Notes | Mod. User | Mod. Date | Mod. Time | Edit |

Dan came into the Registrars Office on 10/05/2004 to declare official withdrawal. Registrar sent the paperwork to to the Financial Aid Office on 10/5/2004.

Add Note

Need help with this page? View Printable Page



Application

- User-Specified Fields
 - 5 pre-defined fields
 - GPA
 - Major
 - Overpayment Status
 - Withdrawal Reason
 - Leave of Absence Reason

Note: Schools can define up to 10 more in User-Specified Fields Setup



Return of Title IV Funds

- Student Record Status
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- School Calendar
- User-Specified Fields**
- Reports
- Data Export

User-Specified Fields

A maximum of 10 user-specified fields can be added.

| User-Specified Fields | | | | |
|-----------------------|--------|--------|-------------------------|--------|
| Field | Type | Length | Description | Action |
| 1 | Date | 8 | Initial Discussion Date | Delete |
| 2 | Select | | | Add |

- Select
- Yes/No
- Numeric
- String
- Date

Need help with this page?



Home Help FAQs [Department of Education Logo]

Return of Title IV Funds

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Post Withdrawal Notes User Data

Overview Demographics R2T4

Post-Withdrawal Worksheet for Dan J. Jones

Amount of Post-Withdrawal Disbursement

L. Amount from Box E of "Treatment of Title IV Funds" Worksheet:

Post-Withdrawal Disbursement Credited to Student's Account

M. Total outstanding charges on student's account: \$

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 school for Room and Board): \$

Amount of Post-Withdrawal disbursement credited for other current charges: \$

Amount of Post-Withdrawal disbursement credited for minor prior year charges (see help text): \$

Total amount credited to Account: \$



Application

- Reports (6)
 - Student Listing
 - Student Notification
 - Student Repayment Arrangements
 - School Portion of R2T4 Returned
 - Students With a Post-Withdrawal Disbursements Not Completed
 - Student Records to be Referred to the Department of Education



Return of Title IV Funds

- Student Record Status
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- User-Specified Fields
- Reports**
- Data Export

Reports

The following reports are available for viewing

- [Student Listing](#)
- [Student Notification](#)
- [Student Repayment Arrangements](#)
- [School Portion of R2T4 Returned](#)
- [Students With a Post-Withdrawal Disbursement Not Completed](#)
- [Student Records To Be Referred to the Department of Education](#)

Need help with this page?



Return of Title IV Funds

- Student Record Status
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Student Listing Options

Withdrawal Start Date:
Please enter this date in "mmddyyyy" format. For example, 08171975

Withdrawal End Date:
Please enter this date in "mmddyyyy" format. For example, 08171975

Withdrawal Type:

Sort By:

Need help with this page?

- -

[Print This Page](#) [Print Help](#) [Close Window](#)

Report Date: 03/11/2004 U.S. DEPARTMENT OF EDUCATION PAGE: 1

Report Time: 22:30:12 RETURN OF TITLE IV FUNDS

Student Listing

THIS DOCUMENT CONTAINS SENSITIVE INFORMATION PROTECTED BY THE PRIVACY ACT

| Social Security Number | Name | School Calendar Profile | Award Year | Withdrawal Type | Withdrawal Date |
|------------------------|---------------|-------------------------|------------|-----------------------------------|-----------------|
| 123-44-5678 | Jones, Dan J. | SCP04 | 2004 | Began official withdrawal process | 03/11/2004 |

[Close Window](#)

Need help with this page?

[Submit](#) [Cancel](#)



Return of Title IV Funds

- Student Record Status
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- School Calendar
- User-Specified Fields
- Reports
- Data Export

Notification Tracking Status

Welcome to Return of Title IV Funds On The Web! Here is the current status of your outstanding records.

Status Information

| | | |
|--|---|----------------------|
| Number of students waiting to be notified: | 2 | View |
| Number of students who have been notified but have not made arrangements to repay: | 0 | View |
| Number of students who have been notified and have made arrangements to repay: | 0 | View |
| Number of students for whom the school has not returned funds: | 2 | View |
| Number of students for whom the school has returned funds: | 0 | View |
| Number of students with a Post-Withdrawal Disbursement not completed : | 0 | View |
| Number of student records to be referred to the Department of Education: | 0 | View |

Need help with this page?



Return of Title IV Funds

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School Portion of Title IV Funds To Be Returned

School must return the unearned portion of Title IV funds as soon as possible but no later than 30 days after the school determined that the student withdrew.

| Social Security Number | Student Last Name | Student First Name | School Calendar Profile | Award Year | Date School Determined the Student W/drew | Days Remaining (30) | Date School Returned Funds |
|------------------------|-------------------|--------------------|-------------------------|------------|---|---------------------|----------------------------|
| 111-22-3333 | TESTER | JOE | SCP04 | 2004 | 01/01/2004 | -32 | <input type="text"/> |
| 123-44-5678 | Jones | Dan | SCP04 | 2004 | 01/30/2004 | -3 | <input type="text"/> |

Submit **Cancel**

Need help with this page?

FSA SCHOOL PORTAL - **RETURN TO FAA MENU** - **EXIT**



Return of Title IV Funds

- Student Record Status
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Students Notified

School must notify student of Title IV grant overpayment within 30 days of the school's Date of Determination that the student withdrew.

| Social Security Number | Student Last Name | Student First Name | School Calendar Profile | Award Year | Date School Determined Student W/drew | Date Student Notified | Selected |
|------------------------|-------------------|--------------------|-------------------------|------------|---------------------------------------|-----------------------|-------------------------------------|
| 123-44-5678 | Jones | Dan | SCP04 | 2004 | 01/30/2004 | <input type="text"/> | <input checked="" type="checkbox"/> |
| 111-22-3333 | TESTER | JOE | SCP04 | 2004 | 01/01/2004 | <input type="text"/> | <input checked="" type="checkbox"/> |

Default Date:

Need help with this page?



Tip #4

- You can use 'Fill All Selected' to update a selected group of records with the default date

The screenshot shows the FSA Return of Title IV Funds web application. The page title is "Students Notified". Below the title, there is a table with columns: Social Security Number, Student Last Name, Student First Name, School Catalog FID#, Award Year, Date School Determined Student Withdraw, Date Student Notified, and Submit. The table contains two rows of data:

| Social Security Number | Student Last Name | Student First Name | School Catalog FID# | Award Year | Date School Determined Student Withdraw | Date Student Notified | Submit |
|------------------------|-------------------|--------------------|---------------------|------------|---|-----------------------|--------------------------|
| 123-44-5555 | JOHN | DAVE | SC14 | 2014 | 01/01/2014 | 01/21/2014 | <input type="checkbox"/> |
| 111-22-3333 | TESTER | JOE | SC14 | 2014 | 01/01/2014 | 01/21/2014 | <input type="checkbox"/> |

Below the table, there is a "Default Date" field set to 01/21/2014. To the right of this field are three buttons: "Select All", "Fill All Selected", and "Reselect All". Below these buttons are "Submit" and "Cancel" buttons, and a "Fill All Selected" button with a yellow highlight.



Applications

- Data Export
 - Comma Delimited
 - Browse



Return of Title IV Funds

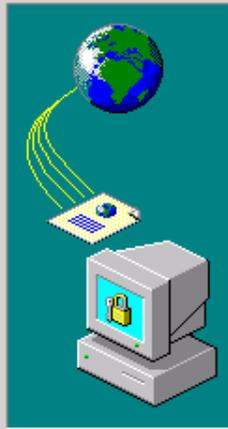
- Student Record Status
- Create New Record
- Find Existing Record
- Institutional Charges
- School Calendar
- User-Specified Fields
- Reports
- Data Export**

Data Export

You may download your user data with one of the following options:

- **Comma-delimited text file**
- **Browse Data**

File Download



You have chosen to download a file from this location.
R2T 4-001847-20040303.txt from test.fotw.sfa.ed.gov

What would you like to do with this file?

Open this file from its current location

Save this file to disk

Always ask before opening this type of file

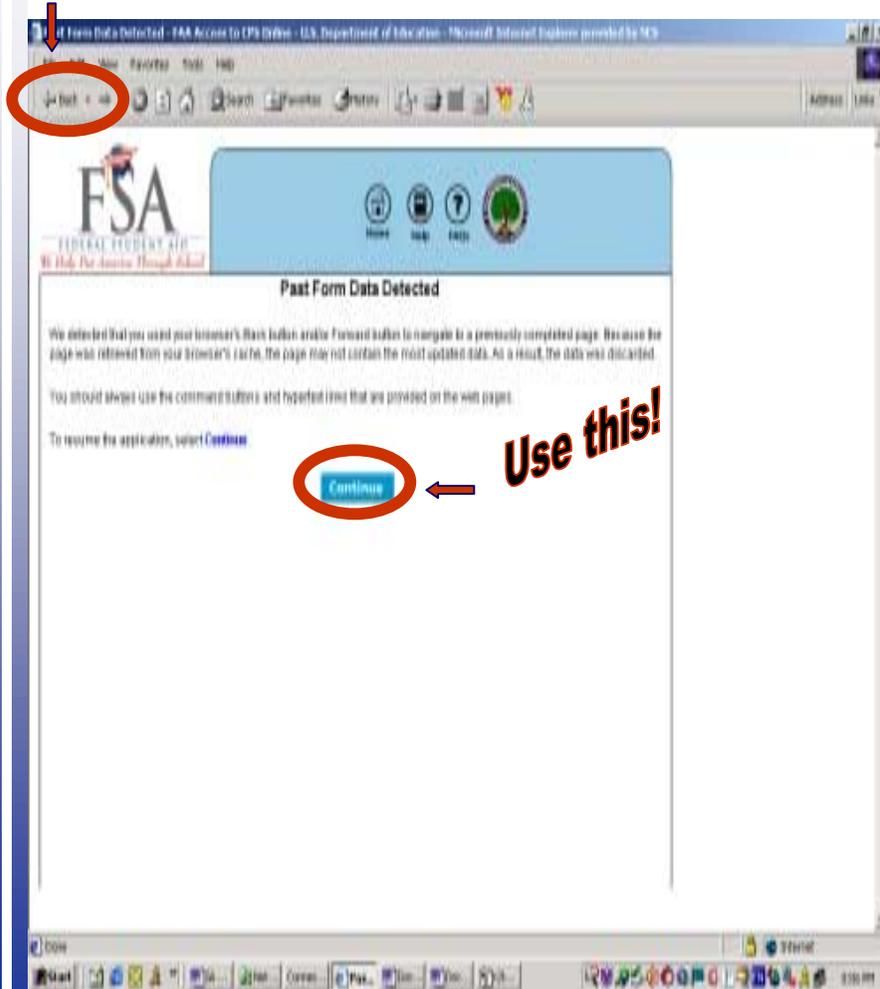
OK Cancel More Info

 Need help with this page?



Tip #5

Not this!



- Use Command Buttons
 - Not 'Back'/'Forward'



Demo



How can you use?

- It's Easy!
 - SIGNUP!
 - Signup via SAIG Enrollment website
 - » <https://www.fsawebenroll.ed.gov/PMEnroll>

Note: The R2T4 Web Application when available will be accessed via FAA Access

- » <https://fafsa.ed.gov/faa/faa.htm>

- Expected Availability
 - Late Spring 2004



Customer Service

- Software Support
 - CPS/WAN Technical Support
 - cpswan@ncs.com
 - (800) 330-5947
- Policy
 - ED's Customer Support center
 - osfa_csb@ed.gov
 - (800) 433-7327

Questions?

