



# **Electronic Access Conference** **2000 GET CONNECTED**



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## Student Financial Assistance

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# *Return of Title IV Funds for Windows Version 1.1.1*



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# *Introduction*

- Who is this session geared for?
- Evaluations
- Questions



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# *Agenda*

- Setup
- Tabs/Entry
- View Return Arrangements
- Reports
- Questions?



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# Setup

## ■ Security

- Define security level/IDs of personnel who will access the software

## ■ System

- Enable notepad entries
- Default to 'Yes'



# Setup

## ■ Program Institutional Charges

- Must be defined prior to school calendar profile code
  - Pre-defined Fields:
    - » Tuition & Fees
    - » Room
    - » Board
    - » 'Other'

Note: Additional (other) fields must have unique names



# Setup

## ■ School Calendar Profile

- Define school beginning/ending date for credit hour schools
  - Define scheduled breaks of 5 days or more
- Define hours for particular pay period/ period of enrollment for clock hour schools
  - Unique Key
    - » School Calendar Profile code or Institutional Charges code/year



# Setup

## ■ User Data setup

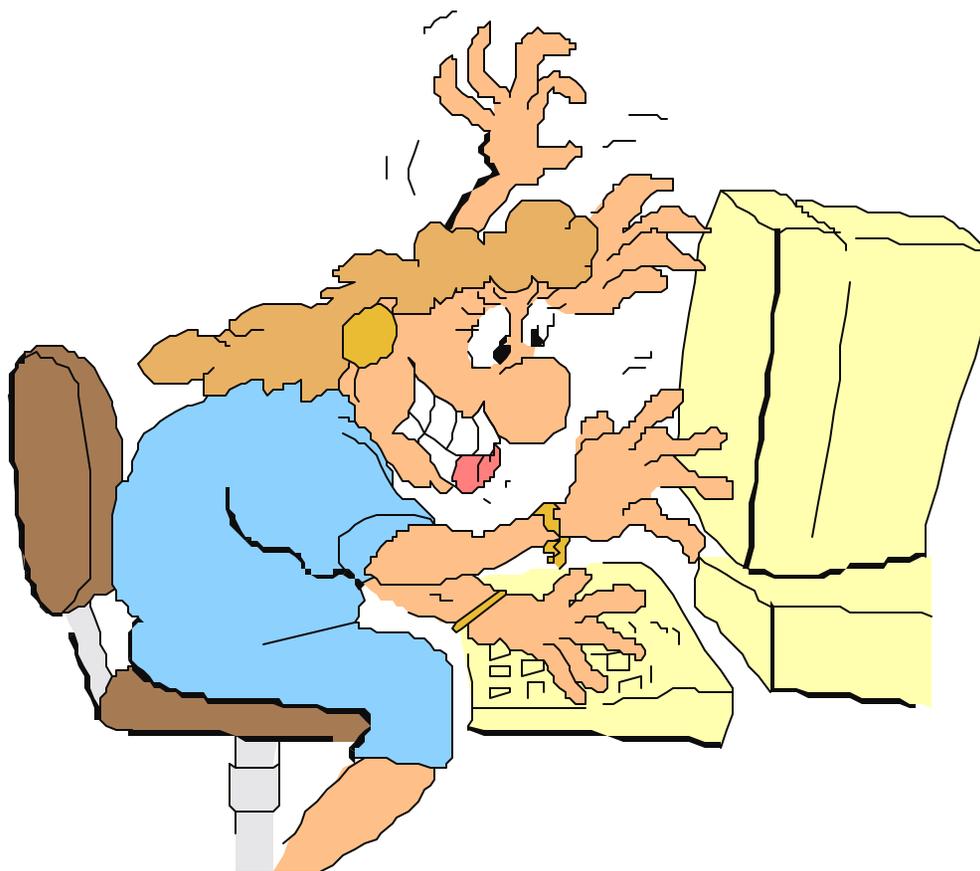
- Define school specific fields that additional data may be collected for on withdrawal students
  - 4 field types available
    - Date
    - Numeric
    - Text
    - Yes or No





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# Ready?



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# *Tabs/Entry*

## ■ Demo tab

- Required fields:
  - Original SSN
- Student ID field
  - Available under file/open to sort by



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# *Tabs/Entry*

## ■ R2T4 tab

- 2000-2010
- Unique key
  - Year, original SSN, School Calendar Profile code
    - Yellow highlighted fields required to ‘save’
- Calculation
  - Step 2 >60% no return due



# *Tabs/Entry*

## ■ Post Withdrawal tab

- Step 4 E > \$0

## ■ Notes tab

## ■ User Data tab

- 4 Pre-defined fields
  - GPA
  - Major
  - Over payment status
  - Withdrawal reason





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# *View Return Arrangements*

## ■ View menu

### – Return arrangements (2 Options)

- Student overpayment
  - 45 Days
    - » Step 8 > zero
- School return arrangement
  - 30 Days
    - » Step 6 > Zero



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# Reports

## ■ Reports

### – Tab

- 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

## – Global

- Student listing
  - » Withdrawal type 1-6 (All)
- Return arrangements
  - Students to be notified report
  - Students notified report
  - School return arrangement report
    - » Arrangement status:
    - » Completed/not completed/all





# Further Assistance

- CPS customer service
  - 800-330-5947/Option 9
  - Types of questions handled:
    - Installations
    - Setup
    - Entry
    - Print





# *Further Assistance*

## ■ ED customer service

- 800-433-7327
  - Types of questions handled:
    - Policy
    - Federal calculation questions

## ■ Additional Assistance

- [cps@ncs.com](mailto:cps@ncs.com)
- [osfap\\_csb@ed.gov](mailto:osfap_csb@ed.gov)
- [sfatech@inet.gov](mailto:sfatech@inet.gov)



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# Questions?



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