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
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?
- Institutional Charges
- School Calendar
- User-Specified Fields
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:
- Student records
- Institutional Charges
- School Calendar
- User-Specified Fields
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 #1

- Setup one Institutional Charge Code per Award Year
  - Use ‘$0’ or most common charge amounts
    - Modify at the record level the individual charges that vary
Tip #2

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

<table>
<thead>
<tr>
<th>School Information</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Year</td>
<td>2004</td>
</tr>
<tr>
<td>School Calendar Profile Code</td>
<td>BCP04</td>
</tr>
<tr>
<td>School Calendar Profile Title</td>
<td>SCHOOL CAL 2004</td>
</tr>
<tr>
<td>Institutional Charges Code</td>
<td>BCP04</td>
</tr>
<tr>
<td>Program Type</td>
<td>Credit Hour-Standard</td>
</tr>
<tr>
<td>Calculations of R2T4 based on</td>
<td>Payment Period</td>
</tr>
<tr>
<td>Payment Period* Start Date</td>
<td>09/01/2004</td>
</tr>
<tr>
<td>Payment Period* End Date</td>
<td>12/31/2004</td>
</tr>
<tr>
<td>Number of Days in the Payment Period</td>
<td>122</td>
</tr>
<tr>
<td>Number of Allowable Break Days</td>
<td>0</td>
</tr>
<tr>
<td>Net Days in the Payment Period</td>
<td>122</td>
</tr>
<tr>
<td>Mod. User</td>
<td>545-01-0001</td>
</tr>
<tr>
<td>Mod. Date</td>
<td>03/11/2004</td>
</tr>
</tbody>
</table>

*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

Enter Social Security Number

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

Social Security Number:

Submit  Cancel

Need help with this page?
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: 123-44-5679
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
Period used for calculation: Payment Period
Step 1: Student and School Title IV Aid Information

Name: Dan J. Jones
Social Security Number: 123-44-5878
Award Year: 2004
School Calendar: SCP04
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.

<table>
<thead>
<tr>
<th>Award Year</th>
<th>Profile Code</th>
<th>Title</th>
<th>Period Start Date</th>
<th>Period End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>All04</td>
<td>All Students</td>
<td>09/01/2004</td>
<td>12/31/2004</td>
</tr>
</tbody>
</table>
August 17, 1975.

<table>
<thead>
<tr>
<th>Loan Type</th>
<th>Net Amount Disbursed</th>
<th>Net Amount That Could Have Been Disbursed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unsubsidized FFEL/Direct Stafford Loan</td>
<td>$1000</td>
<td>$2500</td>
</tr>
<tr>
<td>Subsidized FFEL/Direct Stafford Loan</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Perkins Loan</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>FFEL/Direct PLUS</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Program Type</th>
<th>Amount Disbursed</th>
<th>Amount That Could Have Been Disbursed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pell Grant</td>
<td>$3050</td>
<td>$0</td>
</tr>
<tr>
<td>FSEOG</td>
<td>$400</td>
<td>$0</td>
</tr>
<tr>
<td>Other Title IV programs</td>
<td>$1000</td>
<td>$0</td>
</tr>
</tbody>
</table>

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.

Step 2: Percentage of Title IV Aid Earned

Withdrawal Date:
Please enter this date in "mm/dd/yyyy" format. For example, 08/17/1975 for August 17, 1975.

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

Add Note
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
### User-Specified Fields

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Type</th>
<th>Length</th>
<th>Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Date</td>
<td>8</td>
<td>Initial Discussion Date</td>
<td>Delete</td>
</tr>
<tr>
<td>2</td>
<td>String</td>
<td></td>
<td></td>
<td>Add</td>
</tr>
</tbody>
</table>

Select:
- Yes/No
- Numeric
- String
- Date
Return of Title IV Funds

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
Reports

The following reports are available for viewing:

- Student Listing
- Student Notification
- Student Repayment Arrangements
- School Portion of R2T4 Returned
- Students With a Past Withdrawal Disbursement Not Completed
- Student Records To Be Referred to the Department of Education

Need help with this page?

FSA SCHOOL PORTAL - RETURN TO FAA MENU - EXIT
<table>
<thead>
<tr>
<th>Social Security Number</th>
<th>Name</th>
<th>School Calendar Profile</th>
<th>Award Year</th>
<th>Withdrawal Type</th>
<th>Withdrawal Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>123-44-5678</td>
<td>Jones, Dan J.</td>
<td>SCP04</td>
<td>2004</td>
<td>Began official withdrawal process</td>
<td>03/11/2004</td>
</tr>
</tbody>
</table>

This document contains sensitive information protected by the Privacy Act.
Notification Tracking Status

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

**Status Information**

<table>
<thead>
<tr>
<th>Description</th>
<th>Count</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of students waiting to be notified:</td>
<td>2</td>
<td>View</td>
</tr>
<tr>
<td>Number of students who have been notified but have not made arrangements to repay:</td>
<td>0</td>
<td>View</td>
</tr>
<tr>
<td>Number of students who have been notified and have made arrangements to repay:</td>
<td>0</td>
<td>View</td>
</tr>
<tr>
<td>Number of students for whom the school has not returned funds:</td>
<td>2</td>
<td>View</td>
</tr>
<tr>
<td>Number of students for whom the school has returned funds:</td>
<td>0</td>
<td>View</td>
</tr>
<tr>
<td>Number of students with a Post-Withdrawal Disbursement not completed:</td>
<td>0</td>
<td>View</td>
</tr>
<tr>
<td>Number of student records to be referred to the Department of Education:</td>
<td>0</td>
<td>View</td>
</tr>
</tbody>
</table>

Need help with this page?
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.

<table>
<thead>
<tr>
<th>Social Security Number</th>
<th>Student Last Name</th>
<th>Student First Name</th>
<th>School Calendar Profile</th>
<th>Award Year</th>
<th>Date School Determined the Student Withdraw</th>
<th>Days Remaining (30)</th>
<th>Date School Returned Funds</th>
</tr>
</thead>
<tbody>
<tr>
<td>111-22-3333</td>
<td>TESTER</td>
<td>JOE</td>
<td>SCP04</td>
<td>2004</td>
<td>01/01/2004</td>
<td>-32</td>
<td></td>
</tr>
<tr>
<td>123-44-5678</td>
<td>Jones</td>
<td>Dan</td>
<td>SCP04</td>
<td>2004</td>
<td>01/30/2004</td>
<td>-3</td>
<td></td>
</tr>
</tbody>
</table>

Submit  Cancel
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.

<table>
<thead>
<tr>
<th>Social Security Number</th>
<th>Student Last Name</th>
<th>Student First Name</th>
<th>School Calendar Profile</th>
<th>Award Year</th>
<th>Date School Determined Student Withdraw</th>
<th>Date Student Notified</th>
<th>Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>123-44-5678</td>
<td>Jones</td>
<td>Dan</td>
<td>SCP04</td>
<td>2004</td>
<td>01/30/2004</td>
<td></td>
<td>✅</td>
</tr>
<tr>
<td>111-22-3333</td>
<td>TESTER</td>
<td>JOE</td>
<td>SCP04</td>
<td>2004</td>
<td>01/01/2004</td>
<td></td>
<td>✅</td>
</tr>
</tbody>
</table>

Default Date: 02/20/2004

Select All  Fill All Selected  Deselect All

Submit  Cancel

Need help with this page?
Tip #4

- You can use ‘Fill All Selected’ to update a selected group of records with the default date.
Applications

- Data Export
  - Comma Delimited
  - Browse
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:
R2T4-001847-20040303.txt from test ftpw.sts.ed.gov

What would you like to do with this file?
- Open this file from its current location
- Save this file to disk

[Check box] Always ask before opening this type of file

[OK] [Cancel] [More Info]
Tip #5

- 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/faq/faq.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?