Pell Grant LEU Dispute Portal Guide

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Pell LEU Dispute Portal Process Overview

To complete a Pell LEU Dispute, schools will use the new Pell LEU Dispute Portal on the COD Web site. Below we outline the general steps that schools will take to complete a dispute. The remaining pages of this document illustrate the steps by showing screenshot examples of the COD Web pages.

- 1. From the Pell LEU History page, click on the Create Pell LEU Dispute button.
- 2. From the Create Pell Grant Dispute Pop-up, select the award year of the Pell Grant award/disbursements in question. *Note:* Only awards years eligible for dispute will appear. Under most circumstances, the five most recent award years *are not eligible* for dispute.
- 3. Complete the required information for the dispute on the new Create Pell LEU Dispute page.
 - a. General Information section contains demographic and contact information for both the current school and former school
 - b. Dispute Type (reason for dispute)
 - i. Nonattendance
 - ii. Money refunded
 - c. Disbursed amount under dispute
 - d. Documentation to support the facts of the dispute (file uploads).
 - i. All disputes require a letter from the student and the current school explaining the details about the dispute. There may be other documentation required to support the details of the case, and are dependent on the Dispute Type chosen.
 - ii. A dispute may be created without the documentation, but will be placed in an "Awaiting Documentation" status until the documentation is provided. A dispute may not be submitted "For FSA Review" until all required documentation is uploaded.
 - e. Comments (optional) are limited to 260 characters.
 - f. Submit the dispute for Department of Education (the Department/FSA) review.
- 4. When creating the Pell LEU Dispute, users will be given the chance to review their submission on the Create Pell LEU Dispute Confirmation Pop-up. At that time users may either go back and correct any entry fields, or create the dispute.
- 5. After creating the Pell LEU dispute, users will automatically be brought to the Pell LEU Dispute Search Results page. Here the user will see a message that the dispute has been created successfully. The user will also see the Dispute ID and summary details of the corresponding dispute.
 - a. Schools will receive information about the changing statuses of a dispute via e-mail and messages sent to their SAIG mailboxes (message class PGLETXOP). The messages will be sent to both the current and former school contacts submitted as part of the dispute.
 - b. Schools will also be able to search for a submitted dispute and check the status of submitted disputes through the Escalation Type Search Page. Users will most likely use either the student's SSN and date of birth, or the Dispute ID.
- 6. The Department will review the dispute. During the review process, it may be determined that additional documentation is required. In this case, the status will be changed from "FSA Review in Progress" back to "Awaiting Documentation" and the school will be contacted.
 - a. If it is determined that the former school is required to return funds to complete the dispute process, a "Funding Information" section will be added under the Comments section on the Pell LEU Dispute page. Schools will then be required to document that funds for the disputed amount have been returned to the Department.
 - b. If a school believes that funds are not required for the dispute, it will need to check the corresponding checkbox and provide an explanation, and possibly supporting documentation.

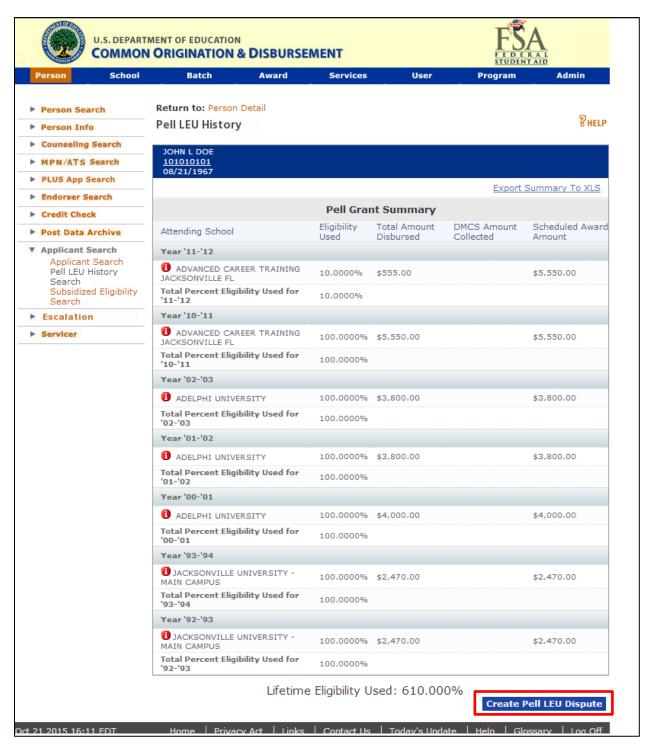
Pell LEU Dispute Status Types

The table below shows the various status types for a Pell LEU dispute and how Federal Student Aid (FSA) defines each status type.

Dispute Status	Dispute Status Definition
Awaiting Documentation	Pell LEU Dispute has been created on COD Web but has not been submitted for review. Note: Required documentation must be uploaded to change the status to "FSA Review in Progress".
FSA Review in Progress	Pell LEU Dispute, including all required supporting documentation, has been submitted to FSA for review.
Closed/Denied	FSA has denied the Pell LEU Dispute.
Approved for Adjustment	FSA has approved the Pell LEU Dispute and verified the Pell LEU adjustment can occur. (Funds may or may not have been verified.)
Funds Not Yet Received	FSA required funds to be received to process the Pell LEU adjustment, but funds have not yet been received.
Approved for Adjustment/Funds Disputed	FSA has approved the Pell LEU Dispute and verified the Pell LEU adjustment can occur. (Funds were disputed by former school.)
Verify Funds Received	FSA has requested documentation to verify funds have been received.
Closed/Funds Received	Funds were required and received and Pell LEU adjustment has been completed. Pell LEU Dispute is closed.
Closed/Funds Not Required	Funds were not required and Pell LEU Adjustment has been completed. Pell LEU Dispute is closed.
Cancelled	Current school cancelled Pell LEU Dispute.

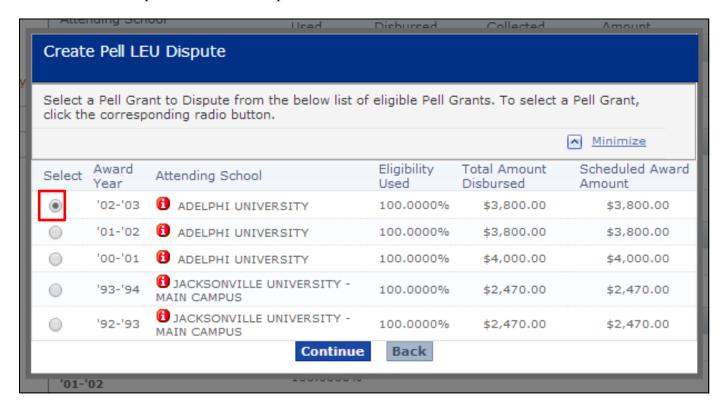
Pell LEU History Page

This page shows the new Create Pell LEU Dispute button in the lower right corner of the Pell LEU History screen. Click on it to begin the process to submit a Pell LEU dispute.



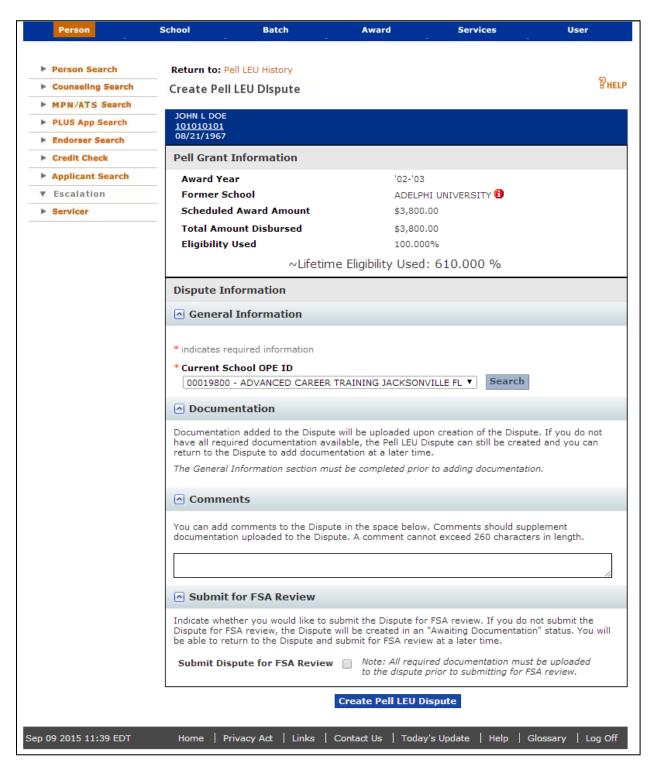
Select Pell Grant to Dispute Pop-up

This page allows to the user to choose from the available archived award years in which the student had a Pell Grant disbursement. Select the radio button for the award year of the Pell Grant disbursement in question. Click on the "Continue" button to proceed to the next step.



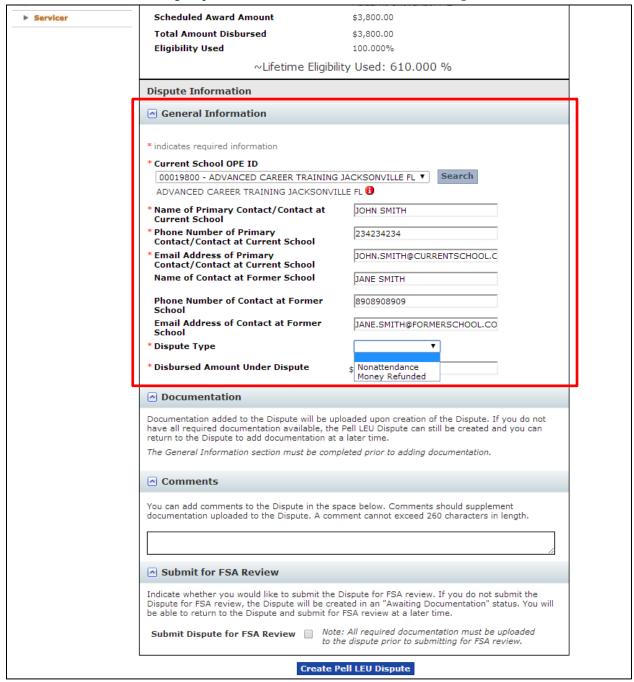
Create Pell LEU Dispute Page

Once the award year is selected, the main dispute page will open. Here, the user will provide the required information needed to escalate the case to the Department of Education (the Department). The information from the award year selection page is displayed at the top of the page. This page has four main sections: **General Information**, **Documentation**, **Comments**, and **Submit for FSA Review**. More information on each of these sections is explained next.



General Information Section

In this section the current school will provide its contact information. If the disputed amount was disbursed at a former school, the contact information of the former school should be provided as well. The school will also select the dispute type and enter the disputed amount in this section. The **Dispute Type** is the general reason for the dispute escalation. For cases when the student never attended the school in the award year recorded, select **Nonattendance**. This would include cases in which identifier issues, such as when the student who received the Pell Grant disbursement is recorded under another student's Pell Grant history. For cases when the former school returned money years ago and no/incorrect adjustment was made to the student's record in the COD System (or in any previous system), select **Money Refunded**. Enter the amount that is being disputed in the **Disbursed Amount Under Dispute**.

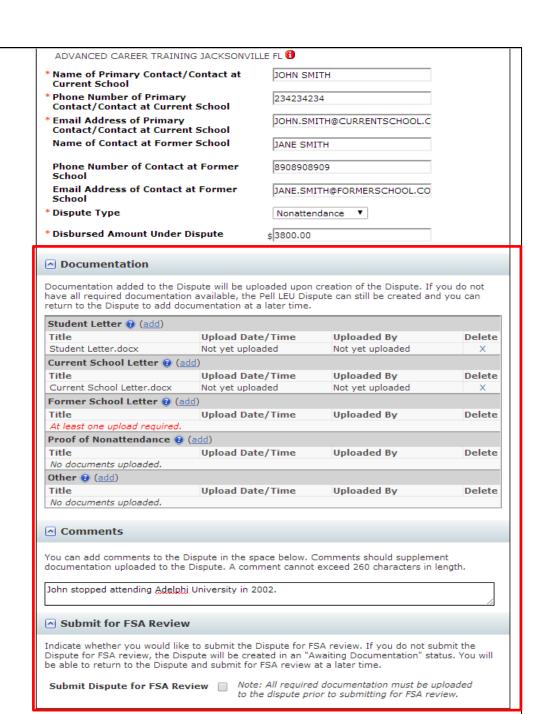


Documentation, Comments, and Submit for FSA Review Sections

The remaining sections on the Create Pell LEU Dispute allow the user to provide the supporting documentation related to the dispute and to submit the dispute for FSA Review. The screenshot showing these sections is on the next page.

- **Documentation** The user will upload the documents that support the facts for the dispute. All disputes require a student letter and school letter(s). Other documents will be required depending on the **Dispute Type**.
- Comments This is an optional field where the school can provide a *brief* description of the dispute. *It is limited to 260 characters.* The more detailed explanation should be provided in the school letter document uploaded with the case.
- Submit for FSA Review The user will click on the checkbox to officially submit the dispute to the Department for review. If the necessary documentation is not included, the school may still click the Create Pell LEU Dispute button, generate the Dispute ID, and the case will be placed in an "Awaiting Documentation" status. When all the required documentation is uploaded, schools will be able to change the status from "Awaiting Documentation" to "FSA Review in Progress".

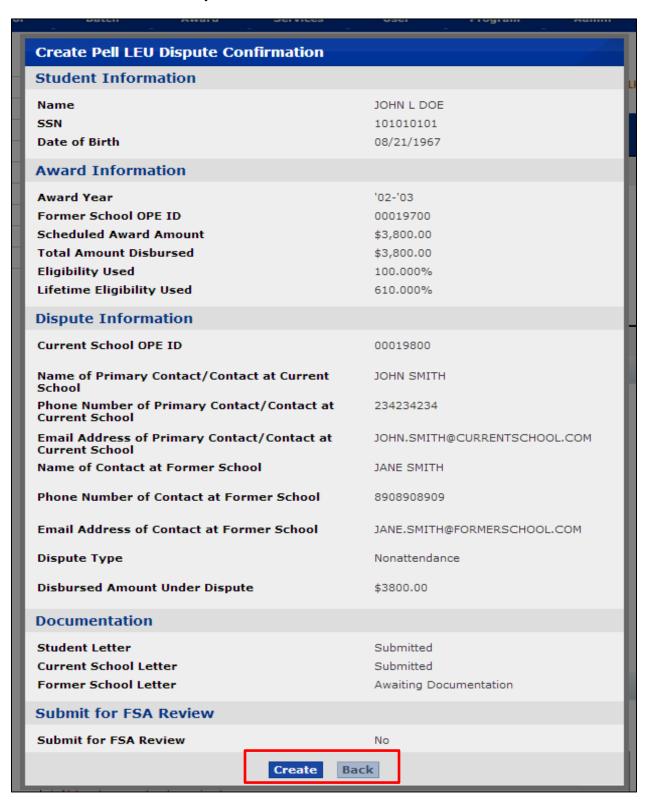
Once submitted, the user will receive a confirmation page as well as an e-mail that acknowledges receipt of the dispute and provides the user with a Dispute ID. This unique identifier can be used to search for the dispute (see next section).



Create Pell LEU Dispute

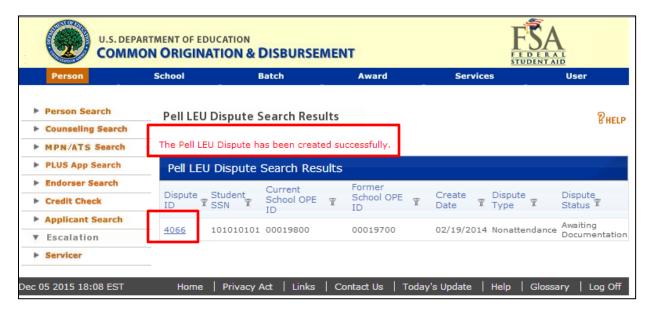
Create Pell LEU Dispute Confirmation Pop-up

The Create Pell LEU Dispute Confirmation page allows the user to review all the information he or she has entered before officially creating the dispute. If any information needs to be corrected, the user should click on the "Back" button. If the information is correct and is ready to be submitted, the user should click on the "Create" button.



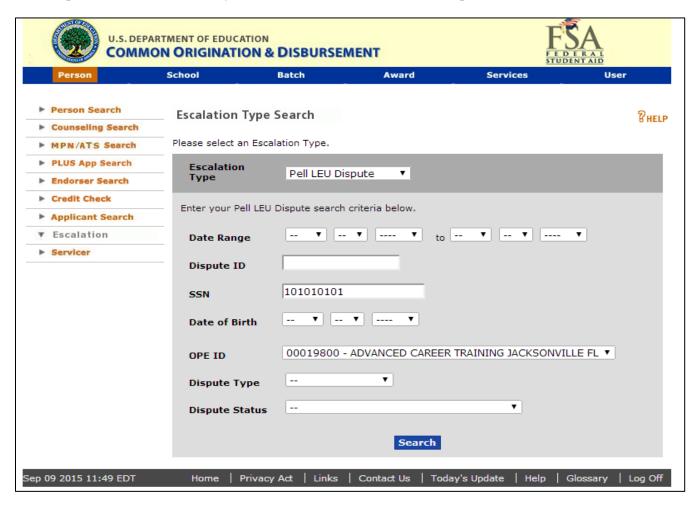
Pell LEU Dispute Search Results Page upon Dispute Creation

Once the Pell LEU Dispute is created, the user will automatically be brought to the Pell LEU Dispute Search Results page. In addition to a message that the Pell LEU Dispute has been created successfully, the user will see the Dispute ID and summary details related to the dispute.



Escalation Type Search Page

The Escalation Type Search page allows a user to search for a dispute that has been created. This page can be accessed under the Person Tab, selecting Escalation from the left-hand navigation links, and then set the Escalation Type to "Pell LEU Dispute." A user can search by Student SSN and Date of Birth, or Dispute ID.



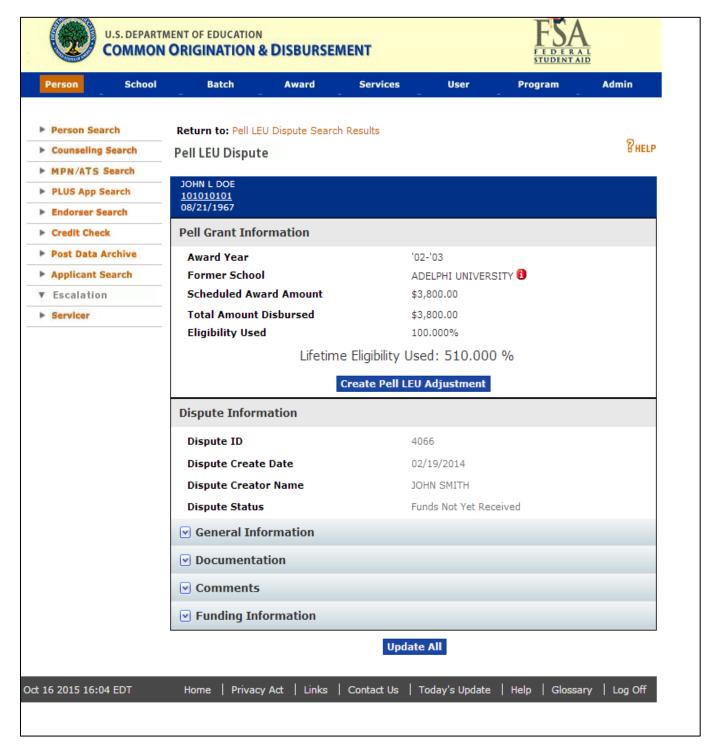
Pell LEU Dispute Search Results Page

This page shows the results based on the submitted search criteria. In this example, Dispute ID 4066 is in a status of "Awaiting Documentation." A user can view the details of the dispute by clicking on the Dispute ID number hyperlink.

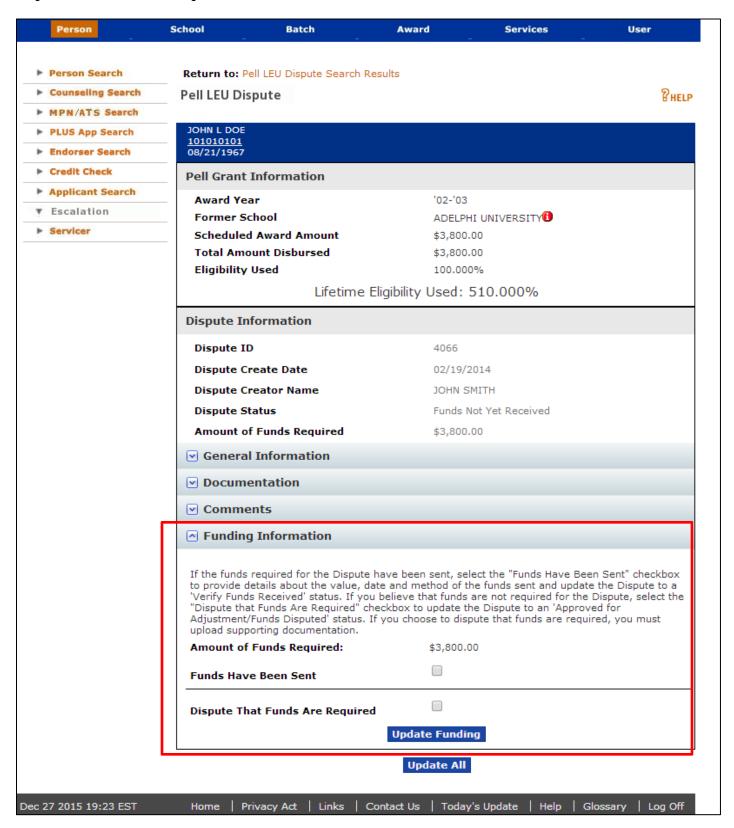


Pell LEU Dispute Page - Funds Not Yet Received Dispute Status

Upon Department review, we will update the status of the dispute based on the information provided in the case. In this example, the dispute has an updated status of "**Funds Not Yet Received**." This means that the Department is waiting for the return of the disputed Pell Grant funds or documentation verifying that the disputed Pell Grant funds were previously returned to the Department.



By expanding the **Funding Information** section of the page, a user can see that the **Amount of the Funds Required** field is showing \$3,800.00 and provides the school the option to select the appropriate checkbox: **Funds Have been Sent** or **Dispute That Funds Are Required**.



When the **Funds Have Been Sent** checkbox is selected, a user must complete additional required fields providing more information about the returned funds, including: **Amount of Funds Sent**, **Date Sent**, and **Method of Delivery**. After providing the information, the user clicks on the **Update Funding** button to submit this new data to the Department for further review.

