

Lesson 1 - Return of Title IV Funds on the Web

Objectives

In this lesson you will:

- Identify the features of Return of Title IV Funds (R2T4) on the Web
- Understand how to set up Web functions
 - Institutional Charges
 - School Calendar
 - User-Specified Fields
- Understand that systematic use of the reports will dramatically reduce the risk of potential audit liability

Key Terms

Institutional Charges

Institutional charges generally are defined as the charges for tuition and fees, room and board, and other educational expenses that are paid to the school directly.

School Calendar

This setup option in R2T4 on the Web allows the school to define the number of days or hours in a program's payment period or period of enrollment.

User-Specified Fields

User-Specified Fields are fields that you create in R2T4 on the Web to track data specific to your school. The fields can be formatted to collect numeric, string (text), date, or Boolean (yes/no) data.

Note about this training

On February 8, 2006, the President signed into law the Higher Education Reconciliation Act (HERA). This law had direct impact on the R2T4 calculation for all students who had a withdrawal date on or after 07/01/06. This training incorporates all changes made to the R2T4 calculation as a result of the HERA.

If you need assistance performing an R2T4 for a student who withdrew prior to 07/01/06, please see the electronic announcement posted 5/19/06 - HERA Operational Implementation Guidance (CPS, COD System, EDExpress Suite)---Updates to R2T4 on the Web and Archival of R2T4 PC Product Due to Higher Education Reconciliation Act of 2005.

R2T4 on the Web Features

R2T4 on the Web is a non-year-specific application developed to calculate the earned and unearned portion of Title IV program assistance. The application includes setup options that aid in the entry and calculation of earned and unearned aid. These setup options include entry of your school's calendar, institutional charges, and user-specified fields.

Navigation Menu for R2T4 on the Web

FAA Access to CPS Online - Return of Title IV Funds on the Web		
Student Record Status Create New Record Find Existing Record Institutional Charges School Calendar User-Specified Fields Reports Data Export	Welcome to Return of Title IV Funds on the Web (R2T4) Return of Title IV Funds (R2T4) is a non-year specific product that processes, calculates, manages and stores students' return of Title IV aid calculation records. Use the links on the left Navigation Bar to set up your school screens, student records and to access reports. The links below explain the R2T4 process and functionality.	
	Before You Start	Using R2T4
	Overview <ul style="list-style-type: none"> ■ What is R2T4? Gather the following: <ul style="list-style-type: none"> ■ Student's Withdrawal Information ■ Student's Title IV Aid Information ■ Student's Program Information ■ Student's Account Information ■ School Information 	Setup the School screens: <ul style="list-style-type: none"> ■ Institutional Charges ■ School Calendar ■ User-Specified Fields Student records: <ul style="list-style-type: none"> ■ Create a new student ■ Find an existing student
		Follow Up
		Overpayment Notification and Tracking reports: <ul style="list-style-type: none"> ■ Student Notification ■ 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 ■ Student Listing ■ Student Records Referred to the

Notification Tracking Status

Just as important as calculating the earned and unearned aid is the process of tracking the student's record status. Tracking features include:

- Number of students waiting to be notified
- Number of students who have been notified but have not made arrangements to repay
- Number of students who have been notified and have made arrangements to repay
- Number of students for whom the school has not returned funds
- Number of students for whom the school has returned funds
- Number of students with a post-withdrawal disbursement
- Number of student records referred to the Department of Education

Reports

Six reports are provided to view aggregate data for your student population. Reports include:

- Student Listing
- Student Notification
- Student Repayment Arrangements
- School Portion of R2T4 Returned
- Students with a Post-Withdrawal Disbursement
- Student Records Referred to the Department of Education

Entering and tracking data for all students will help ensure that you follow through on the complete process of the return of funds. Use of the tracking functions will aid in determining which students have completed which portion of the process. Use of the reports will summarize and help you track where students are in the process as well. The combination of these tools will aid in documenting your process and provide an audit trail to help reduce the potential of audit liability.

Data Export

You can also easily download data to your PC using the Data Export feature. You have the option of using a comma-delimited text file or displaying data on a viewable Web page using the Browse Data option.

Note:



All users at your school must be enrolled for FAA Access to CPS Online to access the R2T4 Web site. Sign up at the SAIG Enrollment Web site: fsawebenroll.ed.gov

Steps to R2T4 on the Web Setup

1. Establish your Institutional Charges. Enter charges that are generic and applicable to most students.
2. Establish your School Calendar Profile Codes.
3. If you choose, create User-Specified Fields to track data specific to your school.

The first two options must be set up in sequence before you can enter the first student record.

Institutional Charges

You must enter program costs for your school's various programs prior to creating student records in R2T4 on the Web. You can create a unique six-character code to identify the institutional charges for each program.

Tip:



Set up one Institutional Charge code per term. Then, modify the individual charges at the record level.

This set of institutional charges is linked to a school calendar profile to create a unique set of charges for a particular range of dates. When you create a student record, you will select the appropriate school calendar profile (which includes an Institutional Charges code) that describes the withdrawn student's charges and range of dates.

Naming Conventions

Name the Institutional Charges codes in a unique way. You may use a combination of text and numbers. The following table shows **examples** of different charges for a program.

Code	Description
ENG011	Undergraduate On-Campus Engineering Program
ENG022	Undergraduate Off-Campus Engineering Program
ENG033	Graduate Engineering Program

Note:



After you assign an Institutional Charges profile to a student, you can no longer modify or delete the profile in Setup. However, you can modify the charges within a student's record.

FAA Access to CPS Online - Return of Title IV Funds on the Web

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

Update Institutional Charges Information

Award Year:	2007 <input type="button" value="v"/>
Institutional Charges Code:	0112
Program Title:	1 Time Undergraduate
Program Type:	All General Undergrad

Description	Amount
Tuition and Fees:	\$ 7852
Room:	\$ 6256
Board:	\$ 2640
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
<input type="text"/>	\$ <input type="text"/>
Total:	\$ 16748.00

School Calendar

The School Calendar setup aids you in calculating the number of days or hours in the payment period or enrollment period based on the date range and any break days you enter. The calendar profile is associated with an Institutional Charges code. You select the Program Type and what to base the calculation on (Payment Period or Period of Enrollment).

For students who withdraw from semester, trimester, or quarter programs, a school must perform the return calculation on a payment period basis. For students who withdraw from a non-standard term-based or non-term-based educational program, the school has the choice of performing the return calculation on either the payment period or period of enrollment basis. The institution must use the same basis (payment period or period of enrollment) in its calculations for all students within a program who cease attendance. (Note: An exception to this rule is provided on page 4-2.)

Update School Calendar Profile Information

School Information		
Award Year	2007 <input type="button" value="v"/>	
School Calendar Profile Code:	Fall107	
School Calendar Profile Title:	Fall 2007	
Institutional Charges Code:	0112 <input type="button" value="Institutional Charges"/>	
Program Hour Type:	Credit Hour-Standard <input type="button" value="v"/>	
Calculations of R2T4 based on:	Payment Period <input type="button" value="v"/>	
Payment Period Start Date:	08312006	
Please enter this date in "mmddyyyy" format. For example, 08171975		
Payment Period End Date:	12152006	
Please enter this date in "mmddyyyy" format. For example, 08171975		
Clock-Hour Specific Fields		
Total Clock Hours in Period Selected:	<input type="text"/>	
Scheduled Break Days		
Starting Date	Ending Date	Description
11202006	11242006	Thanksgiving

Tip:



When searching and/or creating School Calendar Profiles, make sure you enter the desired award year. For example, selecting 2007 identifies the 2006-07 award year.

User-Specified Fields

Five pre-defined fields commonly used by schools are provided in the application by default:

- GPA
- Major
- Repayment Status
- Withdrawal Reason
- Leave of Absence Reason

These fields are found on the student record on the User Data tab. No setup is required for these fields.

In addition, you can create up to 10 User-Specified Fields to gather and track student data specific to your school. These fields can be formatted to collect data in four formats:

- Numeric – 10 characters in length (Valid values are numbers 0-9.)
- String (text) – 40 characters in length (Valid values are letters A-Z.)
- Date – 8 characters in length (MMDDYYYY format)
- Boolean (yes/no) format – 1 character in length (Y or N)

User-Specified Fields

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

User-Specified Fields				
Field	Type	Length	Description	Action
1	Yes/No	1	Met with Counselor	Delete
2	<div style="border: 1px solid gray; padding: 2px;"> Yes/No ▼ </div> <div style="border: 1px solid gray; padding: 2px; margin-top: 2px;"> Select Yes/No Numeric String Date </div>		<input style="width: 100%;" type="text"/>	Add



Software Activity – R2T4 on the Web

Setup

In this exercise, you will set up R2T4 on the Web to prepare for entering student records. You will create an Institutional Charge record, a School Calendar record, and a User-Specified field. Instructions are provided for both standard term and clock-hour school examples. Complete steps for both school types. The award year for all examples is 2007.

Step	Action
1	Open a browser window to the FAA Access demo site: http://fafsademo.test.ed.gov Click the FAA Access to CPS Online Demo System button at the bottom of the page.
2	Click Next .
3	Log in using the User ID: eddemo and Password: fafsatest The first steps show the typical sequence for accessing the FAA Access to CPS Online demo site. Please be aware that you may be prompted for the demo site’s login ID (eddemo) and password (fafsatest) in a different sequence or multiple times.
4	You are now logged into FAA Access to CPS Online. Click Next . (You may be prompted to enter the User ID and Password again.)
5	Enter the following in the Confirming Your Identity screen: SSN: 999999999 First 2 letters of Last Name: XX Date of Birth: 01011900 PIN: 9999 Click Submit .
6	From the FAA Main Menu, select Return of Title IV Funds on the Web .
7	Type the TG number: 99999 Type the school code: E01002 Click Next .

Standard Term

Institutional Charges Setup

8	Click Institutional Charges in the left column.
9	Click Add in the middle of the page to add a new record.
10	Click the drop-down arrow in the Award Year field and select 2007 .
11	You will be creating a code for the Engineering program. Type EGR07 in the Institutional Charges code field.
12	Type Engineering in the Program Title field.
13	Type Undergraduate in the Program Type field.
14	Complete the amount fields as follows. Tuition: 7,235 Room: 6,750 Board: 2,375
15	When finished, click Submit .
16	Next, locate your new record using the Search function. Click the drop-down arrow in the Award Year field and select 2007 . Click Search .
17	A list of records for the 2007 year is displayed. Click the institutional Charges Code for the record you created to display the details.

School Calendar Setup

18	Click School Calendar in the left column.
19	Click Add in the middle of the page to add a new record.
20	Click the drop-down arrow in the Award Year field and select 2007 .

21	Type 07UGR for the School Calendar Profile Code to identify the undergraduate program starting in September.
22	Complete the other fields as follows: School Calendar Profile Title: Undergraduate Institutional Charges Code: EGR07 Program Hour Type: Credit Hour Standard Calculations of R2T4 based on: Payment Period Payment Period Start Date: 09012006 Payment Period End Date: 12152006
23	Click Submit when finished.

User-Specified Field Setup

24	You will create a field to indicate if the student’s academic counselor has been notified of the withdrawal. Click User-Specified fields.
25	Select Yes/No as the type for the field.
26	Type Notification Filed in the Description field.
27	Click Add . The added field is displayed.

Clock Hour

Institutional Charges Setup

1	Click Institutional Charges in the left column. A pop-up box may appear. Click OK to continue.
2	Click Add in the middle of the page to add a new record.
3	Click the drop-down arrow in the Award Year field and select 2007 .
4	You will be creating a code for the Medical Transcriptionist program. Type 90615 in the Institutional Charges code field.
5	Type September 2006 15 Week in the Program Title field.

6	Type Certificate in the Program Type field.
7	Complete the amount fields as follows. Tuition: 1750 Room: 0 Board: 0 Books: 250
8	When finished, click Submit .
9	Next, locate your new record using the Search function. Click the drop-down arrow in the Award Year field and select 2007 . Click Search .
10	A list of records for the 2007 year is displayed. Click the blue highlighted award year for your record to display the details.

School Calendar Setup

11	Click School Calendar in the left column.
12	Click Add in the middle of the page to add a new record.
13	Click the drop-down arrow in the Award Year field and select 2007 .
14	Type S67015 for the School Calendar Profile Code to identify the Medical Transcriptionist program starting in September.
15	Complete the other fields as follows: School Calendar Profile Title: Sept 2006 450Hr 15 Wk Institutional Charges Code: 90615 Program Hour Type: Clock-Hour Program Calculations of R2T4 based on: Payment Period Payment Period Start Date: 09182006 Payment Period End Date: 12152006 Total Clock Hours in Period Selected: 450
16	Click Submit when finished.

