

Lesson 1– Return of Title IV Funds on the Web

 **Time of Lesson: 35 minutes**

Host

Open Slide Show: R2T4 lesson 1.ppt

Display Slides 1 and 2

After completing this lesson, you will be able to:

- Identify the features of the 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

Presenter

Point out Key Terms and Resources



Refer to the Table of Contents provided after the cover page in the Participant’s Workbook (PW).

Key Terms introduced in this lesson are defined on the first page of the first lesson in the PW. You do not have to cover them, but you may want to mention that they are here for future reference. Remind participants that key terms for all lessons are summarized in the Glossary in Appendix A.

Resources for this course are provided in Appendix C. Of particular importance for this course are the sections of the Federal Student Aid Handbook that relate to withdrawal calculations and **a series of Dear Colleague Letters (Don’t read these – FYI only. Gen06-15, GEN-06-05, GEN-04-03, GEN-04-12, and GEN-00-24)**. Each document provides detailed policy guidance as to calculations and notifications for R2T4. Also, refer to the Higher Education Reconciliation Act (HERA) of 2005, Pub. L. 109-171.

On February 8, 2006, the President signed into law the Higher Education Reduction 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.

Display Slide 3 – Application Features



Refer to PW pages 1-2 and 1-3.

R2T4 on the Web is a tool that can assist schools in calculating the earned and unearned portions of a withdrawn student's Title IV aid.

Setup – (Note: In order to use R2T4 OTW - *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)*

Setup options are provided to customize the application using your school's information. These include the ability to establish preset institutional charges and school calendar profile codes to use with various payment periods or periods of enrollment. In addition, R2T4 on the Web contains the five most commonly used pre-defined user-specified fields. You may create up to 10 user-specified fields to gather and track student data specific to your school.

Student Record Entry/Calculation

For each student you will enter data to calculate the earned and unearned portions of Title IV aid.

Notification Tracking Status

Allows you to track a student record and calculated the return of funds, the application provides a series of notification tracking screens that assist you with the process of following up with the student and documentation of the return of funds. If you are only interested in how to track a student's status, please proceed to Lesson 5.

Reports

There are Six reports are provided for you to view aggregate data for your school. We will cover these in Lesson 5.

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. 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

The Data Export feature allows you to download data from the Web. Download your user data by using a comma-delimited text file or by displaying data on a viewable Web page with Browse Data. You may want to use the file to add to your school's other data systems or to track other withdrawal information in an Excel spreadsheet. The data in the spreadsheet may be merged into a form letter to notify students.

Ask participants: Are there other uses you may have for the data that you may download?

Data Entry

Data entry is accomplished through a series of tabs in each record. If you are only interested in learning about data entry, please proceed to Lesson 4.

Display Slide 4 – Steps to R2T4 on the Web Setup



Refer to PW page 1-4.



There are two options that must be set up in sequence before you can enter the first student record: Institutional Charges and School Calendar. The User-Specified Fields are optional but should be created before you begin to enter data.

Display Slide 5 – 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.

The institutional charges are 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.

You should consider setting up Institutional Charges codes only as you need them to keep the process as simple as possible. One approach is to create one generic code in the setup function for a payment period or period of enrollment. If changes need to be made to these charges, they may be modified at the student record level. Refer to PW page 4 for examples of how codes may be set up.

Consider a naming convention for your codes that has meaning and can be easily recognized. Use a combination of letters and numbers in a range to identify programs. One example is an Engineering program. If you have different degree programs within Engineering that have different program costs, you may use EGR followed by a numeric such as 011 for undergraduate engineering.

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



Refer to the screen capture on PW page 1-5.

We are using allowable institutional charges, as defined in the Federal Student Aid Handbook.

Display Slide 6 – School Calendar



Refer to PW page 1-6.



The next setup to complete is the School Calendar Profile. The school can choose whether to have the application perform the R2T4 calculation on a payment period or period of enrollment basis. Standard term based schools will only select payment period. The application provides three different program types from which to choose: Credit Hour-Standard; Credit Hour-Non-standard/Non-term; and Clock Hour. You will again create a unique profile code to identify each of your school calendar records.

You will enter a payment period start and end date. For credit hour programs, this data determines the number of days to be used in the R2T4 calculation. You must indicate any institutionally

scheduled breaks of 5 or more consecutive calendar days for credit-hour programs so that the scheduled breaks are excluded from the return calculation.

For schools that perform their R2T4 calculations based on credit-hour programs, the application automatically calculates the number of days in the payment period or period of enrollment for you.

For schools that use clock hours, you can indicate the total number of clock hours in the period defined and decide whether to use payment period or period of enrollment.

The calendar information is used to determine the amount of TIV aid earned.

Display Slide 7 – User-Specified Fields



Refer to PW page 1-7.

The application provides five user data fields by default:



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


In addition to these fields, you may create up to 10 fields of your own. They may contain the following types of data:

- Numeric
- String (text)
- Date
- Boolean (yes/no) format

For example, many institutions have adopted mentoring programs to assist at-risk students. Utilizing User-Defined Fields allows schools to collect data about students who withdraw. This information could prove to be a critical factor in understanding and identifying at-risk students.

Ask participants: Can you think of other User-Specified Field data that would be useful on your campus?

Display Slide 8 – Setup Demo



Next, we will demonstrate the setup features that we just discussed. Please follow the demonstration of the application features and you will have an opportunity to practice in the following exercise.

You will be creating different setup options for different types of schools. These setup records will be used when you create student records in Lesson 4.

Host

Use the share feature to demonstrate R2T4 on the Web navigation and setup functions.



Before beginning, make sure that you have an Internet Explorer browser window open on your desktop to the FAA Access to CPS Online demo Web site: <http://fafsademo.test.ed.gov>.

1. In the Sharing – Live Meeting window, select the Internet Explorer with the open application.
2. Click **OK**.
3. Use the step table below to walk the participants through each step of the setup procedures.

Step	Action
1	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
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 Main Menu, scroll to the bottom of the page and select Return of Title IV Funds on the Web .

Step	Action
7	<p>Type the TG number: 99999</p> <p>Type the school code: E01002</p> <p>Click Next.</p>
Navigation	
8	<p>Notice the menu options on the left side of the screen. We will be setting up the Institutional Charges, School Calendar, and a User-Specified Field.</p> <p>Never use the back button key to return to a previous page. Always use the left Navigation bar to browse through the application. Click “Home” at the top of the page to return to the home page.</p> <p>Point out the help provided through links on the first page. Review the help function on the top of the page, all of the links on the front home page, and the “Need help with this page” at the bottom of each page.</p>
9	<p>Click Student Record Status (on the left navigation bar).</p> <p>This screen provides the feature to track the various status dates that the school is responsible for following. We will cover these various tracking methods in Lesson 5.</p>
Institutional Charges Setup	
10	Click Institutional Charges in the left column.
11	Click Add in the middle of the page to add a new record.
12	<p>Click the drop-down arrow in the Award Year field and select 2007. The year indicated is the second year in the award year. In this example, the award year is 2006-2007.</p> <p>Note: When a value is selected using any of the “drop-down” boxes, the value will be highlighted in a blue background.</p> <p>Until you select another field, any use of the scroll wheel on your mouse will change the value in the drop-down box.</p>
13	<p>You will be creating a code for the undergraduate program.</p> <p>Type UNGR01 in the Institutional Charges code field.</p>
14	Type Undergraduate in the Program Title field.

Step	Action
15	Type General in the Program Type field.
16	<p>Complete the amount fields as follows.</p> <p>Tuition: 6,200</p> <p>Room: 3,700</p> <p>Board: 1,375 - as you can see, there are additional fields available so that a school can add any other eligible institutional charges (books, fees)</p> <p>Tip: Use the Windows cut and paste features to limit keystrokes when entering setup or student record data.</p>
17	When finished, click Submit at the bottom of the page.
18	<p>Next, locate your new record using the Search function.</p> <p>Click the drop-down arrow in the Award Year field and select 2007.</p> <p>Click Search.</p>
19	<p>A list of records for the 2007 year is displayed.</p> <p>Click the blue highlighted award year for your record to display the details. (UNGR01)</p>
20	<p>Next, we will create a generic record with \$0 for the institutional charges. A school may consider setting up simple institutional charges records with a minimal standard charge or \$0. Since the charges may vary for the individual student, you may save time by creating this generic charge record instead of creating a record for all the populations at your school.</p> <p>As the student's record is created, you can add/change information to each record on a case-by-case basis.</p>
21	<p>Click Add in the middle of the page to add a new record.</p> <p>Click the drop-down arrow in the Award Year field and select 2007.</p>
22	<p>You will be creating a code for any generic program.</p> <p>Type GEN in the Institutional Charges code field.</p>
23	Type Generic in the Program Title field.
24	Type Generic in the Program Type field.

Step	Action
25	Complete the amount fields as follows. Tuition: 0 Room: 0 Board: 0
26	When finished, click Submit .
27	Finally, we will create an Institutional Charges record that will be used for a clock-hour program.
28	Click Add in the middle of the page to add a new record. Click the drop-down arrow in the Award Year field and select 2007 .
29	You will be creating a code for the medical transcriptionist program. Type J90030 in the Institutional Charges code field.
30	Type Med Tran in the Program Title field.
31	Type Med Tran in the Program Type field.
32	Complete the amount fields as follows. Tuition: 5000 Room: 0 Board: 0 Books: 500 (As you can see, we are adding our own institutional charge) When finished, click Submit .
School Calendar Setup – Credit Hour Program	
33	Click School Calendar in the left column.
34	Click Add in the middle of the page to add a new record.
35	Click the drop-down arrow in the Award Year field and select 2007 .
36	Type 07UGR for the School Calendar Profile Code to identify the undergraduate term starting in September 2006.

Step	Action
37	<p>Complete the other fields as follows:</p> <p>School Calendar Profile Title: Undergraduate</p> <p>Institutional Charges Code: UNGR01 (You may also click the Institutional Charges button to select from the list of Institutional Charges codes that have been created.) This links the Institutional Charge record that we created earlier to this school calendar.</p> <p>Program Hour Type: Credit Hour Standard</p> <p>Calculations of R2T4 based on: Payment Period</p> <p>Payment Period Start Date: 09012006</p> <p>Payment Period End Date: 12152006</p> <p>In this example, we will include a scheduled break of five days. The Scheduled Break Days fields are enabled only for credit-hour profiles. The fields are disabled for clock-hour profiles.</p> <p>If your program uses credit hours, use these fields to define scheduled breaks of five or more consecutive calendar days, such as the Thanksgiving holiday or Spring Break. Breaks of five or more consecutive days are excluded from the total number of days in the payment period or period of enrollment and the number of days completed.</p> <p>You can create several scheduled breaks for each school calendar profile. Any break scheduled for fewer than five days is not saved.</p> <p>Scheduled break days are excluded from both the completed days and the total days only if the student's withdrawal date occurred after the school's regularly scheduled break.</p> <p>Scheduled Break Days</p> <p>Starting Date: 11202006</p> <p>Ending Date: 11242006</p> <p>Description: Fall Break</p>
38	Click Submit when finished.
School Calendar Setup – Clock Hour Program	
39	Click Add in the middle of the page to add a new record.
40	Click the drop-down arrow in the Award Year field and select 2007 .

Step	Action
41	Type 2007J for the School Calendar Profile Code to identify the medical transcriptionist program starting in January.
42	Complete the other fields as follows: School Calendar Profile Title: January 2007 30 Week Institutional Charges Code: This time we will click the Institutional Charges button to select from the list of Institutional Charges codes that have been created. (J90030) Program Hour Type: Clock-Hour Program Calculations of R2T4 based on: Period of Enrollment Payment Period Start Date: 01032007 Payment Period End Date: 07282007 Total Clock Hours in Period Selected: 900
43	Click Submit when finished.
User-Specified Field Setup	
44	You will create a field to indicate if the student's academic counselor has been notified of the students withdrawal. Click User-Specified Fields .
45	Select Yes/No as the type for the field.
46	Type Counselor Notify in the Description field.
47	Click Add . The added field is displayed.
Other Features	
48	Click Reports to show the list of available reports. We will discuss this feature in Lesson 5.
49	Click Data Export to show the two viewing options. You may view the data stored in the application or create an export file to download and view data in software such as Excel.

Display Slide 9 – Software Activity – 10 minutes

Complete the exercise beginning on PW page 1-8. You will be using the demo site for FAA Access to CPS Online. The setup records that are created in this lesson will be used in the exercises in Lessons 4 and 5, so they must be completed. The exercises in Lesson 4 use either the credit hour or clock hour Institutional Charges profiles created in this exercise.

Instruct participants to open a separate browser window from the Live Meeting. Failure to do so will cause them to exit from the training session.



At the conclusion of the allotted time, ask if any participants have any questions or problems.

The step tables from the PW are provided below for reference.

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 blue highlighted award year for your record 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	<p>Complete the other fields as follows:</p> <p>School Calendar Profile Title: Undergraduate</p> <p>Institutional Charges Code: EGR07</p> <p>Program Hour Type: Credit Hour Standard</p> <p>Calculations of R2T4 based on: Payment Period</p> <p>Payment Period Start Date: 09012006</p> <p>Payment Period End Date: 12152006</p>
23	Click Submit when finished.

User-Specified Field Setup

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

Clock Hour

Institutional Charges Setup

1	<p>Click Institutional Charges in the left column.</p> <p>A pop-up box may appear. Click OK to continue.</p>
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	<p>You will be creating a code for the Medical Transcriptionist program.</p> <p>Type 90615 in the Institutional Charges code field.</p>
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.

Display Slide 10 – Business Process Worksheet



Locate the Business Process Worksheet (BPW) in Appendix B. We will use this document throughout this course to highlight the different steps in the R2T4 process.

You may use this document as a baseline to guide the business process at your school.

For this lesson, Steps 1-3 on the BPW relate to the setup of R2T4 on the Web.