

# **Peralta Community College District**



## **Financial Aid**

### **R2T4**

## **Reference document**

Created 3/25/2020 David Nguyen

Modified 4/19/2020 Marla Williams

## 1. Search for query R2T4\_REQUIRED\_MERRITT\_DN

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Query

**Query Viewer**

Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search By  begins with

[Advanced Search](#)

**Search Results**

\*Folder View

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
R2T4_REQUIRED_MERRITT_DN		Priva		<b>HTML</b>	Excel	XML	Schedule	Favorite

### Select HTML

**R2T4\_REQUIRED\_MERRITT\_DN**

Term:

Aid Yr:

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (21 kb)

View All First 1-46 of 46 Last

### Select Term 1154 and Aid Yr 2016

In PeopleSoft, I recommend opening the following tabs in order to navigate through the information needed for R2T4 in a timely manner.

- Tuition Calculation, Student Service Center, Assign Awards to a Student, Invoke Professional Judgment, and Disburse Aid with Override.

After retrieving the results, open link [www.fsadownload.ed.gov](http://www.fsadownload.ed.gov) in another tab.

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**Other Web Sites for FSA Download Data**

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[E-Campus Based/FISAP](#)  
[COD](#) (separate enrollment required)  
[NSLDS for FAAs](#) (separate enrollment required)  
[Other Dept. of ED Links](#)

**Software and Associated Documents**

Select this link to download current software and associated installation guides, cover letters, and desk references.  
[For archived software and associated documents, click here.](#)

**Technical References and Guides**

Select this link to download current application system technical references for programmers, ISIR guides/comment codes and text/XML ISIR, TEF Files, summary of changes, and sources of assistance.  
[For archived technical references and guides, click here.](#)

**Recent Postings**

[NSLDS Exit Counseling Submittal](#) 10/23/15  
[NSLDS Enrollment Submittal](#) 10/19/15  
[2016-2017 CPS Test System User Guide](#) 10/16/15  
[Draft 2016-2017 Electronic Data Exchange \(EDE\) Technical Reference](#) 9/25/15  
[Draft 2016-2017 Application Processing System Specifications for Software Developers](#) 9/11/15

This page was last modified on 10/23/2015

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Modified 4/19/2020 Marla Williams

Select **FAA Access to CPS Online** from the left column.

After logging on, select **Return of Title IV Funds on the Web**

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**FAA Access to CPS Online**

Help FAQs

**FAA Access to CPS Online**

**NEED HELP?**

**Welcome to the FAA Main Menu**

Select an option from the following menu. It will be necessary to provide the TG# for your Destination Point and your Federal School Code:

- [Student Inquiry](#)  
View a student's Student Aid Report (SAR) information, including the Expected Family Contribution (EFC), NSLDS information, and SAR Comments. Compare two ISIR transactions for the same student using **ISIR Compare**. Submit a signature flag for an application in a signature hold status using the **Standalone FAA Signature** feature.
- **Application Entry**  
Enter a student's FAFSA/Renewal Application or Correction data and submit it to the CPS for processing.
  - [FAFSA/Renewal Application](#)
  - [Corrections](#)
- **Restore a Saved Application**  
Restore a partially completed and saved FAFSA/Renewal Application or Correction and submit it to the CPS for processing.
  - [FAFSA/Renewal Application](#)
  - [Corrections](#)
- [Identity Verification Results](#)  
Provide the required results of identity and high school completion status verification efforts.
- [ISIR Request](#)  
Request ISIR data.
- [ISIR Analysis Tool](#)  
Analyze FAFSA information reported on the ISIR. Data is used to determine what impact changes to student-reported information had on EFC and Pell eligibility.
- [Return of Title IV Funds on the Web](#)  
Calculate and manage the return of Title IV funds. Data is collected, and the Return of Title IV Funds is calculated according to ED's Student Assistance General Provisions.

**NEED HELP?** **EXIT**

Site Last Updated: Sunday, September 20, 2015

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Enter the **TG # and federal school code**

(Merritt TG# 50324 ; Federal School Code 001267 )

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FAA Access to CPS Online

Help FAQs

FAA Access to CPS Online

NEED HELP?

**Destination/Federal School Code Entry**

We need you to provide us with the TGF for your Destination Point and your Federal School Code. After you have entered your TGF and Federal School Code, select **Next** to continue.

What is the TGF for your Destination Point?  
Enter this number without the TG:

What is your Federal School Code?

PREVIOUS NEXT

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Select **Create new record** from the Left column.

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

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 create student records and to access reports. The links below explain the R2T4 process and functionality.

**Find Existing Record**

Before You Start	Using R2T4	Follow Up
<p>Overview</p> <ul style="list-style-type: none"> <li>What is R2T4?</li> </ul> <p>Gather the following:</p> <ul style="list-style-type: none"> <li>Student's Withdrawal Information</li> <li>Student's Title IV Aid Information</li> <li>Student's Program Information</li> <li>Student's Account Information</li> <li>School Information</li> </ul>	<p>Setup the School screens:</p> <ul style="list-style-type: none"> <li>Institutional Charges</li> <li>School Calendar</li> <li>User-Specified Fields</li> </ul> <p>Student records:</p> <ul style="list-style-type: none"> <li>Create a new student</li> <li>Find an existing student</li> </ul>	<p>Overpayment Notification and Tracking reports:</p> <ul style="list-style-type: none"> <li>Student Notification</li> <li>School Portion of R2T4 to be Returned</li> <li>Student Repayment Arrangement(s) - Completed</li> <li>Student Repayment Arrangement(s) - Not Completed</li> <li>Notification Tracking Status</li> <li>Students With a Post-Withdrawal Disbursement</li> <li>Student Listing</li> <li>Student Records Referred to the Department of Education</li> </ul>

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RETURN TO FAA MENU EXIT

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From the Query, enter student SSN and hit submit.

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**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

Post Withdrawal Notes User Data  
Overview Demographics R2T4

**Student Information**

Last Name:

First Name:

Middle Initial:

Social Security Number: 609-86-5141

Date of Birth:  
Please enter this date in "mmddyyyy"  
format. For example, 08171975

Driver's License Number:

Driver's License State:

School Cross Reference:

Student ID:

Enter Student's **Last Name, First Name, and date of Birth**. The other fields are optional and not required.

On the next page, select the **R2T4** tab.

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

Post Withdrawal Notes User Data  
 Overview Demographics **R2T4**

Return of Title IV Fund Worksheet

Award Year: 2016

School Calendar: F15 [Calendar Profile](#)

Withdrawal Date:  
 Please enter this date in "mmddyyyy" format. For example, 08171975 for August 17, 1975. 10292015

If you do not know the date of withdrawal, and intend to select Withdrawal Type 3 (Unofficial Withdrawal), you must still provide an approximate Withdrawal Date so the correct R2T4 calculation is performed.

? Need help with this page? Cancel Next

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-Select **2016** for the **award year**.

-Click on **Calendar Profile** to select the school calendar. For Fall 2015, Select the F15 R2T4 Calendar.

-Enter **Withdrawal Date**. The withdrawal date can be found on the query, but should be verified through Tuition Calculation.

**To Verify Student Term withdrawal date:**

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  - International Health Coverage
  - Refunds

**Tuition Calculation**

Arthur Stone ID: 10884114 [Academic Information](#) [Display Student's Accounts](#)

View All First 1 of 7 Last

**Academic Career:** Undergraduate

Find | View All First 1 of 7 Last

**Academic Institution:** Peralta Community College Dist **Business Unit:** Peralta Community College Dist

**Term:** S16 Semester **Billing Career:** Undergraduate

**Primary Program:** Matriculating-Merritt **Campus:** Merritt College

**Override Billing Units:**  **Projected Bill Units:**

**Override Init Enrl Fee:**  **Override Init Add Fee:**

**Tuition Residency:** 0.000

**Override Tuition Group:**  **Tuition Group:**

**Tuition Calc Required:**  **Tuition Calc Date Time:**

[Calculate Tuition and Fees](#) [Display Tuition and Fees](#) [Display Errors / Warnings](#)

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#)

Enter Student ID or SSN in Tuition Calculation. Select Academic Information.

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    - Charges and Payments
    - Cashiering
    - Payment Plans

**Tuition Calculation**

**Academic Information**

**Bio/Demo Data**

ID: 10884114 Name: Stone, Arthur J Gender: Male

**Citizenship** Find | View All First 1 of 1 Last

Country	Description
United States	Native

**National ID** Find | View All First 1 of 1 Last

NID Type	National ID
----------	-------------

**Career Term Data** Find | View All First 1-4 of 7 Last

Term	Career	Prim Prog	Residency	Group	Units Tot	Units Level	Acad Load		
S16	UGRD	Matric	In State		0.000	18.000	Freshman No Units	<a href="#">Academic Plan</a>	<a href="#">Enrollment</a>
<b>F15</b>	<b>UGRD</b>	<b>Matric</b>	<b>In State</b>	<b>PCCD TUITI</b>	<b>0.000</b>	<b>18.000</b>	<b>Freshman No Units</b>	<a href="#">Academic Plan</a>	<a href="#">Enrollment</a>
M15	UGRD	Matric	In State	PCCD TUITI	4.000	18.000	Freshman Half-Time	<a href="#">Academic Plan</a>	<a href="#">Enrollment</a>
S15	UGRD	Matric	In State	PCCD TUITI	5.000	14.000	Freshman Less 1/2	<a href="#">Academic Plan</a>	<a href="#">Enrollment</a>

[Return](#)

On the F15 Row, select enrollment.

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Academic Information

### Enrollment Summary

ID: 10884114 Stone, Arthur J

Find View All First 1-5 of 5 Last

Class #	Subject	Catalog Component	Session Census Date	Section	Status	Reason	Basis	Prog Units Bill Units	Add Date Drop Date
43387	<a href="#">Class Info</a> PSYCH	1A	Regular	M4	Dropped	Drop Enrl	Graded	3.00	08/09/2015
	INTRO TO GEN PSYCH	Lecture	09/08/2015			Instructor Drop Census		3.00	09/06/2015
43471	<a href="#">Class Info</a> AFRAM	5	Regular	M1	Enrolled	Withdrawn	Graded	3.00	08/09/2015
	AFRICAN AMER FAMILY IN US	Lecture	09/08/2015					3.00	10/29/2015
43621	<a href="#">Class Info</a> ENGL	201A	Regular	M8	Dropped	Drop Enrl	Graded	4.00	08/09/2015
	PREP FOR COMP/READNG	Lecture	09/08/2015			Requisite Drop		4.00	08/09/2015
43697	<a href="#">Class Info</a> HIST	7B	Regular	M2	Enrolled	Withdrawn	Graded	3.00	08/24/2015
	HIST/U.S. SINCE 1865	Lecture	09/08/2015					3.00	10/29/2015
44048	<a href="#">Class Info</a> MATH	250	Regular	M6	Dropped	Drop Enrl	Graded	3.00	08/09/2015
	ARITHMETIC	Lecture	09/08/2015			No Show (Instructor Drop)		3.00	08/23/2015

[Return](#)

-Select View All to view all enrollment summary for the student.

-Determine the student's withdrawal date by finding the last drop date.

\*\*Print this page to add to R2T4 binder.\*\*

**To Complete R2T4 Form:**



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**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

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Post Withdrawal
Notes
User Data

Overview
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R2T4

Return of Title IV Fund Worksheet

**Step 1: Student and School Title IV Aid Information**

**Name:** Arthur Stone

---

**Social Security Number:** 618-82-8668

---

**Award Year:** 2016

---

**School Calendar:** F15 Calendar Profile

---

**Is the school required to take attendance by an outside entity?** No

---

**Withdrawal Type:** 6 - Last date of an academically-related activity

---

**Grade Level:** 1 - Attended college before/1st yr.

---

**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.

---

Title IV Grant Programs	Amount Disbursed	Amount That Could Have Been Disbursed
Pell Grant	\$ <input type="text" value="1444"/>	\$ <input type="text" value=""/>
Academic Competitiveness Grant	\$ <input type="text" value=""/>	\$ <input type="text" value=""/>
National SMART Grant	\$ <input type="text" value=""/>	\$ <input type="text" value=""/>
FSEOG	\$ <input type="text" value=""/>	\$ <input type="text" value=""/>
TEACH Grant	\$ <input type="text" value=""/>	\$ <input type="text" value=""/>

---

**A. Total Grant Aid Disbursed:**   
Subtotal

This is a display field only, it holds a running calculation of the entered values.

---

**C. Total Grant Aid that Could Have Been Disbursed:**   
Subtotal

This is a display field only, it holds a running calculation of the entered values.

Always select the following:

- Is the school required to take attendance by an outside entity? **NO**
- Withdrawal Type: **6- Late date of an academically-related activity.**

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- Grade Level: **1- Attended college before/ First Year.**
- Leave of absence days: **LEAVE BLANK.**
- Date form completed and Date of the school’s determination that the student withdrew should both be the date in which the R2T4 is being performed.

Next, you will have to enter the student’s award that was disbursed and awards that could have been disbursed; found on the Assign Awards to a Student page in PeopleSoft. Please note for R2T4 you are only required to report PELL, Direct Loan, and SEOG.

**ORACLE**

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Menu

- Award Processing
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  - Assign Packaging Variables
  - Assign Awards to a Student**
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  - Update School Code
- Aggregates
- Self Service Awarding
- Restricted Aid
- Notification Letter
- Need Summary Validation
- View by Date
- View Award Category Summary

**Student Aid Package** | Need Summary | Term Summary

Stone, Arthur J      ID: 10884114  
 Aid Year: 2016      Federal Aid Year 2015 - 2016      Institution: PCCD1

Career: UGRD Undergrad      Package Status: Completed      Award Notification  
 Packaging Plan ID: FS-M      Retrieve      Aggregate Source: Default      Validate  
 Repackaging Plan ID: PELL\_ONLY      Repackage      Award Period: Both      Post      Reset

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10		UGRD	962500300100	BOGG C - Merritt	1,104.00	1,104.00	FS	1	Disbursement +
20		UGRD	961200100100	Federal Pell Grant - Merritt	4,332.00	4,332.00	P1	1	Disbursement +

Save | Return to Search | Notify

Student Aid Package | Need Summary | Term Summary

Select disbursement to view the student’s actual disbursed amount.

**ORACLE**

Home

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- Award Processing
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- View Award Category Summary

**Award Disbursement Detail**

Sequence: 20      Item Type: 961200100100      Net Award Amount: \$4,332.00  
 Disbursement Plan: P1      \*Split Code: 1      Custom Split

Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	1154	Academic	U1	361.00	361.00	361.00	361.00
02	1154	Academic	U1	361.00	361.00	361.00	361.00
03	1154	Academic	U1	722.00	722.00	722.00	722.00
04	1162	Academic	U1	722.00	722.00	722.00	0.00
05	1162	Academic	U1	722.00	722.00	722.00	0.00
06	1162	Academic	U1	1,444.00	1,444.00	1,444.00	0.00

OK      Cancel

- Under Amount Disbursed on the R2T4 form, enter the amount of Financial Aid that was actually disbursed to the student. If a student was eligible for another disbursement for the same term but did not receive it, that amount should be entered under “Amount that could have been disbursed.” For example, if the student only received the 1<sup>st</sup> and 2<sup>nd</sup> disbursement, they would go under “Amount Disbursed”, while the 3<sup>rd</sup> disbursement would be entered under “Amount that could have been disbursed.”

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If the Student has any loans, Enter the loan information in the Loan section of the R2T4 form.

### Step 2: Percentage of Title IV Aid Earned

**Withdrawal Date:**  
Please enter this date in "mmddyyyy" format. For example, 08171975 for August 17, 1975.

---

**Hours scheduled to complete:** (clock hour only)

---

### Step 5: Amount of Unearned Title IV Aid Due from the School

L. Total Institutional Charges: \$

---

 [Need help with this page?](#)

- Verify that the Withdrawal date in Step 2 of the R2T4 form is correct.
- Enter the Institutional Charges by clicking on the "Charges" button.

**How to determine a student's charges:**

A student's charges are based upon the student's enrollment.

For R2T4 purposes only, we will use the following uniform tuition fee schedule:

<b>Full Time</b>	<b>\$552</b>
<b>Three Quarters Time</b>	<b>\$414</b>
<b>Half Time</b>	<b>\$276</b>
<b>Less Than Half Time</b>	<b>\$138</b>

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**Arthur Stone** ID: 10884114

[student center](#) [general info](#) [admissions](#) [transcripts](#) [finances](#) [financial aid](#)

**Tuition Calculation Summary** [calculate tuition](#)

PCCD1 - Peralta Community College Dist

- UGRD - Undergraduate
  - [1162 - 2016 Spring](#)
  - [1154 - 2015 Fall](#)**
  - [1153 - 2015 Summer](#)
  - [1152 - 2015 Spring](#)
  - [1144 - 2014 Fall](#)
  - [1143 - 2014 Summer](#)
  - [1142 - 2014 Spring](#)

**2015 Fall**

Tuition Calc Required: No

Last Calculated on: 10/29/2015 3:24PM

Primary Program: MATRM Matriculating-Merritt

Tuition Group: [PCCD GROUP](#) PCCD TUITION GROUP

Total Tuition and Fees: 296.00 USD

Total Waiver: 276.00

Currency used is US Dollar.

[view student account](#)

**Account Summary**

PCCD1 - Peralta Community College Dist

- [PCCD1 - Peralta Community College Dist](#)

**Peralta Community College Dist**

Account Total Balance: 56.00 USD

Deposit Due: 0.00

Anticipated Aid: 2,888.00

Student Permissions: [Not Granted](#)

Go to: [Student Post 1098-T](#)

Currency used is US Dollar.

**Due Charges**

Due Date	Term	Item Description	Due Amount
09/30/2015	F14	Student Campus Use Fee-Merritt	2.00
09/30/2015	F14	Health Fee	18.00
09/30/2015	F14	AC Translink	36.00

[Adjust Due Date](#)

**Refunds**

Refundable Credits: 0.00 USD

Go to: [Refund Student](#)

To view a student's fee charges, I find it easiest to go through Student Service Center.

-Click on the Finances tab.

-Click the "View Student Account" button.

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- Student Services Ctr (Student)
- Term History
- Transcript Request
- Tuition Calculation
- View Customer Accounts
- View NSLDS Loan Data
- Visa Permit Data
- Add to Favorites
- Edit Favorites

**Customer Accounts**

Business Unit: PCCD1

Stone, Arthur J ID: 10884114 Academic Information

Total: 56.00 Anticipated Aid: 2,888.00

Find | View All First 1-7 of 10 Last

Account Type	Account Number	Balance	Open Date	Status	Account Details
Excess FA	EFA001 - 2015 Fall	0.00 USD	08/20/2015	Active	<a href="#">Account Details</a>
Fees	FEE001 - 2015 Fall	0.00	08/09/2015	Active	<a href="#">Account Details</a>
Misc	MIS001 - 2015 Fall	0.00	08/09/2015	Active	<a href="#">Account Details</a>
Excess FA	EFA001 - 2015 Summer	0.00	06/25/2015	Active	<a href="#">Account Details</a>
Fees	FEE001 - 2015 Summer	0.00	06/15/2015	Active	<a href="#">Account Details</a>
Excess FA	EFA001 - 2015 Spring	0.00	02/03/2015	Active	<a href="#">Account Details</a>
Fees	FEE001 - 2015 Spring	0.00	01/24/2015	Active	<a href="#">Account Details</a>

Go to: [Detail Trans](#) | [Item Summary](#) | [Items by Term](#) | [Items by Date](#) | [Due Charges](#) | [Payment Plans](#) | [View Anticipated Aid](#)

Cancel

Then click on the **Account Details** for “fees”. Make sure you are selecting the correct term—2015 Fall.

**ORACLE**

Home | Work

**Menu**

Search:

My Favorites

- ATB test results
- Checklist Management - Person
- Citizenship and Passport
- Class Roster
- Correct 2014-2015 ISIR records
- Enrollment
- Enrollment Summary
- Enrollment history
- Fee Waiver
- Fiscal Item Types
- HS grad year
- Manage Service Indicators
- Person Comment Entry
- Population Update Process
- Query Viewer
- Report Manager
- Residency Data
- Student Grades
- Student Major
- Student Services Ctr (Student)
- Term History
- Transcript Request
- Tuition Calculation
- View Customer Accounts
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- Visa Permit Data
- Add to Favorites
- Edit Favorites

**Account Details**

ID: 10884114 Stone, Arthur J Business Unit: PCCD1

Account Number: FEE001 - F15 Account Balance: 0.00

Debits: 296.00 Credits: -296.00 Applied: 296.00 Unapplied: 0.00

Find | View All First 1-6 of 6 Last

Item	Term	Amount	Item Details
BOGG BC-Merritt	F15	0.00	<a href="#">Item Details</a>
		10/29/2015	0.00
BOGG BC-Merritt	F15	-276.00	<a href="#">Item Details</a>
		10/29/2015	0.00
Federal Pell Grant - Merritt	F15	-20.00	<a href="#">Item Details</a>
		10/15/2015	0.00
Enrollment Fee-Merritt	F15	276.00	<a href="#">Item Details</a>
		09/13/2015	0.00
Health Fee	F15	18.00	<a href="#">Item Details</a>
		08/09/2015	0.00
Student Campus Use Fee- Merrit	F15	2.00	<a href="#">Item Details</a>
		08/09/2015	0.00

[Return](#)

Select view all to view all charges on the student’s account.

\*\*Print this page to add to the R2T4 Binder.\*\*

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Description	Amount
Tuition and Fees	\$ 276.00
Room	\$ 0.00
Board	\$ 0.00
Health Fee	\$ 18.00
Student Fee	\$ 2.00
<input type="text"/>	\$ <input type="text"/>
Total	\$ 296.00


**Submit**

After Selecting the “Charges” Button in step 5 of the R2T4 form, the above link will pop up. Enter the student’s charges based on their enrollment.

“AC Transit” may be added to a student’s account if they were enrolled in three quarter’s time or more.

Hit Submit to generate the student’s fees.

Lastly,

Hit submit on the R2T4 form to generate the completed form.

At the bottom of the completed form, select “View Printable Page” to print the completed R2T4 record.

**After Completing the R2T4:**

The student's award must be adjusted in PeopleSoft.

Use the Invoke Professional Judgment page in PeopleSoft to adjust the student's award.

To determine how much of an award the student actually earned, we subtract Line O on the completed R2T4 form from the student's initial disbursed amount.

**M. Percentage of unearned Title IV aid**

100% -  = **M.**

Box H

**N. Amount of unearned charges**  
 Multiply institutional charges for the period (Box L) by the percentage of unearned Title IV aid (Box M).

X  = **N.**

Box L                      Box M

**O. Amount for school to return**  
 Compare the amount of Title IV aid to be returned (Box K) to amount of unearned charges (Box N), and enter the lesser amount.

**O.**

In this case, the student was awarded \$1444. According to the R2T4 form Line O, the student owes back \$126.39. The student "earned" \$1317.61, so we will adjust their award amount accordingly.

**ORACLE**

Home | Worklist

**Menu**

- Award Processing
  - Assign Packaging Ratings
  - Assign Packaging Variables
  - Assign Awards to a Student
  - Assign Departmental Awards
  - Invoke Professional Judgment**
  - Perform Mass Action
  - Identify Education Resources
  - Expire Anticipated Aid
  - Batch Expire Anticipated Aid
  - Update School Code
- Aggregates
- Self Service Awarding
- Restricted Aid
- Notification Letter
  - Need Summary Validation
  - View by Date
  - View Award Category Summary
  - View Term Award Summary
  - View Award Earnings Summary
  - View Anticipated Aid Item Type

**Professional Judgement** | Need Summary | Term Summary

Stone, Arthur J      ID: 10884114  
 Aid Year: 2016      Federal Aid Year 2015 - 2016      Institution: PCCD1

Career: UGRD Undergrad      Package Status: Completed  
 Packaging Plan ID: FS-M      Retrieve      Aggregate Source: Default      Validate  
 Repackaging Plan ID: PELL\_ONLY      Repackage      Award Period: Both      Post      Reset

Award	Status	*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10				UGRD	962500300100	BOGG C - Merritt	1,104.00	1,104.00	FS	1	Disbursement +
20			<b>B</b>	UGRD	961200100100	Federal Pell Grant - Merritt	<b>4,332.00</b>	4,332.00	P1	1	<b>Disbursement</b> +

Save    Return to Search    Notify

Professional Judgement | Need Summary | Term Summary

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To Adjust a student's award on the "Invoke Professional Judgment" page, select the Pell award and Enter "B" under action to "Offer/Accept" award. Enter the calculated earned amount into the Offered box then click on "Disbursement" to update the student's disbursements.

**ORACLE** Home

**Menu**

- Award Processing
  - Assign Packaging Ratings
  - Assign Packaging Variables
  - Assign Awards to a Student
  - Assign Departmental Awards
  - Invoke Professional Judgment**
  - Perform Mass Action
  - Identify Education Resources
  - Expire Anticipated Aid
  - Batch Expire Anticipated Aid
  - Update School Code
- Aggregates
- Self Service Awarding
- Restricted Aid
- Notification Letter
- Need Summary Validation
- View by Date
- View Award Category Summary
- View Term Award Summary
- View Award Earnings

**Award Disbursement Detail**

Sequence: 20    Item Type: 961200100100    Net Award Amount: \$1,317.61

Disbursement Plan: P1    \*Split Code: XX  Custom Split

Disb ID	Term	Award Period	Level	Offered	Accepted	Net Disb Balance	Disbursed
01	1154	Academic	U1	1,317.61	1,317.61	1,317.61	361.00
02	1154	Academic	U1	0.00	0.00	0.00	361.00
03	1154	Academic	U1	0.00	0.00	0.00	722.00
04	1162	Academic	U1	0.00	0.00	0.00	0.00
05	1162	Academic	U1	0.00	0.00	0.00	0.00
06	1162	Academic	U1	0.00	0.00	0.00	0.00

OK    Cancel

Click the Checkbox next to "Custom Split" to adjust awards.

Enter the calculated earned amount into the first box for Fall 2015. Zero out all other "offered" disbursements. Hit Ok.

The next page will reflect the student's new award.

**ORACLE** Home    Worklist

**Menu**

- Award Processing
  - Assign Packaging Ratings
  - Assign Packaging Variables
  - Assign Awards to a Student
  - Assign Departmental Awards
  - Invoke Professional Judgment**
  - Perform Mass Action
  - Identify Education Resources
  - Expire Anticipated Aid
  - Batch Expire Anticipated Aid
  - Update School Code
- Aggregates
- Self Service Awarding
- Restricted Aid
- Notification Letter
- Need Summary Validation
- View by Date
- View Award Category Summary

**Professional Judgement**    Need Summary    Term Summary

Stone, Arthur J    ID: 10884114    Institution: PCCD1

Aid Year: 2016    Federal Aid Year 2015 - 2016

Career: UGRD Undergrad    Package Status: Completed    Award Notification

Packaging Plan ID: FS-M    Retrieve    Aggregate Source: Default    **Validate**

Repackaging Plan ID: PELL\_ONLY    Repackage    Award Period: Both    **Post**    Reset

*Nbr	Action	Career	Item Type	Description	Offered	Accepted	Disb Plan	*Split Code	
10		UGRD	962500300100	BOGG C - Merritt	1,104.00	1,104.00	FS	1	Disbursement
20	B	UGRD	961200100100	Federal Pell Grant - Merritt	1,317.61	1,317.61	P1	XX	Disbursement

**Save**    Return to Search    Notify

Professional Judgement | Need Summary | Term Summary

Select "Validate", "post", and SAVE.

The next step is to undisbursed the original disbursement and replace it with the newly calculated disbursement.

You will use the "Disburse with override" link in PeopleSoft for this.

**Disburse Aid W/Override**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

**Search Criteria**

ID: begins with 10884114  
 Academic Institution: = PCCD1  
 Aid Year: = 2016  
 Academic Career: =  
 Term: begins with  
 National ID: begins with  
 Campus ID: begins with  
 Last Name: begins with  
 First Name: begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

**Search Results**

View All

ID	Academic Institution	Aid Year	Academic Career	Term	National ID	Country	NID Short Description
10884114	PCCD1	2016	Undergrad	1162	USA		SSN
10884114	PCCD1	2016	Undergrad	1154	USA		SSN

Enter the Student's ID number, PCCD1 as the Academic Institution, and 2016 for the aid year. Then select the Fall 2015 term "1154".

**Disburse Aid with Override**

Arthur Stone ID: 10884114  
 Aid Year: 2016 Federal Aid Year 2015 - 2016 Institution: PCCD1  
 Term: 1154 2015 Fall Career: Undergrad

**Term Disbursements**

Item Type	Accepted	Authorized	Disb ID	Disb Date
961200100100 Federal Pell Grant - Merritt	\$1,317.61	\$361.00	01 F Pell 1	08/20/2015
961200100100 Federal Pell Grant - Merritt	\$0.00	\$361.00	02 F Pell 2	08/27/2015
961200100100 Federal Pell Grant - Merritt	\$0.00	\$722.00	03 F Pell 3	10/15/2015

Net Disb Bal: \$1,317.61 Disbursed: \$361.00  
 Net Disb Bal: \$0.00 Disbursed: \$361.00  
 Net Disb Bal: \$0.00 Disbursed: \$722.00

Buttons: Authorization, Disbursement, Messages, Override Authorization

Select View ALL to view all disbursements.

1. Click the Checkbox to "Override Authorization"

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Modified 4/19/2020 Marla Williams

2. Hit the Authorization button.
3. Hit the Disbursement button.

\*Follow these steps for all disbursements.

The screenshot shows the Oracle Financial Aid system interface. On the left is a navigation menu with categories like 'My Favorites', 'Peralta Custom', 'Self Service', 'Campus Community', 'Student Admissions', 'Records and Enrollment', 'Curriculum Management', 'Financial Aid', 'File Management', 'Institutional Application Data', 'Federal Application Data', 'Aid Year Activation', 'Verification', 'Financial Aid Term', 'Budgets', 'Ability to Benefit', 'Awards', 'Disbursement', 'Loans', 'Pell Payment', and 'ACG/SMART Grants'. The 'Disbursement' menu item is expanded, showing sub-items like 'Disburse Aid', 'Disburse Aid With Override', 'Process Award Authorizations', 'Process Disbursements', 'View Disbursement Status', 'Maintain User Edit Messages', 'Process User Edit Messages', 'View Calendar Settings', 'Authorization Failure Report', and 'Reconciliation Report'.

The main content area is titled 'Disburse Aid with Override' and displays information for student Arthur Stone (ID: 10884114). The student's aid year is 2016 (Federal Aid Year 2015 - 2016) and their term is 1154 (2015 Fall). The institution is PCCD1 and the career is Undergrad.

Below this information is a table of 'Term Disbursements' with three rows:

Item Type	Accepted	Authorized	Disb ID	Disb Date
961200100100 Federal Pell Grant - Merritt	\$1,317.61	\$1,317.61	01 F Pell 1	08/20/2015
961200100100 Federal Pell Grant - Merritt	\$0.00	\$0.00	02 F Pell 2	08/27/2015
961200100100 Federal Pell Grant - Merritt	\$0.00	\$0.00	03 F Pell 3	10/15/2015

Each row includes a 'Net Disb Bal' of \$1,317.61, \$0.00, and \$0.00 respectively. The interface also features buttons for 'Authorization', 'Disbursement', and 'Messages' for each item, along with a 'Save' button and navigation controls at the bottom.

By disbursing aid with override, you are zeroing out all unearned aid.

The amount the student will have to repay to the college will be reflected in their student account after this step.

The last step in the R2T4 process would be to create a letter to send to the student to notify them to repay.