# **Peralta Community College District**



# **Financial Aid**

**R2T4** 

**Reference document** 

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



Select Term 1154 and Aid Yr 2016

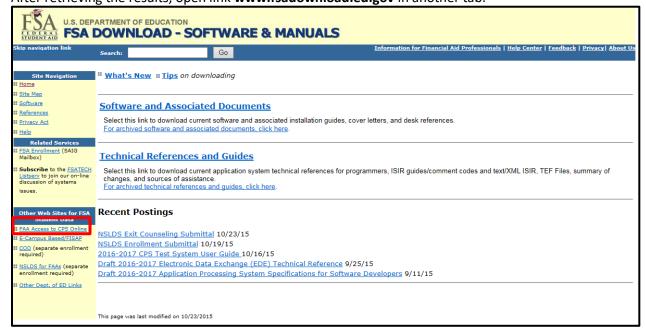
Download results in: Excel SpreadSheet CSV Text File XML File (21 kb)

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.

First 1-46 of 46 Last

After retrieving the results, open link www.fsadownload.ed.gov in another tab.

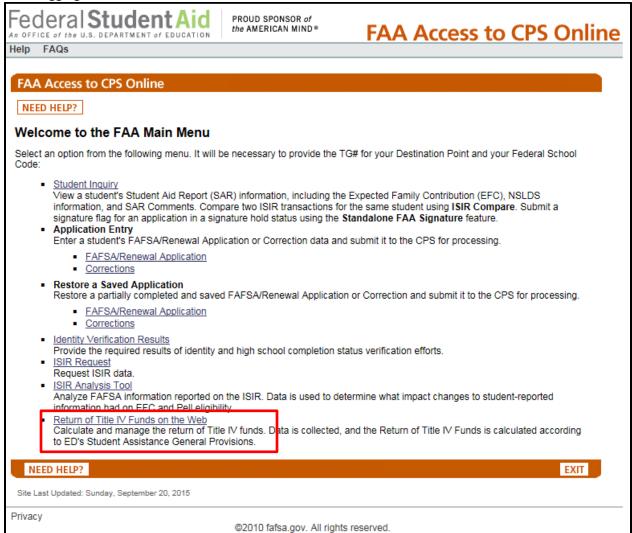


Created 3/25/2020 David Nguyen

Modified 4/19/2020 Marla WIlliams

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

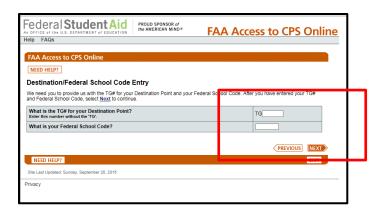
After logging on, select Return of Title IV Funds on the Web



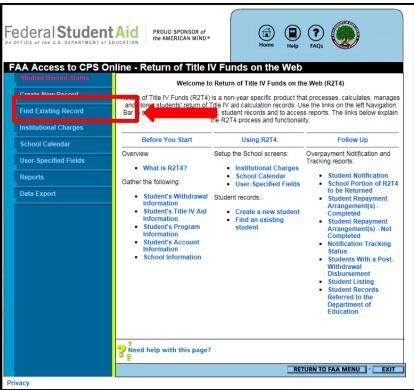
Federal Student Aid Logo, NSLDS, and FAFSA are trademarks of the U.S. Department of Education

## Enter the TG # and federal school code

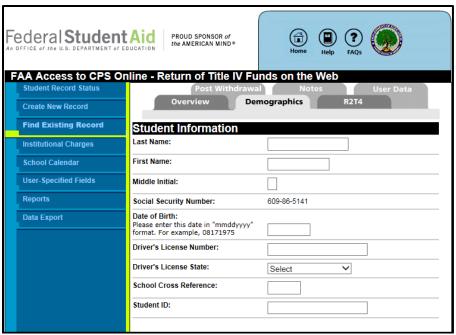
(Merritt TG# 50324; Federal School Code 001267)



Select Create new record from the Left column.

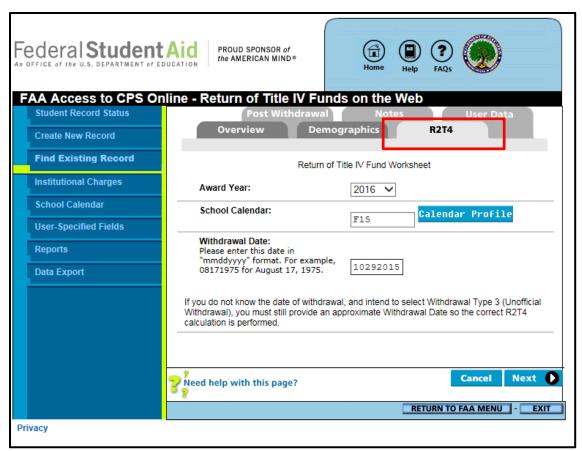


From the Query, enter student SSN and hit submit.



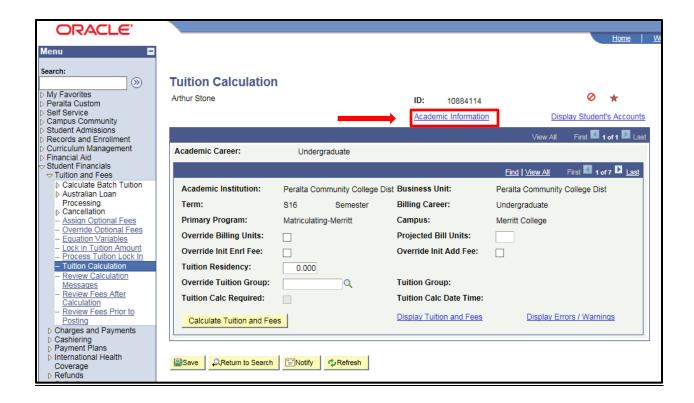
Enter Student's Last Name, First Name, and date of Birth. The other fields are optional and not required.

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

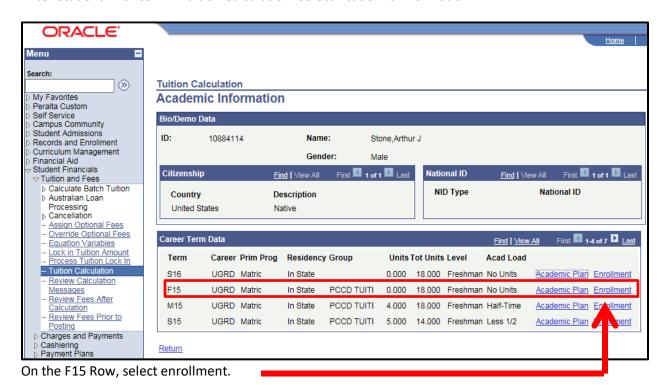


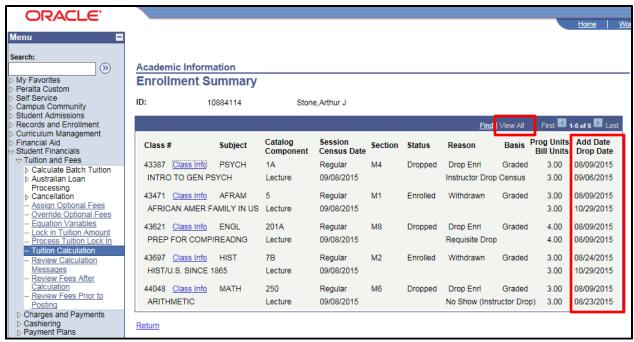
- -Select 2016 for the award year.
- -Click on Calendar Profile to select the school calendar. For Fall 2015, Select the F15 R2T4 Calendar.
- -Enter **Withdrawal Date**. The withdrawal date can be found on the query, but should be verified through Tuition Calculation.

#### To Verify Student Term withdrawal date:



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



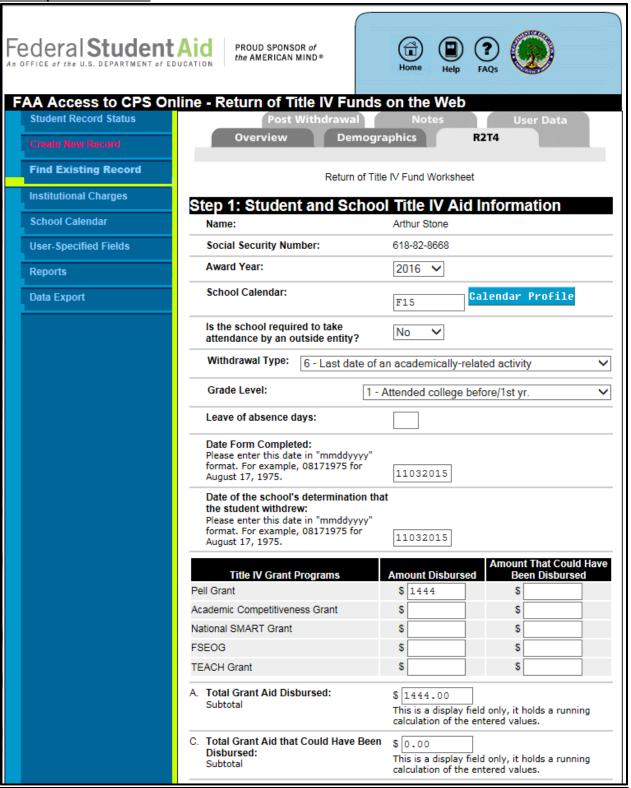


<sup>-</sup>Select View All to view all enrollment summary for the student.

<sup>-</sup>Determine the student's withdrawal date by finding the last drop date.

<sup>\*\*</sup>Print this page to add to R2T4 binder.\*\*

#### **To Complete R2T4 Form:**

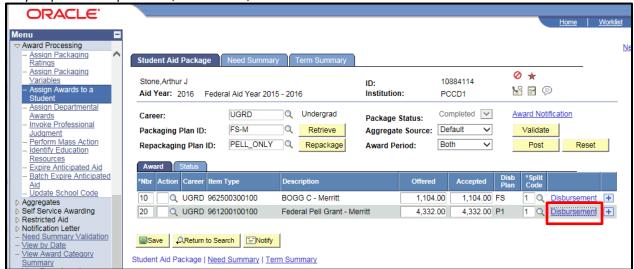


Always select the following:

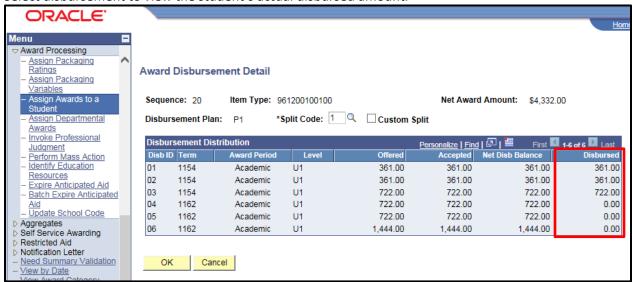
- Is the school required to take attendance by an outside entity? NO
- Withdrawal Type: 6- Late date of an academically-related activity.

- 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.



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



• 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."

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

Please enter this date in "mmddyyyy' format. For example, 08171975 for August 17, 1975.	10292015		
Hours scheduled to complete:	(clock hour only	)	
	ned Title IV A	id Due fro	om the
tep 5: Amount of Unear Chool Total Institutional Charges:	ned Title IV A	Charges	om the

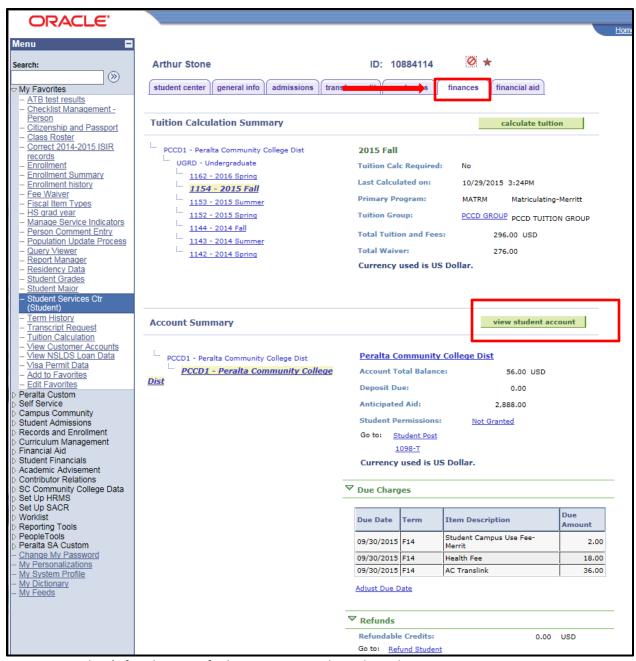
- -Verify that the Withdrawal date in Step 2 of the R2T4 form is correct.
- -Enter the Institutional Charges by clicking on the "Charges" button.

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

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

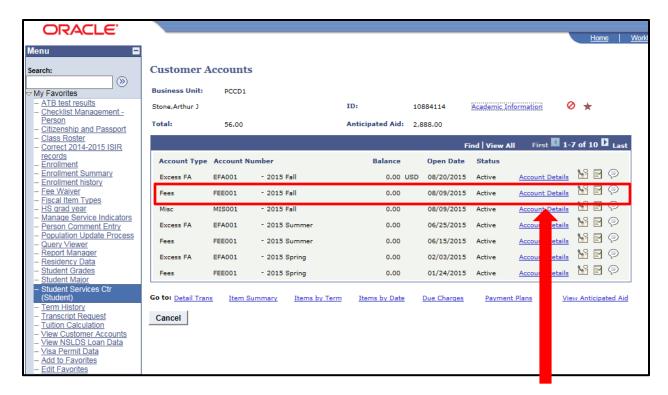
For R2T4 purposes only, we will use the following uniform tuition fee schedule:

Full Time	\$552
Three Quarters Time	\$414
Half Time	\$276
Less Than Half Time	\$138



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.

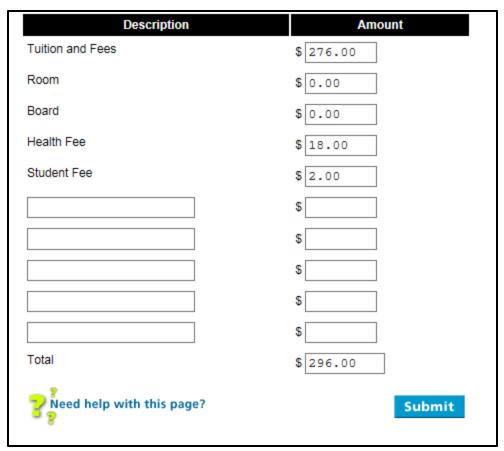


Then click on the Account Details for "fees". Make sure you are selecting the correct term—2015 Fall.



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

<sup>\*\*</sup>Print this page to add to the R2T4 Binder.\*\*



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.

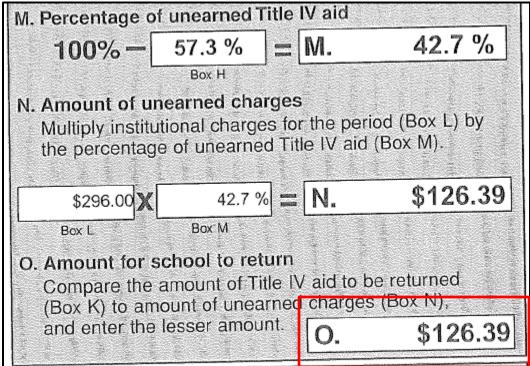
At the bottom of the completed form, select "View Printable Page" to print the completed R2T4 record.

#### **After Completing the R2T4:**

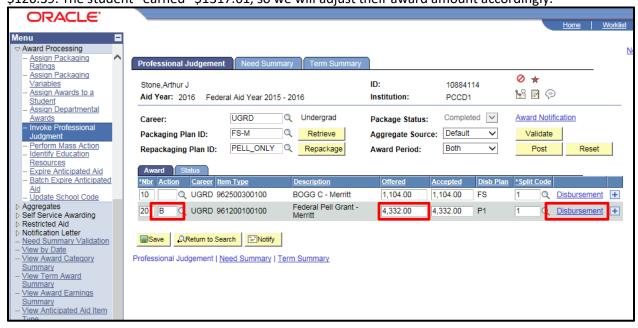
The student's award must be adjusted in PeopleSoft.

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

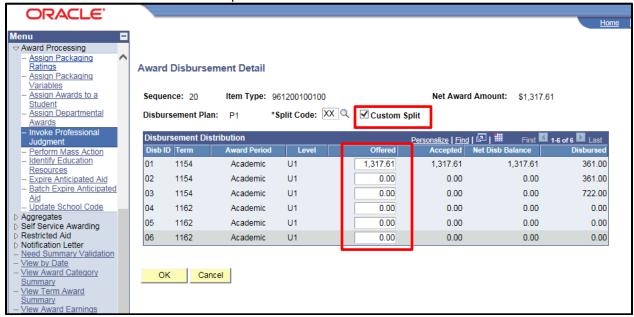
To determine how much of an award the student actually earned, we subtract Line O on the completed R2T4 form from the student's initial disbursed amount.



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.



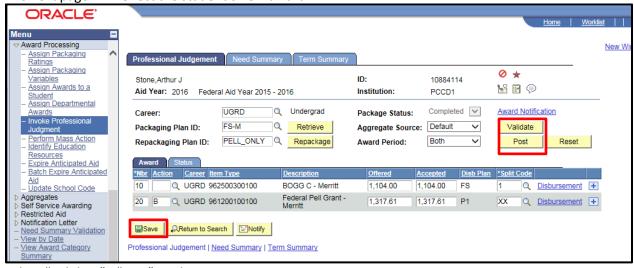
To Adjust a student's award on the "Invoke Professional Judgment" page, select the Pell award and Enter "B" under action to "Offer/Accept" award. Enter the calculated earned amount into the Offered box then click on "Disbursement" to update the student's disbursements.



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.

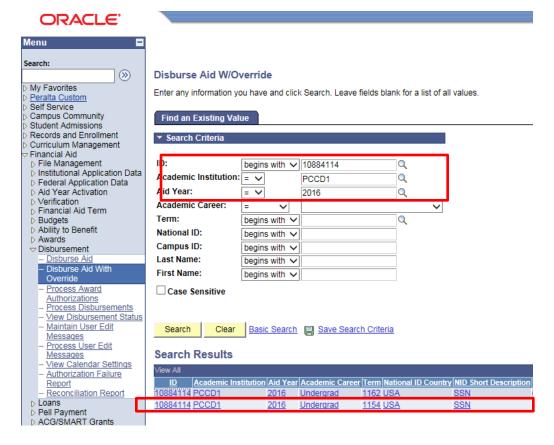
The next page will reflect the student's new award.



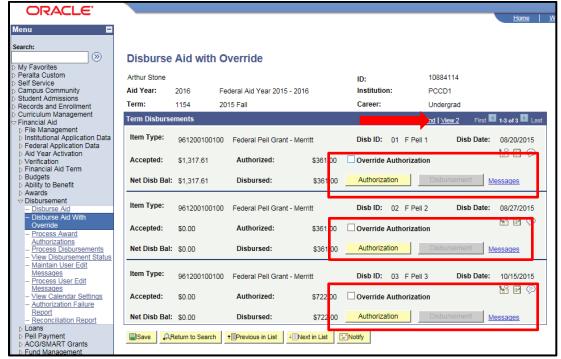
Select "Validate", "post", and SAVE.

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.



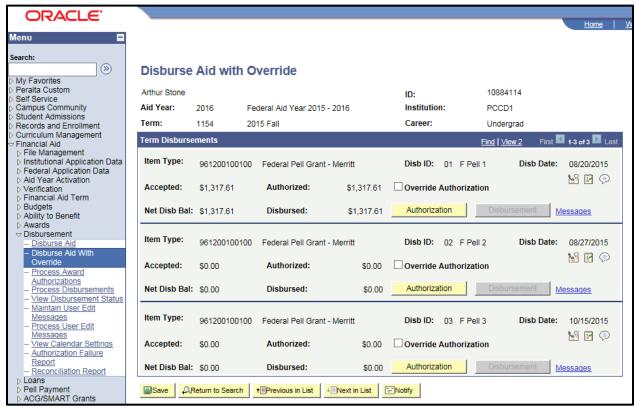
Enter the **Student's ID number**, **PCCD1** as the Academic Institution, and **2016** for the aid year. Then select the Fall 2015 term "**1154**".



Select View ALL to view all disbursements.

1. Click the Checkbox to "Override Authorization"

- 2. Hit the Authorization button.
- Hit the Disbursement button.
- \*Follow these steps for all disbursements.



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.