

Virtual Title IV Technical Assistance Report			
School Name	Merritt College		
OPE ID	00126700		
School Contact	Dr. Lilia Chavez		
Contact Information	lchavez@peralta.edu		
Date	9/8/2020 through 9/10/2020		
Lead	Leslie Acosta		
Support	Eric Santiago		
Support	Raúl Galván		
Support	Douglas Pineda Robles		
Area of Concern	Return of Title IV		
FSA Resource	https://ifap.ed.gov/fsa-assessments/04-02-2019-return-title-iv-funds		
Observation	Not Applicable		
Responsible Office(s)	<table border="0" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> President's Office <input type="checkbox"/> VP Academic Affairs <input checked="" type="checkbox"/> VP Student Affairs <input checked="" type="checkbox"/> Financial Aid Office <input type="checkbox"/> Business Office </td> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> Registrar's Office <input type="checkbox"/> Campus Security <input type="checkbox"/> Information Technology <input type="checkbox"/> Admissions Office <input type="checkbox"/> Other: Click here to enter text. </td> </tr> </table>	<input type="checkbox"/> President's Office <input type="checkbox"/> VP Academic Affairs <input checked="" type="checkbox"/> VP Student Affairs <input checked="" type="checkbox"/> Financial Aid Office <input type="checkbox"/> Business Office	<input type="checkbox"/> Registrar's Office <input type="checkbox"/> Campus Security <input type="checkbox"/> Information Technology <input type="checkbox"/> Admissions Office <input type="checkbox"/> Other: Click here to enter text.
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Comments	<p>1. Update policy for determining Last Date of Attendance for R2T4 calculations to remove language indicating that the student makes such determination. https://www.merritt.edu/financial-aid/merritt-college-financial-aid-return-to-title-iv-r2t4-withdrawal-policy/</p> <p>2. Recommendation to review options for students to notify school of intent to withdraw. Include how to initiate the process of notification if the student is incapacitated in any way. In Process</p> <p>3. Recommendation to attach Exit Counseling Guide for Federal Student Loan Borrowers (and URL link) to email to complete required online exit counseling. See attachment #1</p> <p>4. Review and update R2T4 policy and processes. https://www.merritt.edu/financial-aid/merritt-college-financial-aid-return-to-title-iv-r2t4-withdrawal-policy/</p>		

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	<p>5. Ensure Consumer Information and Policies & Procedures pertaining to R2T4 are consistent across all platforms (website, school catalog, student handbook). https://www.merritt.edu/financial-aid/satisfactory-academic-progress-2/ Changes submitted for 2021-2022 Catalog</p> <p>6. Recommendation to include institutional, state, and accrediting agency refund policies to consumer information, detailed procedures on how to withdraw (all options) and consequences for withdrawing (SAP, overpayment, school balance, grace period. etc.) https://www.merritt.edu/financial-aid/merritt-college-financial-aid-return-to-title-iv-r2t4-withdrawal-policy/</p>
Target Date	12/31/2020
Institution Response	Click here to enter text.
Resolution Date	Click here to enter date.

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Area of Concern	Satisfactory Academic Progress		
FSA Resource	https://ifap.ed.gov/fsa-assessments/02-27-2019-satisfactory-academic-progress		
Observation	Choose an item.		
Responsible Office(s)	<table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border: none;"> <input type="checkbox"/> President’s Office <input checked="" type="checkbox"/> VP Academic Affairs <input checked="" type="checkbox"/> VP Student Affairs <input checked="" type="checkbox"/> Financial Aid Office <input type="checkbox"/> Business Office </td> <td style="width: 50%; border: none;"> <input type="checkbox"/> Registrar’s Office <input type="checkbox"/> Campus Security <input type="checkbox"/> Information Technology <input checked="" type="checkbox"/> Admissions Office <input type="checkbox"/> Other: Click here to enter text. </td> </tr> </table>	<input type="checkbox"/> President’s Office <input checked="" type="checkbox"/> VP Academic Affairs <input checked="" type="checkbox"/> VP Student Affairs <input checked="" type="checkbox"/> Financial Aid Office <input type="checkbox"/> Business Office	<input type="checkbox"/> Registrar’s Office <input type="checkbox"/> Campus Security <input type="checkbox"/> Information Technology <input checked="" type="checkbox"/> Admissions Office <input type="checkbox"/> Other: Click here to enter text.
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Comments	<p>1. Recommendation is to have consistent policies and processes for Satisfactory Academic Progress (SAP) across all platforms including Consumer Information and Policy and Procedures Manual. https://www.merritt.edu/financial-aid/satisfactory-academic-progress-2/ Changes submitted to 2021-2022 Catalog to include link to policy</p> <p>2. The school should review its policy on how many times a student can change majors. We encourage you determine the impact of not having a set policy on the number of times a student can change majors and what impact it may have on the student maintaining eligibility for Title IV funds and degree completion. In Process</p> <p>3. Clarify that non-passing grades will be considered as hours attempted and unearned (see page 68 of Policies & Procedures manual). Also consider grade</p>		

	<p>“P”, that is listed on both passing grades and non-passing grades. In Process 4. Recommendation is to review current policy for students with a bachelor’s degree to appeal to apply for a federal student aid loan to ensure institution is following Federal Regulation. Completed-Website Updated- https://www.merritt.edu/financial-aid/loans/ Regulation can be found in FSA Handbook Chapter #1 (1-14) and https://www2.ed.gov/policy/highered/reg/hearulemaking/2009/sap.html#appeals</p>
Target Date	2/26/2021
Institution Response	Click here to enter text.
Resolution Date	Click here to enter date.

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Area of Concern	Fiscal Management	
FSA Resource	https://ifap.ed.gov/fsa-assessments/04-03-2019-fiscal-management	
Observation	Not Applicable	
Responsible Office(s)	<input type="checkbox"/> President’s Office <input checked="" type="checkbox"/> VP Academic Affairs <input checked="" type="checkbox"/> VP Student Affairs <input checked="" type="checkbox"/> Financial Aid Office <input checked="" type="checkbox"/> Business Office	<input type="checkbox"/> Registrar’s Office <input type="checkbox"/> Campus Security <input type="checkbox"/> Information Technology <input type="checkbox"/> Admissions Office <input type="checkbox"/> Other: Click here to enter text.
Comments	<p>1. Recommendation is for the institution to define the roles and responsibilities in the administration of Title IV Cash Management. Roles and responsibilities should include staff on campus and at the District office.</p> <p>2.Recommendation is to have Fiscal Management policies and processes that are consistent across all platforms including Consumer Information and Policy and Procedures Manual.</p> <p>3. Write the processes for documenting Reconciliation and update the Policy and Procedures Manual accordingly.</p>	

	4. Recommendation to include Financial Aid Office staff in Reconciliation training.	
Target Date	2/26/2021	
Institution Response	Click here to enter text.	
Resolution Date	Click here to enter date.	
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Area of Concern	Policies and Procedures Manual	
FSA Resource	https://ifap.ed.gov/fsa-assessments/03-08-2019-guide-creating-policies-and-procedures-manual	
Observation	Not Applicable	
Responsible Office(s)	<input type="checkbox"/> President's Office <input checked="" type="checkbox"/> VP Academic Affairs <input type="checkbox"/> VP Student Affairs <input checked="" type="checkbox"/> Financial Aid Office <input type="checkbox"/> Business Office	<input type="checkbox"/> Registrar's Office <input type="checkbox"/> Campus Security <input type="checkbox"/> Information Technology <input type="checkbox"/> Admissions Office <input type="checkbox"/> Other: Click here to enter text.
Comments	1. Recommendation is to expand the Policy and Procedures Manual to follow Federal Regulation standards.	
Target Date	3/31/2021	
Institution Response	Click here to enter text.	
Resolution Date	Click here to enter date.	
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Area of Concern	General Recommendations	
FSA Resource	Not Applicable	
Observation	Not Applicable	

Responsible Office(s)	<input checked="" type="checkbox"/> President's Office <input checked="" type="checkbox"/> VP Academic Affairs <input type="checkbox"/> VP Student Affairs <input checked="" type="checkbox"/> Financial Aid Office <input type="checkbox"/> Business Office	<input type="checkbox"/> Registrar's Office <input type="checkbox"/> Campus Security <input type="checkbox"/> Information Technology <input type="checkbox"/> Admissions Office <input type="checkbox"/> Other: Click here to enter text.
Comments	Recommendations: 1- Ensure FA staff continues to participate in MSURSD trainings as well as the annual FSA conference with the goal of being cross train. 2- Consider hiring a Financial Aid Office Supervisor and a FAO specialist.	
Target Date	7/30/2021	
Institution Response	Click here to enter text.	
Resolution Date	Click here to enter date.	