<mark>Title IV (R2T4) Funds Return Procedure</mark>

PROCESS & PROCEDURE FOR RUNNING THE ALL F'S (UNOFFICIAL RESIGNATIONS)

We are required by regulations to do a Title IV Return Calculation whenever a student receives Fs in every class, for the semester. For every day a student is enrolled they are earning a small portion of their Title IV aid. The LDA (Last Day of Attendance) for the student that earned all F's, will be the date that we use to determine how much aid the student earned. We must return Title IV funds on the unearned aid. See the screen clipping of this from the FSA Handbook:

When students fail to earn a passing grade in any class

When a student fails to earn a passing grade
DCL GEN-04-03, February 2004

An institution must have a procedure for determining whether a Title IV recipient who began attendance during a period completed the period or should be treated as a withdrawal. We do not require that an institution use a specific procedure for making this determination.

If a student earns a passing grade in one or more of his or her classes offered over an entire period, for that class, an institution may presume that the student completed the course and thus completed the period. If a student who began attendance and has not officially withdrawn fails to earn a passing grade in at least one course offered over an entire period, the institution must assume, for Title IV purposes, that the student has unofficially withdrawn, unless the institution can document that the student completed the period.

Testing the Use of a Grading Policy

If a school uses its grading policy to determine whether students with failing grades have unofficially withdrawn, during compliance audits and program reviews, student records might be examined to determine whether the grades assigned accurately represent the students' attendance.

FSA HB July 2014

5–56

THESE FUNDS MUST BE RETURNED WITHIN 45 DAYS OF THE DATE OF DETERMINATION THAT THE STUDENT WAS AN UNOFFICIAL RESIGNATION (the date grades were required to be posted).

ALL F'S Return Process

WHAT: TITLE IV Aid consists of: LOANS= Direct Loans and Perkins Loans; GRANTS= PELL, SEOG, & TEACH. It does not include Scholarships, ALT, BOT, or CAL.

WHEN: Two days after grades are due, at the end of a semester, the process and procedure will be started.

WHERE: In BANNER, the SFRNOWD report.

Withdrawals

This chapter explains how Title IV funds are handled when a recipient of those funds ceases to be enrolled (100% withdrawal) prior to the end of a payment period or period of enrollment. These requirements do not apply to a student who does not actually begin attendance or cease attendance at the school. For example, when a student reduces their course load from 12 credits to 9 credits, the reduction represents a change in enrollment status, not a withdrawal. Therefore, no Return of Title IV Funds (R2T4) calculation is required.

The R2T4 regulations do not dictate an institutional refund policy. Instead, a school is required to determine the earned and unearned portions of Title IV aid as of the date the student ceased attendance based on the amount of time the student spent in attendance or, in the case of a clock-hour program, was scheduled to be in attendance. A pro rata schedule is used to determine the amount of FSA funds the student has earned at the time of withdrawal up **through the 60% point** in each payment period or period of enrollment. **After the 60% point** in the payment period or period of enrollment, a student has earned 100% of the FSA funds the student received and was scheduled to receive during the period.

For a student who withdraws after the 60% point-in-time, there are no unearned funds. However, a school must still determine whether the student is eligible for a post-withdrawal disbursement (PWD).

The Department published final regulations on September 2, 2020 that established several new withdrawal exemption categories. If met, these withdrawal exemptions allow a student who has otherwise withdrawn or left the institution to not be considered a withdrawal for Title IV purposes. These exemptions, along with other R2T4 regulations, will be discussed in detail throughout this volume.

R2T4 TERMINOLOGY

- **Title IV Aid** – Federal financial aid provided to eligible college students. Title IV aid consists of student loans, such as Direct Loans and Perkins Loans; also grants, such as the Pell Grant, the Supplemental Education Opportunity Grant (SEOG), and the Teacher Education Assistance for College and Higher Education (TEACH) Grant. It does not include Scholarships, Alternative Loans, BOT, or CAL loans.
- **Academic Year** – The time period from the first day of class for the fall semester to the last day of the spring semester. It also includes the first summer term when awarding financial aid.
- **Census** – It is the 12th day of class.
- **R2T4** – The term used to identify the university's return of unearned aid to the federal government after students resign from school. R2T4 is Return to Title IV. R2T4s get processed in different intervals throughout the academic year. There are different processes for R2T4s that occur prior to the census date in Fall or Spring, after the census date in Fall or Spring, after 60% completion in Fall or Spring, and for Fall or Spring unofficial resignations. There are also similar Summer resignation processes for R2T4s.
- **RPRTIVC** – The Banner report used to process R2T4s. It is **ALWAYS** ran in Audit mode first. You may also run the report in Audit mode a second time to see if your data entries in Banner have processed correctly. After the information has been reviewed, and corrected as necessary, the RPRTIVC is ran in Update mode which is the final report. After Update mode is ran in Banner, the RPRTIVC data is reset and cannot be retrieved, therefore it is very important to save the report on the T: drive.
- **Eligible Disbursement** – Title IV Aid that a student qualifies for under FAFSA. It is shown on the RPRTIVC report as "ELIG DISB".
- **Disbursement** – Title IV Aid that was disbursed to the student, which is shown on the RPRTIVC report as "DISB". It can be verified by viewing the RSIAREV screen in Banner.
- **Not Disbursed** – Title IV Aid that has not been disbursed to the student, which is shown on the RPRTIVC report as "NOT DISB". By using the Tracking tab on the ROARMAN screen or using the Banner search function to find the RRAREQ screen, you can verify if the student has completed the required requests to receive the funds.
- **Post-withdrawal Disbursement** – Title IV Aid that is eligible to be disbursed after a student resigns. It is shown on the RPRTIVC report as "POST-WD DISB".
- **Eligibility Worksheet** – A MS Excel sheet used for all student resignations that occur prior to Census. The Eiligibility Worksheet (EW) details a summary of the student's activity of adding and dropping classes. The Banner SFASTCA screen is used to report the student activity. It is exported as an MS Excel sheet to complete the EW. After Census, we assume the students are attending classes and EW no longer needs to be performed. Templates for the EW are located at *T:/SFA/R2T4/Eligibility WS, Calculations & Reporting Info/ELIGIBILITY WORKSHEET*.
- **Perfect Forms –** Emails sent from the Registrar's Office with the name of the student who is resigning. These emails are printed and added to the student's R2T4 packet for documentation.
- **RHACOMM Category Code –** The code that is entered in the Banner RHACOMM screen. Each semester has a unique code, for example, fall's code is **R2T4FA** . Each student resignation should have a RHACOMM note in Banner with a category code.
- **Last of Attendance (LDA) –** On the RPRTIVC, it is the last date that a student officially attended SHSU.
- **Student Letter –** The official letter regarding the Return of Title IV funds that is required to be sent to most of the students who have resigned from the university. Always use SHSU letterhead and envelopes for these letters. A template is located at *T:/SFA/R2T4/Letters to Students*. A letter template for a Post-Withdrawal Disbursement is located at *T:SFA/R2T4/PostWithdrawalDisb*.
- **Back-Dated Resignations**: Sometimes the Registrar's office will change the last date of attendance for a student. Often, resignations are back-dated to before the first class day. If they

truly never attended any classes, you will need to cancel all of their aid. If they did attend classes, the original resignation calculation stands as it is. The calculation is not dependent on the University's refunds.

ALL F'S Return Procedure

INSTRUCTIONS FOR ALL F'S- UNOFFICIAL RESIGNATIONS (do not begin this until 2 days after the date grades are due to be posted to allow for grade changes). All F's for each term: Fall – December, Spring – May, and Summer – August)

1. In Banner go to **SFRNOWD** = the report that will show all students that received all Fs for the semester
2. ROLL FORWARD
3. UNDER "PRINTER CONTROL" PRINTER: type "DATABASE"; ROLL FORWARD
4. Under "Parameter Values" for **01**-Term code, put YEAR and semester CODE (EX: 201420); FALL: _ _ _ _ 80 SPRING: _ _ _ _ 20 SUMMER: _ _ _ _ 40
5. YOU WILL NEED TO INSERT (1) RECORD: TO THE LEFT/BELOW -**02** STUDENT LEVEL UG- INSERT RECORD BY USING **F6**, THEN UNDER VALUES CHANGE AS SHOWED BELOW to "GR". **03**- FINANCIAL AID SELECTION: "F" **04**- VERIFY ENROLLMENT: "N" **07**- VERIFY HISTORY: "Y"

	Printer	DATABASE	•••	Submit Time	
	Special Print			MIME Type	None
	Lines	55		PDF Font	•••

PARAMETER VALUES

er *		Parameters	Values
	•••	Term Code	202340
		Student Level(s)	UG
		Student Level(s)	GR
		Financial Aid Selection	F
		Verify Enrollment	N
		Start Date	
		End Date	
		Verify History	Y
		Grade which reflects drop.	NC*
		Grade which reflects drop.	Q*
		Grade which reflects drop.	F
		Grade which reflects drop.	F
		Grade which reflects drop.	F*
		Grade which reflects drop.	W
		Grade which reflects drop.	W*
		Grade which reflects drop.	DQ
		Grade which reflects drop.	NC
		Grade which reflects drop.	Q
		Campus Selection	%
		Sort Order	I
		Application ID	
		Selection ID	

6. ROLL FORWARD AND SAVE
7. CLICK ON "RELATED" : REVIEW OUTPUT (IT TAKES ABOUT 2 MINUTES TO RUN)

8. CLICK ON TOOLS FILE NAME (LITTLE DOWN ARROW) UNTIL THE FILE APPEARS ON THE SCREEN; DBL CLICK ON THE FILE TO SHOW THE RECORDS (YOU ARE LOOKING FOR A ".LIS" FILE)
9. GO TO "TOOLS": SHOW DOCUMENT (SAVE & PRINT FILE); CLICK "SAVE FILE" – SAVES TO YOUR BANNER OUTPUT FILE, CLICK OK
10. GO TO THAT FILE AND OPEN IT IN WORD (FIRST PAGE WILL BE BLANK)
11. CHANGE FONT TO SIZE 8, MARGINS TO NARROW, AND ORIENTATION TO LANDSCAPE- leave Font: Courier New
12. FILE WILL LOOK LIKE PICTURE BELOW…

13. SAVE THE FILE AS A WORD DOCUMENT IN T:/SFA/R2T4/ then use the Folder of the year you are in / use the All F's Folder for the Semester you are in
14. PRINT OUT FILE AND STAPLE

SCREENPRINTS NEEDED FOR SFRNOWD REPORT ON STUDENTS:

1. YOU WILL NEED TO PRINT THE FOLLOWING SCREENS FOR EACH STUDENT ON THE REPORT :
   a. **SFAWDRL**- COURSE DETAIL – ROLL FORWARD 3 TIMES TO GET TO THE LDA screen; HIGHLIGHT THE MOST RECENT LDA DATE; this needs to be printed on all students ;
2. WRITE, IN YOUR OWN HANDWRITING, THE MOST RECENT **LDA** (LAST DATE OF ATTENDANCE) FROM THE SFAWDRL SCREEN AND WRITE IT ON THE SFRNOWD REPORT ON EACH STUDENT, THEN HIGHLIGHT THE ONES THAT ARE BEFORE THE 60% DATE. (AFTER THE 60% POINT IN THE PAYMENT PERIOD A STUDENT HAS EARNED 100% OF THE TITLE IV FUNDS HE OR SHE WAS SCHEDULED TO RECEIVE.)
3. **DON'T FORGET**: FOR THE ONES THAT HAD THE MOST RECENT LDA AFTER THE 60% DATE YOU WILL NEED TO ENTER A COMMENT IN RHACOMM: (SEMESTER, YEAR)-

UNOFFICIAL RESIGNATION, LDA _ _/_ _/_ _ (MM,DD,YY)- NO AID TO RETURN, and add a CATEGORY CODE THAT APPLIES: UNOFRF (for fall), UNOFRS (for Spring), or UNOFRM (for Summer).

4. YOU CAN FIND THE 60% DATE BY GOING TO **T: SFA: R2T4: TITLE IV when 60% reached Calc Worksheet** – USE THE TAB OF THE SEMESTER YOU ARE WORKING; FIND THE 60%+ DATE. ANYTHING ON OR AFTER THAT DATE- THERE IS NO AID TO RETURN. (see the screen print….)

Date	Day	Total Days	% Earned		Date	Day	Total Days	% Earned		Date	Day	Total Days	% Earned		Regulations:
															Regulations:
1/14/2015	1	105	0.95%		2/28/2015	46	105	43.81%		4/23/2015	91	105	86.67%		w
1/15/2015	2	105	1.90%		3/1/2015	47	105	44.76%		4/24/2015	92	105	87.62%		
1/16/2015	3	105	2.86%		3/2/2015	48	105	45.71%		4/25/2015	93	105	88.57%		
1/17/2015	4	105	3.81%		3/3/2015	49	105	46.67%		4/26/2015	94	105	89.52%		
1/18/2015	5	105	4.76%		3/4/2015	50	105	47.62%		4/27/2015	95	105	90.48%		
1/19/2015	6	105	5.71%		3/5/2015	51	105	48.57%		4/28/2015	96	105	91.43%		
1/20/2015	7	105	6.67%		3/6/2015	52	105	49.52%		4/29/2015	97	105	92.38%		
1/21/2015	8	105	7.62%		3/16/2015	53	105	50.48%		4/30/2015	98	105	93.33%		
1/22/2015	9	105	8.57%		3/17/2015	54	105	51.43%		5/1/2015	99	105	94.29%		
1/23/2015	10	105	9.52%		3/18/2015	55	105	52.38%		5/2/2015	100	105	95.24%		
1/24/2015	11	105	10.48%		3/19/2015	56	105	53.33%		5/3/2015	101	105	96.19%		
1/25/2015	12	105	11.43%		3/20/2015	57	105	54.29%		5/4/2015	102	105	97.14%		
1/26/2015	13	105	12.38%		3/21/2015	58	105	55.24%		5/5/2015	103	105	98.10%		
1/27/2015	14	105	13.33%		3/22/2015	59	105	56.19%		5/6/2015	104	105	99.05%		
1/28/2015	15	105	14.29%		3/23/2015	60	105	57.14%		5/7/2015	105	105	100.00% last exam day		
1/29/2015	16	105	15.24%		3/24/2015	61	105	58.10%							
1/30/2015	17	105	16.19%		3/25/2015	62	105	59.05%							
1/31/2015	18	105	17.14%		3/26/2015	63	105	60.00%							
2/1/2015	19	105	18.10%		3/27/2015	64	105	60.95%							
2/2/2015	20	105	19.05%		3/28/2015	65	105	61.90%							
2/3/2015	21	105	20.00%		3/29/2015	66	105	62.86%							
2/4/2015	22	105	20.95%		3/30/2015	67	105	63.81%							
2/5/2015	23	105	21.90%		3/31/2015	68	105	64.76%							
2/6/2015	24	105	22.86%		4/1/2015	69	105	65.71%							
2/7/2015	25	105	23.81%		4/2/2015	70	105	66.67%							
2/8/2015	26	105	24.76%		4/3/2015	71	105	67.62%							
2/9/2015	27	105	25.71%		4/4/2015	72	105	68.57%							
2/10/2015	28	105	26.67%		4/5/2015	73	105	69.52%							
2/11/2015	29	105	27.62%		4/6/2015	74	105	70.48%							
2/12/2015	30	105	28.57%		4/7/2015	75	105	71.43%							
2/13/2015	31	105	29.52%		4/8/2015	76	105	72.38%							
2/14/2015	32	105	30.48%		4/9/2015	77	105	73.33%							
2/15/2015	33	105	31.43%		4/10/2015	78	105	74.29%							
2/16/2015	34	105	32.38%		4/11/2015	79	105	75.24%							
2/17/2015	35	105	33.33%		4/12/2015	80	105	76.19%							
2/18/2015	36	105	34.29%		4/13/2015	81	105	77.14%							
2/19/2015	37	105	35.24%		4/14/2015	82	105	78.10%							
2/20/2015	38	105	36.19%		4/15/2015	83	105	79.05%							

Sum 15, POT I, POT II,MM | **S15** | Fall 14 | Sum 14, POT I, POT II,MM | S14 | F13 | Sum13,POT I, POT II,MM | S13 | F12 | Sum11

- If the student had a grant or scholarship- note the hours and LDA. This aid <u>may</u> have to be returned if the student was not in enough hours at Census Date- based on the LDA.
- Also- if the LDA was within the First Class Day and Census you may have to adjust the budget to what was in place when the loan paid out.

5. ONCE YOU HAVE HIGHLIGHTED THE STUDENTS THAT ARE BEFORE THE 60+% DATE, YOU NEED TO PRINT THE FOLLOWING SCREENS (in this order)– Open a WORD document and do Screen Clipping instead of printing the BANNER SCREEN:

   1. ROARMAN - screen clip to Word
   2. SFAWDRL: 1ST SCREEN - screen clip to Word- continue the Word document, then roll forward for next SFAWDRL screen
   3. SFAWDRL: 2nd SCREEN - screen clip to Word- there could be several screens- continue the Word document, then roll forward for SFAWDRL next screen
   4. SFAWDRL: 3RD SCREEN - screen clip to Word- continue the Word document; Close the screen
   5. SHATERM:1st SCREEN – change the "Start Term" field to the Term you are reviewing; CTL Pg Down- which takes you to the Second Tab: Term GPA and Course Detail Information: screen clip this to Word- continue the Word Document; Close the Screen
   6. RNANA(yy): DEMOGRAPHIC TAB - screen clip to Word- continue the Word document; Close the screen
   7. SPAIDEN: ADDRESS TAB - screen clip to Word; Close the screen; Print the Word Document; THEN Close the Word Document
   8. RPAAWRD: AWARD SCHEDULE tab - <u>print</u> this BANNER screen; Close the screen

15. BEFORE DOING ANYTHING ELSE SEND A LIST OF ALL SAM IDs, NAMES, and LDAs (last date of attendance) TO
THE REGISTRAR'S OFFICE (DAVID HINTZEL) FOR THEIR REPORTING PURPOSES. To create this list: Open the SFRNOWD file (that was saved in your BANNER OUTPUT)- in Excel:
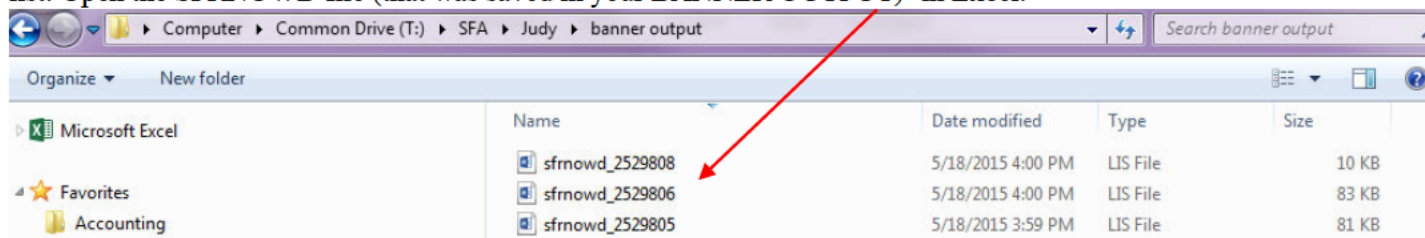
When you open it in Excel: Step 1 of the Text Import Wizard- Choose "Delimited", the "Next":
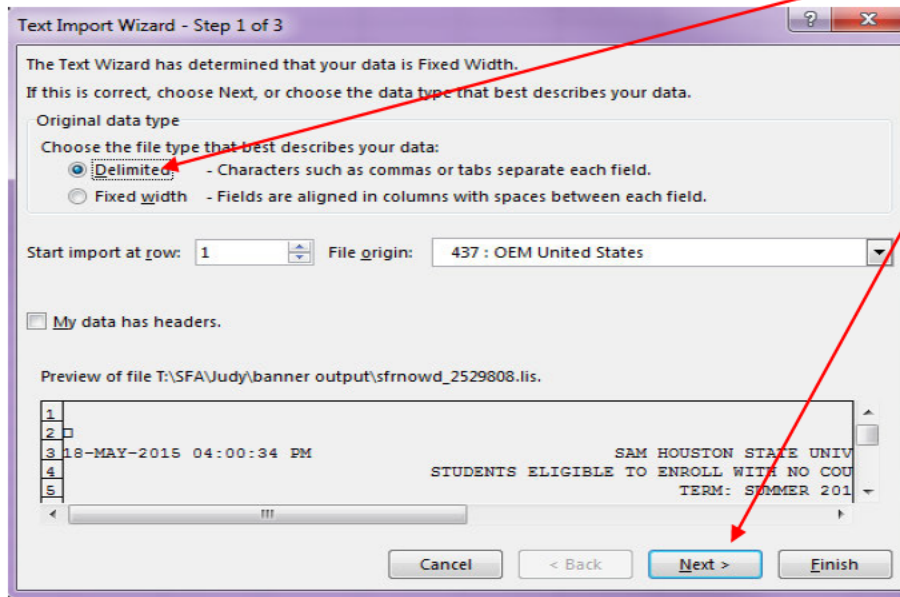
On Step 2 of the Text Import Wizard, the "Tab" box will be checked, also check the "Space" box: Then click "NEXT" to go to the 3rd Step:
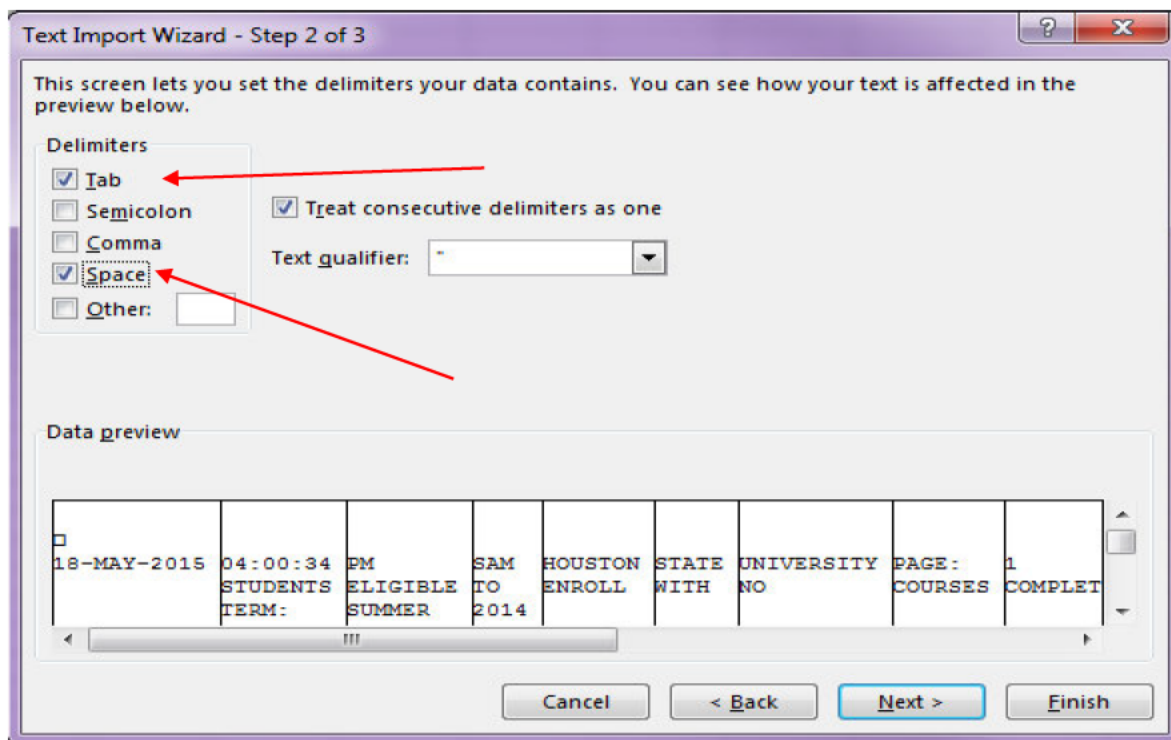
On Step 3 of 3 of the Text Import Wizard, just click FINISH":

This brings up the file:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1																
2	☐															
3	#######	4:00:34	PM		SAM	HOUSTON	STATE	UNIVERSI	PAGE:	1						
4		STUDENT:	ELIGIBLE	TO		ENROLL	WITH	NO	COURSES	COMPLETI	IN		HISTORY	SFRNOWD		
5		TERM:	SUMMER	2014												
6		STUDENT:	WITH	FINANCIA	AID											
7																
8																
9		CAMPUS/	LAST	ORIGINAL	NET											
10		NAME	ID	LEVEL	ENROLLE	COLLEGE	CHANGE	INST	CHGS	INST	CHGS	TITLE	IV	TOTAL	AID	BALANCE
11																
12					UG	10-Apr-14	M/HS	4-Aug-14	2870.5	2870.5	0	1400	2341			
13																
14		40867		1 PHIL	3372	2 M	F									
15		41476	S2	PSYC	2102	2 M	F									
16		41475	S2	PSYC	2302	2 M	F									
17																
18																
19					UG	3-Jul-14	FM	1-Aug-14	1133.5	4353.62	1412	1712	2466			
20																
21		41034	S2	HIST	3369	1 M	F									
22		40905	S2	PHIL	2361	6 M	F									
23																

Copy this to a new tab within the Excel spreadsheet, and work from this copy (you want to keep an original).

Insert a column to the left of Column A. You will be using a formula to join the Last Name, First Name, and Middle name. The formula is: "=concatenate(B12," ",c12," ",e12)". The B12 is the Last Name column-B, 12th row is the first student. C12 is First Name, E12 is Middle Name. Do a "CTL C" then "CTL V" to copy this formula to the next name, in Column A. Do this for all of the names in the report. Then "Copy" Column A, "Paste Special"-"Values", on top of itself, to remove the formula.

Click on Column E and Right Click "Copy ", Click on Column A, Right Click, Click on "Insert Copied Cells". This copies the column where the SAM ID resides.

	A	B	C	D	E	F	G	H
1								
2			□					
3	SAM		########	4:00:34 PM		SAM	HOUSTON STATE	UN
4	TO			STUDENT:	ELIGIBLE	TO	ENROLL WITH	NC
5	2014			TERM:	SUMMER	2014		
6	FINANCIAL			STUDENT:	WITH	FINANCIA	AID	
7								
8								
9	ORIGINAL			CAMPUS/	LAST	ORIGINAL	NET	
10	LEVEL			NAME	ID	LEVEL	ENROLLE	COLLEGE CH
11								
12	██████████████████████████						UG	10-Apr-14 M/
13								
14	PHIL			40867		1 PHIL	3372	2 M
15	PSYC			41476	S2	PSYC	2102	2 M
16	PSYC			41475	S2	PSYC	2302	2 M
17								
18								
19	██████████████████████████						UG	3-Jul-14 FN
20								
21	HIST			41034	S2	HIST	3369	1 M
22	PHIL			40905	S2	PHIL	2361	6 M
23								
24								
25	██████████████████████████						UG	24-Mar-14 M/
26								

Go down the spreadsheet looking at the names (Column B)- some will have the SID included in the name (they did not have a middle name). Type in the SID in column A (next to the Name), then edit the column B name to remove the SID.

	A	B	C	D	E	F	G	H
109	PHIL			40863		1 PHIL	3362	1 M
110	PSYC			41143		1 PSYC	3336	2 W
111								
112								
113	██████████████████████████						UG	26-Mar-14 M/
114								
115	SPED			41386	S2	SPED	3303	1 M
116								
117								
118	GR	████████████████████				GR	8-May-14	M/ED	2-
119								
120	CIED			40534	S1	CIED	5397	1 M
121								
122			□					

This shows the spreadsheet after the corrections:

	A	B	C	D	E	F	G	H	I	J
109	PHIL			40863	1	PHIL	3362	1	M	F
110	PSYC			41143	1	PSYC	3336	2	W	F
111										
112										
113	▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓						UG	26-Mar-14	M/SC	4-Aug-14
114										
115	SPED			41386	S2	SPED	3303	1	M	F
116										
117										
118	▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓						GR	8-May-14	M/ED	2-Aug-14	2473
119										
120	CIED			40534	S1	CIED	5397	1	M	F
121										
122										

Continue down the report, making corrections where needed. Delete columns C thru T. Sort it by Column A. Delete all rows that do not have a SID / NAME & delete any rows with duplicate names, so you are now left with only rows with the SID / NAME. Insert a row above Row 1, and put the Headers in: Col A: SID, Col B: NAME, Col C: LDA. Click on Column C and format it as a date.

FILE	HOME	INSERT	PAGE LAYOUT	FORM

B24   ⋮ ✕ ✓ *fx*
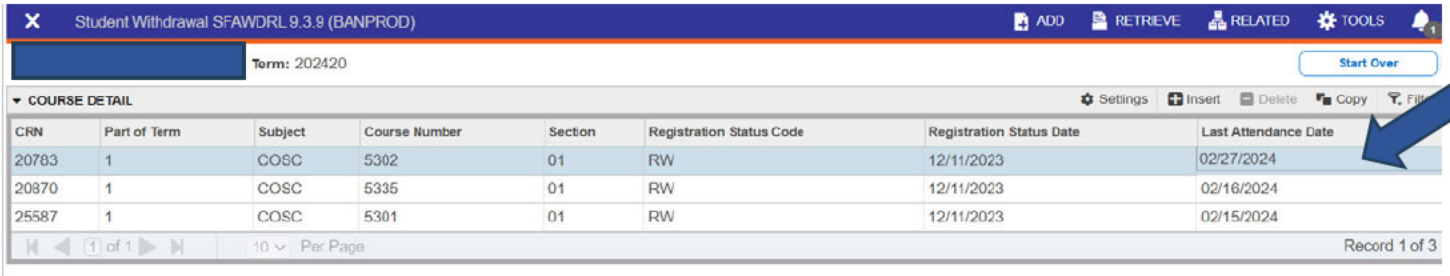
	A	B	C
1	SID	NAME	LDA
2		▓▓▓▓▓▓▓▓▓▓▓	
3		▓▓▓▓▓▓▓▓▓▓▓	
4		▓▓▓▓▓▓▓▓▓▓▓	
5		▓▓▓▓▓▓▓▓▓▓▓	
6		▓▓▓▓▓▓▓▓▓▓▓	

KEEP STUDENT'S SCHEDULE ON THIS EXCEL SHEET IF POSSIBLE
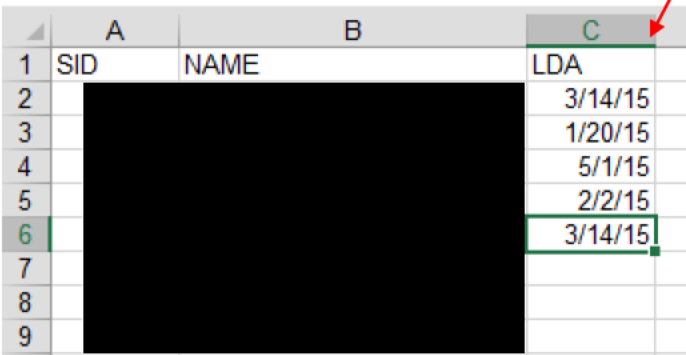
Identifying LDAs

1) For each student, you will need to document the latest date of attendance reported in SFAWDRL. Whichever date is the latest is considered when a student stopping attending and will be the withdrawal date used in the R2T4 calculation.

CRN	Part of Term	Subject	Course Number	Section	Registration Status Code	Registration Status Date	Last Attendance Date
20783	1	COSC	5302	01	RW	12/11/2023	02/27/2024
20870	1	COSC	5335	01	RW	12/11/2023	02/16/2024
25587	1	COSC	5301	01	RW	12/11/2023	02/15/2024

2) Using the WORD printout of the SFRNOWD, key in the LDAs. Make sure you also notate the class and CRN to document if the class is online or not.

	A	B	C
1	SID	NAME	LDA
2			3/14/15
3			1/20/15
4			5/1/15
5			2/2/15
6			3/14/15
7			
8			
9			
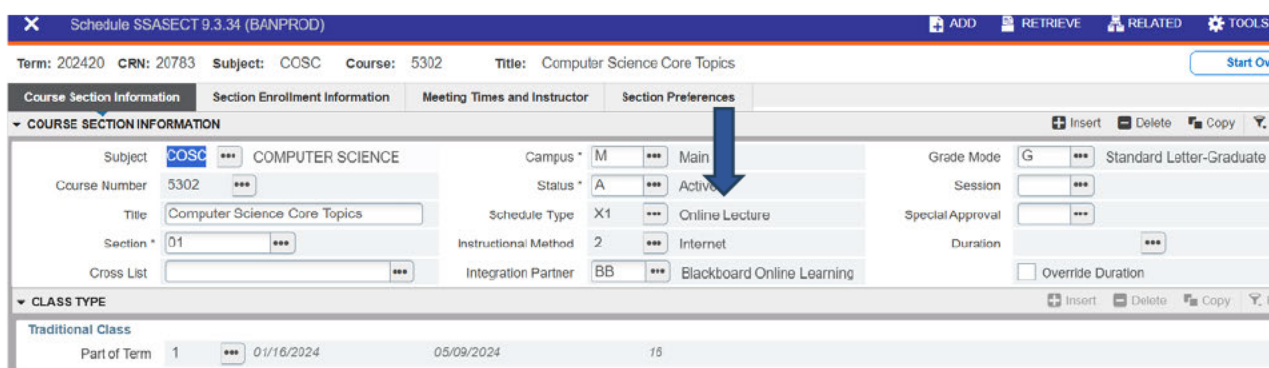
3) After identifying the course that had the latest LDA, you will need to identify if the course is a distance education course. For distance education courses, there are steps below to verify that the LDA is correct.

Go to SSASECT in BANNER: You will use the CRN from the class you determined was the latest date to check if the class is online.

Schedule SSASECT 9.3.34 (BANPROD)

Term: 202420 CRN: 20783

Subject: COSC Course: 5302

Title: Computer Science Core Topics
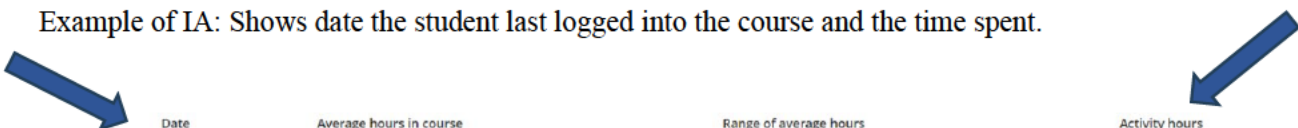
WHEN DETERMINING THE LDA FOR ONLINE COURSES:

DISTANCE EDUCATION (ONLINE/INTERNET) COURSES rule: must have proof of academic engagement for all resignations. for r2t4 purposes, logging into an online course does not constitute academic attendance. the student must demonstrate that they are engaged in the course. examples include submitting an assignment, taking an exam, taking an interactive tutorial, attending an assigned study group, seeing the instructor in person, or contacting the instructor regarding the academic subject studied in the course.

1) Once you've determined the distance education courses, request Internet Activty (IA) for these students, email the list to lmssupport@shsu.edu Jason Woodall is the main contact for any questions or inquiries.
2) Review Internet Activity to identify the last academic engagement compared to what was reported by professor on SFAWDRL.

Example of IA: Shows date the student last logged into the course and the time spent.

Date	Average hours in course	Range of average hours	Activity hours
10/7/24	0.1	0 - 0.54	0
9/30/24	3.67	0 - 15.83	0
9/23/24	2.34	0 - 4.77	0
9/16/24	1.53	0 - 3.08	0
9/9/24	0.67	0 - 1.39	0
9/2/24	1.97	0 - 5.5	0
8/26/24	2.78	0 - 5.8	0.52

3) If the academic engagement on the IA matches the date reported by professor, then this date stands as the LDA used in R2T4 calculation
4) If the LDA provided by a professor is after the IA report's LDA, then contact the professor to confirm if any of the examples listed above occurred on the LDA they provided and submit proof. Professor should be given a deadline and followed up on to ensure we meet R2T4 processing deadlines.
5) when two different LDA's are given and both dates are after the 60% date, enter a note in rhacomm and use the IA report's LDA.

6) Save the file as an Excel Workbook at: T:SFA/R2T4/(folder of the year)/(ALL F's Folder of the Semester)/SFRNOWD (semester)

7) The tab with just the names can be copied to a new workbook within this folder, and saved as "SID, NAME, LDA (semester) and this time delete the rows of the students who do not have to have a calculation done. Registar will input these records into SFAWDRL so we can then run **RPRTIVC** to calculate the "unearned" funding that needs to be returned. (Note: It usually takes 24-48 hours to receive a confirmation email from Registrars.

PART 1: **RUNNING RPRTIVC:** Type the process name **RPRTIVC** in the first main banner screen.

  The form will look like this:

You will need to Select Go to access the rest of the form:

  The **Printer** must be set to **DATABASE** (or the process will never finish running).

  The **Term Code** will be whatever semester you are trying to work in.

  The **Mode** will need to be changed to either **A**-audit **or U**-Calculate, Update and Save mode.

- ‘**A**’ mode - Audit mode is for you to review the resignations. Do not run it in (**U**)**PDATE** until you are sure you don't need to make any more corrections. ‘**U**’ mode- Update mode- locks the fields and nothing more can be changed. <u>You must verify the LDA dates are correct, and the semester start/end dates are correct.</u>
- For **fall** and **spring** semesters you run the report in ‘**A**’ mode. When you are satisfied with the report you can then run it in ‘**U**’ mode- Calculate, Update and Save -which runs the process and saves the work. Remember- no changes can be made after this is run.
- For **summer** you will need to run this in Audit Mode first for **summer parts of term** and determine the start/end dates for each resignation. These dates are then updated in SFAWDRL. Rerun the report again- in ‘**A**’-Mode. Then again in ‘**U**’ mode once all is updated to ensure the data being pulled is accurate.

No other fields are changed. **Next-block** again. Then press **F10** or Click the **Save** icon to save the process.

Go to **Related—Review Output** (see below)

Click on the down arrow next to File Name. The process that was just run will be saved as a ".lis" file. This may take a few minutes. Double click on this to open it up.
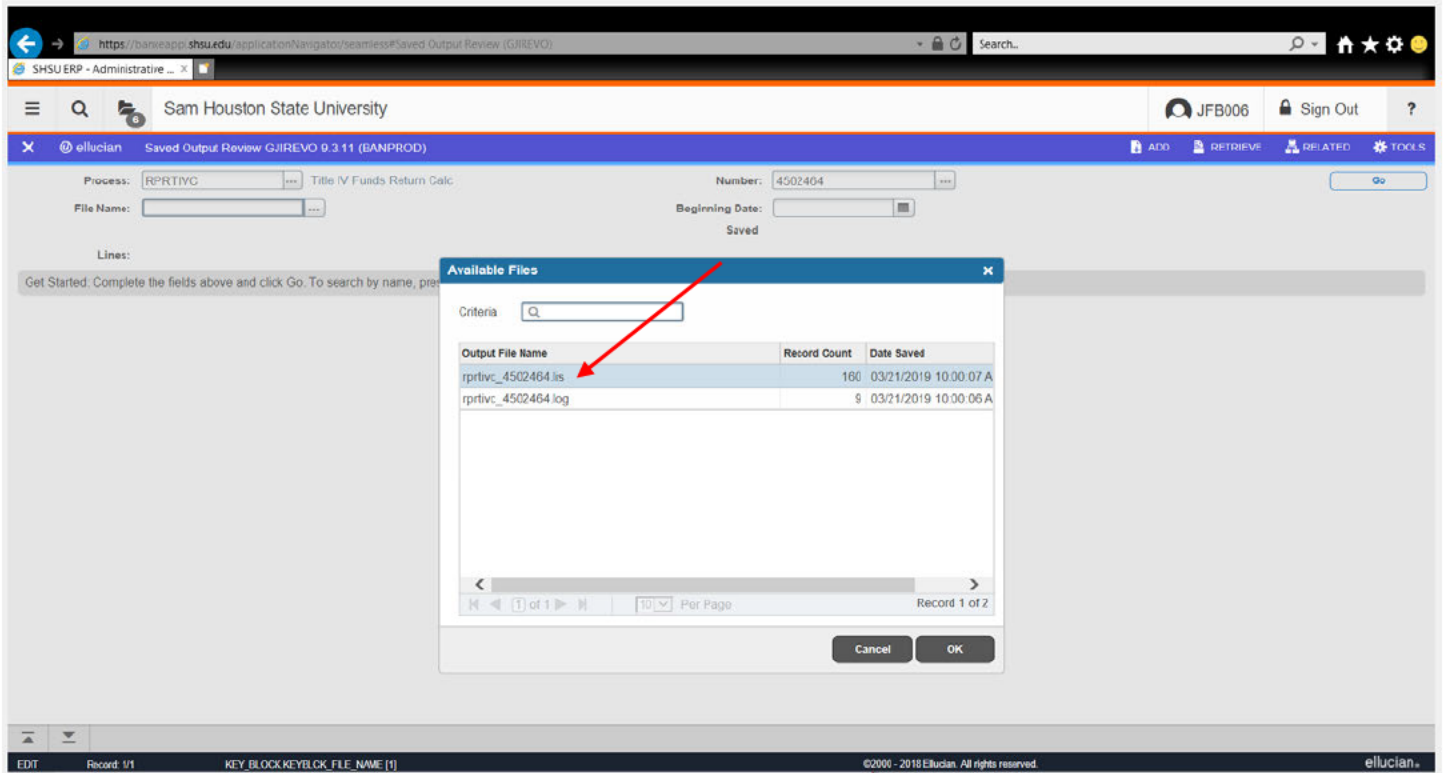
To save the file go to Tools—Show Document (Save and Print File)

Select Save File—this will save the file in the default folder that the User has set up in Banner- to receive Banner output.

Click OK and then click the CLOSE.

Now open T:/SFA/(your Banner Output folder)/(file with today's date) in WORD.

THIS IS WHAT IT SHOULD LOOK LIKE (see the example below):

Note: You will need to switch the orientation to Landscape, the Margins to Narrow, and Select All and change the font size to 8. This way everything fits on one page. From here you can **print and save the file under T:/**SFA/R2T4/(Year)/(Semester)**.

Next- from this report (**RPRTIVC**) you will need to highlight all of the students that have a **DISB** amount <u>AND</u> an **INST REQ RETURN** amount for the loans. Also highlight the **WITHDRAWAL DATE**, and **SAM ID.**

For the ones that do not have any amounts in the **INST REQ RETURN** column, just put an 'X' and do not highlight, and move on to next student. When you get all the way through the report the ones highlighted are those you will actually be returning funds on. **NOTE:** Be sure to check for **TOTAL INSTITUTIONAL CHARGES** to make sure there are amounts in there- if there's not, check SFAWDRL 2nd screen - Institutional Charges. **Also, make sure the enrollment has the right beginning and end date for the semester and**

number of days in the period (you may need to get with the Registrar's Office to get this corrected). When everyone has been checked you may run RPRTIVC in "**U**" Calculate, Update & Save mode.

For the "SUMMER I" you must check individually if the students are registered in Summer II classes. If the students <u>are</u> registered in Summer II they are still eligible to receive their Financial Aid, and you must make notes on report that student is taking Summer II courses. Continue with the normal process for those students with un-official resignations for Summer I.

Complete an **Eligibility Worksheet** on every student, prior to the 12th class day (Census). The Eligibility Worksheet details a summary of the student's activity of adding and dropping classes. (After Census we assume the student is attending class(es).)

ELIGIBILITY WORKSHEETS ARE FOUND ON T:/SFA/R2T4/Eligibility WS, Calculations & Reporting Info/ELIGIBILITY WORKSHEET.

See below an example of a blank Spring Semester:

Eligibility Worksheet - FY1516	DATE:			TSAAREV SFASTC SSASEC SFAWDRL		R2T4:	COMPLETED BY:
SID:	NAME:			STATUS:		RETURN FUNDS:	

SPRING 2016			1/13/16 Wed First Class Day		1/29/16 Fri Census-12th class da		2/10/16 20th Class Day			
Int	POT	CRN	Date Enr	Time Enr	Hours	Del/W	Date	Time Drop	Comment	

AWARDS

Earned	Fund	Awarded	Paid	Date

SFASTCA CODES

Code	Description
AD	Administrative Drop
AF	Administrative Drop - Full Refund
DB	Drop Before Census Date
DD	Drop/Delete in Registrar's Office
SM/DM	Meningitis Drop
DP	Drop for Pre-Requisite
DQ	Drop After Census Date
DW	Withdrw in drop/add. Not on trans
RD	Resigned
RE	Registered
RW	Registered Online
NP	Dropped for Non Payment
NR	Non Reportable Student (ignore this)
SD	Soft Drop

TERM CODES

Code	Description
1	Full Term
5A	First Five Weeks
5B	Second Five Weeks
5C	Third 5 Weeks
7A	First 7-1/2 Weeks
7B	Second 7-1/2 Weeks
DV	Developmental
M	Mini Session
S1	Summer I
S2	Summer II
SL1	1 Hr Science Lab Sum I
SL2	1 Hr Science Lab Sum II
SLF	1 Hr Science Lab Full Term

Internet Classes: Email BOTH: Ricki Hodges (rlh014) & Thomas Sosebee (tas019)
with: Student SID, Full Name, Course Number, Course Subj, Section #
15 minutes or more thru census to establish attendance

To complete this form:

- Fill in the Date
- Put "YES" in the R2T4 line
- Put your initials- in "Completed By"
- Put in the student's SID, Name
- Status: "Resignation"
- Fill in the AWARDS: FUND, Awarded, and Paid

Go to the form SFASTCA to complete the main body of this form.

Make sure the SAM ID is the student's and the TERM CODE is the SpringTerm you are wanting to analyze.

Hit GO.

Click on Filter.

Click the down arrow in the Add Another Field box.

Now click on SOURCE.

Click TOOLS, and Export the report to excel.

You can now use the data from SFASTCA to analyze if the student established Attendance in at least 6 hours.

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Write the CRN, DATE ENR(Activity Date); TIME ENR (Activity Date Time- use 24-hr format); HOURS on the Eligibility Worksheet, for each line item on SFASTCA. Be sure to check the COURSE STATUS, MESSAGE, and STATUS/ADD DATES. If the COURSE STATUS is anything other than RE or RW you will enter the STATUS/ADD DATES in the DEL/W Eligibility Worksheet box, the ACTIVITY DATE time in the TIME DROP EW box.

Once you have filled everything out on the EW, you will need to check to see if the classes were **Face-To-Face** or **Internet**. On SSASECT key in the Class TERM and CRN number; roll forward.

FACE-TO-FACE: see below for the screen:

Indicate on the EW the Part Of Term (POT) for this class.

INSTRUCTIONAL METHOD indicates it is Face-To-Face; You will put this on the EW in the COMMENT; Click on the SSASECT "Meeting Times and Instructor" tab:

The class meets Tuesday and Thursday from 08:00 – 09:20. Put this in the Comment line also. You can now determine if the student could have possibly have attended even 1 class meeting time. (ie…if the class was dropped at 10:55 on Monday before first class day and the first class day was Tuesday, the student could not have attended; however, if it was dropped at 07:00 on Wednesday after Tuesday, the 1st class day, the student could have attended a class.) We assume if the student COULD have attended, that he/she did.

INTERNET:

The INSTRUCTIONAL METHOD is "2 Internet". Check the INT box- to the left -on the EW. You will need to email **Jason Woodall** asking for the student's Online Internet Activity on each Internet Class. In this email, include the student's **SAM ID & NAME**. And from SSASECT include the 4 letter **SUBJECT,** 4 number **COURSE NUMBER,** and 2 number **SECTION.** There should be a reply from one of them within 24 hours. (If not, send a reminder to them.) They will email you the Activity Worksheets for each class on each student. The student must show academic engagement as well as actual activity for at least **15** minutes or more on each class to have established attendance. Academic engagement means that the student has participated in group conversations about class material, submitted a quiz or assignment, or engaged in a course related discussion with the instructor. (If there are questions on determining internet activity, refer to your Team Lead or Associate Director.)

The INSTRUCTIONAL METHOD is "2 Internet". Check the INT box- to the left -on the EW. You will need to email the instructor requesting them to provide documentation of last date of student interaction from one of the following:

- Submitting an academic assignment;
- Taking an assessment or an exam;
- Participating in an interactive tutorial, webinar, or other interactive computer-assisted instruction;
- Participating in a study group, group project, or an online discussion that is assigned by the school; or
- Interacting with an instructor about academic matters

Indicate on the EW the Part Of Term (POT) for this class.

ESTABLISHING ATTENDANCE and ENROLLMENT DATES: in order to be eligible for loans the student must have established attendance in at least 6 hours for the Spring. Following are the possible scenarios:

- Student in 6 hours for Spring; resigned all classes in January (before census) but established attendance in 3 hours; student is NOT eligible for loans or grants.
- Student in 6 hours for Spring; resigned all classes in February (after census) but established attendance in 3 hours; student is NOT eligible for loans, established eligibility for 3 hours PELL grant and did not

establish eligibility for any other grants. In relation to R2T4 processes, if a student had originally enrolled in 15 hours when the time of loan disbursement occurs, they are eligible for the funds. If the same student decides to resign after census and they're enrollment status is less than half time, it is still possible to keep loan eligibility. The FAEV Team, Counseling Team, or the Tech Team could have entered a RHACOMM note that determines if the student has established attendance and maintains loan eligibilty.

- Student is in 6 hours for Spring; resigned all classes in February (after census) and established attendance in 6 hours; student is eligible for the loans and grants

PART 2: ADJUSTING AWARDS TO RETURN THE TITLE IV FUNDS - BASED ON THE INFORMATION FROM RPRTIVC or MANUAL CALCULATION SPREADSHEET:

Using the RPAAWRD screen print write out the calculations needed for the Fee Adjustments on the LRFS:

TO CALCULATE WHAT NEEDS TO BE ADDED TO THE "DIFFERENCE" NUMBER on the LRFS: Go to RLADLOR- for that student- make sure the ORIGINATION tab is on the loan you want to look at, then click on the DISBURSEMENTS tab. See the Screen Clipping below:

Divide the NET AMOUNT by the GROSS AMOUNT- in this example it would be 9,432 divided by 9,534 – which gives you- IN THIS CASE- .9893.

 TAKE THE AMOUNT THAT NEEDS TO BE RETURNED (from RPRTIVC) AND DIVIDE BY THE DECIMAL NUMBER YOU GOT (see above). THE RESULT WILL BE THE AMOUNT YOU PUT IN THE

"DIFFERENCE COLUMN"- (as a negative number) ON THE LRF FORM. THE REVISED AWARD SHOULD THEN CALCULATE.

Fill the LRF fields as indicated on the next page:

Loan Revision Form (LRF) - Direct Loans

Reallocation: Y or N

Classification Change: Y or N

Date:	2/15/2016 Originator:			Loan Processor:	
Student Name:				Class: UNDERGRAD	
Sam ID:				Academic Year: 2015-2016	

CURRENT AWARD		DIFFERENCE	REVISED AWARD
F - DLSUBA	$1,000.00	$0.00	$1,000.00
S - DLSUBA	$1,000.00	-$865.00	$135.00
M - SDLSBA	$0.00	$0.00	$0.00
T - SUB	$2,000.00	-$865.00	$1,135.00

F - DLUNSA	$3,000.00	$0.00	$3,000.00
S - DLUNSA	$3,000.00	-$3,000.00	$0.00
M - SDLUNA	$0.00	$0.00	$0.00
T - UNSUB	$6,000.00	-$3,000.00	$3,000.00

F - DLAUNA	$0.00	$0.00	$0.00
S - DLAUNA	$0.00	$0.00	$0.00
M - SDLAUA	$0.00	$0.00	$0.00
T - ADDL. UNSUB	$0.00	$0.00	$0.00

F - DLPLUA	$5,000.00		$5,000.00
S - DLPLUA	$5,000.00	-$5,000.00	$0.00
M - SDLPLA	$0.00	$0.00	$0.00
T - PLUS	$10,000.00	-$5,000.00	$5,000.00

COMMENTS:

(Put the same notes here that you put in RHACOMM)

Total Loan Allocation on form should match the total loan allocation on RPAAWRD once completed by loan area.

RHACOMM: _____

RRAAREQ: _____

SUPPORTING DOCUMENTATION ATTACHED: _____

SCHOVA: _____ Fund code: _____ Name: _____ Amount: _____ Sem: _____

FINAL REVIEW: _____

Parent Verified (PLUS only):

Revised 9/3/15 RML

NOTE: THE LRF "DIFFERENCE COLUMN" WILL BE THE AMOUNT THAT NEEDS TO BE RETURNED. HOWEVER- YOU WILL NEED TO INCREASE IT FOR THE FEES THAT BANNER AUTOMATICALLY ADDS BACK IN WHEN IT SENDS THE MONEY BACK. THE "NET AMOUNT RETURNED" WILL THEN BE THE AMOUNT ON RPRTIVC.

At this point, add the notes to RHACOMM, so you can Copy and Paste these to the LRF COMMENTS at the bottom of the form.

RHACOMM NOTES SHOULD INCLUDE: "SEMESTER/YEAR"; "UNOFFICIAL RESIGNATION"; LDA; Reduced "what" (i.e. SUB LOAN), how much it was before, how much it is now; put the math you did for the reduction (return) you just did; "Due to ALL F'S * * **ADD the CATEGORY CODE: UNOFRF (for fall) UNOFRFS (for Spring)   UNOFRM (for Summer) ***

- Note: if you add to a Comment at a later date, please preface the additional words with the date you are adding it

PELL ADJUSTMENTS (if needed):

Cancelling the Pell Grant is more involved. Adjust the Award for the appropriate semester in RPAAWRD. Go to Period Lock and change the "Y" to "N". This unlocks the Pell to be adjusted. Enter adjusted amount. **REMEMBER: Change the "N" back to "Y" to lock it back when done.**

Award Maintenance	Award Schedule	Disbursement Schedule	Direct Loan Interface						
▼ FUND AWARD SCHEDULE									
Fund *	Status	Period *	Offered	Accepted	Declined or Cancelled	Memoed or Authorized	Paid	Period Lock	Load
DLPLUA	C	202280			0.00			N	1=Full
DLPLUA	C	202320			0.00			N	1=Full
DLSUBA	C	202280			0.00			N	1=Full
DLSUBA	C	202320			0.00			N	1=Full
DLUNSA	C	202280			0.00			N	1=Full
DLUNSA	C	202320			0.00			N	1=Full
PELLA	A	202280	3,448.00	3,448.00			3,448.00	Y	1=Full
		Total	3,448.00	3,448.00	0.00		3,448.00		
		Fund Total			0.00	0.00			

RHACOMM NOTES SHOULD INCLUDE: "SEMESTER/YEAR"; "UNOFFICIAL RESIGNATION"; LDA; Reduced PELL), how much it was before, how much it is now; put the math you did for the reduction (return)

you just did; "Due to ALL F'S *** * ADD the CATEGORY CODE: UNOFRF (for fall) UNOFRFS (for Spring)   UNOFRM (for Summer) ****

- Note: if you <u>add to a Comment</u> at a later date, please preface the additional words with the date you are adding it

PART 3: LETTERS TO STUDENTS

The Resignation Letter template is saved under T;/SFA/R2T4/Letters to Students—Resignation Student Letter Template. Open the letter:

1. The following message will appear:
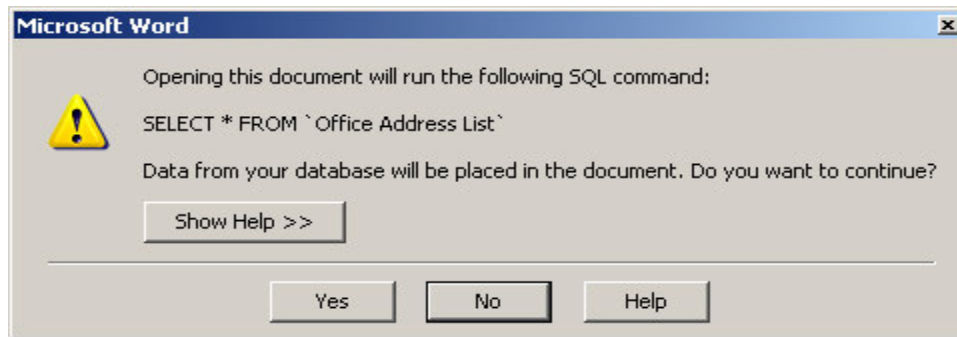
2. Select "No"
3. This will open the letter. It will look like this (see below)
4. To Start the Mail Merge: Click on the Mailings tab, then Click on Start Mail Merge, then Letters
5. Click "Letters" and Click "Next: Starting document"- at the bottom of the page.

6. Next, select "Use Current Document",
And click "Next: Select Recipients"

7. Next you will select "Use an existing list", and Click on "Browse" to pull up the list. You are looking for the Address list….
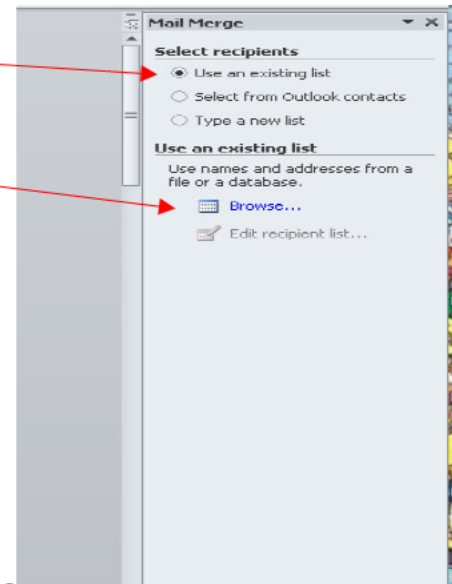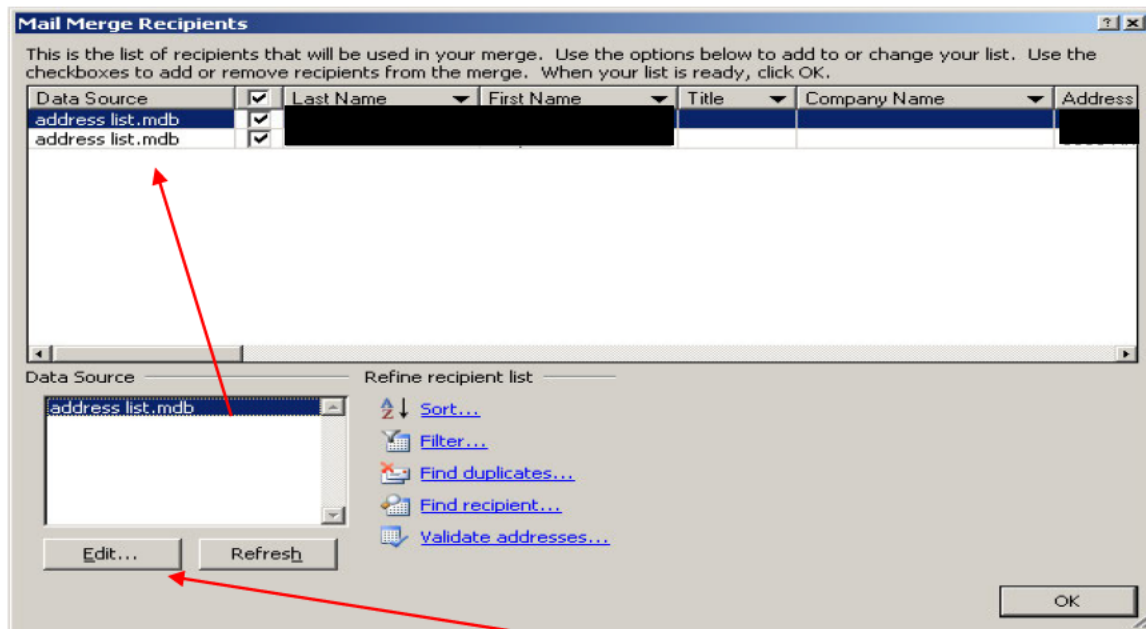

8. The address list is saved under SFA—R2T4—Letters to Students—address list.mdb. Double click on the file to open it up.
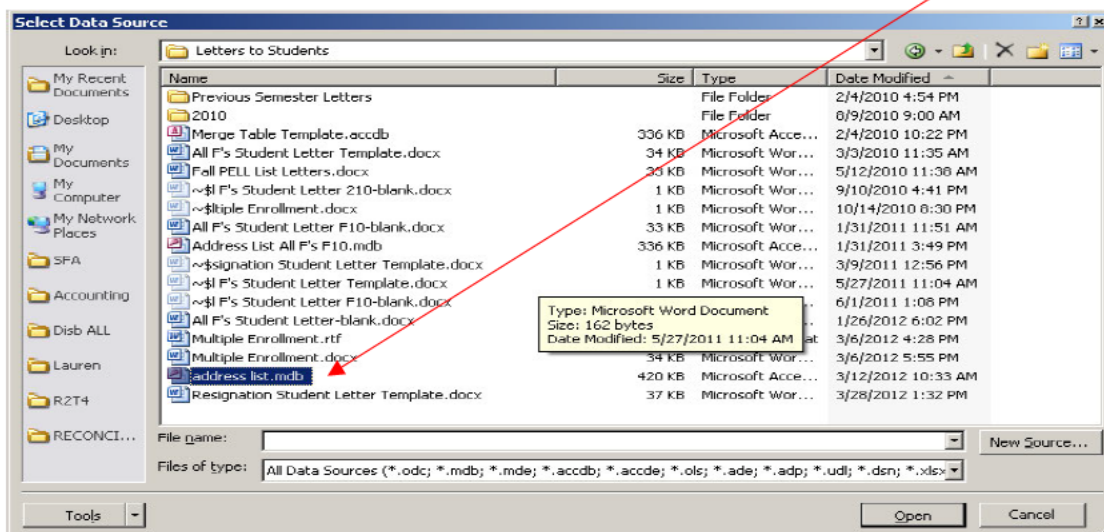
Open the file…this will pop up:

9. Click on "address list.mdb" under Data Source and Click **Edit…**you will need to delete anything that is currently there…and add the new records: You will enter in Last Name, First Name, Semester, Address, City, State, Zip, SID, the amount of Title IV aid that has to be returned: SUB, UNSUB, etc, and the LDA. (You will get this information from the Packet you have printed. Use the SPAIDEN screen clip for the address.) A line is added for each student **(Max 14 before you need to start a new list)**
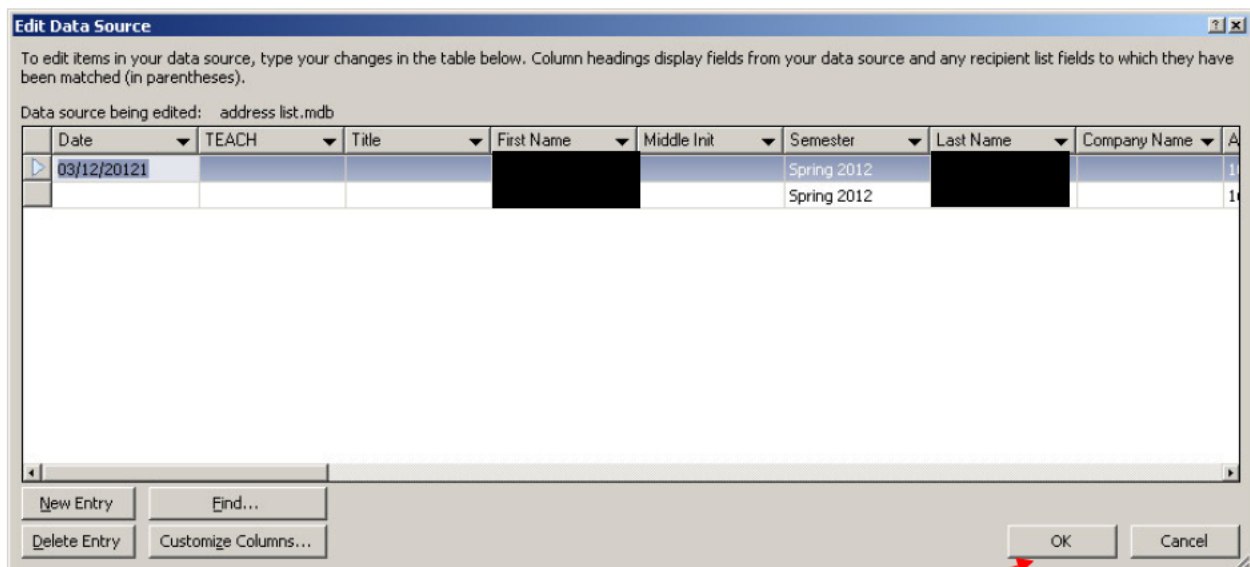
10. When you are done entering in the information, click **OK**.
11. A BOX will pop up asking 'Do you want to update your recipient list and save these changes to the address list' CLICK '**YES**'.
12. Mail Merge Recipients CLICK '**OK**'.

13. Then click **Next** on the Mail Merge Wizard. Click **Next** one more time to Preview your letters. Then click **Next** again to complete the mail merge.

14. Click: "Print"; Click: "Print all records."

Next screen: change it to print 2 copies:
one to send to the student, one for
the R2T4 packet that will be scanned. **Be sure to print on SHSU Financial Aid & Scholarships letterhead.**

15. After the letters are printed this screen comes up again you will need to click on "Previous Preview Your Letters"; keep clicking this till it takes you back to the Select Document Type so you can now print the envelopes
16. This time you will select **Envelopes; Click Next: Starting Document**
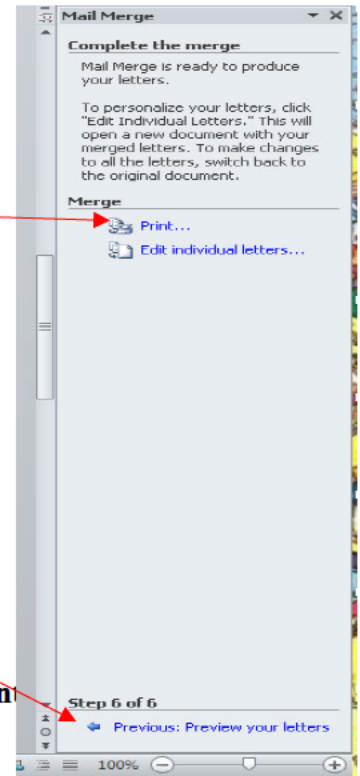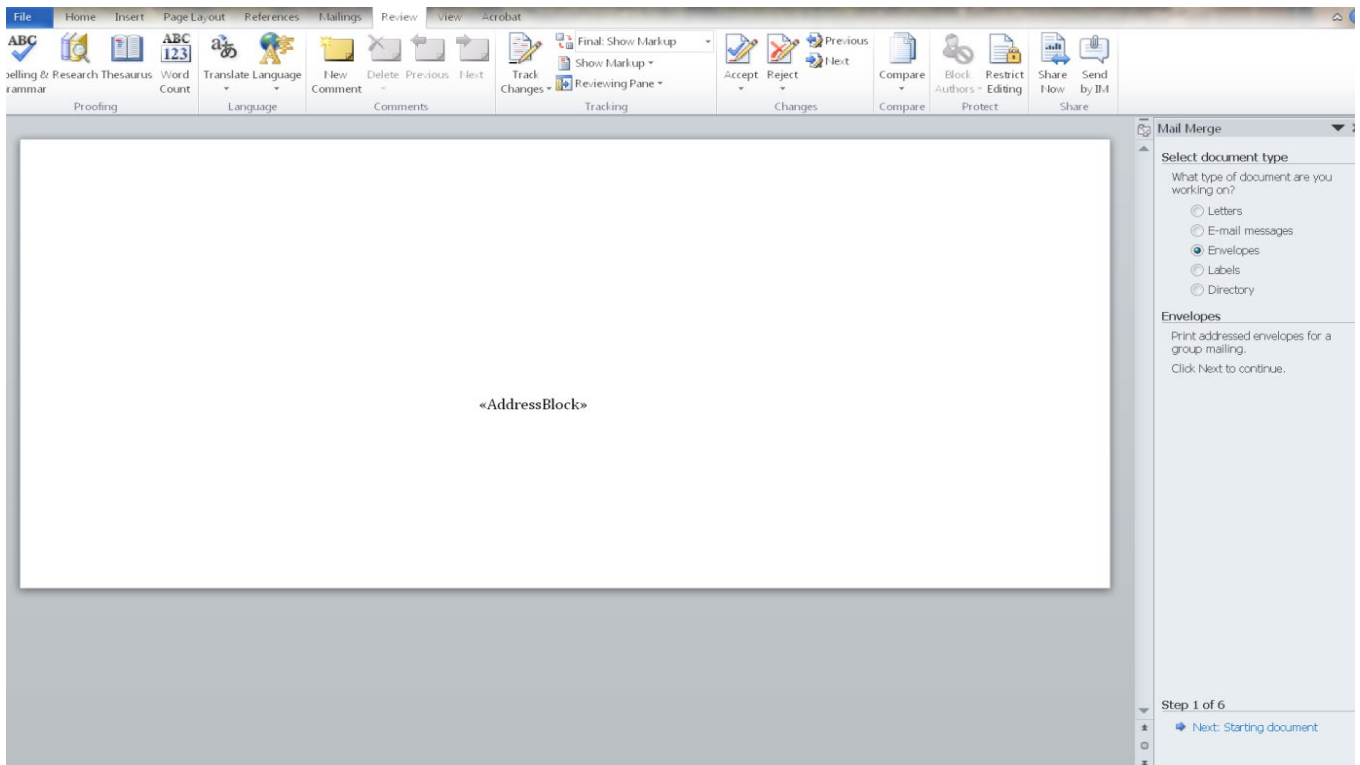
17. The address list.mbd should still be active, so you will select **Change document Layout**
18. A box will pop up "In order to apply the selected envelope option, word must delete current contents of "Resignation Student Letter template any unsaved changes to this document will be lost"– Click **OK.**

19. Click: Next: Select recipients
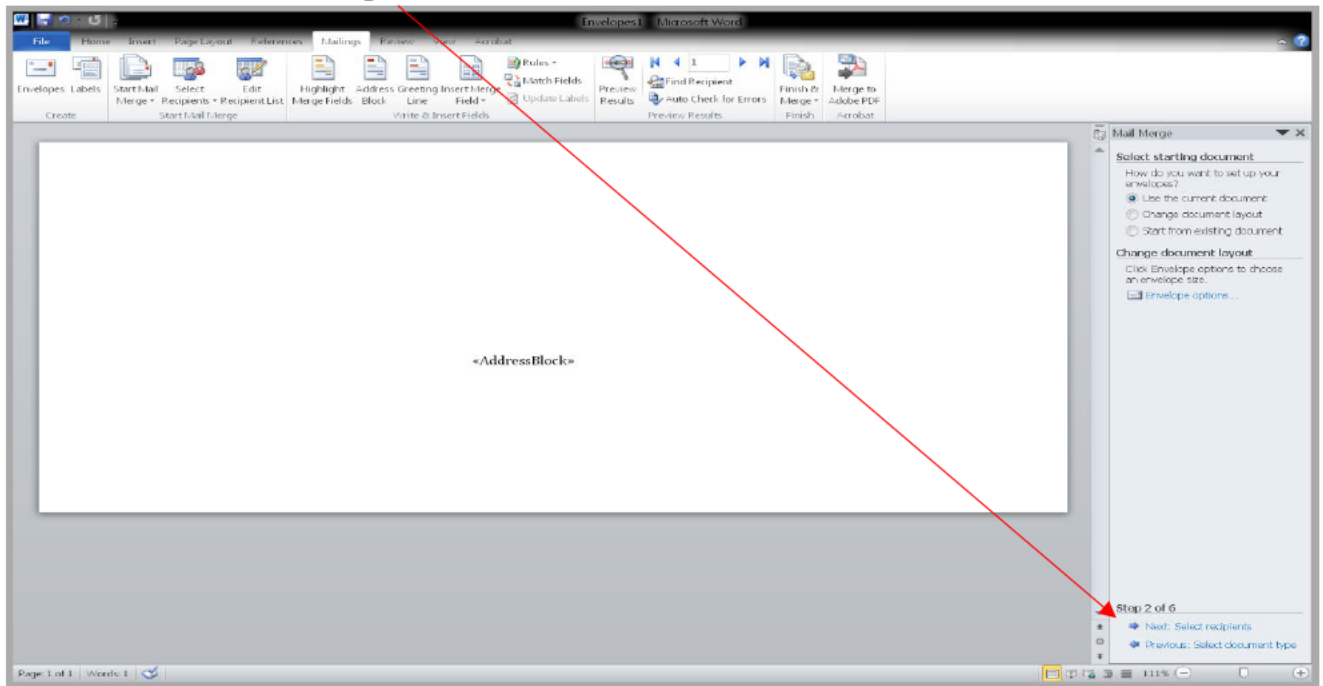
20. From here Click on **Address Block**…
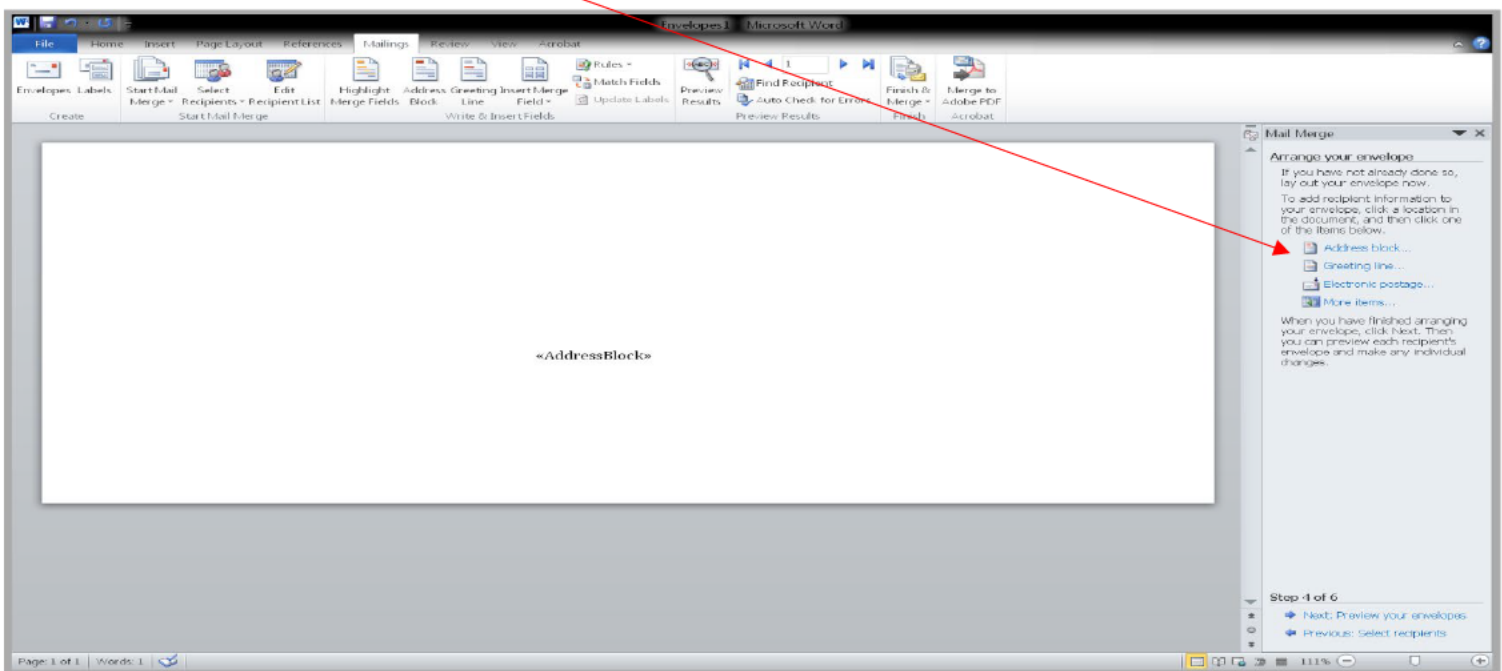
This will pull up the Insert Address Block box; make sure it looks good, then click "OK".
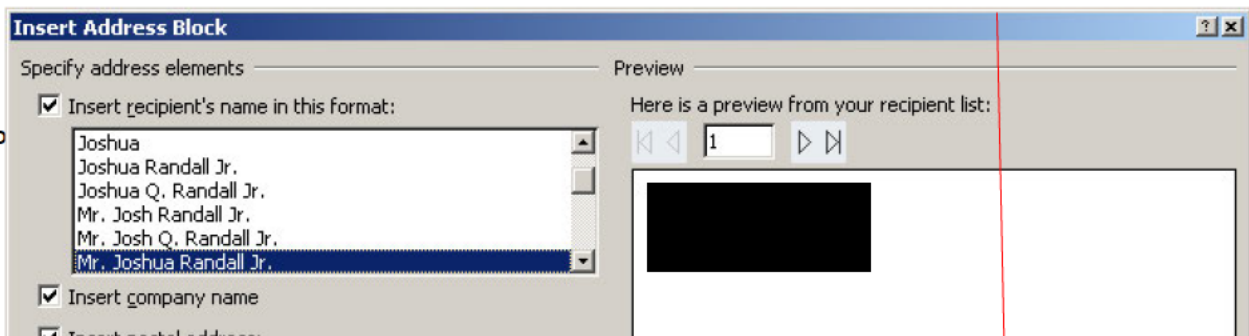
21. The Mail Merge screen pops up again. You need to Click **Next: Preview your Envelopes** (make sure address block is in the middle of envelope screen- if it's not cut/paste where it needs to be.)
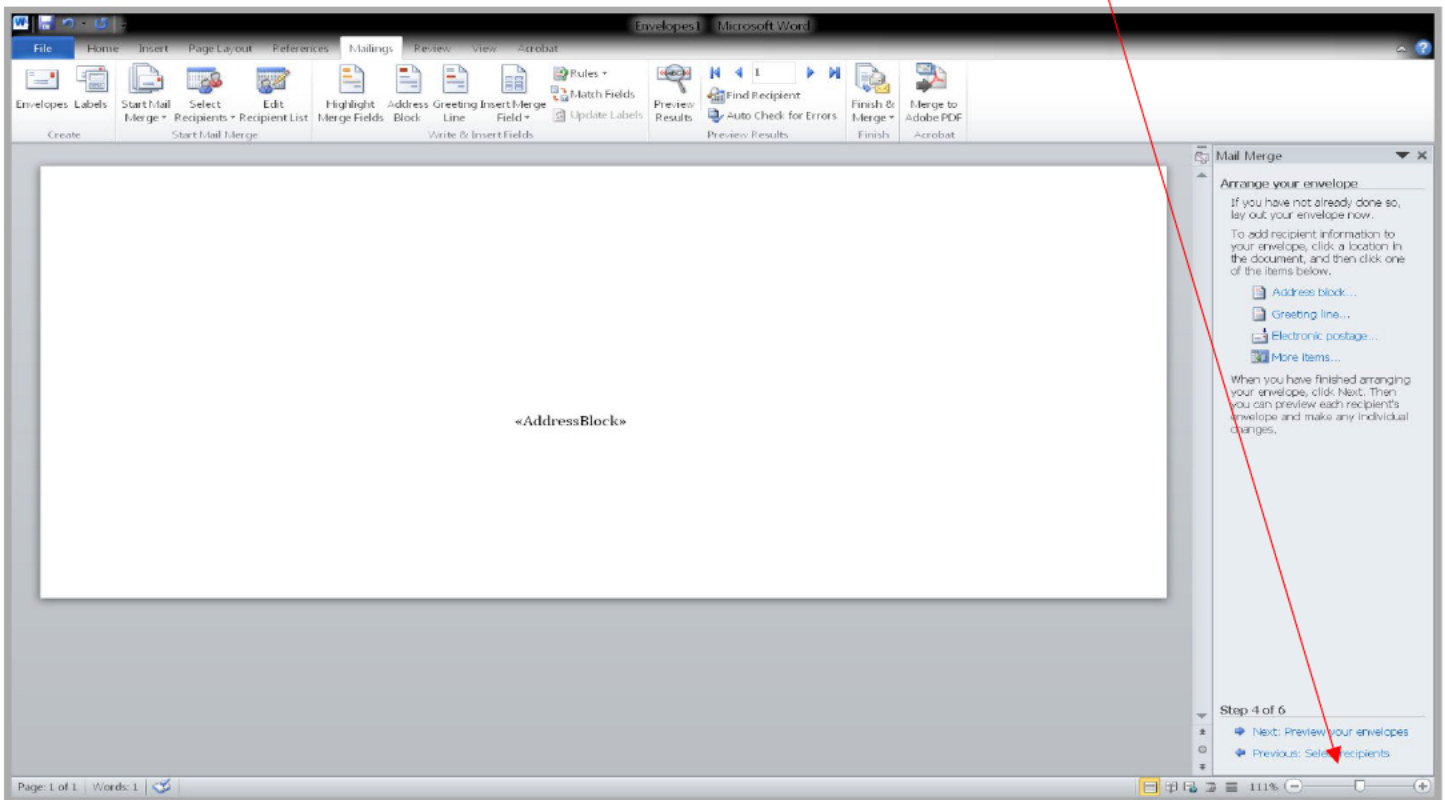
*Note Envelope Options lets you select envelope size (if needed); it defaults to the regular envelope size

    (IF ENVELOPE BOX POPS UP, JUST CLICK '**OK**'- and it does pop up…☺)

22. This screen will show you what your envelope will look like…Click **Next: Complete the merge**
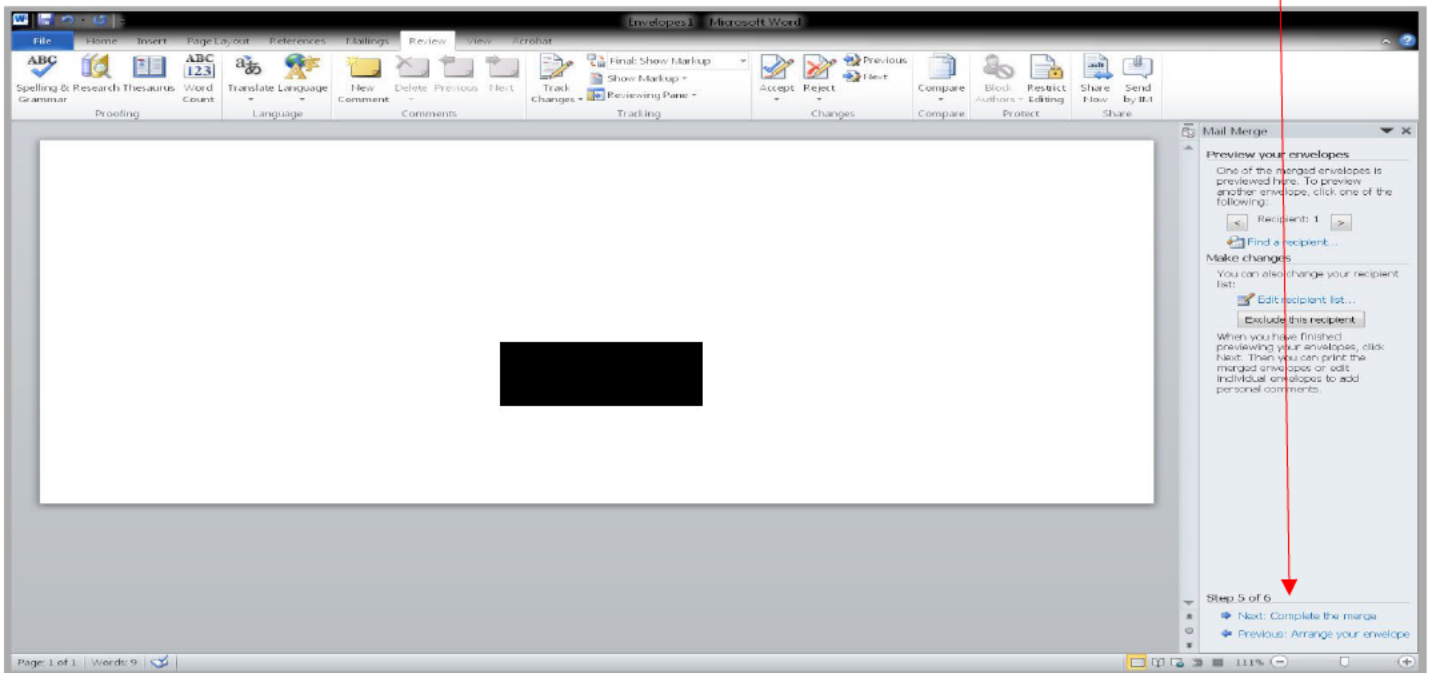
23. Place Envelopes in printer – face side up, flap on the left side; Click **PRINT** and then **PRINTALL; Click "OK"**
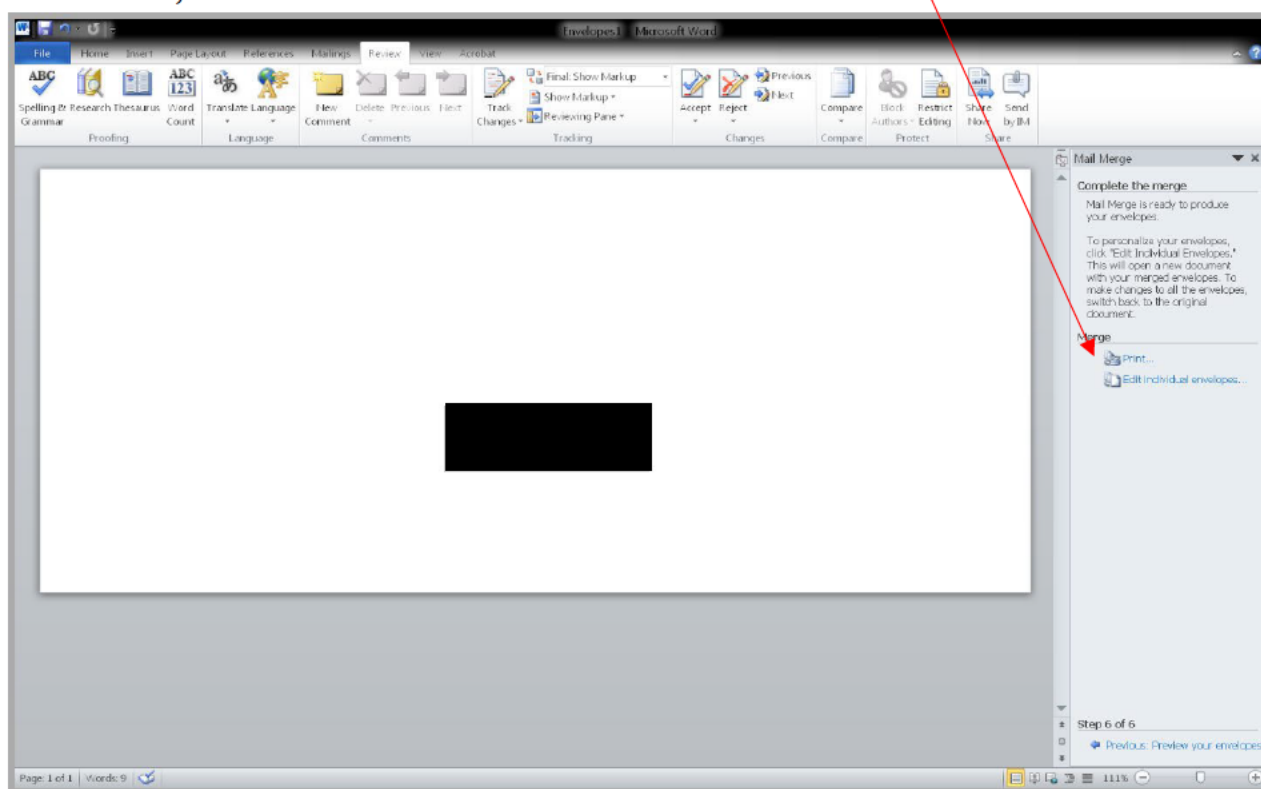
24. When done, close the Word Doucment and **DO NOT SAVE THE DOCUMENT**. (That way the next time you open it, it will be ready to merge again with new information. **If you save, it saves all of the letters…not good…the template will have to be recreated!!)**

25. Last, make sure your whole packet- including the LRF and letter gets put in the box "to be scanned" in mail room. On the top right corner of the top sheet put: R2T4 / C / (your initials); be sure – if you have multiple packets- to put a "NEW STUDENT" colored paper in between each student's packet.

PART 4: PELL GRANTS- when RPRTIVC indicates PELL needs to be returned by the student <u>and they do not have loans to return</u> (there will <u>not</u> be many of these)

On the RPRTIVC report look at the STUDENTS RETURN column. You will need to reduce PELL by the amount the student is required to return.

FOR PELL ADJUSTMENTS:

On the RPRTIVC report look at the STUDENTS RETURN column. You will need to reduce PELL by the amount the student is required to return.

Updating the Pell Grant: Adjust the Award for the appropriate semester in RPAAWRD as previously mentioned.. Go to the AWARD SCHEDULE tab.

Don't forget to "Unlock" the pell, make the adjustment, then "Relock" the pell.

RHACOMM NOTES SHOULD INCLUDE: "SEMESTER/YEAR"; "UNOFFICIAL RESIGNATION"; LDA; Reduced PELL), how much it was before, how much it is now; put the math you did for the reduction (return) you just did; "Due to ALL F'S, Student has to pay back (the amount, and the date the payment has to be made – 45 days from the date of the letter) ,* * **ADD the CATEGORY CODE: UNOFRF (for fall) UNOFRFS (for Spring)   UNOFRM (for Summer) ***

- Note: if you <u>add to a Comment</u> at a later date, please preface the additional words with the date you are adding it

 (You can have this ROAIMMP'd to make sure the adjustment worked.)

CREATING A LETTER FOR THE STUDENT:

Using the same instructions as above (STEP 7: LETTERS TO STUDENTS), input the information and the Address List and create a letter and envelope. (The PELL information is on the lower part of the letter.)

This letter lets the student know they have been overpaid on their PELL and have 45 days to make payment arrangements with the Bursar's Office or pay the balance to the school.

Also, in accordance with the Federal Return of Title IV Funds Policy, it has been determined that you, the student, <u>must</u> repay the following account(s):

1. Pell Grant $ _____
2. Academic Competitiveness Grant $ _____
3. National SMART Grant $ _____
4. SEOG Grant $ _____

TOTAL (2) $ _____

Subtotal (2), if any, will NOT be returned to the appropriate account(s) until you, the student, contact our office! <u>Failure to make full payment of Subtotal 2 (if any), or payment arrangements within the 45-day period will result in a report to the National Student Loan Database System, as well has referral to the Department of Education, rendering you ineligible for Federal Financial Aid from any school.</u>

report this PELL overpayment to NSLDS.

TO REPORT A PELL OVERPAYMENT TO NSLDS: Log into the National Student Loan Database https://www.nsldsfap.ed.gov/nslds_FAP/default.jsp. Enter the student's SSN, FIRST NAME, DOB, then click the RETRIEVE button. Select "Overpayment List" from the menu. Then Click "Add Overpayment"

From here (see above) enter in the TYPE of grant overpayment; the DISBURSEMENT DATE (This should match the disbursement date on COD – you will need to go onto COD and check this!); the INDICATOR should say OVERPAYMENT; the INDICATOR DATE is the date of the overpayment (the Last Date of Attendance); the OUTSTANDING BALANCE is the amount the student owes- this number will have to be rounded to a whole number; the OUTSTANDING INTEREST BALANCE should be -0-; and the SOURCE should say "TRF – TRANSFER". (We are transferring this information to the Dept. of Education.) Click Submit.

The student is now reported to NSLDS and the overpayment will load into BANNER and appear as a Hold on the students account until payment is met. The student will also not be eligible for any financial aid at any University.

NOTE: if the student, at a later date, does make full payment, Update NSLDS (remove the record), and let the Bursars Office know to remove the SOAHOLD.

SPECIAL CIRCUMSTANCES - RESIGNATION

Student Called to Active Duty Military: In the event the student is called to active duty in the middle of a semester, generally the resignation is back-dated by the Registrar's Office. This gives the student a full tuition and fees refund. However, considering that the student did actually attend school, all of their financial aid should not be cancelled. Under these circumstances we will reduce the financial aid by the amount of tuition and fees refund. This leaves the student owing a zero balance. This prevents the student from owing, or getting a refund. In the event they have a balance, **we are not to contact the student per regulations**.

Back-Dated Resignations: Sometimes the Registrar's office will change the last date of attendance for a student. Often, resignations are back-dated to before the first class day. If they truly never attended any classes, you will need to cancel all of their aid. If they did attend classes, the original resignation calculation stands as it is. The calculation is not dependent on the University's refunds.

Post Withdrawal Disbursement: If a Loan Post Withdrawal Disbursement is indicated you will need to generate a Post Withdrawal Disbursement Letter to see if the student/parent wants to proceed with this. Examples of this letter are at T:SFA/R2T4/PostWithdrawalDisb. There is a response deadline for these that will need to be calculated (14 days after the letter) and notated in your Outlook Calendar to remind you. PELL Post Withdrawal Disbursements don't need an approval from the student and the PELL award will need to be changed in BANNER so the student can receive it.

Withdrawal date when a student dies: If a school that is not required to take attendance is informed that a student has died, it must determine the withdrawal date for the student under 34 CFR 668.22(c)(1)(iv). This section provides that if the institution determines that a student did not begin its withdrawal process or otherwise provide official notification of his or her intent to withdraw because of illness, accident, grievous personal loss, or other such circumstances beyond the student's control, the withdrawal date is the date that the institution determines is related to that circumstance.