

R2T4 Policy & Procedure

When federal financial aid funds are disbursed, the expectation is that the student will attend the entire period of enrollment for which the funds were awarded. If students only complete a portion of the semester or term, they have only earned a portion of their federal financial aid. In some cases, this means that funds must be returned to the government, otherwise known as Return of Title IV Funds (R2T4).

- ❖ The senior processor will place any R2T4s that individuals are responsible to complete on their tab in the discontinuance spreadsheet for the semester.
 - BYUFA_NSI_FAD_ENROLL_DATA
 - This query catches students who have had an FAD hold placed on their account
 - BYUFA_DFA_HOLD_NO_FAD
 - This query catches students who have a DFA hold but not an FAD hold
 - BYUFA_FD_V_DISC_VER_COMPLETE
 - This query catches students who have recently completed verification and may need an R2T4 calculation completed
 - BYUFA_MOD_TERM_TYPE_OTHER_2221
 - This query catches students who have withdrawn from courses who are also enrolled in one-week courses. These students may or may not need to be processed as an R2T4 and will be manually reviewed
- ❖ First, see if the student would **not** need an R2T4 completed for any reason
 - Do they have an ISIR on file at the time that they discontinued?
 - If they do not have an ISIR on file as of the date that they discontinued, they are ineligible for Title IV funds for that semester and no R2T4 is necessary
 - Did they have an R2T4 completed previously?
 - Are they meeting SAP?
 - If they are failing, then they would not need an R2T4 completed since they are not eligible for Title IV aid
 - Have they received their maximum federal aid for the year before the semester you are completing the calculation for?
 - Meeting Pell Lifetime Eligibility Limit or 150% for the aid year?
 - Exceeding federal aid aggregates for the aid year or their lifetime?
 - Have they received aid at another school for this semester?
 - Are they a continuing education student, BGS student or visiting student?
 - All of these students are ineligible
- ❖ Get a good idea of the student's situation
 - For information about verification in relation to R2T4 click [here](#)
 - For information about modules during a regular semester click [here](#)
 - For information about how to complete an R2T4 before census click [here](#)
 - For information about considerations for Fall versus Winter semesters click [here](#)
 - For information about retroactive discontinuances click [here](#)
 - For information about Spring/Summer discontinuances click [here](#)

- ❖ Make sure you know which semester you are completing the R2T4 for. Enter that into the spreadsheet and make sure that all of your screens (c163, Financial Aid Status Admin, PET01, REG01, etc.) are set to the correct semester
- ❖ Determine the withdrawal date
 - This date will be found in REG01 next to Discontinuance Date
 - If they do not have a discontinuance date listed in REG01, they may have discontinued before census, or they may still be enrolled in a third time repeat class

Fall Semester 2021 (30 Aug 2021 - 09 Dec 2021)

Fall Semester 2021 GO

Reg Status	9 - Continuing Student	Term Acad Standing	Warning
Reg Eligibility	DC - Day Continuing	Curr Acad Standing	Warning
Reg Priority Date	09 Jun 2021 12:00a MT	Graduate Full-Time Status	
Class Standing	Junior	Distance Education Status	
Discontinuance Date	20 Oct 2021	Independent Study	
YearTerms First - Last	Fall Semester 2020 - Winter Semester 2022	View Flags/Holds	
Programs	Major: Mathematics (BS)		

- If the student discontinued retroactively, we use the 'date submitted' section in the AIM screen PET01

Year/Term Winter 2021
 Reg Eligibility 9 - Continuing Student
 Date Submitted 11/01/2021 07:35 PM

Student Schedule											
Course	Sec	Type	Term	Reg #	TC	Title	Days	Times	Loc	Grd	Hrs
ENGL 292	001			08558	003	British Literary History 2	TTh	2:00 - 3:15	JKB 3108	D-	3.00
ENGL 328R	001			11980	000	Studies in Composing	MW	12:30 - 1:45	JFSB B105	W	3.00
ENGL 669R	001			11271	001	Poetry Workshop	T	4:00 - 6:50	TBA	A	3.00
HIST 201	005			08211	003	World Civilization to 1500	TTh	12:30 - 1:45	TBA	C	3.00
IHUM 243	001			13757	000	Humanities of South Asia		-	TBA	C	3.00
Total Credit Hours											12

- ❖ Determine the date of determination
 - This will be found on the 'date submitted' section in the AIM screen DISC01

📄
✅
📅
✕

YM1 DISC REG02

🔗

Submitted Date	10/22/2021	Notes 10/22/2021 Richey, Joshua L 10/27/2021
Discontinue Date	10/22/2021	
Processed Date	10/25/2021	

- If the student discontinued retroactively, then this date will be the date that the petition was approved. This can be found under the petition requests chart by clicking 'view log'

Petition Requests					
Type	Details	Course	Credit Change	Fees	Decision
Withdraw		PHY S 100 sec 041	-3	0.00	<input checked="" type="radio"/> Approve <input type="radio"/> Deny <input type="radio"/> N/A
Withdraw		REL A 211 sec 025	-2	0.00	<input checked="" type="radio"/> Approve <input type="radio"/> Deny <input type="radio"/> N/A
Withdraw		REL C 225 sec 008	-2	0.00	<input checked="" type="radio"/> Approve <input type="radio"/> Deny <input type="radio"/> N/A
Withdraw		SPAN 322 sec 003	-3	0.00	<input checked="" type="radio"/> Approve <input type="radio"/> Deny <input type="radio"/> N/A
Withdraw		SPAN 326 sec 003	-3	0.00	<input checked="" type="radio"/> Approve <input type="radio"/> Deny <input type="radio"/> N/A
			-13 <input type="button" value="Clear"/>	0 <input type="button" value="Clear"/>	<input type="button" value="Approve All"/> <input type="button" value="Deny All"/> <input type="button" value="Clear All"/>
<input type="button" value="Approved Petition Change Form"/>					
					<input type="button" value="Save Decisions"/> <input type="button" value="View Log"/>

- The date next to the 'approved' decision is the date we would use as the date of determination

Decision Log ✕

Type	Details	Course	Decision	Date	Updated By
Withdraw		PHY S 100 sec 041	APPROVED	03/01/2022 11:05 AM	Richey, Joshua L
Withdraw		REL A 211 sec 025	APPROVED	03/01/2022 11:05 AM	Richey, Joshua L
Withdraw		REL C 225 sec 008	APPROVED	03/01/2022 11:05 AM	Richey, Joshua L
Withdraw		SPAN 322 sec 003	APPROVED	03/01/2022 11:05 AM	Richey, Joshua L
Withdraw		SPAN 326 sec 003	APPROVED	03/01/2022 11:05 AM	Richey, Joshua L

- If there is not a form and there is no way to know when they started the discontinuance process, then we use the discontinuance date on the REG01 screen
- ❖ Enter how many days you have left to complete the R2T4
 - In the box spreadsheet click on the 30-day DoD Deadline box so that there is a green box surrounding it
 - Enter =sum(
 - Next, click on the corresponding date of determination box that you entered into the spreadsheet
 - Then, put +30
 - When you click enter, the date will be exactly 30 days from the date of determination, which is the last possible day that we can complete the calculation

Query Date	Abby's Deadline	30-day DoD Deadline	Student ID	Name	Create Wksht	Withdrawal Semester	Withdrawal Date	Date of Determination
Josh Email 11/15/2021		=sum(I37+30)	68350629	Sprague, Kinsee		Winter 2021	3/31/2021	11/10/2021
		SUM (number1, [number2], ...)						

- ❖ Since the federal government does not require students who discontinued because of COVID-19 to repay federal aid, we should check to see if they mentioned that their discontinuance was due to COVID
 - In DISC01, look in the reasons section. There is an option to specifically mark COVID-19

Student Name	Macias, Natalie Lizbeth
Student BYU ID	639726468
Reg Status	9 - Continuing Student
Reg Eligibility	DC - Day Continuing
Status	Archived
Semester / Term	Fall 2021
Partners	
Resume Enrollment	Spring 2022
First Semester	No
Financial Aid	Federal grant*, Federal loans*
Class Attendance	Yes
Taking Prereqs	No
BYU Health Plan	No
Taking First Term Class	No
Study Abroad	No
BYU Student Employee	No
Living On Campus	No
Sell Back Books	No
Reasons	Mental Health, Academic problems

- In PET01 read the student statement to see if they mentioned COVID-19
- If the student mentions COVID-19 in either of these places, email Abby or Shawn H. if she is unavailable. They are the only ones that can approve whether or not the discontinuance was truly due to COVID.
 - Mark in your spreadsheet whether or not the discontinuance was due to COVID
 - If the discontinuance was due to COVID, click [here](#) for more information
- ❖ Check Financial Aid Status Admin in PeopleSoft to see what kind of federal aid the student has under 'estimated financial aid awards'
 - The student may have disbursed or undisbursed aid that we might need to include in the calculation

Estimated Financial Aid Awards

							Personalize	Find	First	1-3 of 3	Last
Description	Academic Career	Fall	Winter	Spring	Summer	Total	Disbursed Amount				
1 Federal Pell Grant	Undergrad	\$2,373.00	\$2,372.00	\$0.00		\$4,745.00	\$2,373.00				
2 Direct Subsidized Loan 01	Undergrad	\$2,750.00	\$2,750.00			\$5,500.00					
3 Direct Unsubsidized Loan 01	Undergrad	\$3,500.00	\$3,500.00			\$7,000.00					

(Disclaimer: Awards may change.)

Total Aid: \$17,245.00

- This student has a Pell grant listed under disbursed amount. However, they also have loans accepted that have not yet disbursed. We may be able to include loans as aid that could have disbursed if they meet the following criteria **prior** to when the student became ineligible:
 - Official EFC
 - Loan has been originated
 - You can check assign awards to see if the loan has even been accepted
 - You can look at view loan processing actions to see if the loan has been originated
 - A promissory note has been signed before the 30-day R2T4 deadline is over
 - All ISIR comment codes have been resolved
- If the student is eligible for undisbursed aid or a post withdrawal disbursement, click [here](#) for more information
- ❖ Check c163 in AIM to see what the student’s load was for the semester
 - Count the classes the student was enrolled in at census that are **not** third time repeat of audited classes (V).
 - Exception: Since we do not care about classes, we just care about load (F, T, H, L) if we can find proof at the end of the term in the same course load as the load the student had at census then we can perform an R2T4 on that load even if one of the classes we found proof in was not added by census
 - **However**, we can only ever award students up to the load they had locked at census. For example, if census is 1/1/2021 and a student is locked at a half-time load, and then adds another class on 1/2/2021 that then lifts them to a ¾ time load, we cannot award a student a ¾ Pell grant even if they participate in all of their classes.
 - If they withdrew from all Title IV eligible classes and are still enrolled in non-eligible classes (third time repeats or audited classes) then we would need to complete an R2T4 since they are considered a discontinuance for federal aid purposes

		First Day of Class			Add Deadline			Last Day of Class			Tuition Due		2nd Block Tuition Due								
		30 Aug 2021			07 Sep 2021			18 Dec 2021			23 Aug 2021		23 Aug 2021								
	Year Term	Billable Hrs	Section Type	Curr ID	Course Name	Section Number	Grade	Credit Hrs	Add Date	Drop Date	Start Date	End Date	Ben	Pell	Sch	Fee Code	Rule	Reg/Pen Fee	Tuit Pen	Rept	Block
Class Info	20215	1.0	DAY	04025	MUSIC 325R	001	W	1.0	28 Jun 2021	29 Oct 2021	30 Aug 2021	09 Dec 2021							\$161.50		S
	20215	1.0	EVENING	09470	TMA 160	001	W	1.0	28 Jun 2021	29 Oct 2021	30 Aug 2021	09 Dec 2021							\$161.50		S
	20215	4.0	DAY	11904	TMA 276	001	W	4.0	15 Jul 2021	29 Oct 2021	30 Aug 2021	09 Dec 2021							\$646.00		S
	20215	3.0	DAY	12043	TMA 115	001	W	3.0	28 Jun 2021	29 Oct 2021	30 Aug 2021	09 Dec 2021							\$485.00		S
	20215	1.0	EVENING	12321	DANCE 174	002	W	1.0	15 Jul 2021	29 Oct 2021	30 Aug 2021	09 Dec 2021									S
	20215	2.0	DAY	12578	REL C 225	014	W	2.0	28 Jun 2021	29 Oct 2021	30 Aug 2021	09 Dec 2021							\$76.00		S

- Enter **both** the load and the number of credits into your spreadsheet
- ❖ Depending on the type of financial aid, start looking for proof of participation

- If the student is eligible for Pell
 - You need to find proof in classes up to the student's load at census
 - For example, if a student is enrolled in 15 credits you would only need to find proof in 12 credits to establish that the student was eligible for the funds that they received.
- If the student **only** has loans that have already been disbursed
 - You only need to find proof in 0.5 credits since the student would have been eligible for the disbursement at the time the funds were released to their account
- The first place to look for proof of participation is DISC01 or PET01
 - In DISC01 we can accept
 - Passing/failing as of date
 - In DISC01 we cannot accept
 - Passing/failing as of unverified
 - Pending

REL A 327 (003)	Shannon, Avram R	Passing as of Oct 5, 2021 <i>Oct 26, 2021 by Shannon, Avram R</i>
IHUM 202 (013)	Cales, Diane Smith	Failing as of Oct 8, 2021 <i>Oct 22, 2021 by Cales, Diane Smith</i>
SPAN 330 (008)	Stallings, Gloria Berenice	Failing as of Sep 10, 2021 <i>Oct 22, 2021 by Stallings, Gloria Berenice</i>
SPAN 457R (001)	Price, Brian Lee	Failing as of Oct 8, 2021 <i>Oct 22, 2021 by Price, Brian Lee</i>
DANCE 140 (006)	Bayles, Emily Elizabeth	Passing as of Unverified <i>Oct 22, 2021 by Bayles, Emily Elizabeth</i>
REL C 225 (022)	Esplin, Scott C	<i>Pending</i>

- In PET01
 - Under instructor comments, you can click on the course listed and it will show any comments that the professor has made. If they mention that the student participated or attended the class, we can count this as proof of participation

Instructor Comments							
Type	Details	Course	Instructor	Support	Response Created	Created By	Documents
Withdraw		PHY S 100 section 044	Lawler, Margaret J jeannette_lawler@byu.edu Proxy	Neutral	11/09/2021 03:16 PM	Lawler, Margaret J	
Conway is currently passing with a D-, but he has not done anything for several weeks. He has been inconsistent about doing work since the end of September.							

- If you still need to find proof of participation after checking these resources, check learning suite, canvas, and the testing center.
- Learning suite
 - Any dates under the following headings
 - Latest recorded score dates
 - Latest recorded submitted assignments via learning suite
 - Latest recorded attendance dates
 - Learning suite exams taken
- Testing Center

- Any dates for the class count as proof
- Canvas
 - Any dates next to specific assignments in the class section count as proof
- Click [here](#) for detailed instructions on how to look for proof
- If you still cannot find proof of participation, contact the professor for the class(es) that the student does not have proof in.
 - Click [here](#) for detailed instructions on how to contact a professor
- We are required to document our proof of attendance for federal aid purposes
 - Document any proof found from DISC01, PET01, learning suite, canvas, or the testing center in a file note
 - Document responses from professors in a file note, and then also make sure to send it to imaging in the correct aid year
 - Doc Type: FinR2T4
- If the student has proof up to their load at census, then we do not need to make any initial adjustments
- If the student has proof in a load other than what they are currently being awarded for, you may need to make an initial adjustment
 - For example, if the student was enrolled in full time at census but we could only verify proof of participation $\frac{3}{4}$ time, then we would need to adjust their Pell grant to $\frac{3}{4}$ time before we can proceed with the calculation
 - Click [here](#) for detailed instructions on how to make an initial adjustment
- If we cannot verify proof of attendance in any of the student's classes, then we must cancel all Title IV eligible aid since they never established eligibility. No R2T4 is required.
 - **If the student had loans disbursed and refunded to them, we will need to send out a 30-day demand letter. Click here for more information.**
 - Make sure to change the student's FA term to N if they did not participate and they are not eligible for any aid
- ❖ Find the student's institutional charges
 - We count charges from the following categories:
 - Tuition
 - Prorated tuition
 - Class fees
 - Prorated class fees
 - On campus room/rent
 - Only rent and electricity
 - On campus meal plans
 - Program fees (study abroad)
 - We **do not** include
 - Furniture charges from campus housing
 - This may show as an on-campus housing charges for a few dollars – check on My Financial Center to see if it is an eligible charge
 - Prorated tuition for repeats

- Student center health plans
- In PeopleSoft, go to view customer accounts
 - Click on items by term and then view all
 - Scroll down to the correct term
 - We count institutional charges up to and including the date that the student withdrew under the column date posted
 - We do include cents when calculating institutional charges

2021 F -7,334.60 7,234.60 0.00 -100.00 -100.00

Item Details					
Personalize Find View All First 1-28 of 28 Last					
Item Type	Date Posted	Item Effective Date	Line Total	Item Balance	
BYU Store - Text Books	09/06/2021	09/06/2021	49.99	0.00	
BYU Store - Text Books	09/07/2021	09/07/2021	202.49	0.00	
BYU Store - Text Books	09/15/2021	09/15/2021	49.99	0.00	
Credit Card Fee	08/16/2021	08/16/2021	61.20	0.00	
Direct Ln Fed Unsb Stafford01	08/20/2021	08/20/2021	-2,101.40	0.00	
Direct Ln Fed Unsb Stafford01	08/20/2021	08/20/2021	-1,609.60	0.00	
Heritage Halls	07/21/2021	07/21/2021	402.40	0.00	
Heritage Halls	07/21/2021	07/21/2021	402.40	0.00	
Heritage Halls	07/21/2021	07/21/2021	402.40	0.00	
Heritage Halls	07/21/2021	07/21/2021	402.40	0.00	
Heritage Halls	07/21/2021	07/21/2021	402.40	0.00	
Prorated Tuition	10/02/2021	10/01/2021	200.00	0.00	
Prorated Tuition	11/09/2021	11/08/2021	646.00	0.00	
Refund - CashNet Credit Card	10/04/2021	10/04/2021	296.53	0.00	
Refund - CashNet Credit Card	11/10/2021	11/10/2021	646.00	0.00	
Refund Excess Funds	09/01/2021	09/01/2021	2,101.40	0.00	
Tuition - Fall	07/28/2021	07/28/2021	2,908.00	2,908.00	
Tuition - Fall	10/02/2021	10/01/2021	-1,616.00	-1,616.00	
Tuition - Fall	11/09/2021	11/08/2021	-1,292.00	-1,292.00	
Tuition - Fall Repeat	07/28/2021	07/28/2021	152.00	0.00	
Tuition - Fall Repeat	10/02/2021	10/01/2021	817.00	0.00	
eCredit Card - Housing	07/27/2021	07/27/2021	-502.40	0.00	
eCredit Card - Tuition & Fees	08/16/2021	08/16/2021	-3,121.20	0.00	
eCredit Card - Tuition & Fees	10/02/2021	08/16/2021	599.00	0.00	
eCredit Card - Tuition & Fees	10/02/2021	08/16/2021	-296.53	0.00	
eCredit Card - Tuition & Fees	10/02/2021	08/16/2021	-302.47	0.00	
eCredit Card - Tuition & Fees	11/09/2021	08/16/2021	646.00	0.00	
eCredit Card - Tuition & Fees	11/09/2021	08/16/2021	-646.00	0.00	

- For example, if this student discontinued on 11/8/2021 then their institutional charges would be:
 - Housing: \$2,012
 - Tuition: \$1,492
 - Total: \$3,504
- ❖ If the student needs and R2T4, go to PeopleSoft, create worksheet
 - You will need to click the second tab, add a new value.
 - Put in the ID, make sure the aid year is correct, and then put in the term
 - On the first tab, Return TIV Aid input
 - Date of withdrawal
 - Institutional determination date
 - Select payment period.
 - Save

Return TIV Aid | Return of Funds Worksheet | Student/School Return | Post-Withdrawal Disbursement | Return TIV Aid Notes

Allen, Brianna ID 337851877
 Institution BYU Brigham Young University Aid Year 2022
 Term 2215 Fall 2021 Program Type Credit Hour Program
 FA Term Academic Career UGRD Calculate All

Student Status FA Term

Summary
 Date of Withdrawal 09/15/2021 Undetermined Withdrawal Date Days Elapsed 12 Last Updated
 *Overall Status Pending *Institutional Determination Dt 09/15/2021 Date Form Completed 09/27/2021

Period Information
 Payment Period Enrollment Period *Start Date 08/30/2021 *End Date 12/17/2021

Term Information
 Term 2215 Withdraw Date 09/15/2021 60 Pct Dt 11/01/2021 Term Begin Date 08/30/2021
 FA Term Withdraw Date 09/15/2021 Term End Date 12/17/2021

Session Information
 Session Withdraw Date 60 Pct Dt Session Period Begin Date
 Session Withdraw Date 60 Pct Effective Dt Session Period End Date
 Use Session Calculation Data

Save Return to Search Notify Add Update/Display

Return TIV Aid | Return of Funds Worksheet | Student/School Return | Post-Withdrawal Disbursement | Return TIV Aid Notes

- On the second tab
 - Click calculate all
 - By clicking the details link next to E you can make sure that all of the correct Title IV aid has been included in the calculation – be especially careful if the student needed an initial adjustment
 - ◆ Aid must be disbursed in a regular calculation for the aid to show up in E – thus you must wait until all of the appropriate aid has disbursed to then complete the calculation

Return TIV Aid | Return of Funds Worksheet | Student/School Return | Post-Withdrawal Disbursement | Return TIV Aid Notes

Amber JoAnn Stephenson ID 503479047
 Institution BYU Brigham Young University Aid Year 2022
 Term 2215 Fall 2021 Program Type Credit Hour Program
 Calculate Calculate All Date of Withdrawal 10/29/2021 Institutional Determination Dt 10/29/2021

Worksheet Data

E. Total TIV Aid Disb	6290.00	Detail	N. Unearned Inst Charges	0.00	
F. Total TIV Grant Aid	3073.00		O. Amt Due From School	0.00	Detail
G. Total TIV Aid	6290.00		P. Total School Must Return	0.00	
H. Pct. TIV Aid Earned	58.10	Detail	Q. Amt Due From Student	2635.51	
I. TIV Aid Earned	3654.49		R. Stdnt Loan Repaymnt Amt	3217.00	Detail
J. TIV Aid to Disburse	0.00		S. Initial TIV Grant Amount	0.00	
K. TIV Aid to Return	2635.51		T. TIV Grant Protection Amt	0.00	
L. Total Institutional Chrgs	0.00	Detail	U. TIV Grant Return Amt	0.00	Detail
M. Pct TIV Aid Unearned	41.90				

Action Complete Student Return of Funds Tracking Information
47 characters remaining

Save Notify Add Update/Display

- Input institutional charges

- We include **exact** cents for institutional charges
- Click calculate
- The rest of the worksheet should fill out
- Save

N

Return TIV Aid **Return of Funds Worksheet** Student/School Return Post-Withdrawal Disbursement Return TIV Aid Notes

Amber JoAnn Stephenson ID 503479047

Institution BYU Brigham Young University Aid Year 2022

Term 2215 Fall 2021 Program Type Credit Hour Program

Calculate Calculate All Date of Withdrawal 10/29/2021 Institutional Determination Dt 10/29/2021

Worksheet Data

E. Total TIV Aid Disb	6290.00	Detail	N. Unearned Inst Charges	1282.14	
F. Total TIV Grant Aid	3073.00		O. Amt Due From School	1282.14	Detail
G. Total TIV Aid	6290.00		P. Total School Must Return	1282.14	
H. Pct. TIV Aid Earned	58.10	Detail	Q. Amt Due From Student	1353.37	
I. TIV Aid Earned	3654.49		R. Stdnt Loan Repaymnt Amt	1934.86	Detail
J. TIV Aid to Disburse	0.00		S. Initial TIV Grant Amount	0.00	
K. TIV Aid to Return	2635.51		T. TIV Grant Protection Amt	0.00	
L. Total Institutional Chrgs	3060.00	Detail	U. TIV Grant Return Amt	0.00	Detail
M. Pct TIV Aid Unearned	41.90				

Action Complete Student and School Return of Funds Tracking Information
36 characters remaining

Save Notify Add Update/Display

- Click on the detail link next to O
 - This will give you a breakdown of how much we need to adjust the student's aid and which types of aid we need to adjust
 - This is the following order in which we return federal financial aid
 - ◆ Unsubsidized loans
 - ◆ Subsidized loans
 - ◆ PLUS loans
 - ◆ Pell grants
 - ◆ IRAQ/Afghanistan service grants
 - ◆ FSEOG
 - ◆ TEACH grants
 - Add Pell amounts from O to Pell amounts from U to get the total amount of Pell grants that you should return
 - If the amount in U is positive, add that amount to O to get the total amount of Pell grants that you should return
 - If the amount in U is negative, then we treat it as if it is zero. Only return the amount listed in O in this case
 - If there is not a Pell amount listed in O but there is an amount listed in U, then return the amount listed in U
- On the last tab, Return TIV Aid Notes
- List institutional charges and the breakdown

- If the discontinuance was due to COVID, list it here
- If the student discontinued past 60% list it here
 - If a student discontinued past 60% find instructions [here](#)
- How to adjust Pell grants
 - In O (and U), you will see if Pell grants need to be returned. Round that amount **up** to the next whole dollar
 - You will need to adjust Pell grants first in Invoke Professional Judgment. The system will try to adjust it if you try to do the loans first
 - In Action put 'B' to the left of federal Pell grant
 - Enter the amount in offered that you would like to now be disbursed
 - Keep in mind that you need to add in applicable fall/winter amounts for which the student may not have discontinued from
 - Once you enter the amount, a warning box will pop up, click okay and then check the custom split box
 - This will allow you to enter custom amounts for each semester
 - Click through any warnings
 - Click okay
 - Click validate
 - Click on the blue disbursement link to check that your award was validated correctly
 - Post
 - Save
- How to adjust loans
 - Adjust loans in assign awards
 - Get the amounts from O in the worksheet to see how much you need to adjust the loans
 - Keep in mind that you are not adjusting the entire year's loan, just the semester that the student discontinued
 - Round the amount from O **up** to the nearest dollar
 - In assign awards, take the net disbursement balance for the semester the student discontinued (found in the blue disbursement link) and subtract the amount you got from O
 - The number that you get will be what you want your new net disbursement balance to be in assign awards
 - Take that new number and divide it by the origination fee for the year
 - This year it is 0.098943
 - That will give you the amount that you need to offer/accept in assign awards to get the correct net disbursement balance
 - Validate
 - Double check that the new disbursement amount is correct – you may have to adjust the offered amount up or down by \$1

*Original net disbursement from assign awards – Rounded up amount from line O
= New net disbursement amount in assign awards*

- We are only adjusting the loan for Fall 2021, so we know that we need to cancel all of the unsubsidized loan since the amount to adjust in O matches the net disbursement amount in assign awards (\$990 - \$990 = \$0)
- For the subsidized loan, we would subtract \$2,227 - \$293 = \$1,934
 - $\frac{\$1,934}{0.98943} = \$1,954.660764278423$
 - In general, rounding down will allow for the correct amount in the net disbursement balance, so offer \$1,954 (we can only offer whole dollar amounts)
 - Since the student is no longer eligible for the winter portion of their loan, in assign awards we would put 'B' for \$1,954 in assign awards
 - Validate
 - Click the blue disbursement tab to check that it was done correctly. Most of the time you will need to create a custom split

Award Disbursement/Split

Hei

*Sequence Item Type 900000001301 Net Award Amount \$1,934.00

Disbursement Plan DA *Split Code XX Custom Split Custom Loan Fee

Disbursement Distribution											
Disbt ID	Term	Award Period	Level	Offered	Accepted	Offer Loan Fee	Offer Rebate	Accept Loan Fee	Accept Rebate	Net Disbursement Balance	Disbursed
01	2215	Fall/Winter (Academic)	U2	1954	0.00	10.00	0.00	10.00	0.00	0.00	2,227.00
02	2215	Fall/Winter (Academic)	U2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
03	2215	Fall/Winter (Academic)	U2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
04	2221	Fall/Winter (Academic)	U2	0.00	0.00	10.00	0.00	10.00	0.00	0.00	0.00
05	2221	Fall/Winter (Academic)	U2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
06	2221	Fall/Winter (Academic)	U2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

OK Cancel

- Validate
- Check the disbursement again and make sure the net disbursement balance matches

*Sequence 20

Item Type 900000001301

Net Award Amount \$1,934.00

Disbursement Plan DA

*Split Code XX Custom Split Custom Loan Fee

Disbursement Distribution											Personalize	Find	Print	First	1-6 of 6	Last
Disbt ID	Term	Award Period	Level	Offered	Accepted	Offer Loan Fee	Offer Rebate	Accept Loan Fee	Accept Rebate	Net Disbursement Balance	Disbursed					
01	2215	Fall/Winter (Academic)	U2	1,954.00	1,954.00	20.00	0.00	20.00	0.00	1,934.00	2,227.00					
02	2215	Fall/Winter (Academic)	U2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00					
03	2215	Fall/Winter (Academic)	U2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00					
04	2221	Fall/Winter (Academic)	U2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00					
05	2221	Fall/Winter (Academic)	U2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00					
06	2221	Fall/Winter (Academic)	U2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00					

OK

Cancel

- If it matches, post
- ❖ Anytime that you make an adjustment for an R2T4, you should disburse with override
 - Go to the PeopleSoft screen, disburse aid with override
 - Select the correct term
 - Click view all
 - For any areas that you have adjusted or canceled, click the override authorization box
 - Next, click the yellow authorize box
 - Make sure that the authorized amount changes to the correct sum
 - The amount accepted and the amount authorized should match
 - Never select the yellow disbursement button
 - Save

Item Type 900000001301 Direct Subsidized Loan 01

Disbt ID 01 Fall 1/3

Disb Date 08/20/2021

Accepted \$2,250.00

Authorized \$2,227.00

 Override Authorization

Net Disb Bal \$2,227.00

Disbursed \$2,227.00

Authorization

Disbursement

Messages

Item Type 900000001301 Direct Subsidized Loan 01

Disbt ID 01 Fall 1/3

Disb Date 08/20/2021

Accepted \$1,954.00

Authorized \$1,934.00

 Override Authorization

Net Disb Bal \$1,934.00

Disbursed \$2,227.00

Authorization

Disbursement

Messages

- ❖ Double check to make sure that the student's Financial Aid (Census) Load is not N if they get to keep aid
 - If it is N, change it to the amount that they participated in
- ❖ Leave a file note
- ❖ Message the student
- ❖ Complete the Worksheet on the first tab
 - Make sure to select save or the complete status will not go through

Return TIV Aid | Return of Funds Worksheet | Student/School Return | Post-Withdrawal Disbursement | Return TIV Aid Notes

Stephenson, Amber JoAnn ID 503479047

Institution BYU Brigham Young University Aid Year 2022

Term 2215 Fall 2021 Program Type Credit Hour Program

FA Term Academic Career UGRD Calculate All

Student Status FA Term

Summary

Date of Withdrawal 10/29/2021 Undetermined Withdrawal Date Days Elapsed 21 Last Updated

Overall Status Completed Institutional Determination Dt 10/29/2021 Date Form Completed 11/19/2021

Period Information

Payment Period Enrollment Period *Start Date 08/30/2021 *End Date 12/17/2021

Term Information

Term 2215 Withdraw Date 10/29/2021 60 Pct Dt 11/01/2021 Term Begin Date 08/30/2021

FA Term Withdraw Date 10/29/2021 Term End Date 12/17/2021

Session Information

Session Withdraw Date 60 Pct Dt Session Period Begin Date

Session Withdraw Date 60 Pct Effective Dt Session Period End Date

Use Session Calculation Data

Save Return to Search Notify Add Update/Display

❖ Resolve the FAD NSI

- You can do this on several screens including: Manage service indicators, Financial Aid Status – Admin, Create WS, etc.
- Click on the red do not symbol
- Click on the FAD code
- Select release
- OK

Service Indicators Help

Manage Service Indicators

Brett Travis Hammer 034590569

Display Effect Negative Institution Brigham Young University Refresh

+ Add Service Indicator

Service Indicator Summary

Code	Code Description	Reason Description	Institution	Start Term	End Term	End Term Description	Start Date	End Date
FAD	Financial Aid Discontinuance	Fin Aid Adjustment Needed	BYU	2215	2021 F		11/18/2021	

+ Add Service Indicator

Edit Service Indicator

Amber JoAnn Stephenson 503479047 Release

*Institution BYU Brigham Young University

*Service Indicator Code FAD Financial Aid Discontinuance

*Reason NRF Fin Aid Adjustment Needed

Description This hold is in place because you discontinued from all federal aid eligible courses, which triggered a re-evaluation of your aid. You cannot have refunds or

Effect Negative Service Indicator

❖ Put the student's information on the Student Financials Spreadsheet in Box

- List the date you add the name, the term, and the student ID.
- Next, list the aid as is on Financial Aid Admin after you make all of the necessary adjustments

Estimated Financial Aid Awards

							Personalize	Find	Print	Refresh	First	1-2 of 2	Last
Description	Academic Career	Fall	Winter	Spring	Summer	Total	Disbursed Amount						
1 Federal Pell Grant	Undergrad	\$3,073.00	\$3,072.00	\$0.00		\$6,145.00	\$3,073.00						
2 Direct Subsidized Loan 01	Undergrad	\$1,954.00	\$0.00			\$1,954.00	\$2,227.00						
(Disclaimer: Awards may change.)						Total Aid:	\$8,099.00						

- For this student, it would be \$3,073 in Pell, \$1,954 in subsidized loans, and \$0 in unsubsidized and PLUS loans.
- Put any notes that student financials might need to be aware of
 - For example, if it is a post withdrawal disbursement

COVID-19 Discontinuances

- ❖ Students who are approved as a COVID-19 discontinuance are not required to return aid that they normally would have had they discontinued for other reasons
- ❖ Even though students who discontinue due to COVID are not required to return the aid, we are still required to perform the calculation as normal – just do not return any aid at the end
- ❖ In your file note, mention how much aid the student would have been required to return under normal circumstances
- ❖ Let the senior processor know that you had a student approved for a COVID-19 Discontinuance
- ❖ For the senior processor
 - Put on the COD indicator for the student for **each** type of aid that they were awarded
 - You will need to put on the indicator for students who discontinued before and after 60%
 - If they have both loans and Pell, then you will need to do this process once for each award type
 - In COD go to person and look them up by their social security number
 - Under Person Info click on the award you need to add the indicator for
 - Make sure you are on the correct award year, and then select the amount that was approved for the year

Person | **School**

- ▶ Person Search
- ▼ Person Info
 - Detail
 - All Awards
 - Pell**
 - Credit Check
 - Events
 - Correspondence
 - Disclosure Statements
 - Borrower-Servicer
 - Relationship
 - Default Search
- ▶ Counseling Search
- ▶ MPN/ATS/Manifest
- ▶ PLUS App Search
- ▶ Endorser Search
- ▶ Credit Check
- ▶ Applicant Search
- ▶ Escalation
- ▶ Servicer
- ▶ Default Search
- ▶ Informed Borrower

PELL								
Pell Lifetime Eligibility Used: 113.941%					Full Pell LEU History			
Award Year					'21-'22			
Pell Grant Summary								
Attending School	Eligibility Used	POP Flag	POP Start Date	POP End Date	Award Amount Approved	Award Amount Disbursed	Scheduled Award Amount	
Year '21-'22								
BRIGHAM YOUNG UNIVERSITY	37.5032%				\$3,365.00	\$1,442.00	\$3,845.00	
Total Percent Eligibility Used for '21-'22:					\$3,365.00	\$1,442.00		

CREATE NEW AWARD

- Under award information select disbursements
- Next, click on the number – this will correspond with the semester that they student had an R2T4 completed for

Award Search

Award Information

[Detail](#)

[Disbursements](#)

Return to: [Pell Awards](#) -> [Award Detail](#)

Award Disbursements Information

BRIGHAM YOUNG UNIVERSITY

WILL K COWDEN
02/21/1996

PELL
'21-'22

Please click on the Disbursement number to view Disbursement Detail.

Total Accepted for Actual Disbursements \$1,442.00

Total Accepted for Pending Disbursements \$0.00

Disbursements

No.	School Enrollment Code	Accepted Amount	Date Disbursed	Date Processed	Sequence Number	Enrollment Status	CIP Code	Program CIP Code Year	Special Program
1	00367000	\$1,442.00	08/20/2021	08/20/2021	1	Three-quarters Time	16.0302	2020	Not Applicable

[CREATE NEW](#)

- Hit update

Disbursement Information

BRIGHAM YOUNG UNIVERSITY

WILL K COWDEN
02/21/1996

PELL
'21-'22

Disbursement 1

Disbursement Information

Disbursement Date: 08/20/2021

Award Amount Approved: \$3,365.00

Scheduled Award Amount: \$3,845.00

Accepted Amount: \$1,442.00

Sequence Number: 1

Status: Disbursed

Date Disbursed: 08/20/2021

Date Processed: 08/20/2021

School Enrollment Code: 00367000

Enrollment Status: Three-quarters Time

Program CIP Code Year: 2020

Program CIP Code: 16.0302

Payment Start Date:

Coronavirus Indicator

Program Credential Level: 03 - Bachelor's Degree

Special Programs: Not Applicable

Published Program Length Years: 4.5

Published Program Length Months:

Published Program Length Weeks:

Weeks Programs Academic Year:

[UPDATE](#)

- On the next page, make sure the payment start date is correct
 - This should be the first day of the semester
- Check the coronavirus indicator box
- Click submit

Update Disbursement Information



BRIGHAM YOUNG UNIVERSITY
PELL
'21-'22
Disbursement 1

When submitting a disbursement with the Coronavirus Indicator selected, the Payment Period Start Date must be included and be populated with a valid date.

The fields marked with an asterisk (*) are required.

Common Record Information

Batch ID 2021-11-19T18:31:37.0095254206
Attending Entity ID 95254206

Disbursement Information

Name WILL K COWDEN

SSN 646305453

Award Amount Approved \$3,365.00

Scheduled Award Amount \$3,845.00

Disbursement Number 1

Sequence Number 66

***Disbursement Date** August 20 2021

***Accepted Amount** \$1,442.00

Payment Start Date August 30 2021

Coronavirus Indicator

Disbursement Release Indicator True

School Enrollment Code 00367000

Special Programs Not Applicable

***Published Program Length** 4.5 Years

***Program Credential Level** 03 - Bachelor's Degree

***Enrollment Status** Three-Quarters Time

***Program CIP Code Year** 2020

***Program CIP Code** 16.0302 [LIST OF CIP CODES](#)

[VIEW PERSON DATA](#) [VIEW AWARD DATA](#) [CONTINUE](#) [DELETE](#) [CANCEL](#) [SUBMIT](#)

- The coronavirus indicator should know have a 'yes' on the disbursement information screen
- This process will be the same for direct loans – just make sure to click on the direct loans under person info
- Make a note on your spreadsheet on how much aid the student would have had to return – you will be required to report sum amounts we would have returned for all students granted a COVID-19 exception
 - You will want to note the amount of Pell, subsidized loans, unsubsidized loans, PLUS loans, and total amounts from each aid type.
 - If they discontinued past 60%, there will be no aid that they would have been required to return
- At the end of the aid year, you will need to report the sums in COD
 - In COD go to Tools

- Select R2T4 Lump Sum Reporting
- School selection: Brigham Young University
- Disaster Type: Coronavirus
- Enter the Award Year
- Search
- When you think that there will not be any other funds to report for the year, click report new funds
 - This will allow you to create your first report, which can edit if needed
 - ◆ To find a report that you have already created, click search. The report will come up, which you then have the option to edit.
 - In this report, you will be required to disclose how much money we would have returned for Pell grant, unsubsidized loans, subsidized loans, and PLUS loans.
 - You will also need to report the total aid that would have been returned from all areas.

Undisbursed Aid & Post Withdrawal Disbursements

- ❖ If the amount disbursed to the student is less than the amount the student earned, and for which the student is otherwise eligible, he or she is eligible to receive a post-withdrawal disbursement (PWD) of the earned aid that was not received.
 - Just because a student is eligible for undisbursed aid to be included in their calculation does not mean that we will ultimately make a post withdrawal disbursement
- ❖ A student may be eligible for undisbursed aid to be included in the R2T4 calculation when:
 - They accepted loans that meet all late disbursement rules, but the loan did not actually disburse to the student account
 - The student completed verification before they discontinued but they were never packaged

- The student completed verification within the appropriate deadlines and is found to be eligible for additional aid as a result of that verification
- The student dropped all courses before census and the system automatically canceled their Pell grant when the student did participate
- ❖ Exceptions
 - We cannot include funds as undisbursed aid if they will exceed Pell lifetime eligibility limits
 - We cannot include loans as undisbursed aid if they will exceed federal aggregate limits
 - If a student was an overaward which caused us to cancel a winter portion of a loan, then we do not include those funds as aid that could have been disbursed
- ❖ Loans
 - Late disbursement requirements
 - A valid ISIR has been processed
 - A valid ISIR includes both an official and unofficial EFC – we are unable to accept a rejected ISIR to meet these requirements, however
 - The loan has been originated
 - A promissory note has been signed
 - The signature may be obtained after the student withdrawals but **must** be signed before we perform the R2T4 calculation
 - If SAR/ISIR has comment codes, then they need to be resolve before we can do R2T4
 - These funds should be included even if we cannot include the funds as a PWD
 - If a student accepted loans when they did not establish half time enrollment and the loan meets all other requirements for a late disbursement, we can include that aid as aid that could have disbursed in the calculation
 - However, since the student did not establish eligibility for the funds, then we will never actually make a post withdrawal disbursement
 - For example, consider a student who accepted a fall/winter loan and received that loan for fall and completed the term but then decided to discontinue from winter semester. The winter portion of the loan originated, and they only ever enrolled in 3 credits. They then decide to discontinue. Even though the loan never would have disbursed to the student, we can include those funds as aid that could have disbursed.
 - We will never disburse the aid since they did not enroll in 6 credits.
- ❖ If you find that a student is eligible for a post withdrawal disbursement, follow these steps:
 - Make sure that the student has any undisbursed aid that is eligible to be included in the calculation on their account but **not** disbursed
 - In other words, the Pell or loans should be accepted on assign awards, but nothing should actually be disbursed to the student's account.
 - Fill the first tab of the worksheet as normal
 - On the second tab, when you click calculate all, make sure that E is empty. However, in the detail link, double check that the amount that could have been disbursed is correct. F should have that same amount listed

Return TIV Aid | **Return of Funds Worksheet** | Student/School Return | Post-Withdrawal Disbursement | Return TIV Aid Notes

Taryn RaeAnn Stanfield ID 314271917
 Institution BYU Brigham Young University Aid Year 2022
 Term 2215 Fall 2021 Program Type Credit Hour Program

Calculate Calculate All Date of Withdrawal 09/15/2021 Institutional Determination Dt 09/15/2021

Worksheet Data	
E. Total TIV Aid Disb	0.00 Detail
F. Total TIV Grant Aid	2042.00
G. Total TIV Aid	2042.00
H. Pct. TIV Aid Earned	16.20 Detail
I. TIV Aid Earned	330.80
J. TIV Aid to Disburse	330.80
K. TIV Aid to Return	0.00
L. Total Institutional Chrgs	3060.00 Detail
M. Pct TIV Aid Unearned	83.80
N. Unearned Inst Charges	2564.28
O. Amt Due From School	0.00 Detail
P. Total School Must Return	0.00
Q. Amt Due From Student	0.00
R. Stdnt Loan Repaymnt Amt	0.00 Detail
S. Initial TIV Grant Amount	0.00
T. TIV Grant Protection Amt	0.00
U. TIV Grant Return Amt	0.00 Detail

Action Complete Post-Withdrawal Disbursement Information
51 characters remaining

Save Return to Search Notify Add Update/Display

Calculate TIV Aid Information

Title IV Grant Programs		
Amount Disbursed		Amt Could Have Been Disbursed
1. Pell Grant	0.00	2042.00
2. FSEOG	0.00	0.00
3. TEACH Grant	0.00	0.00
4. Iraq Afghanistan Srv Grant	0.00	0.00
Subtotal A.	0.00	Subtotal C. 2042.00

Title IV Loan Programs		
Net Amount Disbursed		Net Amt Could Have Been Disb
5. Unsubsidized Direct Loan	0.00	0.00
6. Subsidized Direct Loan	0.00	0.00
7. Perkins	0.00	0.00
8. Direct Grad PLUS Loan	0.00	0.00
9. Direct Parent PLUS Loan	0.00	0.00
Subtotal B.	0.00	Subtotal D. 0.00

A.	0.00
+ B.	0.00
= E.	0.00
A.	0.00
+ C.	2042.00
= F.	2042.00
A.	0.00
B.	0.00
C.	2042.00
+ D.	0.00
= G.	2042.00

- Enter institutional charges and click calculate
 - The amount in O should be zero. This is because instead of reducing a student's award that has already been disbursed, we will actually be disbursing additional funds to them.
- Complete the worksheet and save
- Go to the fourth tab, post-withdrawal disbursement
 - The PWD Detail link will break down you what kind of aid we need to return, and how much we need to disburse to the student

- Always round these amounts **down**
 - ◆ In the example below, the student would be sent a PWD of \$330

New Wind

Return TIV Aid | Return of Funds Worksheet | Student/School Return | **Post-Withdrawal Disbursement** | Return TIV Aid Notes

Taryn RaeAnn Stanfield ID 314271917
 Institution BYU Brigham Young University Aid Year 2022
 Term 2215 Fall 2021 Program Type Credit Hour Program

Calculate Date of Withdrawal 09/15/2021 Institutional Determination Dt 09/15/2021
Post-Withdrawal Disb Status Completed Date Form Completed 12/03/2021

Part I, II, III

J. TIV Aid to Disburse (Box 1) 330.80 Total PWD Credited (Box 2) 0.00
 Part IV Allocation of PWD
PWD Detail Box 1 330.80 - Box 2 0.00 = Box 3 330.80

Part V, VI

PWD Notification Sent

Response Deadline

Date Response Received Response Received Not Received
 Late Response Not Accepted

Date Direct Disb Mailed Grant Loan

Return TIV Aid | Return of Funds Worksheet | Student/School Return | Post-Withdrawal Disbursement | Return TIV Aid Notes

Post-Withdrawal Disbursements

Hel

Eligible Aid Not Disbursed	Aid To Be Late Disbursed	Remaining To Be Disbursed
		330.80
Pell Grant 2042.00	Pell Grant 330.80	0.00
FSEOG 0.00	FSEOG 0.00	0.00
TEACH 0.00	TEACH 0.00	0.00
IASG 0.00	IASG 0.00	0.00
Perkins 0.00	Perkins 0.00	0.00
Sub 0.00	Sub 0.00	0.00
Unsub 0.00	Unsub 0.00	0.00
Grad Plus 0.00	Grad Plus 0.00	0.00
PLUS 0.00	PLUS 0.00	0.00
	Remaining	0.00

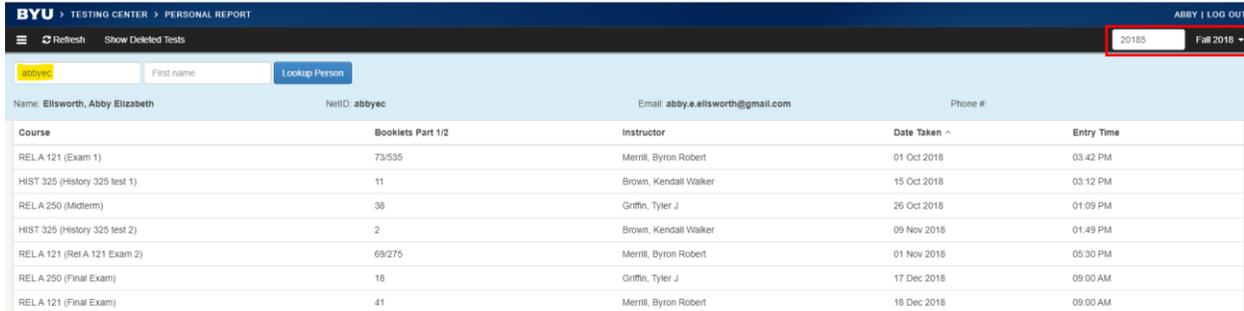
- Go to Invoke Professional Judgment in PeopleSoft to return grant funds
- Disburse aid with override
- Put the student on the student financials spreadsheet and mark that they were a post withdrawal disbursement in the notes
- Place an FDV negative service indicator in PeopleSoft
 - In PeopleSoft go to Manage Service Indicators
 - Enter the student ID and search

- Click on ‘Add Service Indicator’
- Fill out the following:
 - ◆ Service indicator code: FDV
 - ◆ Reason: R2T4
 - ◆ Start term: term the student discontinued from
- Click Ok
- Save
- Notify the student that they were eligible for a post withdrawal disbursement
- If the student was eligible for loans
 - We must receive confirmation that the student wants the loans they may be eligible for before we can disburse them
 - We must provide information about the loans for PWD students within 30 days
 - They have a minimum of 14 days to tell us if they want the loan, but we can only disburse the fund within 180 days of the Date of determination
 - ◆ Make sure to document these dates on the post withdrawal disbursement tab and save your progress
 - If we cannot make the disbursement and they request the funds, we must notify them in writing that we will not make the disbursement and why
 - Make any loan adjustments in the system and notify student financials
- Once all adjustments have been made, mark that the Post Withdrawal disbursement status as complete
- ❖ We are prohibited from making post withdrawal disbursements in the following circumstances
 - A second disbursement of loan funds (unless the student has completed the loan period)
 - A disbursement of Direct Loan when they have not signed an MPN
 - If the MPN is the only thing prohibiting a PWD, then we should call the student to see if they would like the loans. This is because the student can sign the MPN anytime within the 30-day deadline and we would then be able to make the disbursement.
 - A disbursement of a Direct Loan for a first year first time borrower who withdraws before the 30th day of the students program of study (except when this delay does not apply because of low default rates)
 - A disbursement of Pell for a student who did not have a valid SAR/ISIR by the deadline
 - A first disbursement of Direct Loan in a loan period to a student enrolled in a modular program who has withdrawn before beginning attendance in enough courses to establish half time enrollment status
 - For a student who has withdrawn, a school cannot disburse aid received for a previous semester unless the student qualifies for a late disbursement

Finding Proof of Participation

- ❖ Testing Center
 - <https://testing.byu.edu/personal-report>

- Enter the student's BYU ID or Net ID.
- In the top right corner, make sure it is the right semester.
 - Note: once you click the Lookup button the Semester field will change back to the current semester.
- If they took a test in the class, then you have proof that they began attendance.



Course	Booklets Part 1/2	Instructor	Date Taken ^	Entry Time
REL A 121 (Exam 1)	73/535	Merrill, Byron Robert	01 Oct 2018	03:42 PM
HIST 325 (History 325 test 1)	11	Brown, Kendall Walker	15 Oct 2018	03:12 PM
REL A 250 (Midterm)	38	Griffin, Tyler J	26 Oct 2018	01:09 PM
HIST 325 (History 325 test 2)	2	Brown, Kendall Walker	09 Nov 2018	01:49 PM
REL A 121 (Ret A 121 Exam 2)	69/275	Merrill, Byron Robert	01 Nov 2018	05:30 PM
REL A 250 (Final Exam)	18	Griffin, Tyler J	17 Dec 2018	09:00 AM
REL A 121 (Final Exam)	41	Merrill, Byron Robert	18 Dec 2018	09:00 AM

❖ Learning Suite

- https://learningsuite.byu.edu/.oPXR/admin/student_attendanceb
- Enter the term, year, Teaching area (this may take time to load), and then find the Course.
 - Make sure you also select the correct section or professor if applicable
- Enter the student's NetID (cannot use ID number) in the field next to the "Get Gradebook Data" button, then select this button.
- If a date shows up under "Submitted Assignments," "Recorded Attendance," or "Exams Taken," we can use that date as their date of participation.
- While the exact dates in the "Recorded Score" boxes can't be used (because it's the last date a professor modified their grade, and thus isn't when they participated), it's still proof of participation.

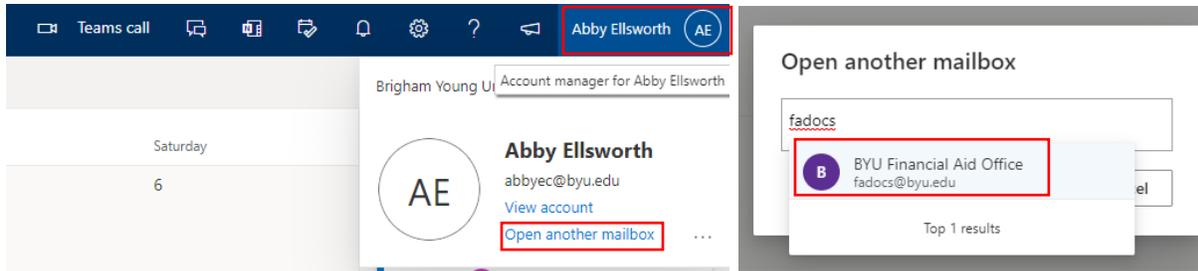
❖ Canvas

- <https://tableau.byu.edu/#/site/LMS/views/CanvasUserSubmissionReportNew/CanvasUserReport?iid=1>
- Enter the Year Term at the top right-hand corner.
- Enter the NetID on the top right-hand corner. Make sure to check the net ID box, or the student will not show up
 - Also make sure to un-check the box after you are finished with that student as Canvas can pull up data from multiple students at a time.
- When the results load, you can check the top left-hand corner for the course.
- If there is a date in the 'submitted at' column, you can count that as proof

Year	Course Name	Section Num.	Units	St. User ID	SUBMIT TO AT (Email)	Title
2021	CJUS 101	001	0012444	646512005	NULL	Center Lecture Extra Credit
						Course Outline Assignment
						Extra Credit - Recitation Lecture
						Final Exam (Proctored)
						Final Exam (Proctored)
						Mid-Course Tag Up
						Misplaced Exam - not correction
						Midterm Exam (Proctored)
						Module 2 Quiz (Updated)
						Module 2 Reading & Quiz (Chapter 1)
						Module 2 Reading & Quiz (Chapters 2 & 3)
						Module 4 Reading & Quiz (Chapter 4)
						Module 5 Reading & Quiz (Chapters 5 & 6)
						Module 6 Reading & Quiz Part 1 (Chapter 7)
						Module 6 Reading & Quiz Part 2 (Chapter 8)
						Module 7 Reading & Quiz (Chapter 9)
						Module 8 Reading & Quiz (Chapter 10)
						Module 8 Reading & Quiz (Chapter 14)
						Module 10 Reading & Quiz (Chapter 15)
						Module 11 Reading & Quiz (Chapter 16)
						Proctored Practice Quiz (Remedy) (Proctored)
						Rec'd
						Section Services Extra Credit
						William Extra Credit
						1/11/2021 4:46:53 PM Setting up your Exams Profile
						2/12/2021 6:50:23 PM Syllabus Code
						3/15/2021 6:55:51 PM Welcome to Camms 300 - Discussion
						3/22/2021 6:58:48 PM Discussion - Legal System and Current Events
						3/30/2021 2:22:36 AM "Signed In" Error
						3/30/2021 2:27:34 AM Discussion - Free Speech
						2/6/2021 2:23:00 AM Discussion - Reputation and Free Speech
						2/18/2021 2:14:12 AM Discussion - Defamation Application
						2/20/2021 2:31:02 AM Discussion - Privacy
						2/20/2021 2:58:00 PM Midterm - Course Checkup
						2/28/2021 1:31:51 AM Midterm Exam
						3/5/2021 3:28:14 PM Discussion - Gov. Meetings and Records
						3/9/2021 6:55:21 PM Media Law Paper
						3/20/2021 1:49:09 AM Discussion - Copyright
						4/5/2021 12:52:28 AM Discussion - Broadcast/Internet Regulation

Contacting Professors

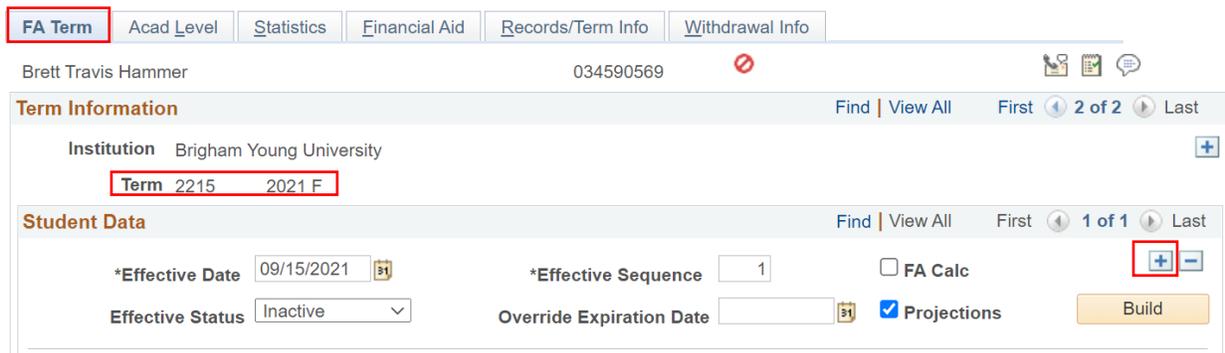
- ❖ The first step is to email the professor
- ❖ Find the professor's email in PERSUM
- ❖ In the fadocs email in outlook, email the professor the template from box
 - Make sure that you select the correct template for the student's situation (before/after census)
 - Make sure to change the necessary fields
 - Professor's last name
 - Student's name
 - Student ID
 - Class
 - Section number
 - Date you need a response by
 - Your signature
 - Subject line: STUDENT NAME, SEMESTER Discontinuance Proof of Participation
- ❖ Generally, do not give the professor up until your 30-day deadline to respond. Give them, at most, a week to respond. Make sure to follow up if they do not respond by the date that you give to them
- ❖ If they do not respond to emails, call the professor
 - You can find their phone number in PERSUM
 - If you cannot reach them, call their department to see if you can contact them by any other means. They may be able to help reach them or tell you when to call.
- ❖ How to get into the fadocs email in outlook
 - Go to outlook online
 - Once in your personal account, go to the top righthand corner where your name is located and click on it
 - Click on open another mailbox



- ❖ Type in fadocs and then select the email and click open

Initial Adjustment

- ❖ If a student has been awarded more aid than they have proof for, we need to make an initial adjustment of their Pell grant
 - Double check in c163 what their load should be and take into account any repeats, or classes added after census
- ❖ First, go to Maintain student FA term in PeopleSoft
 - On the first tab, FA Term, navigate to the correct term (do not adjust the wrong semester/term!)
 - Select the + button on the Student Data row. This will allow you to make changes to the student's FA Term



- On the second tab, acad level, change the FA Load to reflect the load without the withdrawn course(s) you are excluding. Ex: F, T, H, L
- If the load does not match the calculated load, make sure the box next to financial aid load is checked.

FA Term Acad Level Statistics Financial Aid Info Records/Term Info Withdrawal Info

Rebecca Anne Pedersen 751663832

Term Information Find | View All First 2 of 6

Institution: Brigham Young University Term: 2013 F

Student Data Find | View All First 1 of 5

Effective Date: 09/03/2013 Seq: 1 Status: Active
 Academic Career: Undergraduate Primary Program: Fine Arts and Communications,
 Academic Plan: Music Performance Academic Sub-Plan: Vocal

Ovrd

Form of Study: Enrollment Enrollment Course Load Pct: 0.1
 Approved Academic Load: Full-Time Full-Time
 Academic Load: F Full-Time Full-Time
 Financial Aid Load: H Full-Time Full-Time
 Academic Level Projected: 20 Sophomore Sophomore
 Start: 20 Sophomore Sophomore
 End: 20 Sophomore Sophomore

[View HERA Academic Level](#)

- Go to the statistics tab and change the taken credits to the number of credits the student is currently enrolled in.

FA Term Acad Level Statistics Financial Aid Records/Term Info Withdrawal Info

Brennan K Henline 045905703

Term Information Find | View All First 2 of 6 Last

Institution Brigham Young University Term 2215 2021 F

Student Data Find | View All First 1 of 2 Last

Effective Date 09/29/2021 Sequence 1 Effective Status Active
 Academic Career Undergraduate Primary Program Student Life
 Academic Plan Open-Major Academic Sub-Plan

	Override	Term	Calculated	Override	Cumulative	Calculated
GPA	<input type="checkbox"/>	0.000	0.000	<input type="checkbox"/>	3.010	3.010
Taken	<input checked="" type="checkbox"/>	0.000	0.000	<input type="checkbox"/>	41.000	41.000
Remote		0.000				
Total		0.000				
Passed	<input type="checkbox"/>	0.000	0.000	<input type="checkbox"/>	41.000	41.000
Residency		0.000			0.000	
Residence Terms		0.000				
SULA Units	<input type="checkbox"/>	0.000	0.000			
SULA Load						

SULA Special Program Not Applicable

Session Detail

- Anticipated
- In Progress
- Completed
- Current
- Current Load No Units

Transfer Credit

Save Return to Search Notify Update/Display Include History Correct History

FA Term | Acad Level | Statistics | Financial Aid | Records/Term Info | Withdrawal Info

- Save (click okay on any pop-ups that show up. Sometimes there are several).
- ❖ Go to the Assign Awards to a Student screen and select Validate. This should automatically adjust the Pell grant for you. If it does not, put a "C" in the Action box and tab, go back to the Action box and enter a "B" and Validate.

- Verify the amounts are correct and Post.
- ❖ You will then need to manually authorize the change on the Disburse Aid with Override screen.
- ❖ Message the student about the reduction. There should be a template in Box to use.

Verification & R2T4

- ❖ If a student does not have a valid ISIR on file at the time that they discontinue, then they are not eligible for an Title IV funds for that semester and no R2T4 is required
- ❖ If the student has completed verification before the R2T4 deadline, and does not submit any subsequent ISIRs
 - Complete the R2T4 as normal
 - Return any unearned funds or make a [PWD](#) of grant funds within 45 days of the date of determination if the aid did not disburse
 - If a student provides all documents for verification after withdrawing but **before** verification submission deadline and in time for 30-day R2T4 deadline, then the institution will perform an R2T4 calculation using all Title IV aid that the student established eligibility for as a result of the verification **and** for which the conditions of a late disbursement had been met **prior** to the student's loss of eligibility due to withdrawal
 - Keep in mind that if they complete verification on day 29 out of 30 (from the date of determination), we will have to complete the R2T4 within the 30-day deadline
- ❖ When the student has not and never will complete verification leaving them with an unofficial EFC
 - If the school cannot meet the 30-day deadline because verification is not complete, complete the R2T4 on funds that can be disbursed without verification (Unsubsidized loans and PLUS loans)
 - A student who fails to provide the required documentation in time for a school to complete verification and meet the R2T4 deadlines is responsible for returning any Title IV grant funds and subsidized loans already disbursed prior to being selected for verification.
- ❖ When the student was selected for and has not completed verification within the 30-day deadline for the R2T4 **but** completes verification later
 - An R2T4 should have already been done on funds that are not subject to verification
 - We will need to do a **new** R2T4 once verification is complete based on all the aid that student qualified for due to the completed verification
 - They must have completed verification no later than 120 days after the student's last day of attendance or the deadline established each year by the Department (the end of September/year end close out) whichever is earlier
 - This applies if the student was not enrolled at the time that we are reviewing the calculation. If the student is currently enrolled, then the 120 day deadline starts over again for the next time that the student ceases attendance
 - A school must make any applicable post-withdrawal disbursement
- ❖ When we completed and R2T4 on a valid ISIR, but the student submits a **subsequent** ISIR that needs to be verified

- For example, when a dependent student discontinued and had an R2T4 done, then submits an ISIR during spring/summer when they get married
- If the student is no longer in attendance when selected **and** will not reenroll in the aid year **no** further disbursements will occur.
 - We do not need to complete verification, and we may keep the R2T4 based on the first ISIR that the student was awarded on
 - We cannot make a PWD unless verification is completed
- If the student is enrolled when they are selected for verification but does not complete verification
 - If verification is not completed, then we **cannot** make any PWD
 - If the student does not complete verification prior to the R2T4 deadline, we must perform the calculation based on Title IV aid not subject to verification that was disbursed and could have been disbursed when the student withdrew
- If the student is enrolled when they are selected for verification and completes it
 - Must recalculate aid eligibility and take the following actions
 - Reduction in eligibility
 - ◆ Student must resolve overpayment made to them
 - ◆ When a new R2T4 calculation is completed, the calculation should only include funds they are eligible for with their new EFC
 - Cancel any excess funds the student is no longer eligible for as a result of the verification before you complete the R2T4
 - Increase in eligibility
 - ◆ Must do a new R2T4 based on the aid the student is eligible for based on new EFC
 - ◆ If they are eligible for more Pell grant funds, then the school should include those funds **as aid that could have been disbursed**
 - Return funds or make post withdrawal disbursement
 - ◆ If we are required to return **more** funds than done by the previous R2T4, then we must do so and make appropriate adjustments when reported NSLDS/COD

Modules within a regular semester

- ❖ During Fall/Winter, a student can be enrolled in semester length courses, first block classes, and second block classes
- ❖ If the student is enrolled in a combination of first block and semester length courses
 - If they drop all courses, they are a discontinuance
 - If they drop all semester length courses and stay enrolled in the first block class
 - If the first block class has not ended, they are still enrolled and no R2T4 is required
 - If the first block class has ended and then they drop all semester length courses, they are considered a discontinuance since they are no longer have current enrollment
 - Check to see if the module that they completed is 49% of the semester. If it is, then no R2T4 is required since this is a discontinuance exception

- Remember, since there is only one census for Fall/Winter, we can use proof of participation from any class, regardless of the module.
- ❖ If the student is enrolled in a combination of second block classes and semester length courses
 - If they drop all courses, they are a discontinuance
 - If they drop all semester length courses and stay enrolled in a second block class
 - Since the student has current enrollment, an R2T4 would not be required
 - If the second block class has not started yet, obtain written intent that the student plans to attend the second block class
 - If no intent is provided, then proceed with an R2T4 calculation
 - If the student intends to attend, then no R2T4 is required at this time
 - Verify that the student does end up attending. If they do not return, then we would need to complete an R2T4
 - If the second block class has started and you can verify proof of participation, no R2T4 is needed since they have current enrollment
 - If the student subsequently drops all second block classes they would be a discontinuance and we would use the date they drop the second block class as the date of determination
- ❖ Weeklong courses
 - A student can be awarded federal financial aid for a course that is only a week. It will follow the same general rules as other modular classes
 - If a student drops all semester length and modular courses and stays enrolled in a one-week class
 - If they are currently enrolled, then no R2T4 would be required
 - If the class has not yet begun, then obtain written intent to attend
 - ◆ If they do not provide written confirmation, proceed with the R2T4
 - ◆ If they do provide confirmation, verify that they attend. If they do not, we need to complete an R2T4
 - If the class has ended at the time that the student discontinues from all other courses, then they do not have current enrollment and the student would need an R2T4 completed
 - ◆ If the student completed a first or second block module and a one-week class, see if the combination of those courses adds up to 49% of the term. If they do, then no R2T4 would be required.

R2T4 Calculations Before Census

- ❖ Complete the R2T4 as normal, but note the differences below
- ❖ Withdrawal date
 - Normally, we would find the withdrawal date in REG01. However, when a student discontinues before census, a discontinuance date will not populate in REG01
 - Go to REG03 to see the date that the student dropped their last Title IV aid eligible class and use that as your date of withdrawal

- When you look for proof of participation, **only** use the classes that the student dropped on their withdrawal date
- For example, the student below would have a withdrawal date of 9/02. Even though the student was enrolled in three classes for the semester, we would only include CELL 360 and CELL 444 when we look for proof of participation since those are the classes dropped on their withdrawal date

Action	Course	Sec	Sec Type	Curr ID	TC	L Q	Term	Hrs	Gd	Date/Time	A/D Card	Who	App	Note	Info
Add	CELL 444	001		13473	001		S	2.0		28 Jun 2021 21:40:40	N				
Add	CELL 360	001		09121	004		S	3.0		28 Jun 2021 21:47:44	N				
Drop	CELL 360	001		09121	004		S	3.0		06 Jul 2021 11:16:07	N	Waitlist			
Add	CELL 360	002		09121	004		S	3.0		06 Jul 2021 11:16:07	N	Waitlist			
Drop	CELL 360	002		09121	004		S	3.0		02 Sep 2021 15:47:46	N				
Drop	CELL 444	001		13473	001		S	2.0		02 Sep 2021 15:47:47	N				

- ❖ Date of determination
 - When a student discontinues before census, it will be the same date as the withdrawal date found by checking REG03
- ❖ COVID-19
 - We are not required to message each student to determine if they discontinued due to COVID-19 if they discontinue before census
- ❖ Undisbursed aid
 - Students who discontinue before census may have aid canceled by the system. That would mean they would potentially be eligible for a post withdrawal disbursement
- ❖ Proof of participation
 - For professors, there is a different process that they use to check for participation. Make sure to send the appropriate message template to professors so they can find proof
 - Sometimes, if a student discontinues before census, they would not have begun participation in the class, and we would not need to look for proof
 - For example, classes start on Monday 1/1/2021. A student discontinues on 1/1/2021 from one class, ACC 200 that meets on Tuesday and Thursday. Since the ACC 200 class would have begun on 1/2/2021 and the student discontinued on 1/1/2021, we know that the student could not have participated, and we do not need to look for proof of participation in that course
 - Use the following link to see when a class is scheduled to begin
 - <https://commtech.byu.edu/noauth/classSchedule/index.php?yearTerm=20211&curriculumId=11448&titleCode=001>
 - Use CLS10 in AIM to see professor information
- ❖ Classes eligible for aid
 - If a student drops all courses before census, then those courses will not appear in c163. As a result, you will need to check recsum to see if any of the classes that the student discontinued from were third time repeats
- ❖ Maintain Student FA Term

- Sometimes the system will automatically adjust the student's FA term to N when they discontinue before census
 - If they did not participate and no R2T4 is needed, then the N status can remain
 - If the student did participate and they are eligible to keep aid on their account, then we cannot keep the status of N on their account
 - If a loan change is being transmitted, the load needs to be at least halftime, or it will fail.
 - If the student is only eligible for Pell, change the load to correspond to the Pell they get to keep. For example, if a student gets to keep \$23 in Pell grants then we would want to leave the load at L. If they get to keep \$1,000 in Pell grants, then they would need a load of H.
 - ◆ The load does not need to correspond to their original enrollment, just the aid that they get to keep

Considerations for Fall vs. Winter R2T4s

- ❖ Fall semester
 - It may be more common for students to submit a FAFSA later in the semester. In this case, a student's census would be the first time they are packaged if that occurs after the published census
 - This will affect their load for awards that they are eligible for
 - If a student discontinues with loans for fall semester, they are no longer eligible for the Winter disbursement of the Fall/Winter loan that they accepted since they do not have continuous enrollment
 - When you adjust the aid for the student, also cancel the student's winter portion of the loan that is undisbursed. The student can still request loans for winter semester, we would just have to offer it as a winter only loan instead of as a fall/winter loan.
- ❖ Winter semester
 - Make sure to adjust student's aid for only winter and keep any aid on the student's account that they were eligible for during fall semester.

Retroactive Discontinuances

- ❖ For retroactive discontinuances for the current semester
 - Withdrawal date
 - Since the act of withdrawing is considered proof of participation, we can use the date the petition was officially submitted as the withdrawal date
 - You can find this in PET01

Year/Term Winter 2021
 Reg Eligibility 9 - Continuing Student
 Date Submitted 11/01/2021 07:35 PM

Student Schedule											
Course	Sec	Type	Term	Reg #	TC	Title	Days	Times	Loc	Grd	Hrs
ENGL 292	001			08558	003	British Literary History 2	TTh	2:00 - 3:15	JKB 3108	D-	3.00
ENGL 328R	001			11980	000	Studies in Composing	MW	12:30 - 1:45	JFSB B105	W	3.00
ENGL 669R	001			11271	001	Poetry Workshop	T	4:00 - 6:50	TBA	A	3.00
HIST 201	005			08211	003	World Civilization to 1500	TTh	12:30 - 1:45	TBA	C	3.00
IHUM 243	001			13757	000	Humanities of South Asia		-	TBA	C	3.00
Total Credit Hours											12

- Date of determination
 - This date will be the date that the petition was approved. This can be found under the petition requests chart by clicking 'view log'

Petition Requests					
Type	Details	Course	Credit Change	Fees	Decision
Withdraw		PHY S 100 sec 041	-3	0.00	<input checked="" type="radio"/> Approve <input type="radio"/> Deny <input type="radio"/> N/A
Withdraw		REL A 211 sec 025	-2	0.00	<input checked="" type="radio"/> Approve <input type="radio"/> Deny <input type="radio"/> N/A
Withdraw		REL C 225 sec 008	-2	0.00	<input checked="" type="radio"/> Approve <input type="radio"/> Deny <input type="radio"/> N/A
Withdraw		SPAN 322 sec 003	-3	0.00	<input checked="" type="radio"/> Approve <input type="radio"/> Deny <input type="radio"/> N/A
Withdraw		SPAN 326 sec 003	-3	0.00	<input checked="" type="radio"/> Approve <input type="radio"/> Deny <input type="radio"/> N/A
			-13	0	<input type="button" value="Approve All"/> <input type="button" value="Deny All"/> <input type="button" value="Clear All"/>
			<input type="button" value="Clear"/>	<input type="button" value="Clear"/>	
<input type="button" value="Approved Petition Change Form"/>			<input type="button" value="Save Decisions"/> <input checked="" type="button" value="View Log"/>		

- The date next to the 'approved' decision is the date we would use as the date of determination

Decision Log ✕

Type	Details	Course	Decision	Date	Updated By
Withdraw		PHY S 100 sec 041	APPROVED	03/01/2022 11:05 AM	Richey, Joshua L
Withdraw		REL A 211 sec 025	APPROVED	03/01/2022 11:05 AM	Richey, Joshua L
Withdraw		REL C 225 sec 008	APPROVED	03/01/2022 11:05 AM	Richey, Joshua L
Withdraw		SPAN 322 sec 003	APPROVED	03/01/2022 11:05 AM	Richey, Joshua L
Withdraw		SPAN 326 sec 003	APPROVED	03/01/2022 11:05 AM	Richey, Joshua L

❖ For retroactive discontinuances from past semesters

- An R2T4 should have been completed previously from an unofficial withdrawal.
 - In that case, the past R2T4 can stand. Leave a file note documenting that a new R2T4 is not necessary since one was already complete
- If an R2T4 was not completed, check to see if the student received a passing grade for the semester in question
 - You can do this by going to rec17 in AIM
 - If the student received a passing grade, then they completed the term and earned all Title IV aid for the semester. No R2T4 would be necessary.

R2T4 Past 60%

- ❖ For federal aid purposes, the student earned all Title IV aid. As a result, the student will not need to return any funds.
- ❖ If a student discontinued past 60% then you still need to complete an R2T4 even though you will not return any funds
- ❖ Complete the R2T4 as normal. Note that the student participated past 60% in the worksheet and in a file note
 - Keep in mind that a student who does not participate in all courses they were paid for may need an initial adjustment
 - For example, if a student discontinued past 60% and was enrolled in 12 credits but only participated in 6 credits, then we would reduce their Pell grant to half time. They would be required to return the funds for the classes that they did not participate in
- ❖ Send the specific past 60% message to the student from Box
- ❖ Still list the student in the student financials spreadsheet

Spring & Summer Discontinuances

Reasons a Student Would not Need an R2T4 Completed

- ❖ Did they meet a withdrawal exemption? Click [here](#) for more information
- ❖ Did they have written intent to attend a future module within the payment period? Click [here](#) for more information
- ❖ What was the timing of their withdrawal? Click [here](#) for more information
- ❖ Did the student establish eligibility for any federal financial aid?
 - Consider base and additional Pell eligibility. Click [here](#) for more information
 - Consider whether or not a student attended another university during the aid year. Click [here](#) for more information

Written Intent to Attend

- ❖ If a student withdraws from Spring term and still has Summer enrollment, we need to obtain written confirmation from the student that they intend to attend a module later within the payment period
- ❖ We must obtain the written confirmation at the time the student would have been considered a withdrawal
 - Our policy is to wait 1 – 1 ½ weeks for the student to respond to our message
 - If the student does not respond, then we assume that they will not attend
- ❖ If we do receive a letter of intent
 - Do not complete the R2T4 at this time
 - Pull back any Summer aid that the student is not eligible for until 10 days prior to the start of Summer term
 - Check back at Summer census to make sure that the student stays enrolled in Summer courses
 - If the student drops all Summer courses, complete an R2T4 with a Spring withdrawal date and a date of discontinuance of Summer census
 - If the student stays enrolled, then we just need to make sure that they are being paid correctly, and we would not need to complete an R2T4
- ❖ If we do not receive a letter of intent
 - Proceed with the R2T4
 - Check back at Summer census to see if the student enrolls
- ❖ Instances that we would not need to request a letter of intent
 - The student does not have any Summer enrollment when they dropped Spring classes
 - Even if they enrolled in Summer at some point, if they do not have current Summer enrollment when they discontinue from Spring, we do not need to ask for intent
 - The student is only eligible for additional Pell grants. They are enrolled in 3 credits Spring and 3 credits Summer. They drop all Spring courses and stay enrolled in Summer
 - Since the student is only eligible for additional Pell, even if they attended Summer courses, they would not be eligible for pell grants. We do not need to request intent
 - Cancel the aid on assign awards

- Make sure that the financial aid load has been updated. If it has, then the award also should have been updated. Check to make sure and make adjustments to aid if needed
- If the financial aid load has not updated, go to maintain student FA term and change the load
 - ◆ Go to Maintain Student FA Term and scroll to the correct term
 - ◆ On the first tab, FA Term, click on the blue plus button under student data (not term information)

The screenshot shows the 'FA Term' tab for student Noah Ryan Schill (ID: 643541246) at Brigham Young University. The 'Term' is set to '2223 2022 SP'. The 'Student Data' section includes fields for 'Effective Date' (03/21/2022), 'Effective Sequence' (1), 'FA Calc' (unchecked), 'Effective Status' (Active), and 'Override Expiration Date'. Below this is a table of override and calculated values:

Override	Calculated Values
Academic Career: <input type="checkbox"/> Undergraduate	UGRD
Primary Program: <input type="checkbox"/> 1017U Physical and Mathematical Scie	1017U
Academic Plan: <input type="checkbox"/> 31516 Computer Science	31516
Sub-Plan: <input type="checkbox"/> 34293 Data Science	34293
*Aid Year: <input type="checkbox"/> Financial Aid Year 2021-2022	2022
Billing Career: Undergraduate	
*Campus: MAIN	
Academic Year: 2021	
<input checked="" type="checkbox"/> Eligible to Enroll	

At the bottom of the Student Data section, there are buttons for 'Build Info', 'Census Date', 'Advisor', and 'Campus Info'. A blue plus button is highlighted in the top right corner of the Student Data section.

- ◆ On the second tab, Acad Level, change the financial aid load to the appropriate load (in this case L)
- ◆ Make sure that the override button is NOT checked. This way, the student's financial aid load will update if they enroll in more credits for Summer and become eligible for additional Pell at that time

FA Term	Acad Level	Statistics	Financial Aid	Records/Term Info	Withdrawal Info
Noah Ryan Schill		643541246			
Term Information					Find View All First 3 of 7 Last
Institution	Brigham Young University		Term	2223 2022 SP	
Student Data					Find View All First 1 of 2 Last
Effective Date	03/31/2022		Sequence	1	
Academic Career	Undergraduate		Effective Status	Active	
Academic Plan	Computer Science		Primary Program	Physical and Mathematical Scie	
			Academic Sub-Plan	Data Science	
Override			Calculated Values		
Form of Study	<input type="checkbox"/>	Class Enrollment	Class Enrollment		
Approved Academic Load	<input type="checkbox"/>	Full-Time	Full-Time		
Academic Load	<input type="checkbox"/>	N No Unit Load	No Units		
Financial Aid Load	<input checked="" type="checkbox"/>	L No Unit Load	No Units		
Academic Level	<input type="checkbox"/>				
Projected	<input type="checkbox"/>	40 Senior	Senior		
Start	<input type="checkbox"/>	40 Senior	Senior		
End	<input type="checkbox"/>	40 Senior	Senior		
Course Load Percent	<input type="checkbox"/>	0.00			
View HERA Academic Level					

- We do not want to change anything in PJ, otherwise the student will not automatically be packaged
- If the student drops all Spring courses and then subsequently enrolls in Summer courses, that counts as intent to attend and we would not need to request written confirmation
- If the student marks in DISC01 that they intend to re-enroll for Summer term, we can count this as intent and would not need to request written intent from the student
- ❖ When we request intent to attend from a student we should always create an R2T4 sessions page
 - If the student does provide intent to attend
 - Create a second note in the sessions page and write: “received written confirmation from the student that they will attend Summer term”
 - In the sessions page, put a status of ‘in progress’ for the Summer term
 - If the student does not provide intent to attend
 - Create a second note in the sessions page and write “did not receive written confirmation from the student that they will attend Summer term”
 - Completing these steps will allow us to create a query to check to see if a student does come back for Summer term
 - If they do not come back: an R2T4 would need to be completed
 - If they do come back: We may need to undo an R2T4 completed form when we did not receive intent

Pulling Back Spring Disbursements

- ❖ When a student discontinues Spring and then provides written consent that they will attend Summer we cannot award the aid for Summer until 10 days prior to the start of Summer
- ❖ Steps to undisbursed aid
 - First, reduce the aid down to their current Summer enrollment in assign awards
 - We do not want to adjust anything in PJ or else the student will not be packaged properly
 - Update the FA term to current enrollment levels and do **not** check the override box

- Next, put on a user edit on Maintain User Edit Messages in PeopleSoft
 - If a user edit has been placed previously, then you do not need to place another one
 - Msg Type: Error
 - Msg Code: SUMMER
 - Term: 2223
 - Put on a comment explaining why you placed the user edit
 - Msg Action: No action taken
 - Save

Brittany Megan Allen ID 318526975

Aid Year 2021 Financial Aid Year 2020-2021 Institution BYU

Find | View All First 1 of 1 Last

*Msg Type Error *Msg Code SUMMER Summer Block Enrollment Message Detail

Msg Dt/Tm 05/25/2021 11:59:15.000000AM *Term 2213 2021 SP Msg Action No Action 1 Process

User ID abbyec Dt Compl 05/25/2021 not eligible for spring disbursement due to discontinuance

Save Return to Search Notify

- Go to disburse aid with override
 - Do not check the override authorization button
 - Click on the authorization button
 - This should zero out the aid listed next to 'authorized' but the disbursed amount should stay the same for now

Disburse Aid with Override

T Clark Callister ID 284158016
Aid Year 2021 Financial Aid Year 2020-2021 Institution BYU
Term 2213 Spr - Sum 2021 Career Undergrad

Term Disbursements Find | View All First 1-2 of 2 Last

Item Type	900000000001 Federal Pell Grant	Disbt ID	03 Spring	Disb Date	04/19/2021
Accepted	\$0.00	Authorized	\$0.00	<input type="checkbox"/> Override Authorization	
Net Disb Bal	\$0.00	Disbursed	\$0.00	Authorization	Disbursement

Item Type	900010000001 Federal Pell Grant: Additional	Disbt ID	03 Spring	Disb Date	04/19/2021
Accepted	\$1,587.00	Authorized	\$1,587.00	<input type="checkbox"/> Override Authorization	
Net Disb Bal	\$1,587.00	Disbursed	\$1,587.00	Authorization	Disbursement Messages

Save Return to Search Previous in List Next in List Notify

- Wait a day for the aid to undisbursed
- To check if the aid has undisbursed
 - Go to disburse aid with override and make sure that the aid listed as disbursed has zeroed out

Disburse Aid with Override

Brittany Megan Allen ID 318526975
Aid Year 2021 Financial Aid Year 2020-2021 Institution BYU
Term 2213 Spr - Sum 2021 Career Undergrad

Term Disbursements Find | View All First 1-2 of 2 Last

Item Type	900000000001 Federal Pell Grant	Disbt ID	03 Spring	Disb Date	04/19/2021
Accepted	\$0.00	Authorized	\$0.00	<input type="checkbox"/> Override Authorization	
Net Disb Bal	\$0.00	Disbursed	\$0.00	Authorization	Disbursement

Item Type	900010000001 Federal Pell Grant: Additional	Disbt ID	03 Spring	Disb Date	04/19/2021
Accepted	\$1,574.00	Authorized	\$0.00	<input type="checkbox"/> Override Authorization	
Net Disb Bal	\$1,574.00	Disbursed	\$0.00	Authorization	Disbursement Messages

Save Return to Search Previous in List Next in List Notify

- You should also be able to see that the amount has come off of FA admin after student financials posts batches

Additional & Base Pell

- ❖ A student can only receive 600% of Pell grants (Pell Lifetime Eligibility Limit or Pell LEU) within their undergraduate career. This is roughly 6 years if a student uses 100% per year.
 - Base Pell is the first 100% of their Pell LEU that they use within an aid year
- ❖ A student can use up to 150% of their Pell eligibility within one year, provided that they enroll in at least half-time over the duration of Spring/Summer
 - Additional Pell is any Pell grant a student is awarded within one aid year that exceeds 100%
- ❖ At BYU, Spring/Summer is a trailer semester, so if a student receives a full-time Pell grant during Fall/Winter, then a student would have used all of their base Pell during Fall/Winter and would be awarded additional Pell Spring/Summer (assuming that they enroll in half-time)
 - Sometimes Spring/Summer is a header at other schools, meaning they would be awarded Spring/Summer aid first within an aid year and winter would be the trailer. Be careful when determining whether or not a student is eligible for aid at BYU if you notice that the system is not awarding them Pell
- ❖ If a student is only eligible for additional Pell during Spring/Summer, then we must verify that they participate in at least half time to establish that they were eligible for the Pell grants that they were awarded
 - For example, if a student enrolls in 9 credits and we find that they only participated in 3, we would be forced to cancel the entire $\frac{3}{4}$ time Pell grant that they received. This is because they did not establish eligibility for the additional Pell grant that they were awarded
- ❖ If the student is eligible for both base and additional Pell, then we need to report that to COD in a specific way. If the total amount of Pell the student is eligible for after the R2T4 is completed can fit on the base Pell item type, then we need to make sure to put those funds on that item type in PeopleSoft
 - For example, if a student comes full-time fall, three-quarter-time winter, and half-time Spring/Summer, then we will put all of the Spring/Summer aid on the additional Pell item type in PeopleSoft even though the student is eligible for LTHT base Pell
 - If after we complete the R2T4 the remaining Pell amount that the student gets to keep will fit into the LTHT base Pell award (and does not go over the LTHT amount), then we need to cancel the additional Pell item type in PeopleSoft and put the remaining award on the base Pell item type
 - In this same scenario, let's say this student is eligible for \$812 base Pell and \$812 in additional Pell for Spring/Summer totaling \$1,624. The student discontinues and only attends 15% of the term. We determine that they are allowed to keep \$240 in Pell grants. Since the \$240 fits within the \$812 base Pell amount, we would then cancel the additional Pell item type in assign awards and put all of the money the student is eligible for on the base Pell item type
 - Base Pell: \$3,248 for Fall, \$2,345 for Winter, and \$240 for Spring/Summer
 - If the student completed 58% of the term and we concluded that they earned \$941 in Pell grants, then we would keep the funds on the additional Pell item type
 - Base Pell: \$3,248 Fall, \$2,345 Winter

- Additional Pell: \$941 Spring/Summer

Spring/Summer Header or Trailer

- ❖ At BYU, Spring/Summer is a trailer semester. This means that if students have used 100% of their Pell eligibility during Fall/Winter that they will be using additional Pell for Spring/Summer
- ❖ Other schools treat Spring/Summer as a header semester, which would mean that those students use base Pell for Spring/Summer
 - If a student in this situation transfers to BYU, then they may have either used their entire Pell grant eligibility for the aid year (150%) or, they may not be eligible to be paid the Pell load that they are enrolled in
 - For example, if a student attends a university with a Spring/Summer header semester and enrolls in half time they would use 25% of their eligibility at that university. They then attend Fall and Winter at BYU and enroll full time during both semesters. At this point, they have used 125% of their eligibility. The student then enrolls in full-time Spring/Summer at BYU. The student would only be eligible to be paid for half-time. This is because they only have 25% of their Pell eligibility left for the aid year
- ❖ To check to see if a student received aid at another university and to see the percentage of their Pell LEU that they have used at each university that they received aid at, go to NSLDS
 - Under the heading ‘Aid’ select ‘Grants’ This will allow you to see a history of the Pell grants that the student has received broken down by aid year

Pell Grant History

Lifetime Eligibility Used: 316.654%

#	Award Year	Scheduled Amount	Award Amount	Disbursed Amount	% Sched. Award Used by Award Yr	Latest Disb	Posted by COD
1	2021 - 2022	\$3,245	\$3,245	\$3,245	100.0000	12/28/2021	12/29/2021
		BRIGHAM YOUNG UNIVERSITY 00367000		EFC: 3266	Ver. Flag: V	Tran: 03	
		1st Time: No	Additional Eligibility: No	Post 9/11 Deceased Veteran Dependent: No		Children of Fallen Heroes: No	
2	2020 - 2021	\$6,345	\$3,437	\$3,437	54.1686	04/28/2021	06/23/2021
		BRIGHAM YOUNG UNIVERSITY 00367000		EFC: 0	Ver. Flag: V	Tran: 05	
		1st Time: No	Additional Eligibility: No	Post 9/11 Deceased Veteran Dependent: No		Children of Fallen Heroes: No	
3	2020 - 2021	\$6,195	\$3,097	\$2,323	37.4979	02/18/2021	02/19/2021
		UTAH VALLEY UNIVERSITY 00402700		EFC: 146	Ver. Flag: V	Tran: 08	
		1st Time: No	Additional Eligibility: Yes	Post 9/11 Deceased Veteran Dependent: No		Children of Fallen Heroes: No	
4	2019 - 2020	\$6,195	\$3,097	\$3,097	50.0000	01/23/2020	01/23/2020
		UNIVERSITY OF UTAH 00367500		EFC: 0	Ver. Flag: V	Tran: 05	
		1st Time: No	Additional Eligibility: No	Post 9/11 Deceased Veteran Dependent: No		Children of Fallen Heroes: No	

- ❖ In this example, the student received Pell grants at BYU and UVU. They have used a total of 91.6665% of their Pell grant eligibility during the 2020-2021 aid year
 - If they were to come Spring/Summer then they would have 8.3335% eligibility remaining for base Pell and 58.3335% total (this includes base and additional Pell) remaining for the aid year
 - To calculate the exact dollar amount, multiply that base percentage by the dollar amount of a 100% Pell grant at BYU (based on our EFC)
 - $\$6,345 \times 0.083335 = \528.760575
 - To calculate the dollar amount that the student would be eligible for in additional Pell for this student:

- Keep in mind that the student can only receive a maximum of 50% of their eligibility for one semester
 - ◆ $50 - 8.3335 = 41.6665\%$
 - ◆ $\$6,345 \times 0.416665 = \$2,643.739425$
- Thus, this student's total eligibility for Spring/Summer is roughly \$3,173

Withdrawal Timing

- ❖ If the student drops all future courses between Spring/Summer
 - An R2T4 is required if they do not meet withdrawal exemptions because they have not completed all of the days in the payment period that they were scheduled to attend and they were paid based on the courses they were scheduled to attend
- ❖ If the student drops classes from both modules on the same day
 - They are considered a discontinuance and may need an R2T4 calculation adjusted. Include classes in the timeframe as mandated by the R2T4 freeze date
- ❖ If the student drops all Summer courses on the same day that they complete the Spring term
 - The student is not considered a discontinuance

Withdrawal Exemptions

- ❖ If a student meets any one of the following withdrawal exemptions, then we are not required to perform an R2T4 calculation
 - The student discontinues from all Summer courses, but the student completes half time credits during Spring semester
 - Completing a course means that a student must pass the course with a D- or higher
 - An E, W, I, NS, or T grade does not meet this criteria, regardless of whether or not the student will eventually complete the course, or attended through the end of the semester. If at the time the student discontinues the student has not passed 6 credits, then they would need an R2T4 completed (assuming they do not meet any other withdrawal exemptions)
 - The student completes modules that encompass 49% of the payment period
 - The calculation used to determine if a student completed 49% of the semester is **not** the same as the calculation used to determine if a student attended 60% of the semester
 - The 49% calculation is only used to determine if the student is considered a withdrawal or is exempt from an R2T4
 - For this calculation, a student had to have successfully completed a module or combination of modules that consists of 49% of the payment period **not** 49% of the days within the payment period
 - This amount **cannot** be rounded up
 - The 49% calculation is as follows:
 - Number of days in the combination of modules that the student successfully completed / Days in the period (1st day of class through last day of finals) – (scheduled breaks of 5 or more consecutive days + all days between modules in the period)

- The 60% calculation is used to determine the percentage of the payment period or period of enrollment the student completed. If a student has completed 60% of the period, then they have earned the aid that they have been awarded
- The 60% calculation is as follows:
 - Calendar days completed in the period / (Total calendar days in the period – scheduled breaks of 5 days or more)
- The student meets all graduation requirements prior to withdrawing

Withdrawal & Determination Date

- ❖ Determining which withdrawal and determination date to use during Spring and Summer can be difficult since there are two modules. Here are most of the scenarios that could occur:
 - The student comes Spring without ever enrolling in Summer and then discontinues from the Spring semester
 - The withdrawal and determination date would be the date that the student drops the last Spring class they were enrolled in
 - If the student later enrolls in a Summer course, we would have to undo the R2T4 we completed for Spring semester since the student has current enrollment within the payment period
 - The student enrolls in both Spring and Summer semesters and then drops all Summer courses followed by all Spring courses
 - The withdrawal and determination date would be the date that the student drops the last Spring class they were enrolled in
 - The student enrolls in both Spring and Summer semesters then drops all Spring courses while staying enrolled in Summer courses
 - We would need to obtain a letter of intent that the student will attend the Summer courses that they are enrolled in
 - If we receive intent to attend, then no R2T4 is required
 - ◆ We must then verify that the student actually ends up attending. If they do not, then the withdrawal date is the date that the student dropped all Spring courses
 - The date of determination would be the Summer census – this is the first date that we could know that the student did not attend as expected
 - If we do not receive intent to attend, the withdrawal and determination date would be the date that the student drops the last Spring class they were enrolled in
 - The student enrolls in both Spring and Summer semesters, discontinues from Spring, and provides intent to attend Summer. The student does attend a portion of the Summer semester, but then discontinues from Summer term as well
 - The withdrawal and determination date would be the date that the student discontinued from the remainder of their Summer courses. However, remember to adjust the timeframe to reflect the number of days the student actually attended (click [here](#) for more information)
 - The student comes Summer without ever enrolling in Spring and then discontinues from the Summer semester

- The withdrawal and determination date would be the date that the student drops the last Summer class they were enrolled in

Pell Recalculation Date (PRD/Census Date)

- ❖ A regular Fall/Winter semester only has one census date, or Pell recalculation date (PRD)
 - The PRD is when we lock in a student's load to determine their eligibility for Pell grants (remember that loans are not subject to census)
 - For example, if a student is enrolled in 8 credits at the PRD, then they are only eligible to receive up to that amount in Pell grants (half-time). Even if they enrolled in a second block course later in the term bringing them up to 10 credits, they would not be eligible for ¾ time Pell, only half-time which is what they were enrolled in at the PRD
- ❖ Spring/Summer each have their own Pell recalculation date, meaning we have two for the payment period
 - A Pell recalculation date will be activated once it has been passed. That means that the entire day will have to elapse
 - For example, if Spring's PRD is on 5/4 then the student's load is not locked until 11:59:59 on 5/4. The student has all day on 5/4 to add or drop classes to lock in their load
 - We will use the last activated PRD to lock in a student's load and therefore establish the student's Pell grant eligibility
 - If we have not passed and therefore activated a PRD, click [here](#) for more information
 - The PRD can only be activated if a student enrolls in courses that correspond with that PRD
 - For example, a student never enrolls in Spring courses. However, the student enrolls in Summer semester and then drops all Summer courses before the Summer PRD. We would not revert back to the Spring PRD because the student cannot activate a PRD without enrolling in courses that correspond to that term
 - The PRD becomes the date that the student dropped their last Summer course
 - Only one RFD will apply to a student
 - If a student submits an **initial** FAFSA during the Spring/Summer semester a student's PRD would be the first time they are packaged if that occurs after the published census
 - This does not apply to students who are submitting an updated/subsequent ISIR. Their PRD would not be the date they are repackaged, the PRD would be the normal published date
 - How we count load from Spring when the Summer PRD has passed
 - We can count any passing grade (A-D-, P) in the load once Summer census passes
 - We can count an earned E, NS, I, or T grade in the load once Summer census passes
 - They must have participated in the last week of classes to earn an E
 - We cannot count an unearned E, NS, I, or T grade in the load once Summer census passes
 - We cannot count any W in the load once Summer census passes
- ❖ Examples of how to calculate a student's load with two PRDs during Spring/Summer

- A student enrolls in 9 credits Spring only but never activates the Spring PRD as they drop all classes before that date
 - The PRD then becomes the date the student discontinued from their last Spring course. Since they never enrolled in Summer, they also never activated that PRD
 - So, if the student drops 6 credits on 5/2 and the last 3 credits on 5/3, then the PRD is 5/3. In this example, the student's load on their PRD is LTHT as they were only enrolled in 3 credits
- A student enrolls in Spring and Summer. When the Spring PRD passes and the load locks, they are enrolled in 5 credits Spring and 2 credits Summer. They drop all courses before the Spring semester ends
 - The PRD is Spring census. Their load would be locked at 7 credits or half-time. However, since the Summer semester never began, they could only have participated in LTHT. If the student is only eligible for additional Pell, they would not be able to establish eligibility for Pell grants and all aid would have to be canceled
- A student enrolls in Spring and Summer courses. At Spring PRD the load locks, they are enrolled in 2 credits Spring. The Spring PRD passes and they then enroll in 8 credits for Summer. Summer semester begins, and the student drops all of their Summer courses before the Summer PRD
 - The PRD is Spring census. Their load is locked at 2 credits for Spring. Even if they participated in the Summer courses, LTHT is the highest amount that we can pay them. We can substitute Summer class participation for that Spring course, however
- A student enrolls in Spring semester but drops all Spring courses before the Spring PRD. The student proceeds to enroll in Summer courses but then also drops all Summer courses before the Summer PRD
 - The PRD for each individual semester becomes the date that they dropped the last courses associated with that term. For R2T4 purposes, we use the last activated PRD, so we would use the Summer PRD for the calculation which is the date they dropped their last Summer course
- A student enrolls in 5 credits during Spring and 6 credits during Summer term when the Spring PRD passes and the load locks. The student withdraws from all 5 credits from Spring term. We receive intent to attend the Summer term so we do not complete an R2T4. They attend the first month of Summer term and then discontinue from Summer term
 - The PRD is Summer term. Since the student withdrew from the Spring courses by the Summer PRD, we cannot count those Spring courses in the load and we can only pay them up to half-time
- A student enrolls in 6 credits Spring and 4 credits Summer when the Spring PRD passes and the load locks. The student gets an A in 3 credits and withdraws from the other 3 credits Spring. They attend Summer courses for a few weeks and then withdraw from the remainder of their Summer courses
 - The PRD is Summer term. Since the student earned an A in 3 credits Spring, we can count those classes in the load. We cannot count the W in the load since they

- withdrew from that course by the Summer PRD. The load for this student would be half-time, with 7 credits
- A student enrolls in 6 credits during Spring and 6 credits during Summer term when the Spring PRD passes and the load locks. The student fails all 6 credits from Spring term. We receive intent to attend the Summer term so we do not complete an R2T4. They attend the first month of Summer term and then discontinue from Summer term
 - The PRD is Summer term. In order for us to count an E in the load, we would have to prove that the student earned the E. This means that the student must have participated through the final week of classes
 - If we can prove that they earned the E in all courses, the load would be full time
 - If we cannot prove that the student earned any of the E grades, then the load would be half time
 - The same rules apply for NS, T, and I grades. To count them in the load, we must prove that the student earned the grade by participating through the last week of classes

Enrollment Period (timeframe)

- ❖ The R2T4 freeze date (RFD) determines the denominator/timeframe of the R2T4 calculation
 - BYU uses two freeze dates, one for Spring and one for Summer
 - The RFD for Spring is the same as the Spring PRD, and the Summer RFD is the same as the Summer PRD
 - An RFD is activated once that date has passed
 - If we have not passed and therefore activated an RFD click [here](#) for more information
 - Only one RFD will apply to a student. The RFD that applies to a student will be the one that has passed the most recently
 - The RFD will only apply to a student if they enroll in courses for that term
 - For example, we will not use a Spring RFD for a student if they never enroll in Spring semester
 - The modules included in the denominator will be:
 - The modules that the student was enrolled in on the activated RFD
 - The modules that the student participated in (regardless of whether or not they were enrolled in that course as of the RFD)
- ❖ Examples
 - A student enrolls in Spring and Summer courses. The Spring RFD passes, and the student then decides to drop all Spring courses and stays enrolled in Summer
 - If the student provides intent to attend, then we would not need to complete an R2T4
 - If the student does not provide intent to attend, then we would proceed with the R2T4. The timeframe would include both Spring and Summer since they were enrolled in both courses at the RFD
 - If the student provides intent and then does not attend Summer term
 - If the student drops Summer courses before the Summer RFD, then we would use the Spring RFD, PRD, and withdrawal date. The timeframe would be Spring-Summer

- If the student drops the Summer courses after the Summer RFD then we would use the Summer RFD, PRD, and withdrawal date. The timeframe would be Summer only since the student was not enrolled in the Spring classes as of the Summer RFD
 - Unless the student participated in Spring courses, in which case we would include Spring in the timeframe
 - ◆ This is why we should always collect proof in courses that were aid eligible, even if an R2T4 is not needed at that time
- A student enrolls in Spring courses only and then the Spring PRD passes. They then enroll in Summer courses and drop everything before the Summer term starts
 - The timeframe would be Spring only. The student was not enrolled in Summer courses as of the Spring PRD, and they could not have participated in Summer courses at that time
- A student enrolls in Spring and Summer and then drops all courses on the same day before the Spring RFD
 - The RFD becomes the withdrawal date. In this case, the timeframe would be Spring-Summer since they were enrolled in both on that date
- A student enrolls in Summer and Spring. They drop Summer courses and then the Spring RFD passes. The student then discontinues from Spring courses two weeks later
 - The timeframe is Spring only since the student was not enrolled in Summer as of the Spring RFD, and they could not have participated in Summer courses
- A student enrolls in Spring and Summer courses and decides to drop all of them before the Spring RFD passes. We perform an R2T4 with a Spring-Summer timeframe. Then, the student enrolls in Summer courses. As a result, we undo the R2T4, however, the student drops all Summer courses before the Summer RFD passes
 - In this instance, a student never passes an RFD to activate it. The RFD becomes the most recent withdrawal date, which would be the date that the student discontinued from the remainder of the Summer classes (the second time). In that case, the timeframe would be Summer only
 - Unless the student participated during Spring term
- A student enrolls in Spring courses and the Spring RFD passes. The student then drops all Spring courses and registers in a Summer course the next day. Since we have intent to attend, we do not perform the R2T4. The student participates for a few days of the Summer term and decides it is not for them. They then drop that class before the Summer RFD
 - The last activated RFD is Spring. They were only enrolled in Spring at that time, but they participated in Summer courses so the timeframe would be Spring-Summer
- A student enrolls in Spring and Summer and the Spring RFD passes. The student discontinues from Spring classes but provides us with intent to attend Summer. We do not find that they attended the Spring course that they were enrolled in. The student passes the Summer RFD and then drops the remainder of their classes
 - The timeframe would be Summer only. The most recent activated RFD is Summer. At that time, the student was only enrolled in Summer, and the student never participated in their Spring classes

Institutional Charges

- ❖ For purposes of determining the amount of institutional charges to use in the R2T4 calculation, an institution must always use the initial charges assessed to the student for the entire payment period or period of enrollment
- ❖ An institution only accounts for adjustments to those charges made prior to the student's withdrawal (for example, for a change in enrollment status unrelated to the withdrawal)
- ❖ This also applies to situations where the institution charged the student for classes in multiple modules, but the denominator of the R2T4 calculation only consists of the days in a single module
 - This means that we include Spring and Summer charges in the R2T4 calculation even if a module that the student enrolls in never begins

R2T4 Sessions Page

- ❖ We use this page to tell the system each student's specific denominator within the R2T4 calculation. This is because each student will have a different denominator that depends on what the student was enrolled in and what the student participated in
- ❖ Each student who has an R2T4 performed during Spring/Summer should have an R2T4 sessions page
- ❖ Navigation in PeopleSoft
 - Main Menu → Financial Aid → Return of Title IV Funds → Return TIV Session
- ❖ Procedure
 - Add a new value
 - Put in the ID and term
 - Click view all
 - This will automatically create a row for each period
 - 8W1 is Spring
 - 8W2 is Summer
 - 1 is Spring-Summer
 - You can add or subtract needed rows by clicking the + or – buttons
 - Next, click on the symbol next to 'Details 3'

The screenshot shows the 'Return TIV Session' page in PeopleSoft. At the top, there are tabs for 'Return TIV Session' and 'Return TIV Session Notes'. Below this, the student's information is displayed: Sandstrom, Sage L (ID: 513339553), Institution: BYU (Brigham Young University), Aid Year: 2021, Academic Career: UGRD (Undergraduate), Program Type: Credit Hour Program, Term: 2213 (Spr - Sum 2021), Term Begin Date: 04/27/2021, and Term Ending Date: 08/12/2021. A 'Calculate All' button is visible. Below the student information is a 'Session Details' table with columns for Session, Session Begin Date, and Session End Date. The table contains two rows: 1 8W1 (Eight Week - First) with dates 04/27/2021 to 06/17/2021, and 2 8W2 (Eight Week - Second) with dates 06/21/2021 to 08/12/2021. Red boxes highlight the 'View All' button and the '+' and '-' buttons in the table.

Session	Session Begin Date	Session End Date	
1 8W1	04/27/2021	06/17/2021	+ -
2 8W2	06/21/2021	08/12/2021	+ -

- Check the withdrawal date for each period to make sure that they are correct

- Each session will need its own status
 - Cancel
 - Do not use
 - Completed
 - Student has completed all classes for the session
 - In progress
 - Student is actively attending classes for the session
 - Or, we have a letter of intent
 - Not enrolled
 - Student is not enrolled in any classes for the session
 - Or, the student has discontinued from the session and we need to use those term dates in the R2T4 calculation
 - Not started
 - Session has not started and we did not get a letter of intent, but we need a calculation with Spring and Summer dates
 - Rescind
 - Student withdrew from both semesters. Functions the same as withdraw but is another option since we can only use one status per term.
 - Withdraw
 - Discontinued – populated from term history session withdrawal
 - Examples
 - If a student withdraws from Spring and Summer at the same time and we need a Spring-Summer timeframe, then we would use withdraw for Spring and not enrolled for Summer
 - If a student withdraws from Spring/Summer and Spring-Summer classes all on the same day, then Spring would be not enrolled, Spring-Summer would be withdraw, and Summer would be not enrolled
- Once you have selected a status for each term, click calculate and the period summary portion will update
 - Verify that the completed days in the period is correct
 - Make sure that the session period begin and end dates correspond to the timeframe that you determined. If you do not see the right dates being pulled in, then you may have used the wrong status
- Save

Return TIV Session | Return TIV Session Notes

Sandstrom, Sage L ID 513339553

Institution BYU Brigham Young University Aid Year 2021

Academic Career UGRD Undergraduate Program Type Credit Hour Program

Term 2213 Spr - Sum 2021

Term Begin Date 04/27/2021

Term Ending Date 08/12/2021 Calculate All Last Updated

Session Details Personalize | Find | View All | First 1-2 of 2 Last

Session	Session Begin Date	Session End Date	Session Break	Status	Date of Withdrawal	Completed Days	Total Days
1 8W1	04/27/2021	06/17/2021	0	Rescind	05/22/2021	26	52
2 8W2	06/21/2021	08/12/2021	3	Withdraw	06/28/2021	8	53

Period Summary

Override

Completed Days for Period 37

Total Days for the Period 108

Period Adjustment

Total Session Break

Holiday Schedule 2021 Detail

Pct. TIV Aid Earned for Period 34.30

Date of Withdrawal 06/28/2021

Session Period Begin Date 04/27/2021

Session Period End Date 08/12/2021

60 Pct Eff Dt for Session 06/30/2021

Save Return to Search Notify Next tab Add Update/Display

- Go to the Create WS page in PeopleSoft
 - On the first tab 'Return TIV Aid'
 - Check the 'Use Session Calculation Data' box
 - The information under Session information should now match what you input on the Return TIV Session page. If not, then go back to the Return TIV Session page and make the needed corrections
 - Process the R2T4 as normal

Return TIV Aid | Return of Funds Worksheet | Student/School Return | Post-Withdrawal Disbursement | Return TIV Aid Notes

Sandstrom, Sage L ID 513339553

Institution BYU Brigham Young University Aid Year 2021

Term 2213 Spr - Sum 2021 Program Type Credit Hour Program

FA Term Academic Career UGRD Calculate All

Student Status FA Term

Summary

Date of Withdrawal 06/28/2021 Undetermined Withdrawal Date Days Elapsed 23 Last Updated

*Overall Status Completed *Institutional Determination Dt 06/28/2021 Date Form Completed 07/29/2021

Period Information

Payment Period Enrollment Period *Start Date 04/27/2021 *End Date 08/12/2021

Term Information

Term 2213 Withdraw Date 06/28/2021 60 Pct Dt 06/30/2021 Term Begin Date 04/27/2021

FA Term Withdraw Date Term End Date 08/12/2021

Session Information

Session 8W2 Withdraw Date 06/28/2021 60 Pct Dt 07/22/2021 Session Period Begin Date 04/27/2021

Session Withdraw Date 06/28/2021 60 Pct Effective Dt 06/30/2021 Session Period End Date 08/12/2021

Multiple Session Details Use Session Calculation Data

Save Return to Search Notify Add Update/Display

R2T4 Past 60%

- ❖ It is important to remember that students will have different dates that they are considered to have participated past 60% of the semester
- ❖ There are three different 60% dates for students who are enrolled in the following combination of modules
 - Spring only
 - Summer only
 - Spring through Summer
- ❖ If a student enrolls in Spring and then discontinues from Spring but subsequently enrolls in Summer term and also discontinues from Summer then we **cannot** just use the published 60% date for Spring through Summer
 - In this case, we can only pay a student for the days within the payment period that they actually attended
 - To achieve this, we would use the Return of TIV Session Page to make sure that only the days the student attended go towards completing 60% of the term
- ❖ Procedure for a student who discontinues from both Spring and Summer
 - Collect a last date of attendance for Spring
 - Collect a withdrawal date for Summer
 - On the Return TIV Session page, the status for Spring will be rescind
 - In the date of withdrawal section, manually put in the student's LDA
 - The status for Summer will be withdraw
 - In the date of withdrawal section, manually put in the withdrawal date
 - Click calculate all
 - Make sure that the completed days for the period and total days for the period look right.
 - Proceed as normal

Return TIV Session | Return TIV Session Notes

Bradt, Kylen Belle ID 093849521

Institution **BYU** Brigham Young University Aid Year 2021

Academic Career **UGRD** Undergraduate Program Type Credit Hour Program

Term **2213** Spr - Sum 2021

Term Begin Date

Term Ending Date

Session Details Personalize | Find | View All | First 1-2 of 2 Last

Session	Session Begin Date	Session End Date	Session Break	Status	Date of Withdrawal	Completed Days	Total Days
1 8W1	04/27/2021	06/17/2021	0	Rescind	05/27/2021	31	52
2 8W2	06/21/2021	08/12/2021	3	Withdraw	06/28/2021	8	53

Period Summary

Override

Completed Days for Period

Total Days for the Period

Period Adjustment

Total Session Break

Holiday Schedule 2021

Pct. TIV Aid Earned for Period 38.90

Date of Withdrawal 06/28/2021

Session Period Begin Date

Session Period End Date

60 Pct Eff Dt for Session

Before census

- ❖ Withdrawal date
 - The withdrawal date will normally be found in REG01. If the student discontinues before census, then we need to look in REG03 to find the date that they discontinued from the last class that they were enrolled in
 - We only need to look for proof in courses that the student dropped on their withdrawal date
 - If the student still has current enrollment in Summer term when they drop Spring courses, then we need to ask for written confirmation to attend Summer
- ❖ Undisbursed aid
 - If a student discontinues before census, then the system will often cancel the student's aid. Check to see if the student would have been Pell-eligible before the discontinued
 - Also remember to check to see if the student is eligible for base or additional Pell
 - Students often enroll in fewer credits during Spring/Summer. If they have a higher EFC, make sure that they would have been eligible for Pell grant based on their enrollment level at census
 - For example, a student has a 5000 EFC. They are eligible for Pell grants if they enroll in half-time or more. If the student was only enrolled in 3 credits at their census, then they would not be eligible for Pell grants due to their enrollment level and high EFC
- ❖ Proof of participation
 - Make sure that the student could have begun enrollment in the courses that they were enrolled in at census
 - For example, if a student discontinues on Wednesday and the first time that one of their classes meets on Friday, then we would not need to look for proof in that course
 - For example, if a student discontinues during Spring and they are enrolled in a Summer course at the Spring PRD, then that student never could have begun enrollment in that Summer course, and we would not need to look for proof
- ❖ Aid eligible classes
 - Classes will not appear in c163 if a student discontinues before census. Make sure to check Recsum for third-time repeats to see if the classes are federal aid eligible
- ❖ Maintain Student FA term
 - If a student discontinues before census, the system may automatically change the student's financial aid load to N
 - If the student does not participate in the term at all and does not have any future enrollment in future modules/they do not provide intent to attend in future modules, then we can keep the load at N
 - If the student did not participate in Spring courses but they have future enrollment in Summer, and they provide intent to attend Summer, then follow the instructions listed [here](#) to change the student's load to match their Summer enrollment so that the system will automatically package the student if they decide to attend

- If the student does participate and they are eligible to keep aid as a result of an R2T4, then the financial aid status of N cannot remain on their account
 - If a loan change is being transmitted, the load needs to be at least halftime, or it will fail
 - If the student is only eligible for Pell, change the load to correspond to the Pell they get to keep. For example, if a student gets to keep \$23 in Pell grants then we would want to leave the load at L. If they get to keep \$1,000 in Pell grants, then they would need a load of HT
 - ◆ The load does not need to correspond to their original enrollment, just the aid that they get to keep
- ❖ PRD
 - If the student withdraws prior to the published census date, then the date that the student drops all courses for that module becomes their withdrawal date and PRD to determine their load.
- ❖ Freeze Date
 - If the student withdraws prior to the R2T4 Freeze Date, the institution includes the days associated with any module/course the student started and any module/course the student was enrolled in for the period as of the withdrawal date
 - For example, if the Spring census date is 5/4 and the student enrolls in 3 credits Spring and 3 credits Summer on 5/1 and then drops both courses on 5/3 then the student has discontinued before the published Spring RFD. The withdrawal date then becomes 5/3. On that date, the student was enrolled in both Spring and Summer courses, so we would include both modules in the denominator of the R2T4 calculation

Helpful Flow chart

- ❖ Order of operation
 - Did the student complete a module?
 - If yes, then did that module consist of 49% of the payment period?
 - If yes, then no R2T4 is needed
 - Did the student complete half-time during Spring?
 - If yes, then we do not need to complete an R2T4, just make sure that the student is being paid correctly
 - Did the student drop courses at a time that would make an R2T4 unnecessary?
 - Do we have intent to attend a future module?
 - If yes, then no R2T4 is needed at this time
 - Make sure that the student only receives aid 10 days prior to the start of the term that they will attend
 - Does the student have current enrollment?
 - If yes, then n R2T4 is not necessary
 - What is the active census?
 - What is the load at the active census?
 - Is the student eligible for aid based on their load?

- Consider base/additional Pell
- Consider header/trailer semesters
- Which classes can be considered as part of that load?
 - For example, did the student enroll in those courses by the active census? Are there 3rd-time repeat or audited classes?
- Did the student participate in the load that they were paid for?
- Does the Pell grant need to be adjusted to match the load the student participated in?
- What is the active RFD?
 - Make sure to use the sessions page to input the correct timeframe
- Complete the R2T4

Reminders

- ❖ Students enrolled in Spring-Summer credits receive an NS grade for the class at the Spring grade posting deadline. This is because the Spring-Summer class is attached to the Spring term, so the grade posting system automatically assigns an NS (No grade) if the class has not been graded (which it wouldn't since it is Spring-Summer). The grade is changed after Summer when the Spring-Summer class is completed
- ❖ When a student discontinues from Spring, we want to adjust their Financial Aid load in Maintain Student FA term to reflect the aid that they get to keep as a result of the R2T4 calculation
 - For example, if a student gets to keep \$400 in Pell grants, then the load would be LTHT. If the student gets to keep \$2,400 in Pell grants then the load would be TQT
 - If a student gets to keep loans only, then their load would need to be HT
 - Unlike Fall/Winter, we cannot leave a student's load as the load that they had when they discontinued, we need to change it to the money that they actually get to keep
 - For these students, make sure that we **do** check the override button for the FA load. This will help us to catch students whose load changes when they enroll in Summer courses
- ❖ If a student has an R2T4 completed for Spring and re-enrolls Summer
 - We must undo the R2T4
 - We must now pay the student for their load at the Summer PRD
 - This may result in a student losing money if they enroll in fewer credits during Summer than they were awarded from the Spring R2T4
 - For example, a student is only eligible for additional Pell and enrolls in half-time Spring. They discontinue and are eligible to keep \$800 from an R2T4 calculation. The student then enrolls in Summer term in only 3 credits. We will undo the R2T4 and cancel all aid since the student is not eligible to be paid Pell grants for LTHT enrollment.
 - **We track this with a query that we run once after Summer census**
 - If a student discontinues from Spring and comes back Summer but they were only awarded loans
 - We do not automatically re-disburse the loan that they were awarded. We would message them to let them know that they are not eligible for those funds again and let them accept them if they would like them

- They must still meet half time eligibility requirements
- ❖ Once we change a student's award on Professional Judgement, then the system will not automatically re-package a student if they re-enroll
 - We should catch these students on Pell not Equal
- ❖ If a student is **not** an R2T4 as receives a W for Spring term
 - We can pay them for the W if they participate in that course and do not have any future enrollment in Summer term
 - Once a student passes Summer census and has Summer enrollment, we can no longer pay them for the W that they received in Spring, even if they participated
 - We will track students who are receiving aid for Spring term while they have Summer enrollment by running this query after Summer census