

9.2 Review Return to Title IV Summary

Purpose: Use this document as a reference on how to review the R2T4 summary using ctcLink.

Audience: Financial Aid staff.

 You must have at least one of these local college managed security roles:

- ZD FA Director
- ZD FA R2T4 Prcs
- ZZ FA Funds Manager
- ZZ FA R2T4 Prcs

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Review R2T4 Summary

Navigation: NavBar > Navigator > Financial Aid > Return to Title IV Funds > Review Summary of TIV Return

1. The **Rtn TIV Stu Sum HERA** search page displays.
2. Complete the following fields:
 - **Academic Institution**
 - **Aid Year**
 - **Term**
3. Select the **Search** button.

Rtn TIV Funds Stu Sum HERA

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

Find an Existing Value

▼ Search Criteria

Academic Institution = ▼

Aid Year = ▼

Term = ▼

Program Type (Credit/Clock Hr) = ▼

Search

Clear

Basic Search

Save Search Criteria

4. The **Return of TIV Funds Summary** page displays.
5. Use the **Return of TIV Funds Summary** page to view a summary of a student's return of TIV funds calculation.
6. Select the **Go To Worksheets** link.

Return of TIV Funds Summary

Institution WA220 Tacoma CC

Aid Year 2018

Term 2177 FALL 2017

Program Type Credit Hour Program

View

☐ All

☐ Completed

☒ Pending

Personalize Find View All First 1-4 of 5 Last				
Status	Summary	Calculation Period	Worksheet Data	
ID	Name	*Status	Go To Worksheets	
1 201229073		Pending ▼	Go To Worksheets	
2 201288930		Pending ▼	Go To Worksheets	
3 201302285		Pending ▼	Go To Worksheets	
4 201321028		Pending ▼	Go To Worksheets	

Save

Return to Search

Notify

7. The system opens a new browser window and takes you to the **Create Worksheet** page. The **Return of TIV Aid** tab defaults.
8. Use this page to:
 - view RTIV withdraw calculation detail,
 - recalculate the withdrawal,
 - or add a new student who has withdrawn.
9. Select the **X** on the new tab to close and return to the **Review of TIV Funds Summary** page.

Create Worksheet

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

Institution WA220 Tacoma CC
 Term 2177 FALL 2017

ID 201229073
 Aid Year 2018
 Program Type Credit Hour Program
 FA Term Academic Career UGRD

★

Calculate All

Summary

Date of Withdrawal 12/01/2017 dt

☐ Undetermined Withdrawal Date

Days Elapsed 688

[Last Updated](#)

*Overall Status Pending

*Institutional Determination Dt 12/19/2017 dt

Date Form Completed

Period Information

☐ Payment Period

☒ Enrollment Period

*Start Date 09/25/2017 dt

*End Date 12/14/2017 dt

Term Information

Term 2177

Withdraw Date

60 Pct Dt 11/12/2017

Term Begin Date 09/25/2017

FA Term Withdraw Date

Term End Date 12/14/2017

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](#)

10. The **Review of TIV Funds Summary** page displays.
11. Select the **Summary** tab.
12. The **Summary** tab displays:
 - withdrawal,
 - cancel,
 - and institutional determination dates.
13. The **Undetermined Withdrawal Date** check box is selected if the student withdrew unofficially. This information comes from the **Return TIV Aid** page.
14. The system displays a date to indicate the midpoint of the payment period if the student unofficially withdraws. You can update this field if you want to use a different withdrawal date.
15. The **Withdrawal\Cancel Date** field indicates:
 - Last date of recorded attendance,
 - date the student began the withdrawal process,
 - date the student provided to your school with the intent to withdraw,
 - or the midpoint of the payment period if the student unofficially withdraws.
16. The system displays the default date based on the date that was established in Student Records.
17. The **Institutional Determination Date** field indicates the withdrawal date determined by the financial aid office.

Return of TIV Funds Summary

Institution WA220 Tacoma CC

Aid Year 2018

Term 2177 FALL 2017

Program Type Credit Hour Program

View

☐ All

☐ Completed

☒ Pending

Personalize Find View All First 1-4 of 5 Last			
Status	Summary	Calculation Period	Worksheet Data
Undetermined Withdrawal Date		Withdrawal \ Cancel Date	Inst Determination Date
		Days Elapsed	
1	<input type="checkbox"/>	12/01/2017	12/19/2017
2	<input type="checkbox"/>	12/14/2017	12/19/2017
3	<input type="checkbox"/>	11/01/2017	12/19/2017
4	<input type="checkbox"/>	11/08/2017	12/19/2017

Save Return to Search Notify

18. Select the **Calculation Period** tab.

19. The **Calculation Period** tab displays the time period the system uses to define the start and end date of the payment period or enrollment period. It also displays the amount of aid the student may be eligible for as a post-withdrawal disbursement.

20. If the student received less than his eligibility, the system displays the amount to be disbursed.

Return of TIV Funds Summary

Institution WA220 Tacoma CC

Aid Year 2018

Term 2177 FALL 2017

Program Type Credit Hour Program

View

☐ All

☐ Completed

☒ Pending

Personalize Find View All First 1-4 of 5 Last					
Status	Summary	Calculation Period	Worksheet Data		
Period Used for Calculation		Period Start Date	Period End Date	Date Form Completed	J. TIV Aid to Disburse
				Status	
1	Enrollment Period	09/25/2017	12/14/2017		
2	Enrollment Period	09/25/2017	12/14/2017		
3	Enrollment Period	09/25/2017	12/14/2017		
4	Enrollment Period	09/25/2017	12/14/2017		

Save Return to Search Notify

21. Select the **Worksheet Data** tab.

22. The **Worksheet Data** tab displays the amount of aid the institution must return to the Title IV programs and the status or the amount due from the student and the status.

Return of TIV Funds Summary

Institution WA220 Tacoma CC

Term 2177 FALL 2017

Aid Year 2018

Program Type Credit Hour Program

View ☐ All ☐ Completed ☒ Pending

Personalize | Find | View All | First 1-4 of 5 Last

Status	Summary	Calculation Period	Worksheet Data	
O. Amt Due From School		Status	Q. Amt Due From Student	Status
1				
2				
3	729.41	Pending	497.73	Pending
4				

Save Return to Search Notify

23. You have successfully reviewed a detailed summary of the student's return of funds calculation.
24. End of procedure.