


9.2 Run Return to Title IV Report

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

Audience: Financial Aid staff

Use the **Return of TIV Funds Report** page to generate the Return of Title IV Funds Withdrawal report.

 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.

Run the R2T4 Report

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

1. The **Return of TIV Aid Report** run control search page displays.
2. Enter the **Run Control ID**.
3. Select the **Search** button.

Student Tracking

Return of TIV Aid Report

Return of TIV Aid Report

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

Find an Existing Value

Add a New Value

▼ Search Criteria

Search by: Run Control ID begins with

☐ Case Sensitive

Search

Advanced Search

Find an Existing Value

Add a New Value

4. The **Return of TIV Aid Report** page displays.
5. The report displays the most recent withdrawal dates first and the oldest last. The system displays the information based on how you define your run control options. It includes:
 - worksheet calculations,
 - return of funds by the school and student,
 - institutional charges, and
 - number of days since the withdrawal date.
6. Complete the following fields:
 - **Institution**
 - **Aid Year**
 - **Term**
 - **Program Type**
7. Select the **Active** check box.
8. Use the **Report Structured By** field to structure the report by date, by name, or by date range/name.
9. Use the **Process Students** field to select completed, new, new and pending, or pending withdrawals.
10. You can select to process the report by specific careers. If the **Process Selected Careers** check box is clear, the system processes all careers.
11. Select the **Save** button.
12. Select the **Run** button.

Student Tracking
Return of TIV Aid Report

Return of TIV Funds Report

Run Control ID TRAINING
Report Manager
Process Monitor
Run

Return of TIV Funds Report Parameters
Find | View All
First 1 of 1 Last

*Institution WA220
*Aid Year 2018
Term 2177
☒ Active

Report Structured By By Date
Program Type (Credit/Clock Hr)
☐ Clock Hour Program
☒ Credit Hour Program

Process Students New and Pending Withdrawals

☒ Process Selected Careers

Selected Careers		Personalize Find View All		First	1 of 1	Last
Academic Career		Totals				
1	Academic	Totals				

Total Students Processed	0	Students 0-10 Days	0	Students 21-30 Days	0
		Students 11-20 Days	0	Students Over 30 Days	0

Process Instance 0
Run Date and Time

Refresh

Save
Return to Search
Notify

Add
Update/Display

13. The **Process Scheduler Request** page displays.
14. Select the **OK** button.

Process Scheduler Request

User ID CTC_JMERRILL
Run Control ID TRAINING

Server Name
Run Date 11/07/2019

Recurrence
Run Time 8:13:24AM
Reset to Current Date/Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Title IV Return of Funds	FATIVRTN	SQR Report	Web	PDF	Distribution

OK
Cancel

15. The **Return of TIV Funds Report** page displays.
16. Make note of the **Process Instance** number.
17. Select the **Process Monitor** link.

Return of TIV Funds Report

Run Control ID: TRAINING Report Manager **Process Monitor** Run

Return of TIV Funds Report Parameters Find | View All First 1 of 1 Last

*Institution: WA220 *Aid Year: 2018 Term: 2177 ☒ Active

Report Structured By: By Date **Program Type (Credit/Clock Hr)**

Process Students: New and Pending Withdrawals ☐ Clock Hour Program
☒ Credit Hour Program

☒ Process Selected Careers

Selected Careers Personalize | Find | View All | 1 of 1 | Last

Academic Career	Totals
1 Academic	Totals

Total Students Processed: 0 Students 0-10 Days: 0 Students 21-30 Days: 0
Students 11-20 Days: 0 Students Over 30 Days: 0

Process Instance: 0 Run Date and Time

Refresh

Save Return to Search Notify Add Update/Display

18. The **Process Monitor** page displays.
19. Select the **Refresh** button until the status is **Success** and **Posted**.
20. Select the **Go Back to Return to TIV Aid Report** link.

Process List Server List

View Process Request For

User ID: CTC_JMERRILL Type: Last: 1 Days **Refresh**

Server: Name: Instance From: Instance To: Save On Refresh ☒

Run Status: Distribution Status: ☒

Process List 1-2 of 2 View All

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	30524447		SQR Report	FATIVRTN	CTC_JMERRILL	11/07/2019 8:13:24AM PST	Success	Posted	Details
<input type="checkbox"/>	30524441		PSJob	CODIN	CTC_JMERRILL	11/06/2019 11:59:18AM PST	Success	Posted	Details

[Go back to Return of TIV Aid Report](#)

Save Notify

Process List Server List

21. The **Return of TIV Funds Report** page displays.
22. Select **Report Manager** link.

Return of TIV Funds Report

Run Control ID TRAINING **Report Manager** Process Monitor Run

Return of TIV Funds Report Parameters Find | View All First 1 of 1 Last

*Institution WA220 *Aid Year 2018 Term 2177 ☒ Active

Report Structured By By Date

Process Students New and Pending Withdrawals

☒ Process Selected Careers

Selected Careers Personalize | Find | View All | 1 of 1 Last

Academic Career	Totals
1 Academic	Totals

Total Students Processed 129 Students 0-10 Days 4 Students 21-30 Days 0

Students 11-20 Days 0 Students Over 30 Days 125

Process Instance 30524447 Run Date and Time 11/07/2019 8:14:39AM

Refresh

Save Return to Search Notify Add Update/Display

23. The **Report Manager** page displays.
24. Select the **Administration** tab.
25. Select the **Title IV Return of Funds** report link associated with the Process Instance number.

List Explorer **Administration** Archives

View Reports For

User ID CTC_JMERRILL Type Last 1 Days Refresh

Status Folder Instance to

Report List

Select	Report ID	Prs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	1332561	30524447	Title IV Return of Funds	11/07/2019 8:14:11AM	Acrobat (*.pdf)	Posted	Details
<input type="checkbox"/>	1332556	30524442	SFA_COD_IN	11/06/2019 12:00:13PM	Text Files (*.txt)	Posted	Details

☒ Select All ☐ Deselect All

Delete Click the delete button to delete the selected report(s)

[Go back to Return of TIV Aid Report](#)

Save

List | Explorer | Administration | Archives

26. The report opens in a new window.

Report ID: FATIVRTN.SQR
Institution: WA220
Aid Year: 2018
Term: 2177

PeopleSoft
TITLE IV RETURN OF FUNDS REPORT

Page No. 1
Run Date 11/07/2019
Run Time 08:14:39

Academic Career: UGRD

Student Name	SSN	Wdrl Date	Days Since	FA Term Dt	Status	Create Dt	Inst Date	Days Since
					P	11/08/2017	12/19/2017	688
					P	12/14/2017	12/19/2017	688
					P	11/01/2017	12/19/2017	688
					P	12/01/2017	12/19/2017	688
		11/21/2017	716	11/21/2017				688
		11/21/2017	716					688
		11/17/2017	720	11/17/2017				688
		11/17/2017	720					688
		11/17/2017	720	11/17/2017				688
		11/17/2017	720	11/17/2017				688
		11/17/2017	720	11/17/2017				688
		11/17/2017	720	11/17/2017				688

27. You have successfully generated a Return of TIV Funds Withdrawal report.
28. End of procedure.