Implementing an Office Training

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Author Note

The content of this paper is done in affiliation with Boise State University, specifically within the department of Applied Sciences and the Financial Aid Office.

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Implementing an Office Training

Abstract

For my capstone project, I chose to develop a training course with corresponding materials regarding the Return to Title IV Funds (R2T4) process in the Financial Aid Office. I have been working in this office for over a year, and I have been the manager and main processor of R2T4 for over six months. When I took a step back, I realized that our office has very little in terms of proper training materials, instead relying on new employees to learn through written out procedures. While this is okay for some of the easier processes, it does not foster an easy learning environment for heavily audited procedures such as R2T4. In order to address this, I’ve created a job aid and training slideshow presentation. Additionally, my supervisor and I recognized that our office would benefit from more understanding on this topic specifically as it would allow for the potential to have additional processors for it rather than just myself. Stakeholders include me, the Financial Aid Office as a whole, the institution, and its students. I have been able to provide something that our office not only needed, but something that can be utilized and iterated upon for other processes as well to foster a better training environment within our department.

Keywords: Financial Aid, Return to Title IV Funds, training course, job aid, iteration, design thinking, user-friendly
Section 1: Introduction to Capstone Project

One person currently processes Return to Title IV Funds (R2T4) calculations in the Financial Aid Office which can lead to a risk of increased errors on a highly audited process. The project I have chosen is to design a training course, consisting of a job aid and training presentation, for R2T4 calculations that the Financial Aid office must do for students who completely withdraw from a semester after receiving federal aid. I began doing this by using the main resources that I utilized to get certified: the “Return to Title IV Funds Self-Study Guide” by the National Association of Student Financial Aid Administrators (NASFAA) and the “Withdrawals and the Return of Title IV Funds | 2023-2024 Federal Student Aid Handbook” by the Federal Student Aid (FSA) office. I then proceeded to break down my procedures into process flow-charts for the job aid, followed by breaking down the calculation itself in a slideshow presentation.

Section 2: Elements coming together

Innovative Approach

Within our office, many struggle to explain R2T4 to students and how it could potentially impact them. As the main processor, while I may not exactly enjoy the concept itself from a moral standpoint, I do understand the importance of the calculation and how the audit for it could impact our Title IV Funding from the federal government if we do not meet expectations. My supervisor and I have been discussing the possibility of trying to find a way to get more people involved in the R2T4 process since early January, due to a huge workload of unofficial withdrawals from the fall semester that caused me to work quite a bit of overtime that month. Breaking this calculation down into its individual components will help my colleagues understand it better overall, and assist in training a small team to help me process them. Having
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more than one processor means more internal resources for the Financial Aid office overall regarding R2T4, particularly if I am out of office or eventually move into a new position.

**Emotional Intelligence**

This project is a result of recognizing how much of a struggle it was for me to be the only processor of R2T4 calculations during busier times of the year. Even with my supervisor occasionally helping, we both recognized it was too much. Additionally, knowing it is such an audited process, it is a risk to our office and institution to have only one person taking on this workload alongside her other responsibilities. I know it is a bit of an intimidating process to my colleagues, so I have gone into the project with a mindset to simplify it as much as possible so it is more easily understood. As I developed an R2T4 training and its materials, I used concepts from my UX (User Experience) Design emphasis to achieve this goal. The calculation itself is complex but can be more easily understood when we break down its parts into smaller pieces during the training presentation. I also can relate with how it feels to come into this topic with a minimal understanding, and will let the audience know this as well. I will make sure to offer my support throughout the learning process and afterwards, since it will still be a process I directly manage.

This project is valuable for myself, the Financial Aid office, the institution, and our students. It gives me time back for other priorities during peak times of year for our office. It ensures more understanding of R2T4 in general, which will contribute to better audits overall which ensures our institution continues eligibility for Title IV Funds (i.e. the Pell Grant, Direct Loans, etc.). If I were to ever take an extended leave or get a new job, it leaves the office with employees who are familiar with the process and makes them capable of training future employees on it as well. Finally, students will benefit from quicker turnaround times to know
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how much they potentially owe. They also will be able to ask questions regarding their withdrawals and receive faster responses from our office.

Creative Thinking

Throughout my Bachelor of Applied Science program, my emphasis has been on UX Design. Because of this, I utilized aspects of Design Thinking as my main creative approach to this project, particularly the empathizing, ideating, defining, and prototyping steps. I won’t have a chance to test the training until later on this year, so I had to rely on feedback primarily from my supervisor. Once I can properly test the training course I’m developing and get additional feedback, I will then be able to go back and iterate on the previous stages until the end result is where I would like it to be. My approach is unique in many ways, as the Financial Aid office has no formal training courses or materials developed at all. Additionally, it is not commonplace for us to utilize any Design Thinking methods as financial aid isn’t typically viewed as a ‘creative’ field. My emphasis on UX Design has helped me see the potential in making this training user-friendly in order to help encourage others in the office that R2T4 is not a subject to avoid or be feared. I’ve already had discussions to take some of the job aid materials I’ve created and make copies for the student-facing side of our office so they can better explain it to students as well. My goal with my creative approach is making something I can leave behind that can be updated and utilized in the future, even without my or my supervisor’s oversight or input.

Your Innovative Solution

Developing a training course is innovative for my office due to there not being an existing one at all for any of our processes. Much of the financial aid ‘training’ process is utilizing federal websites as resources as well as our existing written procedures. While these are certainly helpful, they lack the hands-on value of providing training materials as well as a crash
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course in a topic. As the process I have created this training for is one of the most complicated in our office, I relied heavily on feedback from my supervisor and peers throughout designing it. I also used my existing knowledge and resources to ensure that, while user-friendly, my materials are compliant with the regulations surrounding R2T4.

Section 3: Results

I measured the results by presenting my training course and materials to my supervisor and then asked her to evaluate it all through an evaluation document that I prepared beforehand. The results were great, even though there is still some room for improvement. I am satisfied that I have created something that can continue being iterated upon and utilized by other Financial Aid Counselors in our office to train and cross-train more effectively.

My project provides many benefits to the Financial Aid Office and our students. Our office has no formal training materials or presentations to help new staff or existing staff learn specific topics. Because R2T4 is heavily regulated, this ends up in many questions. Additionally, there is only one main processor which can lead to a lot of work on one person. Getting others familiar with the process allows for less questions, freeing up time for the main processor. It also allows for more than one processor to exist. The training job aid and slideshow presentation also serve as examples of how to approach a training course for other topics within financial aid as well. The Assistant Director of Production, Lauren Krigbaum, provided the following feedback: “This presentation is going to change the way we train our office. I am thrilled to be able to roll it out to our team and see the benefits that come from it.” Additionally she stated, “This presentation can be used in multiple areas of our office - most notably training new Production team members on the R2T4 process, which will help improve our cross training and processing times immensely … The customer service team will also benefit greatly from this presentation.
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This is often a very tough and confusing topic for them to navigate with students, and this presentation will give them the overview and information they need to be able to accurately and confidently answer student questions.” (L. Krigbaum, personal communication, April 13, 2024).

Section 4: Conclusion

For my capstone project, I chose to tie my project in with my current profession by developing a training course and materials on a process I manage: Return to Title IV Funds. I anticipated that the end product would be training materials that better explain R2T4 and that they would encourage other Financial Aid Counselors to create their own training materials. Based on my supervisor’s feedback, I have achieved the former. Time will tell if my colleagues decide to implement their own training or not. If I had more time, I would have involved more of my coworkers by seeking their feedback on the presentation instead of just my supervisor. I also would have liked to present it to a small ‘test group’ for feedback as well. After completing this project, I hope to continue iterating and improving on it for our office. I am proud of my initial results, as they are a reflection of all that I have learned during my time as a student at Boise State University. I move forward knowing that I can prevail in future projects and endeavors both professionally and personally.

Section 5: References


https://www.nngroup.com/articles/technical-jargon/?lm=ux-writing-study-guide&pt=article


**Section 6: Appendix**

This appendix provides links to the actual materials I developed for the training course: a job aid and slideshow presentation.

R2T4 Job Aid: 

https://docs.google.com/document/d/17iEV2XfR9FF_GwSsQ5MKVzHvWX664Wjr/edit?usp=sharing&ouid=105582883775206886720&rtpof=true&sd=true

R2T4 Slideshow Presentation:

https://docs.google.com/presentation/d/1hRaB-D6N4f5SSEaPfV7cGu3iNm_vdyoh/edit?usp=sharing&ouid=105582883775206886720&rtpof=true&sd=true
R2T4 Job Aid
COMPLETE WITHDRAWALS

Flowchart:

1. Student completely withdraws (CWD)
2. Official Withdrawal
3. Calculate percentage of earned aid
4. Perform R2T4 calculation
5. If some: Perform Enrollment Adjustment for Pell Grant
6. Receive drop date reported by Registrar’s Office
7. Confirm attendance
   - Did student attend all courses?
8. NO
   - Cancel all federal aid
   - Post FNEE communication
   - END
9. YES/SOME
   - Post FWN & FWNE communications
   - END

END
F GRADES

FLOWCHART

1. Does report have conflicting information?
   - Yes: Professors report students' LDAs
   - No: Unofficial Withdrawal

2. Is student a Never Attend?
   - Yes: Cancel all federal aid
     - Yes: Confirm attendance Did student attend all courses?
       - Yes: STOP HERE FOR PARTIAL F GRADES & SEND FUPDX
       - No: Post FNEE communication
     - No: If some: Perform Enrollment Adjustment for Pell Grant

3. Calculate percentage of earned aid
   - Perform R2T4 calculation
   - Post FFN & FFNE communications
   - END
Order of Funds Returned

ORDER OF FUNDS RETURNED

1st
Direct Unsubsidized Loan

2nd
Direct Subsidized Loan

3rd
Direct PLUS Loan

4th
Federal Pell Grant

5th
Iraq & Afghanistan Service Grant (IASG)

6th
Federal Supplemental Educational Opportunity Grant (FSEOG)
Additional Resources

- R2T4 Self Study Guide file path: R:\Financial Aid\Data\NASFAA University Study Guides\2023-2024 NASFAA Self-Study Guide
  - File name: NASFAA_2023-24_R2T4_SSG.pdf
- Federal Student Aid Handbook:
- Code of Federal Regulations (CFR 34 668.22):
RETURN TO TITLE IV FUNDS (R2T4) – CALCULATION TRAINING
LESSON PLAN

DEFINITIONS

• **Dates**: drop dates and the date of determination/withdrawal

• **% Earned**: how much aid a student actually earned

• **Types of Aid**: what aid is impacted by an R2T4 calculation

• **Institutional Charges**: charges originally assessed to the student that determine how much aid the school must return

LEARNING OBJECTIVES

Understanding the difference between the drop date and date of determination.

Understanding the order in which funds are returned.

Understanding how we find institutional charges.

Understanding how the calculation breaks down.
DATES – DROP & DETERMINATION
**DROP DATES**

- The date a student actually dropped a course.
- These dates can vary as students may drop individual courses throughout a term until they end up a CWD.
- The final drop date of a session (regular or module) needs to be used in the calculation.

**Important note:** If a student CWDs during a scheduled break* of 5+ days, their drop date should be the Friday before the break and their date of determination will remain as the LDA.

*Spring or Thanksgiving breaks*
DATE OF DETERMINATION/withdraw

- **Official Withdrawals**: The date a student reported their intent to completely withdraw from a semester.
  - We refer to these as a CWD.
- **Unofficial Withdrawals**: The date the institution became aware a student did not complete their courses.
  - We refer to these as ALL F GRADES.
- This date is the last date of attendance (LDA).
PERCENT OF AID EARNED & TYPES OF AID

How much a student earns and what type of aid is impacted by an R2T4 calculation
PERCENT EARNED

• Determined by how many days a student attended a course.
  • Modules can play heavily into a student earning less because these are shorter time periods than Regular Session courses.

• # of Days Attended / # of Total Days Scheduled = % of Period Completed

• Total Aid \times \% \text{ of Period Completed} = \text{Earned Aid}
TYPES OF AID IMPACTED BY R2T4

• Federal Direct Unsubsidized, Subsidized, and PLUS Loans
• Federal Pell Grant
• Iraq & Afghanistan Service Grant (IASG) and Federal Supplemental Educational Opportunity Grant (FSEOG)
INSTITUTIONAL CHARGES

Determines what portion of aid a school must return
INSTITUTIONAL CHARGES

- BFA_R2T4_FEECHRGS_SNGL_LZE_BR will pull the correct institutional charges by using the date that the CWD occurred.

- We must use charges originally assessed to a student’s account prior to any credits being applied that reverse charges.

- If a student’s enrollment status changes due to a Pell Recalculation Date (PRD) that occurred before they became a CWD, we must use the new charges.
THE CALCULATION
R2T4 CALCULATION

• Disbursed Aid – Earned Aid = Total Unearned Aid

• School’s vs Student’s share

• We have 45 days of the date of determination to return unearned Title IV Funds.

  • We stay within 30 days in case a correction is needed for the initial calculation.
<table>
<thead>
<tr>
<th>Institution IDBSU</th>
<th>Boise State University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term</td>
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<tr>
<td>Date of Withdrawal</td>
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<tr>
<td>ID</td>
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<td>Aid Year</td>
<td>2024</td>
</tr>
<tr>
<td>Program Type</td>
<td>Credit Hour Program</td>
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**Worksheet Data**

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<th>Amount</th>
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<tr>
<td>E. Total TIV Aid Disb</td>
<td>2431.00</td>
</tr>
<tr>
<td>F. Total TIV Grant Aid</td>
<td>830.00</td>
</tr>
<tr>
<td>G. Total TIV Aid</td>
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<td>H. Pct TIV Aid Earned</td>
<td>59.10</td>
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<td>I. TIV Aid Earned</td>
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<td>J. TIV Aid to Disburse</td>
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<tr>
<td>K. TIV Aid to Return</td>
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<td>L. Total Institutional Charges</td>
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<td>M. Pct TIV Aid Unearned</td>
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<td>O. Amt Due From School</td>
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<td>P. Total School Must Return</td>
<td>957.06</td>
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<td>Q. Amt Due From Student</td>
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<tr>
<td>R. Stint Loan Repayment Amt</td>
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<tr>
<td>S. Initial TIV Grant Amount</td>
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<tr>
<td>T. TIV Grant Protection Amt</td>
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<tr>
<td>U. TIV Grant Return Amt</td>
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**Action**

Complete Student and School Return of Funds Tracking Information

36 characters remaining
<table>
<thead>
<tr>
<th>Student Return of Funds</th>
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<tbody>
<tr>
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<tr>
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<tr>
<td>Response Date</td>
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<tr>
<td>Repayment Arrangement</td>
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<td>Funds Return Date</td>
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</tr>
<tr>
<td>Q. Amt Due From School</td>
<td>957.06</td>
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</tbody>
</table>
### Treatment Of Title IV Funds When A Student Withdraws From A Credit-Hour Program

**Student's Name**

**Social Security Number**

**Date from completed**

**Date of student's determination**

**Period used for calculation (check one)**
- Payment period
- Period of enrollment

**Monetary amounts should be in dollars and cents (rounded to the nearest penny). When calculating percentages, round to three decimal places. (For example, 4490.449, or 44.9%)**

#### STEP 1: Student's Title IV Aid Information

<table>
<thead>
<tr>
<th>Title IV Grant Programs</th>
<th>Amount Disbursed</th>
<th>Amount that Could Have Been Disbursed</th>
<th>Total Title IV aid disbursed for the period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pell Grant</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FSEOG</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEACH Grant</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Iraq and Afghanistan Service Grant</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Subtotal</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Title IV Loan Programs</th>
<th>Net Amount Disbursed</th>
<th>Net Amount that Could Have Been Disbursed</th>
<th>Total Title IV aid disbursed and that could have been disbursed for the period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unsubsidized Direct Loan</td>
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</tr>
<tr>
<td>Subsidized Direct Loan</td>
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<tr>
<td>Direct Grad PLUS Loan</td>
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</tr>
<tr>
<td>Direct Parent PLUS Loan</td>
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<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Subtotal</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### STEP 2: Percentage of Title IV Aid Earned

- **Start date**
- **Scheduled end date**
- **Date of withdrawal**

A school that is not required to take attendance may, for a student who withdraws without notification, enter 100% in Box H and proceed to Step 3. Or, the school may enter the last date of attendance at an academically related activity for the "withdrawal date" and proceed with the calculation as instructed.

**H. Percentage of payment period or period of enrollment completed**

Divide the calendar days completed in the period by the total calendar days in the period (excluding scheduled breaks of five days or more AND days that the student was on an approved leave of absence).

<table>
<thead>
<tr>
<th>Completed days</th>
<th>Total days</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- If this percentage is greater than 60%, enter 100% in Box H and proceed to Step 3.
- If this percentage is less than or equal to 60%, enter that percentage in Box H, and proceed to Step 3.

### STEP 3: Amount of Title IV Aid Earned by the Student

\[
\% \times \frac{A}{B} \times C \times D \times E = F \times G
\]

- **Box H**
- **Box G**

### STEP 4: Title IV Aid to be Disbursed or Returned

- If the amount in Box I is greater than the amount in Box E, go to Item J (post-withdrawal disbursement).
- If the amount in Box I is less than the amount in Box E, go to Item K (Title IV aid to be returned).
- If the amounts in Box I and Box E are equal, STOP. No further action is necessary.

**J. Post-withdrawal disbursement**

From the Amount of Title IV aid earned by the student (Box E) subtract the Total Title IV aid disbursed for the period (Box E). This is the amount of the post-withdrawal disbursement.

**STOP here, and enter the amount in "J" in Box 1 on Page 3 (Post-withdrawal disbursement tracking sheet).**
**Step 4: Aid to be Disbursed or Returned CONTINUED**

From the Total Title IV aid disbursed for this period (Box E) subtract the amount of Title IV aid earned by the student (Box I). This is the amount of Title IV aid that must be returned.

\[ \text{Box E - Box I} = \text{K. S.} \]

**Step 5: Amount of Unearned Title IV Aid Due from the School**

**L. Institutional charges for the period**

- Tuition
- Room
- Board
- Other

\[ \text{Total Institutional Charges (add all the charges together)} = \text{L. S.} \]

**M. Percentage of unearned Title IV aid**

\[ \frac{100\%}{\text{Box M}} = \text{M. S.} \]

**N. Amount of unearned charges**

Multiply institutional charges for the period (Box L) by the percentage of unearned Title IV aid (Box M).

\[ \text{Box L} \times \text{Box M} = \text{N. S.} \]

**Step 6: Return of Funds by the School**

The school must return the unearned aid for which the school is responsible (Box C) by reimbursing funds to the following sources, in order, up to the total net amount disbursed from each source:

**Title IV Programs**

1. Unsatisfactorily Discharged Direct Loan
2. Subsidized Direct Loan
3. Direct Grad PLUS Loan
4. Direct Parent PLUS Loan

\[ \text{Total loans the school must return} = \text{P. S.} \]

**Step 7: Initial Amount of Unearned Title IV Aid Due from the Student**

From the amount of Title IV aid to be returned (Box K) subtract the amount for the school to return (Box C).

\[ \text{Box K - Box C} = \text{Q. S.} \]

**Step 8: Repayment of the Student’s Loans**

From the net loans disbursed to the student (Box B) subtract the total loans the school must return (Box C) to find the amount of Title IV loans the student is still responsible for repaying (Box R). These loans consist of loans the student has earned, or unearned loan funds the school is not responsible for repaying. They are repaid to the loan holders according to the terms of the borrower’s promissory note.

\[ \text{Box B - Box C} = \text{R. S.} \]

**Step 9: Grant Funds to be Returned**

**S. Initial amount of Title IV grants for student to return**

From the initial amount of unearned Title IV aid due from the student (Box Q) subtract the amount of loans to be repaid by the student (Box R).

\[ \text{Box Q - Box R} = \text{S. S.} \]

**T. Amount of Title IV grant protection**

Multiply the total of Title IV grant aid that was disbursed and that could have been disbursed for the period (Box E) by 50%.

\[ \text{Box E} \times 0.50 = \text{T. S.} \]

**U. Title IV grant funds for student to return**

From the initial amount of Title IV grants for student to return (Box S) subtract the amount of Title IV grant protection (Box T).

\[ \text{Box S} - \text{Box T} = \text{U. S.} \]

**Step 10: Return of Grant Funds by the Student**

Except as noted below, the student must return the unearned grant funds for which he or she is responsible (Box U). The grant funds returned by the student are applied in order as indicated, up to the amount disbursed from that grant program minus any grant funds the school is responsible for returning to that program in Step 6.

Note that the student is not responsible for returning funds to any program to which the student owes $50.00 or less.

**Title IV Grant Programs**

1. Pell Grant
2. Iraq and Afghanistan Service Grant
3. TEACH Grant
4. Perkins Loan
5. FSEOG

**Amount to Return**

- \[ \text{Box U} \]
**POST-WITHDRAWAL DISBURSEMENT TRACKING SHEET**

**Student's Name:**

**Social Security Number:**

**Date of school's determination that student withdrew:**

---

### I. Amount of Post-withdrawal Disbursement (PWD)

Amount from “Box 7” of the Treatment of Title IV Funds When a Student Withdraws worksheet

<table>
<thead>
<tr>
<th>Box 1</th>
<th></th>
<th></th>
</tr>
</thead>
</table>

### II. Outstanding Charges For Educationally Related Expenses Remaining On Student's Account

Total Outstanding Charges Scheduled to be Paid from PWD

| Note: Prior-year charges cannot exceed $200. |

<table>
<thead>
<tr>
<th>Box 2</th>
<th></th>
<th></th>
</tr>
</thead>
</table>

### III. Post-withdrawal Disbursement Offered Directly to Student and/or Parent

From the total Post-withdrawal Disbursement (Box 1), subtract the Post-withdrawal Disbursement to be credited to the student's account (Box 2).

This is the amount you must make to the student (grant) or offer to the student or parent (loan) as a direct disbursement.

<table>
<thead>
<tr>
<th>Box 1</th>
<th></th>
<th></th>
</tr>
</thead>
</table>

### IV. Allocation of Post-withdrawal Disbursement

Because COO will only accept whole dollar entries for Direct Loans, a Direct Loan disbursement will have to be rounded up or down to the nearest whole dollar, not to exceed annual or aggregate limits.

If an institution only awards Pell and Iraq and Afghanistan Service Grants in whole dollars, the total award to the student for the period must be rounded up or down to the nearest whole dollar, not to exceed the annual or lifetime eligibility limitations.

<table>
<thead>
<tr>
<th>Type of Aid</th>
<th>Loan Amount School Seeks to Credit to Account</th>
<th>Loan Amount Authorized to Credit to Account</th>
<th>Title IV Aid Credited to Direct Disbursement</th>
<th>Loan Amount Offered as Direct Disbursement</th>
<th>Loan Amount Accepted as Direct Disbursement</th>
<th>Title IV Aid Disbursed Directly to Student</th>
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<td>Direct Grad PLUS Loan</td>
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</table>

### V. Authorizations and Notifications

- Post-withdrawal disbursement loan notification sent to student and/or parent on:
  - / /
- Deadline for student and/or parent to respond:
  - / /
- Response received from student and/or parent on:
  - / /
- School does not accept late response:
  - / /
  - / /

### VI. Date Funds Sent

- Date direct disbursement mailed or transferred:
  - Grant: / /
  - Loan: / /

You should use this format when the withdrawal date is on or after 7/1/2021.
LEARNING HIGHLIGHTS

• Drop Dates vs Date of Determination
• Order in which we return Title IV Funds
• Institutional Charges and their role in the calculation
• Return to Title IV Funds calculation breakdown
PLEASE REACH OUT WITH ANY QUESTIONS!

Financial Aid Counselor currently managing R2T4:

Ashley Connolley
ashleyconnolley@boisestate.edu