Return To TIV in Delivered FA - How Far We Have Come
CUNY 2015 BARFITA Conference
June 5th, 2015

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The Early Days (November 2010 - June 2012)

- November 2010, QCC01 Go-Live with Campus Solutions
  - Manually identified R2T4 via paper withdrawal forms
    - Registrar’s Office kept all paper withdrawal forms in a centralized location, alphabetical order
    - Cross reference with SFA to identify who is R2T4
  - Manually enter R2T4 calculations into SFA system
  - CUNY requests PWD automation in July 2011
Oh no, what did we do?
The Early Days (November 2010 - June 2012)

- Creation of I510 and I623 Reports
  - Inability to sort reports in excel (sorted via SSN and EMPLID respectively)
  - Once enhanced, able to identify potential cases
  - Records must process Term Withdrawal for I510 identification of cases
  - Used UAPC reports, Interface reports and Registrar Total Withdrawal Queries to assure all potential cases were captured
  - Manually entered R2T4 calculations in SFA
The Early Days (November 2010 - June 2012)

• Issue with Message Courses:
  – Not being captured by reports
  – Creation of external query to identify students with Message Course enrollment, and total withdrawal in other courses.
  – I510 not identifying cases properly
    • Used I623 instead, more accurate data
Large Scale Confusion Stage
FA Delivered (Fall 2012)

• Fall 2012 FA Delivered (E-033 R2T4 CEMLI)
  – Term Withdrawal process must continue to be run in order for worksheets to be created
  – Must run E-033 Manually
  – Allow worksheets to be created and adjusted manually
  – Session Withdrawal logic released
Confusing… but starting to make sense
FA Delivered (2012-present)

A student is selected for R2T4 worksheet creation if:

1) Term withdrawn, or

2) Grades in all courses are “W”, “WA”, “WD”, “WU”, and “WF” or any combination of these (WD grade is added, WN grade is removed)

3) Have either anticipated or disbursed Title IV aid and

4) Incurred institutional liability of tuition or allowable fees
<table>
<thead>
<tr>
<th>Jerez_Arge</th>
<th>23097920</th>
</tr>
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<tbody>
<tr>
<td>NCC01</td>
<td>Guttman Community College</td>
</tr>
<tr>
<td>1152</td>
<td>2015 Spring Term</td>
</tr>
<tr>
<td></td>
<td>ID:</td>
</tr>
<tr>
<td></td>
<td>Aid Year: 2015</td>
</tr>
<tr>
<td></td>
<td>Program Type: Credit Hour Program</td>
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<tr>
<td></td>
<td>FA Term Academic Career: UGRD</td>
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</table>

**Summary**

- Date of Withdrawal: 05/07/2015
- Overall Status: Complete
- Undetermined Withdrawal Date: No
- Days Elapsed: 7
- Last Updated: 05/14/2015

**Period Information**

- Payment Period: No
- Enrollment Period: Yes
- Start Date: 03/04/2015
- End Date: 06/14/2015

**Term Information**

- Term: 1152
- Withdraw Date: 05/08/2015
- 60 Pct Dt: 05/08/2015
- Term Begin Date: 03/04/2015
- Term End Date: 08/06/2015

**Session Information**

- Session: 1
- Withdraw Date: 05/07/2015
- 60 Pct Dt: 05/08/2015
- Session Withdraw Date: 05/07/2015
- 60 Pct Effective Dt: 05/08/2015
- Session Period Begin Date: 03/04/2015
- Session Period End Date: 08/06/2015

**Multiple Session Details**

- Override Days from Session: No
<table>
<thead>
<tr>
<th>Worksheet Data</th>
<th>Calculation</th>
<th>Detail</th>
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</thead>
<tbody>
<tr>
<td>E. Total TIV Aid Disb:</td>
<td>2149.00</td>
<td></td>
</tr>
<tr>
<td>F. Total TIV Grant Aid:</td>
<td>2149.00</td>
<td></td>
</tr>
<tr>
<td>G. Total TIV Aid:</td>
<td>2149.00</td>
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<tr>
<td>H. Pct. TIV Aid Earned:</td>
<td>59.60</td>
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<td>I. TIV Aid Earned:</td>
<td>1280.80</td>
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<td>J. TIV Aid to Disburse:</td>
<td>0.00</td>
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<td>K. TIV Aid to Return:</td>
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<tr>
<td>L. Total Institutional Chrgs:</td>
<td>1841.45</td>
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<td>M. Pct TIV Aid Unearned:</td>
<td>40.40</td>
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<td>N. Unearned Inst Charges:</td>
<td>743.95</td>
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<td>O. Amt Due From School:</td>
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<td>P. Total School Must Return:</td>
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<td>Q. Amt Due From Student:</td>
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<td>R. Stdnt Loan Repaymnt Amt:</td>
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<td>S. Initial TIV Grant Amount:</td>
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<td>T. TIV Grant Protection Amt:</td>
<td>1074.50</td>
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<td>U. TIV Grant Return Amt:</td>
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</table>

**Action:** Complete Student and School Return
**FA Delivered** (2012-present)

- External report to identify Message Courses
- May 2013 preparation for Wave 2 Go Live
  - Run CEMLI, runs to No Success
  - Outreach to Central
  - Error occurred during Wave 2 preparation, CEMLI must be re-coded
    - Testing throughout the Summer @ Hudson Street
- IT-internal report created to identify potential R2T4 cases
Integration Points

• Withdrawal Dates from SR
• 60% Point Date from SR
• Term/Session Start and End Days from SR
• Immunization Data dependencies from Health Office
• WN/WU Grade dependencies from Faculty
• Confirmation of Commencement of Attendance from Faculty
• Institutional Charges from SF
• Awards and Disbursement Data from FA
FA Delivered (2012-present)

• Challenges
  – Worksheets Auto Completed
  – Adjustments to aid occurred erroneously
  – Authorization process runs
    • Aid cancelled for non-enrollment
  – Disbursement process runs
    • All funds returned since $0 Authorized
  – Manually correct worksheets/Complete
  – Work around
    • Security access required to Disburse with Override
FA Delivered (2012-present)

• Challenges
  – Worksheets being auto-completed at time of creation (WU cases and those earning 100%)
  – Incorrect PWD notifications
    – Manually create revised PWD and email students
  – Incorrect Fees
    – Change of Program not included
  – Repackaging Issues
    – Aid being repackaged for R2T4 students, back to original awards
  – WN/WU Records not earning 50%
  – WD/W/WU Combinations not earning 50%
Moving Forward!!

• Accomplishments
  – Six Amendments have been moved to PRD to enhance E-033 based on recommendations from Central and/or College CRMs
  – WD Grades added/WN Grades removed
  – FLD and FPD Service Indicators created to prevent aid removal by the Authorization process
  – 12-6 Schools working closely together to determine handling of various scenarios between two Sessions
Moving Forward!! (Accomplishments Continued)

- “Adjust” feature to allow colleges to indicate that awards ready to adjust instead of waiting 20 day period
- Service Indicators created to identify students whose PWD would be greater than 180 days from determination date
- Session Withdrawal logic enhanced to create worksheets for Winter/Summer and 12-6 School sessions
- Repackaging enhanced so R2T4 cases are ignored, avoiding re-awarding full awards
- CF R2T4 Draft Manual and R2T4 Q&A Document Updated
Moving Forward!! (Accomplishments Continued)

- Corrected WU and W/WU combination calculations Completing too soon
- Removed Term Withdrawal requirement
- Fixed Single Session Percent Earned Value so records exactly 50%
- Locked Awards after Adjustments
- Removed logic that caused worksheet’s withdrawal and determination dates to change
- Auto-adjusting awards for PWD cases
- Combinations of official/unofficial withdrawals earning more than 50%
Accomplishments to come

• Total # of Days and the Completed Days fields to exclude breaks of 5 days or more
• Cancelled worksheets to not change to Complete
• Records earning 100% of aid to not Complete without a 20 day waiting period
• Fix percentage earned to WN/WD/W/WU combinations
• Withdrawal dates within scheduled 5+ days breaks must revert to date prior to break
Working Towards Tomorrow

- How we feel today
- How we would like to feel tomorrow
Questions?
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