

Description	Dates
Banner Financial Aid System Overview Shared Data and Data Standards Common Matching Banner Financial Aid Record Creation and EDE Dataload Requirements Tracking Batch Posting Comment Codes	3/23/10-3/25/10
Consulting Month 1	4/6/10 - 4/8/10
RORRULE Rules Population Selection & Letter Generation Need Analysis & Verification EDE ISIR Corrections Applicant Budgeting	4/27/10 - 4/29/10
Consulting Month 2 / Lifetime Docs Conversion Planning & Security Grid	5/11/10 - 5/13/10
Funds Management/Disbursement Configuration Perkins Loan (if needed) Packaging/Outside Resources/Third Party Payments (Contracts)/Exemptions Disbursement Processing - Feed to AR (Title IV Authorizations) California – BOGG, CARE, EOPS, Cal Grant	6/1/10 - 6/3/10
Consulting Month 3	6/29/10 - 6/30/10
Transfer Monitoring Common Functions – Holds, Messages Batch Posting Data Logging Satisfactory Academic Progress Student Employment	7/13/10 - 7/15/10
Consulting Month 4	7/27/10-7/29/10
Direct Lending / FFELP/Alternative Loan Processing Pell COD Processing	8/10/10 - 8/12/10
Consulting Month 5	8/24/10 - 8/26/10
Return of Title IV Funds Common Functions Misc Topics Banner Self-Service (Web) New Year Roll	9/14/10 9/16/10
SAP Training R2T4 Training Cal Grant Plan and Specifications FISAP Introduction	9/29/10 - 10/1/10

BOG Decisions for 1112 Update Security Grid Start Datablocks Design for Reporting Strategy	10/12/10-10/14/10
Finalize BOG Process Conversion Specs Continued SAP Design Continued CAL Grant Design	10/26 /10-10/28
Hosted FM Solution Testing 1011 AR Meeting for 1112 Disbursement Dates Continued Datablock Design – Reports Verification Documents Discussion / Task List Assign Work Tasks	11/9 - 11/11/10
VCCCD Work Week	11/22 - 11/24/10
Follow-up on Assignments Roll 1011 to 1112 – Production	12/15 -12/17/10
Setup 1112 Assign Work Tasks	1/18-1/20/11
VCCCD Work Week	1/25 -1/27/11
Go Live Dataloads Assign Work Tasks	2/9 - 2/11
VCCCD Work Week	2/22-2/24/11
Follow-up on Assignments AR Consulting Mock Registration/Disbursement	3/8-3/10/11
Go Live BOG Module	3/29 - 3/31/11
Go Live Verifications Assign Work Tasks	4/12 - 4/14/11
VCCCD Work Week	4/26 -4/28/11
Follow-up on Assignments Go Live Cal Grant Rosters Assign Work Tasks	5/10 - 5/12/11
VCCCD Work Week	5/24 - 5/26/11
Follow-up on Assignments Go Live Packaging	6/7 - 6/9/11
Year Round Pell	7/5 - 7/7/11
Go Live COD	7/19/11-7/21/11
Go Live Loans	8/2/11-8/4/11

Go Live Disbursement Go Live Student Employment Assign Work Tasks	8/9/11-8/11/11
VCCCD Work Week Follow-up on Assignments	8/16/11-8/18/11
Go Live R2T4 Assign Work Tasks	9/13/11-9/15/11
VCCCD Work Week	9/27/11-9/29/11
VCCCD Work Week Follow-up on Assignments	10/11/11-10/13/11
Go Live SAP Assign Work Tasks	10/25/11-10/27/11
VCCCD - New Year Roll 1213	11/8/11 - 11/10/11
VCCCD - New Year Roll 1213	11/15/11-11/17/11
VCCCD - New Year 1213 Setup	12/13/11-12/15/11





### Withdraw Pending Status Change Report(SFRNOWD)

Use this report to identify students who have zero enrollment hours but have not been officially withdrawn, and have grades that indicate they did not successfully complete the course.

Oracle Fusion Middleware Forms Services: Open > GJAPCTL

File Edit Options Block Item Record Query Tools Help

Process Submission Controls: GJAPCTL 8.3.0.2A (PROD)

Process: SFRNOWD Withdraw Pending Status Change Parameter Set:

---

**Printer Control**

Printer: DATABASE Special Print: Lines: 55 Submit Time:

---

**Parameter Values**

Number	Parameters	Values
02	Student Level(s)	UG
03	Financial Aid Selection	T
04	Verify Enrollment	Y
05	Start Date	
06	End Date	
07	Verify History	Y
08	Grade which reflects drop.	%
09	Campus Selection	%

LENGTH: 1 TYPE: Character O/R: Required M/S: Single  
T = Title IV recipients only; F = Fin Aid recipients; A = All students.

---

**Submission**

Save Parameter Set as Name: Description:  Hold  Submit



### Withdrawn Student Report(SFRWDRL)

Use this report to identify students whose enrollment status has been changed to withdrawn and have no withdrawal record created yet. This report can also record the student's withdrawal date for Title IV purposes, and create a withdrawal record for those students who received Title IV funds. This report also identifies students for which the withdrawal record and the enrollment status code or date or total of original institutional charges has changed.

Oracle Fusion Middleware Forms Services: Open > GJAPCTL

File Edit Options Block Item Record Query Tools Help

Process Submission Controls GJAPCTL 8.3.0.2A (PROD)

Process: SFRWDRL Withdrawn Student Report Parameter Set:

---

**Printer Control**

Printer: DATABASE Special Print: Lines: 55 Submit Time:

---

**Parameter Values**

Number	Parameters	Values
01	Audit or Update Mode	A
02	Term Code	201205
03	Student Level	UG
04	Campus Code	3
05	Title IV Recipients only	Y
06	Enrollment Status Code	%
07	Default WDRL Code	
08	Major Sort Sequence	S

LENGTH: 6 TYPE: Character O/R: Required M/S: Single  
Enter Term Code.

---

**Submission**

Save Parameter Set as Name: Description:  Hold  Submit





**Return of Title IV Funds Recipient Withdrawn Status Report(RPRTIVR)**

Use this report to view and print a summary of all the students who have had a withdrawal status code entered on their student record. You can view just those students who have received Title IV funds, or students who have received any type of financial aid. In addition, you can choose to view only the students who have had the Title IV repayment calculation performed.

Oracle Fusion Middleware Forms Services: Open > GJAPCTL

File Edit Options Block Item Record Query Tools Help

Process Submission Controls GJAPCTL 8.3.0.2A (PROD)

Process: RPRTIVR Title IV Recipient Withdrawn Parameter Set:

**Printer Control**

Printer: DATABASE Special Print: Lines: Submit Time:

**Parameter Values**

Number	Parameters	Values
01	Aid Year	1112
02	Period	
03	Beginning Withdrawal Date	
04	Ending Withdrawal Date	
05	Title IV Fund Code Ind.	1
06	Sort Sequence Ind.	N
07	Withdrawal Status Code	
08	Calculation Status	U

LENGTH: 4 TYPE: Character O/R: Required M/S: Single  
Identifies which aid year to process.

**Submission**

Save Parameter Set as Name: Description:  Hold  Submit



**Return of Title IV Funds Calculation Process (RPRTIVC)**

Use this report to calculate Title IV repayments for students who have withdrawn from the term . If you run the process in Audit mode, SCT Banner will perform the calculations and print the report . Calculations will not be saved. If you run the process in Calc and Save mode, then SCT Banner will perform the calculation, print the report, and save the results.

Oracle Fusion Middleware Forms Services: Open > GJAPCTL

File Edit Options Block Item Record Query Tools Help

Process Submission Controls GJAPCTL 8.3.0.2A (PROD)

Process: RPRTIVC Title IV Funds Return Calc Parameter Set:

**Printer Control**

Printer: DATABASE Special Print: Lines: 55 Submit Time:

**Parameter Values**

Number	Parameters	Values
01	Term Code	
02	Process Indicator	B
03	Applicant ID	
04	Sort Sequence Indicator	N
05	Mode	A
06	Application ID	
07	Selection ID	
08	Creator ID	

LENGTH: 6 TYPE: Character O/R: Required M/S: Single  
Identifies which term to process.

**Submission**

Save Parameter Set as Name: Description:  Hold  Submit





### Return of Title IV Funds Withdrawal Calculation Report(RPRTIVI)

Use this report to print summarized Title IV repayment information from the Return of Title IV Funds Calculation Form (RPATIVC). You can print information for a single student, a particular group of students, or all students falling within a date range that you specify.

Oracle Fusion Middleware Forms Services: Open > GJAPCTL

File Edit Options Block Item Record Query Tools Help

Process Submission Controls GJAPCTL 8.3.0.2A (PROD)

Process: RPRTIVR Title IV Recipient Withdrawn Parameter Set:

---

**Printer Control**

Printer: DATABASE Special Print: Lines: Submit Time:

---

**Parameter Values**

Number	Parameters	Values
01	Aid Year	
02	Period	
03	Beginning Withdrawal Date	
04	Ending Withdrawal Date	
05	Title IV Fund Code Ind.	3
06	Sort Sequence Ind.	CI
07	Withdrawal Status Code	
08	Calculation Status	A

LENGTH: 4 TYPE: Character O/R: Required M/S: Single  
Identifies which aid year to process.

---

**Submission**

Save Parameter Set as Name: Description:  Hold  Submit





APPENDIX D. During aid year 1112 a database was developed to calculate the number of days leading to the R2T4 deadline for each student (R2 Early Alert)

AIDY_CODE	AR_TERM_C	ID	DISBU	DISBURSED	ALREADY_RE	LATEST_DROP_DATE	TODAY
1112	201205	900088633	PELLV	45	-1	6/21/2012 3:44:18 PM	8/14/12
1112	201205	900093459	PELLM	111	-1	6/18/2012 5:51:08 PM	8/14/12
1112	201205	900132640	PELLM	494	0	7/9/2012 6:33:50 AM	8/14/12
1112	201205	900157895	PELLO	345	-1	6/20/2012 1:46:42 PM	8/14/12
1112	201205	900191381	PELLO	776	-1	7/10/2012 2:05:55 PM	8/14/12
1112	201205	900225033	PELLV	256	-1	6/18/2012 9:41:38 PM	8/14/12
1112	201205	900227727	PELLV	1119	-1	6/26/2012 8:43:01 AM	8/14/12
1112	201205	900280317	PELLV	937	-1	6/20/2012 1:42:57 PM	8/14/12
1112	201205	900287578	PELLV	1188	-1	7/5/2012 8:25:16 AM	8/14/12
1112	201205	900298411	PELLV	494	-1	7/21/2012 5:41:18 AM	8/14/12
1112	201205	900310085	PELLV	403	-1	7/10/2012 12:04:36 PM	8/14/12
1112	201205	900316237	PELLV	380	-1	7/11/2012 4:44:08 PM	8/14/12
1112	201205	900343647	PELLO	243	-1	6/18/2012 6:59:13 PM	8/14/12
1112	201205	900349302	PELLV	326	-1	6/22/2012 8:54:35 AM	8/14/12
1112	201205	900380191	PELLV	18.28	-1	6/19/2012 8:51:37 AM	8/14/12
1112	201205	900391817	PELLM	18	-1	6/19/2012 8:36:55 AM	8/14/12
1112	201205	900396973	PELLV	247	-1	6/18/2012 3:38:44 PM	8/14/12
1112	201205	900420302	PELLV	284	-1	6/21/2012 5:53:02 PM	8/14/12
1112	201205	900421382	PELLM	494	0	6/24/2012 5:38:28 AM	8/14/12
1112	201205	900425287	PELLO	342	-1	6/19/2012 9:31:58 PM	8/14/12



APPENDIX E. R2T4 Worksheet

Job Grid #7:	R2T4	not managed by DAC Batch Processing - responsibility of each college - SEPTEMBER
• SFRNOWD (ID'S POTENTIAL R2'S)	R2T4_MC	Own Login
• SFRNOWD	R2T4_OC	Own Login
• SFRNOWD	R2T4_VC	Own Login
• SFAWDRL	MANUAL ENTRY (code and date)	Own Login
• RPATIVC	MANUAL (calculation, simulation)	
• RPRTIVI		(Report to show all that had calculation)
• ROARMAN (Maintain awards - buttor	Adjust Grants	
• RPALORG	Adjust Loans – Record Insert – enter Return Amt	
• ROAHOLD (Put R2t4 hold on student FA record)		
• SOAHOLD (Put R2t4 hold on student record)		
• RHACOMM (Add comment regarding R2T4 just performed)		
• RERExx (Extracts institutional return amt.) (now students will pay institutional portion back to school)		
• For student portion – send letter have 45 days – if return then ROARMAN down – if no return stop		
	SFAREGF - review student course/fee assessments	
	SFARHST - student registration history and extention -- Final Grades	
	SFASTCA -	
FSA calculations and record keeping?	references (from Grid #12 Recon)	
NOTE: Banner Forms on front menu is under the Electronic Data Exchange title		
• REAOR12 is where Pell Originations are in Banner (left side orig record/right side acknowledgments)		
• READI12 is where Disbursements are in Banner (left side disb record/right side acknowledgments)		
• MRR = REIRMRR (list of all students reported) highlight student – next block is how to navigate		
• REISSOA – Statement of account summary (shows how much has COD shows has been drawn down) should match COD		
• REIDOSA – Statement of accounts detail		
• REIRECN – COD Pell reconciliation - by student		
• REIYTDS – Year to Date summary (origination)		





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**August 15, 2012**

APPENDIX A. R2T4 training and resource publications September 13, 2011

**September 13 - 15, 2011 Agenda**

**Tuesday**

The following topics will be covered during the day during the approximate timeframes

Time	Topic
8:00am – 12:00pm	<ul style="list-style-type: none"> <li>• Homework/Progress Status – Review Critical Tasks and Issues Status Report?</li> <li>• Problems / Issues</li> <li>• RNIAPPL – Multiple Tran #s – Strip Program Review</li> <li>• Recon Pell and DLoan – SAS and Recon Files / RERGRNT</li> </ul>
1:00pm – 4:30pm	<ul style="list-style-type: none"> <li>• 8.12 Release Testing</li> <li>• RORENRL – Freeze Process in Production</li> <li>• Change College Issues</li> </ul>

**Wednesday**

The following topics will be covered during the day during the approximate timeframes.

Time	Topic
8:00am – 12:00pm	<ul style="list-style-type: none"> <li>• R2T4 Training and Production Work</li> <li>• Recoup Pell and Direct Loan Process</li> </ul>
1:00pm – 4:30pm	<ul style="list-style-type: none"> <li>• Cal Grant Awards and \$\$ Status – Disburse 8/29. Webgrants Pop Sels Needed - ??</li> <li>• SAP Certificate Students Report / Other Reports Identified ??</li> <li>• Payroll Loads Status</li> <li>• Romelle – Job Grid Overview</li> </ul>

**Thursday**

The following topics will be covered during the day during the approximate timeframes.

Time	Topic
8:00am – 12:00pm	<ul style="list-style-type: none"> <li>• Extract/Send to COD Pell and Loan Originations – Recon</li> <li>• IT Task Review</li> <li>• Consortium Agreement Status</li> <li>• AR 8.3 and FA 8.12 Plan / Student 8.5.3 in Dec for SAP Calc</li> <li>• 8.5.2 in September – Gainful Employment</li> <li>• Security Grid Review / Classes updated?</li> <li>• Overpayments Report?</li> </ul>
1:00pm – 4:00pm	<ul style="list-style-type: none"> <li>• Wrap-up any unfinished work.</li> <li>• Assign user exercises and assignments – Next Month</li> <li>• Task Log, Milestones and Project Plan Review</li> <li>• Next visit Oct. 25 - 27, 2011 – New Year Roll / 12113 Setup</li> </ul>

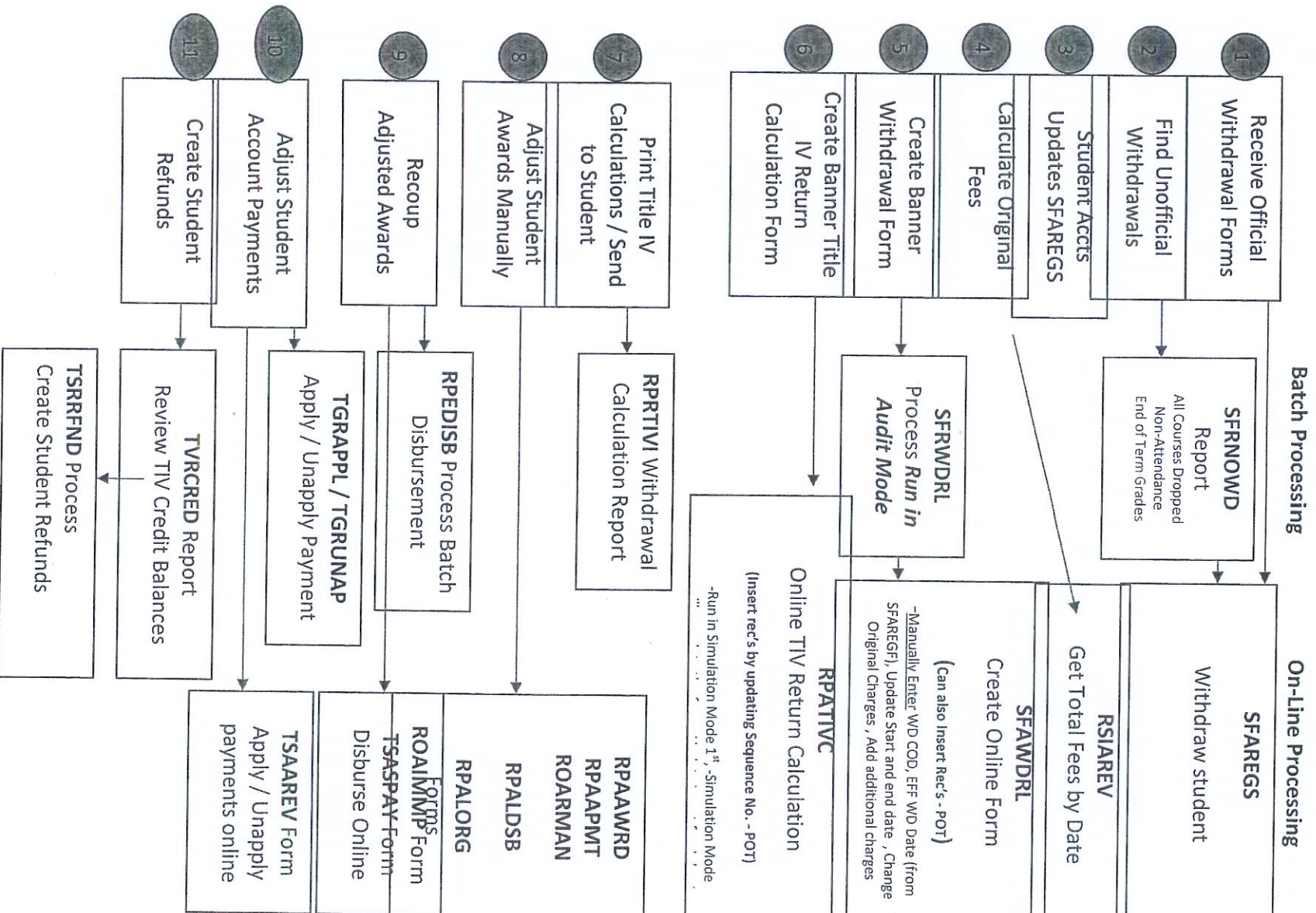




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**August 15, 2012**

Return of Title IV Processing





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BANNER Forms and Reports Used to Monitor and Process Return to Title IV funds

August 15, 2012

# SUNGARD<sup>®</sup> HIGHER EDUCATION

## Banner Financial Aid System Return of Title IV Funds Summit 2007

This handout is meant to supplement the SunGard HE Return of Title IV Funds handbook.

### Setup Required

#### Accounts Receivable

TSADETC Define TIV detail codes (pg. 2-4)

TVVAUTH Define TIV return of funds authorization codes (pg. 2-5)

#### Student

SOATERM Define the original cutoff date for registration (pg. 2-6)

SLATERM Define the original cutoff date for housing (pg. 2-6)

SOATBRK Define period of time (5 or more days) during a term when students do not attend class

STVWDRL Define withdrawal status codes (pg. 2-7)

STVESTS Connect withdrawal status codes (set up on STVWDRL) and check at least one 'wdrl ind' to determine which students are withdrawn. (pg. 2-7)

#### Financial Aid

ROAINST

Select if you will return the student's portion of TIV awards or if the student will return the funds and choose if you will round funds (all except loans). (pg. 2-8)

RTVTRREQ

Define tracking requirement codes to be used in the TIV Authorization Request Process (TVPREQA) to allow the creation of tracking requirements by AR. (pg. 2-9). Three distinct tracking requirements are required: 1) use TIV funds to pay non-institutional charges, 2) use TIV funds to pay prior year balances, and 3) hold credit balances resulting from TIV funds

RTVTRST

Two distinct status codes required to define a student's response (accpt/deny). (pg. 2-9). Both requirement statuses must be set to 'satisfy'.



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August 15, 2012

## Procedures for the Return of Title IV Funds

### Changing the Designation of Charges (pg. 3-11)

SFAWDRL Changes to the original charges may be done on this form after the withdrawal has taken place.

TSAAREV Changes to the original charges may be done on this form (or TSADETL, TSADETF) prior to the withdrawal.

An original charge is determined by one of the following (pg. 3-11):

- Effective date of the assessed charge is less than or equal to the original charge cutoff date entered on the SLATERM or SOATERM depending on the type of charge or
- The charge is being assessed for the first time based on source codes for room, meal or phone and fee assessment date for enrollment charges.

The original charge cutoff date is used to determine original charges entered on the following forms & processes in addition to those assessed via the web or VR:

SFAREGS	SLAMASG	SLAPASG	SLARASG
SFRFASM	SLRFASM	SFRFASI	

### Maintain the Withdrawal Status of Students (pg. 3-13)

SFRNOWD Locate students who have officially and unofficially withdrawn from the term

SFAREGS Update a student's enrollment status

SFAWDRL Create a withdrawal record for a student for TIV purposes. Establish effective withdrawal date, enrollment start & end dates, review calculations, enter additional costs required for the student's program, adjust original charges, review/add/change the last date attended.

SFRWDRL Identify students with enrollment status codes that indicate they have withdrawn, but don't have a withdrawal record with the same enrollment status code and date (withdrawal records that haven't yet been created or ones that have been created but have changed)





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**August 15, 2012**

**Calculate a Student's Return of Title IV Funds (pg. 3-17)**

**RPRTIVR** Summary of all students who had a WD status entered on their student record. This is generally used if you will change each student's record on RPATIVC.

**RPRTIVC** Locate Students who have withdrawn from the term (perform this process in audit mode)

**RPRTIVC** Locate students who have withdrawn from the term, perform the calculation & print the report.

**RPATIVC** Simulate, view or calculate and save a student's withdrawal record.

**RPRTIVI** Report of all students with a record on RPATIVC. This is useful to update the RPAAWRD form.

**Adjust & Disburse a Student's Award After the Calculation has Been Performed**

**RPAAWRD** Adjust the student's award based on the output from the RPRTIVC report or RPATIVC.

**ROAIMMP** Immediate disburse to the student's account

**RPEDISB** Disburse in batch to students accounts

**Refund TIV Funds to the Student (pg. 3-9)**

**TGRAPPL** This process runs the application of payments process

**TGRUNAP** This process runs the unapplication of payments process

**TGRAPPL** Run this process with parameter #2 set to Y

**TVRCREd** This report will give you a list of Students with Title IV credits

**TSRRFNDRun** this process in flag mode to get the Auto Refund Credit Amount – Student Report

**Procedures for Title IV Authorizations**

Authorizations are required to be collected from the student to (pg.):

- Pay non-institutional charges
- Use TIV funds to pay prior year balances
- Hold credit balances resulting from TIV funds

**Maintain TIV Authorization Codes (pg. 3-3)**

**TVVAMASS** Create authorizations for multiple students

**TVVAAUTH** Create authorizations for a single student

**Change an existing Authorization Code (pg. 3-6)**

**TVVAAUTH** Insert a record, enter authorization code, set status and enter a start date

**Batch post authorization codes to AR**

1. Establish tracking requirements – either have the authorizations in tracking groups or batch post.
2. **TVPREQA** Create authorizations in batch from financial aid tracking requirements



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**August 15, 2012**

**Banner 7.5.1 Release: June 2007**

This release includes modified or added provisions for return of Title IV funds as referenced in the Higher Education Act of 2005 (HERA), Pub.L. 109-171, section 484B. R2T4 provisions effective for withdrawals after 7/01/06.

- Amount of grant overpayment due from student is limited to the amount by which the original grant overpayment amount exceeds half of the total Title IV grant funds received by the student. No repayment is due if student owes \$50.00 or less.
- R2T4 provisions cover Pell, SEOG, ACG, SMART, FFELP, Direct, and Perkins.
- LEAP, SLEAP, GEAR UP, and SSS funds will no longer apply to Title IV fund requirements.

**Changed Reports and Processes (p.102-106)**

**RPRTTVC Return of Title IV Funds Calculation Process (p.102-104)**

Modified to include ACG, SMART grants and to exclude LEAP beginning with 0607 aid year.

- Not changes to R2T4 calculation except for grant repayment.
- New Graduate/Professional PLUS loan treated as a PLUS loan.
- Return of Fund Priority Order prior to 0607 on p. 102.
- Return of Fund Priority Order beginning 0607:

Unsubsidized Federal Stafford Loan	Federal Pell Grant
Subsidized Federal Stafford Loan	Federal Academic Competitiveness Grant (ACG)
Federal Perkins Loan	Federal National SMART Grant
Federal Parent PLUS or Graduate/Professional PLUS	Federal SEOG

- Post-withdrawal disbursement priority order prior on p.103.
- Post-withdrawal disbursement priority order beginning 0607:

Federal Pell Grant	Subsidized Federal Stafford Loan
Federal Academic Competitiveness Grant (ACG)	Unsubsidized Federal Stafford Loan
Federal National SMART Grant	Federal Perkins Loan
Federal SEOG	Federal Parent PLUS or Graduate/Professional PLUS

- Calculation of Student Share Returned for a Grant Overpayment (p.104)
- Student share of grant overpayment limited to amount by which original grant overpayment amount exceeds half of total Title IV grant funds received, provided the amount is greater than \$50.00.
- Student grant repayment = overpayment amount minus sum of all student's grants times .50.
- RPRTTVC modified to include new EL Direct Disbursement Check Amount in the Title IV Return calculation, if an EL direct check amount exists.



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**BANNER Forms and Reports Used to Monitor and Process Return to Title IV funds**

**August 15, 2012**

**RPRTTVI      Return of Title IV Funds Withdrawal Calculation Report (p.104-105)**

Report includes ACG and SMART Grants and excludes LEAP.

**RPRTIVR      Return of Title IV Recipient Withdrawn Status Report (p.106)**

Starting in 0607, report includes ACG and SMART Grants and excludes LEAP.

- Banner uses Federal Fund ID of PLUS for Parent PLUS and Graduate/Professional PLUS loans.





APPENDIX B. Workshops held for Financial Aid staff responsible for processing R2T4

Financial Aid R2T4 Training - January 27, 2012 1-4pm

Moorpark College	Oxnard College	Ventura College	DAC
Kim Korinke	Linda Robison	Alma Rodriguez	Romelle Renner
Kathy Marcus	staff	4 staff	John Cooney
Maria Urenda			Deborah La Teer (FAO mtg @4)
			Chedva Weingart

1. R2T4 Process - Review Steps
2. Case Studies from each college
3. Documents to standardize process and results

FAO meeting – 4pm

Agenda Topics

1. -Recon schedule for DL, Pell, FWS, Cal Grants--- view month-end balance sheets for DL/Pell, Recon Notebooks?
2. -Freeze date – Feb 6
3. -Repeat Checking Letter/Policy
4. -1213 new year setup – disbursement dates for Pell - August 13, 2012 and January 7, 2013 in RFRDEFA

Implementation – Project Milestones

5. Are we happy about our finished deliverables? – (the project as a whole)
6. What were some frustrating parts of the project?
7. How could we have done the things that frustrated us better?
8. What were the accomplishments of the project?
9. Which of our processes worked best?
10. Which of our processes could be improved upon?
11. If we could, Is there any part of the project you would recommend reversing and starting from scratch?
12. Did all stakeholders, senior managers, customers, end users participate effectively? If not, how can we improve participation?
13. How can we improve upon the centralized Grid?



APPENDIX C. Financial Aid Officers met via conference call to resolve R2T4 cases and other processing concerns – list of calls, staff, and officer meetings

VCCCD Meeting Title	Group	Type	Meeting Date	StartTime
Teleconference with FinAid Officers	Ventura County CCD	Meet & Confer	10/12/2011	10:30 AM
Teleconference with FinAid Officers	Ventura County CCD	Meet & Confer	11/4/2011	8:30 AM
FinAid Officer meeting			11/10/2011	1:00 PM
FinAid R2T4 Training for staff			11/16/2011	8:00 AM
FinAid Officer meeting			12/9/2011	8:00 AM
FinAid Implementation			1/10/2012	8:00 AM
FinAid Implementation			1/11/2012	8:00 AM
FinAid Implementation			1/12/2012	8:00 AM
FinAid Implementation			2/7/2012	8:00 AM
FinAid Implementation			2/8/2012	8:00 AM
FinAid Implementation	Ventura County CCD	Meet & Confer	2/9/2012	1:00 PM
FinAid Implementation			2/9/2012	8:00 AM
FinAid FAO meeting	Ventura County CCD	Meet & Confer	2/16/2012	9:00 AM
FinAid Project Review	Ventura County CCD	Meet & Confer	2/21/2012	9:00 AM
Banner FA Staff Training - Planning Session			3/9/2012	10:00 AM
FinAid Implementation			5/1/2012	8:00 AM
FinAid Training Day 2 am	Ventura County CCD	Meet & Confer	5/2/2012	8:00 AM
FinAid Implementation			5/2/2012	8:00 AM
FinAid Implementation			5/3/2012	8:00 AM
FinAid Staff Training group A	Ventura County CCD	Meet & Confer	6/5/2012	9:00 AM
FinAid Implementation	Ventura County CCD	Meet & Confer	7/10/2012	8:00 AM
FinAid Implementation	Ventura County CCD	Meet & Confer	7/11/2012	8:00 AM
FinAid Implementation	Ventura County CCD	Meet & Confer	7/12/2012	8:00 AM
FinAid 1213 ramp up	Ventura County CCD	Meet & Confer	8/8/2012	8:00 AM





VCCCD

BANNER Forms and Reports Used to Monitor and Process Return to Title IV funds

August 15, 2012

Meeting | Insert | Format Text

Meeting: FinAid FAO conference call Meeting

Calendar | Appointment | Scheduling Assistant | Tracking Assistant | Add or Remove Attendees | Message to Attendees | Meeting Workspace | Address Book | Check Names | Responses | Show As: Busy | Reminder: None | Recurrence | Time Zones | Categorize | Private | High Importance | Low Importance | Spelling | Proofing

3 attendees accepted, 0 tentatively accepted, 1 declined.  
This appointment occurs in the past.

To: Alma Rodriguez; Kimberly Korinke; Linda Robison; John Cooney; Rupinder Bhatia; Darlene Melby; Deborah La Teer; Rocio Avina

Subject: FinAid FAO conference call

Location: Meet & Confer via cccConfer.org Rooms...

Start time: Thu 2/16/2012 9:00 AM All day event

End time: Thu 2/16/2012 10:30 AM

Tentative agenda --- (please let me know any additional agenda topics):

1. Fraud - resources, best practices, developing / draft policy & procedure
2. Consortium agreement review
3. R2T4, Double Pell, other ongoing topics
4. Disbursement Dates
5. Survey Monkey out to FA staff for review/action 2/21

Teleconference/PC access ---- via CCC CONFER MEET & CONFER

MEETING DETAILS: Status: Active  
Title: FinAid FAO meeting  
College: Ventura County CCD  
Number Of Participants:5 Closed Caption: No

Date	Start time	End time	Duration	Closed Caption
2/16/2012	9:00 AM	10:30 AM	90	No

**PRIOR TO YOUR FIRST CCC CONFER MEETING Test Your Computer Readiness**

**PRESENTER DETAILS**  
> Dial your telephone conference line: (888) 886-3951 > Enter your passcode: 3323490  
> Go to [www.cccconfer.org](http://www.cccconfer.org) > Log into MyConfer to connect to your meeting

**PRESENTER CONFERENCE FEATURES**  
\*0 Contact the operator for audio assistance \*6 Mute/unmute your individual line \*92 Roll call to hear a list of all participants on the call  
\*94 Lock/unlock entrance to the conference \*96 Lecture mode mutes all participants  
\*97 Lecture mode unmutes all participants

**PARTICIPANT PASSCODE: 731393**

FOR ASSISTANCE CCC Confer Client Services - Monday - Friday between 8:00 am - 4:00 pm Phone: 760-744-1150 ext 1537 or 1554  
Email: [clientservices@cccconfer.org](mailto:clientservices@cccconfer.org)



**Mary Anne McNeil**

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**From:** Romelle Renner  
**Sent:** Thursday, August 09, 2012 6:16 PM  
**To:** Deborah La Teer; Mary Anne McNeil  
**Subject:** FW: Financial Aid R2T4 Training - 1213 dates

FV!...

The FAOs agreed on these dates for R2 training.

Romelle

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**From:** Romelle Renner  
**Sent:** Wednesday, August 08, 2012 5:36 PM  
**To:** Kimberly Korinke; Alma Rodriguez; Linda Robison  
**Cc:** Darlene Melby; Victoria Lugo; Karen Engelsen  
**Subject:** Financial Aid R2T4 Training - 1213 dates

Hello, All –

We'd like to continue the Return to Title IV training we started last fall when Banner FinAid was implemented. For 1213, we would again offer 2 training events for Financial Aid Specialists who process R2T4, as follows:

FALL: Friday, September 7, 8am – 11am, at Ventura College  
SPR: Friday, January 25, 8am – 11am, at Ventura College

Please let me know that the dates work for your college.

Regards,

Romelle Renner  
Technical Data Specialist  
[ycccd.edu](mailto:ycccd.edu)  
805-652-5545