

ADMINISTERING ADDS, DROPS, AND WITHDRAWALS

Benedict A. Dorsey | Training Officer
U.S. Department of Education

April 5, 2022

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

This information is current as of January 2022.

AGENDA

- 1 Adds, Drops, and Federal Pell Grant Recalculation
- 2 Modules and Pell Grant Recalculation
- 3 Adds, Drops, and Direct Loan Disbursements
- 4 Withdrawals
- 5 Resources

Agenda...

ADDs, DROPs, AND FEDERAL PELL GRANT RECALCULATION

MANDATORY PELL GRANT RECALCULATIONS

34 CFR § 690.80

- Expected Family Contribution (EFC) changes
- Enrollment status changes between terms
- Attendance not begun in all credit hours used to determine Pell Grant award

4

There are mandatory Pell Grant recalculations and optional recalculations.

Mandatory Pell Grant recalculations

Federal Pell Grant must be recalculated if:

- The student's Expected Family Contribution (EFC) changes, and this change affects the amount of the student's Pell Grant for the award year
- The student's enrollment status changes between terms; you must recalculate Pell Grant for the correct status for the upcoming term
- The student does not begin attendance in all credit hours for which Pell Grant is paid; you must recalculate and pay the Pell Grant award based on the credit hours in which the student began attendance
- if the student does not begin all credits

OPTIONAL PELL GRANT RECALCULATION

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION



- For change in enrollment status after attendance begun in all credit hours
- Applies only to Pell Grant awarding for term-based credit-hour programs
- May set **Pell Grant Recalculation Date (PRD)**
- PRD may be different than “census” or “add/drop” date

Recalculating a Pell Grant award when there is a change in enrollment status after the student has begun attendance in all credit hours is an *optional* Pell recalculation.

Institutions can establish a time period for students to add or drop courses before determining a student’s enrollment status for Pell Grant awarding/disbursing.

You may choose to set a date after which Pell Grants will not be recalculated for enrollment status changes. This is called the **Pell Grant Recalculation Date**.

This date may be the same as your institution’s census date, or “add/drop date”. But you should refer to it as a Pell Recalculation Date, Pell lock-in date, Pell freeze date, etc., in your Pell recalculation policy and procedures.

PELL GRANT RECALCULATION OPTIONS

Options to establish Pell Grant recalculation policy:

- Enrollment status changes anytime within term (up or down)
- Based on enrollment status as of single fixed date (PRD)
- Based on enrollment status as of last modular course within term
 - Multiple PRDs for term
 - Only one PRD applies to student within term

6

There are three ways to establish a Pell Grant recalculation policy:

- Policy for Pell Grant recalculation if student's enrollment status changes anytime within the term, or
- Policy for Pell Grant recalculation based on enrollment status as of a single fixed date, or
- Policy for Pell Grant recalculation to account for modules within a term
 - You may use multiple PRDs in the term to account for modules
 - Each student only has one PRD per term

PELL GRANT RECALCULATION POLICY

Examples

Hometown Community College
Fall term start date: August 16, 2021
PRD: August 27, 2021

Sara

- Begins attendance on 8/16 with 6 credit hours
- Adds 3 credit hours on 8/22
- Pell Grant enrollment status = 9 credit hours

Ben

- Begins attendance on 8/16 with 12 credit hours
- Drops 6 credit hours on 8/25
- Pell Grant enrollment status = 6 credit hours

7

Hometown Community College had a fall term start of August 16, 2021, with a PRD of August 27, 2021.

PELL GRANT RECALCULATION POLICY

Examples

Hometown Community College
Fall term start date: August 16, 2021
PRD: August 27, 2021

Annie

- Begins attendance on 8/16 with 6 credit hours
- Adds 3 credit hours on 8/30
- Pell Grant enrollment status = 6 credit hours

Joshua

- Begins attendance on 8/16 with 12 credit hours
- Drops 6 credit hours on 8/30
- Pell Grant enrollment status = 12 credit hours

8

Hometown Community College had a fall term start of August 16, 2021, with a PRD of August 27, 2021.

WITHDRAWALS AND PRD

How is Pell eligibility determined?

Institution must use the enrollment status established on the *earliest* of the date of withdrawal or the PRD.



When determining Pell Grant eligibility, an institution must use enrollment status established on the *earliest* of the date of *withdrawal* or the *PRD*.

WITHDRAWALS AND PRD

Examples

Hometown Community College
Fall term start date: August 16, 2021
PRD: August 27, 2021

Barbara

- Begins attendance on 8/16 with 6 credit hours
- Withdraws on 8/23
- Pell Grant enrollment status = 6 credit hours

Kelsey

- Begins attendance on 8/16 with 6 credit hours
- Drops 3 credit hours on 8/20
- Withdraws on 8/27
- Pell Grant enrollment status = 3 credit hours

Scott

- Begins attendance on 8/16 with 6 credit hours
- Adds 6 credit hours on 9/7
- Withdraws on 10/12
- Pell Grant enrollment status = 6 credit hours

10

Hometown Community College had a fall term start of August 16, 2021, with a PRD of August 27, 2021.

INITIAL PELL GRANT CALCULATION

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

- First Pell Grant calculation for student
- Made on or after date institution receives ED-produced EFC and ED publishes Pell Grant schedules



11

This is the first Pell Grant calculation that is made for a student for a specific award year.

The initial calculation date must be no earlier than the date you receive an official Department-produced EFC, such as a SAR or ISIR, and ED publishes the Pell Grant Payment and Disbursement Schedules for that award year. **You must confirm any estimated Pell awards made without an official ISIR or before the Department publishes the Pell Grant Payment and Disbursement Schedules.** When that situation occurs, the initial calculation is the date you confirm (or change) the student's eligibility.

INITIAL PELL GRANT CALCULATION

- Base Pell award on student's enrollment status as of initial calculation
- May occur before admission or enrollment
- May occur before or after PRD
- Document each student's initial calculation date

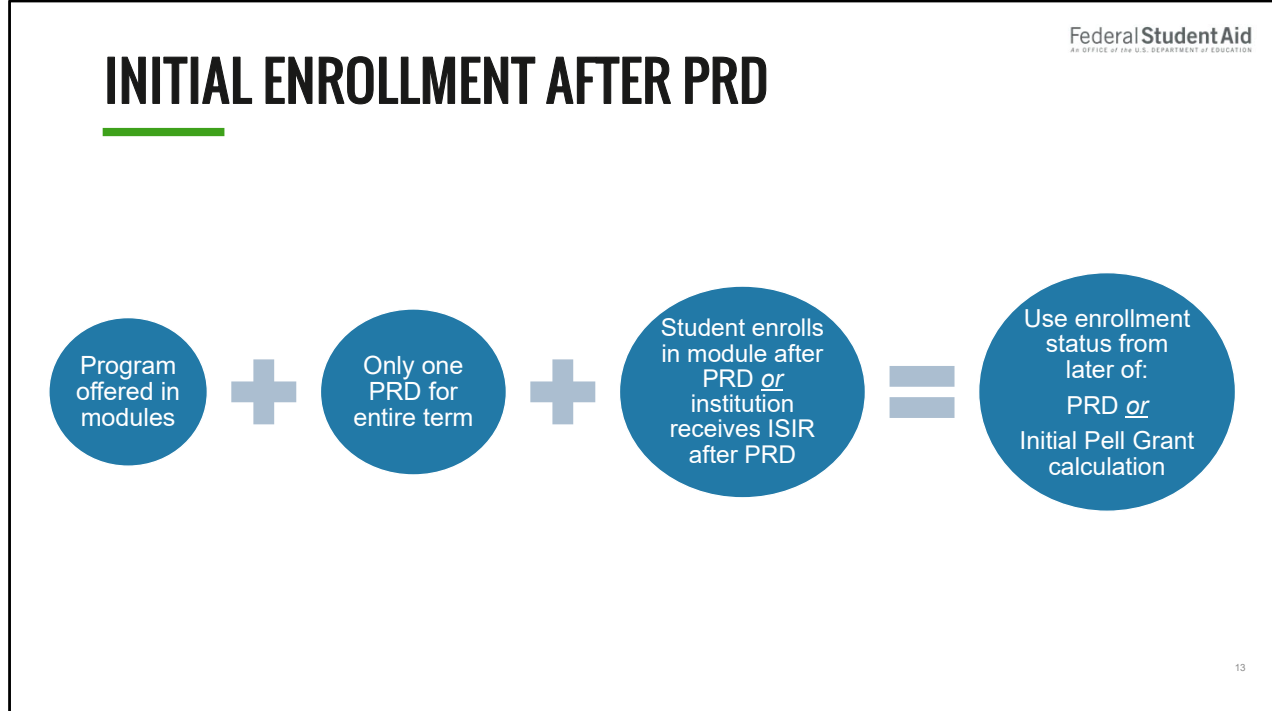


12

The student's Pell award is based on his/her actual or anticipated enrollment at the time of initial calculation. The student need not have applied to, be admitted to, or enrolled in the institution prior to making an initial calculation.

You should document each student's initial Pell calculation date because you may need it later to determine a student's enrollment status for his/her Pell Grant award.

The initial calculation may occur before or after institution's Pell Recalculation Date (PRD).



How would you calculate a student's enrollment status for Pell Grant if the student is enrolled in a program offered in modules, your institution has only one PRD for the entire term, and the student either enrolls in a module that begins after the PRD or you receive the official ISIR after the PRD?

You would use the student's enrollment status as of the PRD or the date of the initial Pell Grant calculation, whichever is later.

INITIAL ENROLLMENT AFTER PRD

Examples

Hometown Community College
Fall term start date: August 16, 2021
Modules with term
One PRD: August 27, 2021

Paul

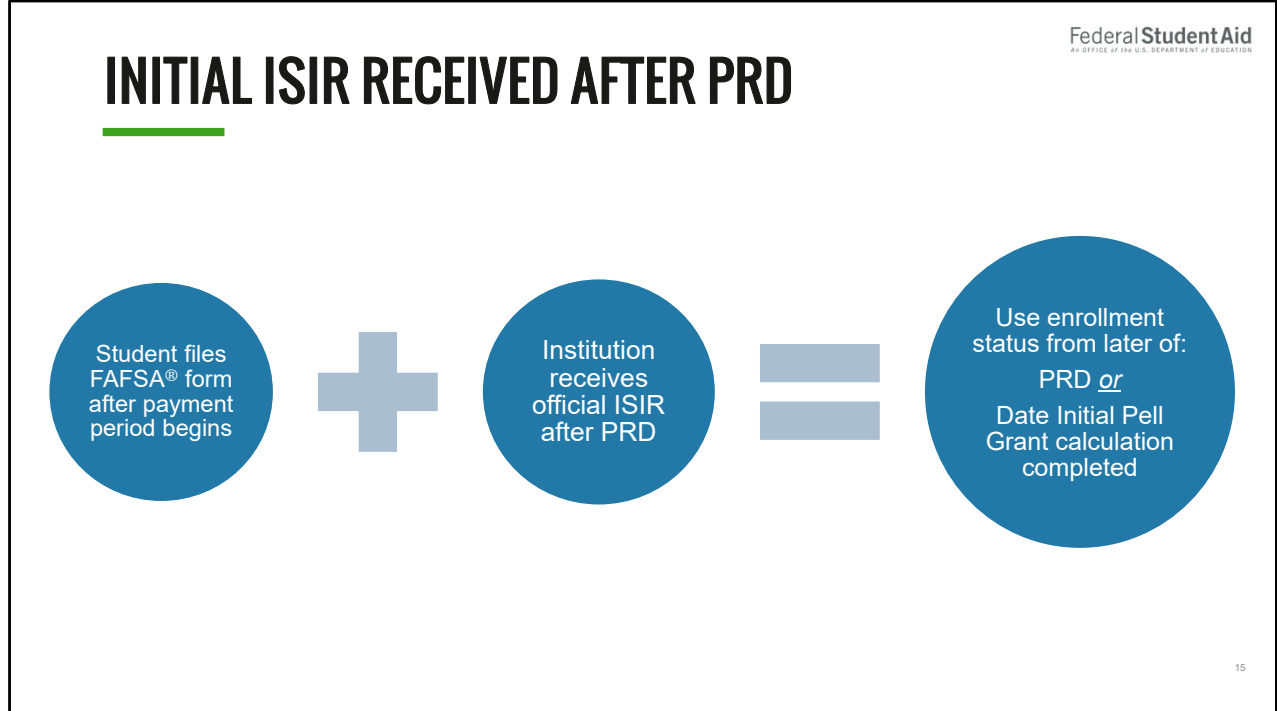
- Does not register or begin attendance at start of term
- Registers in two modules for 6 credit hours on 9/13
- Start date = 10/4
- Pell Grant enrollment status = 6 credit hours

John

- Begins attendance on 8/16 with 6 credit hours
- Registers in one module for 3 credit hours on 10/4
- Start date = 10/4
- Pell Grant enrollment status = 6 credit hours

14

Hometown Community College had a fall term start of August 16, 2021. HCC offers modules within each term. It uses only one PRD for the entire term on August 27, 2021.



How would you calculate a student's enrollment status for Pell Grant if the student files a FAFSA® form after the payment period begins, and you receive the official ISIR after the PRD?

In this case, the initial Pell Grant calculation occurs when you receive the official ISIR, which is after the PRD. The student's enrollment status is established on the date that the initial Pell Grant calculation is completed.

INITIAL ISIR RECEIVED AFTER PRD

Examples

Hometown Community College
Fall term start date: August 16, 2021
PRD: August 27, 2021

David

- Begins attendance at start of term in 12 credit hours
- Files FAFSA® form on 8/31
- HCC receives official ISIR on 9/3
- Pell Grant enrollment status = 12 credit hours

Bruce

- Begins attendance at start of term in 12 credit hours but drops 3 credit-hour course on 9/10
- Files FAFSA® on 9/15
- HCC receives official ISIR on 9/17
- Pell Grant enrollment status = 9 credit hours

16

Hometown Community College had a fall term start of August 16, 2021, with a PRD of August 27, 2021.

MODULES AND PELL GRANT RECALCULATION

MODULES AND PRD

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

Multiple PRDs (optional)

- Assign PRD to each module
- Student activates PRD with attendance
- Use *all courses* in payment period for enrollment status



Question

What happens if a student does not begin attendance in a module?

Answer

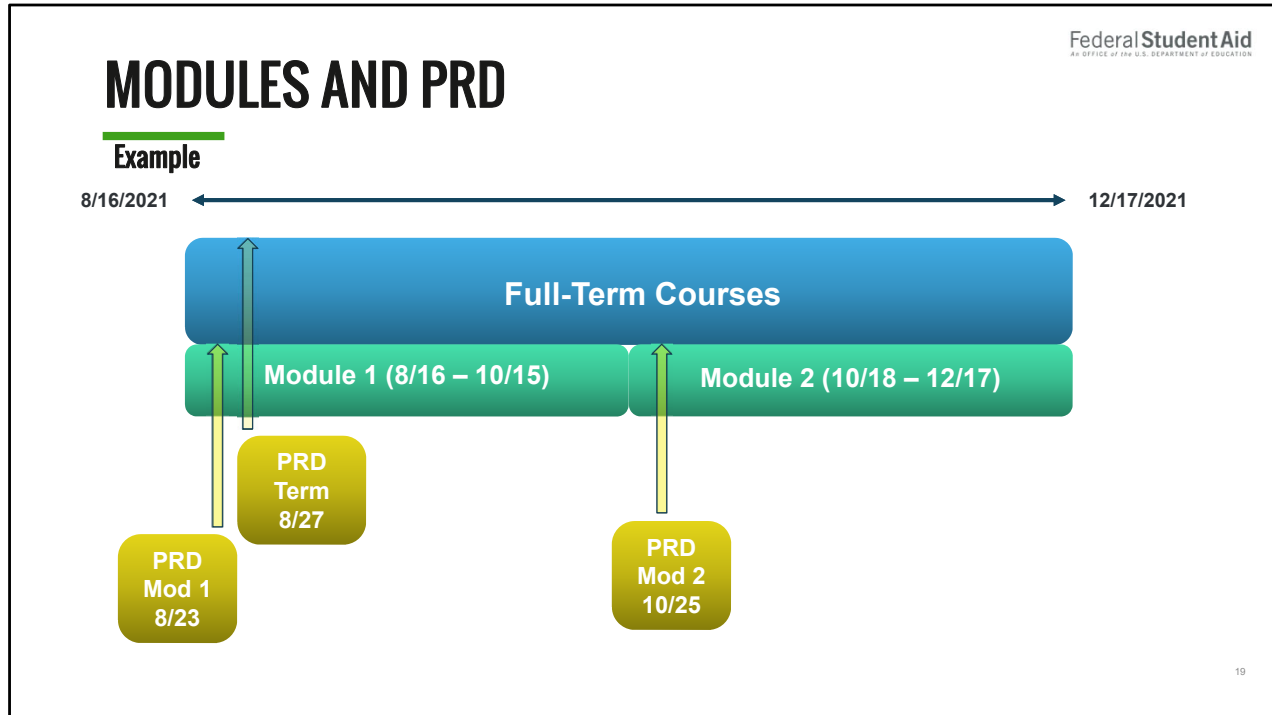
You will use the *latest active* PRD to determine the student's Pell Grant eligibility for the payment period.

18

You may use multiple PRDs in programs offered in modules. It is acceptable to assign a “potential” PRD to each module within a term.

The PRD in each module is activated only if the student begins attendance in that module. Use all courses in the payment period to determine a student's Pell Grant enrollment status when the student activates the PRD.

If the student does not begin attendance in that module, then you will use the last activated PRD to determine the student's enrollment status for Pell Grant eligibility. **It is important to remember that only ONE PRD will ever apply towards a student within a term.**



Hometown Community College has a term start date of August 16, 2021, and term end date of December 17, 2021.

HCC uses three different PRDs:

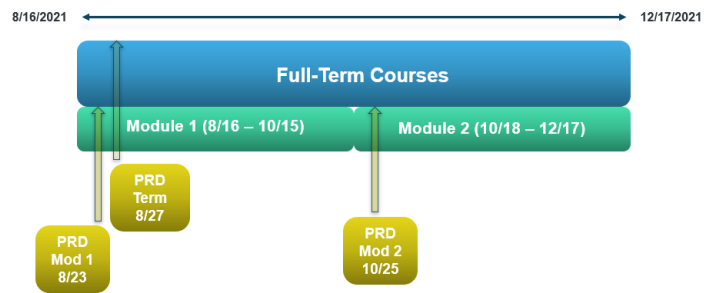
- August 23rd for Module 1 courses
- August 27th for the full-term courses
- October 25th for Module 2 courses

MODULES AND PRD

Example

Jesse

- Two courses (6 credits) in full term
- One course (3 credits) in Module 1
- One course (3 credits) in Module 2
- Drops one full-term course on 9/7
- Begins Module 2 course
- Drops Module 2 course on 10/21
- Pell Grant enrollment status = 6 credit hours



Jesse is scheduled to attend two courses (six credits) in the full-term, one course (three credits) in Module 1 and one course (three credits) in Module 2.

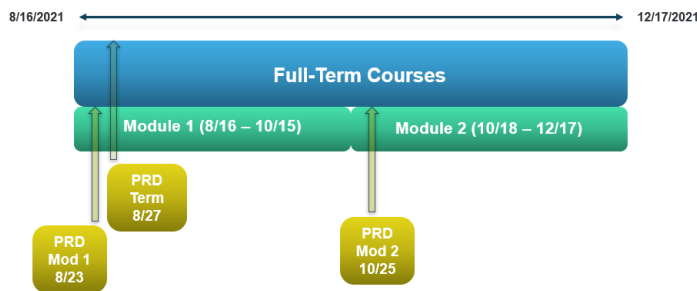
He drops a full-term course (three credits) on September 7th.

Jessie begins Module 2 on October 18th, but he drops the course on October 21st.

Since Jesse began attendance in the Module 2 course, he activated the Module 2 PRD. Therefore, the institution uses the October 25th PRD.

MODULES AND PRD

Example



Michelle

- Two courses (6 credits) in full term
- One course (3 credits) in Module 1
- One course (3 credits) in Module 2
- Drops one full-term course on 9/7
- *Never begins* Module 2 course
- Pell Grant enrollment status = 9 credit hours

21

ADDs, DROPs, AND DIRECT LOAN DISBURSEMENTS

ADDS, DROPS, AND DIRECT LOAN DISBURSEMENTS

- PRDs not applicable
- Eligibility confirmation process occurs at disbursement
- Enrollment status determination
 - Half-time enrollment at disbursement
 - Ultimately began attendance in at least one class



23

- PRDs do not determine enrollment status for Direct Loans
- Institutions must have a process in place for determining a student's eligibility at the time of loan disbursement
- An otherwise eligible student must be *enrolled* at least half-time at the time of the disbursement and ultimately must have begun attendance in at least one class

EARLY DISBURSEMENTS

Question

What happens if you make an early loan disbursement based on half-time status, and the student only begins less-than-half-time attendance?

Answer

The student is still eligible for the loan disbursement.

Subsequent disbursements cannot be made unless the student reestablishes at least half-time enrollment. The student will repay the disbursed loan according to the terms and conditions of the promissory note, unless the institution returns funds through the R2T4 process.

24

Early disbursements can be made to an eligible student or parent as early as 10 days prior to the enrollment start date for a term-based credit-hour program, and the student must be *scheduled* for at least half-time attendance prior to making the early disbursement.

EARLY DISBURSEMENTS

Question

What happens if you make an early loan disbursement, and the student never begins attendance?

Answer

You must return any Direct Loan funds that were credited to the student's account.

If any funds were disbursed directly to the student, you must notify the loan servicer that the student is ineligible for the funds. The servicer will issue a 30-day demand letter to the student.

34 CFR § 668.21 – Student does not begin attendance

25

WITHDRAWALS

STUDENT WITHDRAWAL

Regulatory definitions

34 CFR § 668.22(a)(2)(i)

A. Credit-hour program

- Fails to complete **all scheduled days** in payment period or period of enrollment

B. Clock-hour program

- Fails to complete **all scheduled clock hours and weeks of instructional time** in payment period or period of enrollment

*****And does not meet any withdrawal exemptions*****

27

When is a student considered a withdrawal?

STUDENT WITHDRAWAL

Regulatory definitions

34 CFR § 668.22(a)(2)(i)

C. Standard term or nonstandard-term program

- Not scheduled to begin another course within same payment period or period of enrollment *for more than 45 days* after end of module student ceased attending
- Not applicable if on approved leave of absence

28

A student is a withdrawal in a standard or nonstandard-term program if the next course (*within the same payment period or period of enrollment*) in which the student is scheduled to enroll begins more than 45 calendar days after the end of the module that the student ceased attending, unless the student is on an approved leave of absence.

Important!

If a student is enrolled only in modules within a term (no full-term courses), then the 45-day timeframe applies if the student provides written confirmation to attend a later module within the term.

STUDENT WITHDRAWAL

Regulatory definitions

34 CFR § 668.22(a)(2)(i)

D. Non-term or subscription-based program

- Cannot resume attendance within payment period or period of enrollment *for more than 60 days* after student ceased attending
- Not applicable if on approved leave of absence

29

A student is a withdrawal in a non-term or subscription-based program if the student is unable to resume attendance within a payment period or period of enrollment for more than 60 calendar days after the student ceased attending unless the student is on an approved leave of absence.

STUDENT WITHDRAWAL

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION



Question

What if the student **ceases attendance in all Title IV-eligible courses** in payment period or period of enrollment, but stays enrolled in non-Title IV eligible courses?

Answer

The student is a withdrawal for Title IV purposes.

30

Important!

A student is a withdrawal for Title IV purposes if the student withdraws (officially or unofficially) from all Title IV-eligible courses in a payment period or period of enrollment. This is true even if the student continues enrollment in non-Title IV-eligible courses in the same payment period or period of enrollment.

Also, a student is a withdrawal if the student begins attendance and does not earn a passing grade in at least one course – unless you can document that the student completed the payment period or period of enrollment.

WITHDRAWAL EXEMPTIONS

The Distance Education and Innovation regulations that became effective on July 1, 2021 (unless early implemented), provide new withdrawal exemptions. If a student meets **just one** of these exemptions, then the student is not a withdrawal for Title IV purposes, and you would not complete an R2T4 calculation.

R2T4 WITHDRAWAL EXEMPTIONS

Student not considered withdrawn...

34 CFR § 668.22(a)(2)(ii)(A)

(1) All programs

Completes all program requirements for graduation before completing scheduled days or clock hours in period



32

A student who completes all the requirements for graduation from his or her program before completing the days or hours in the period that he or she was scheduled to complete is not considered to have withdrawn for Title IV purposes. This exemption applies to all programs, with or without modules.

R2T4 WITHDRAWAL EXEMPTIONS

Student not considered withdrawn...

34 CFR § 668.22(a)(2)(ii)(A)

(2) Programs offered in modules

i. and ii. Successfully completes one or modules comprising 49% or more of number of days in payment period

- Excludes scheduled breaks of five or more consecutive days
- Excludes all days between modules
- May not round up to 49%

33

A student who is enrolled in a program offered in modules is not a withdrawal for Title IV purposes, if the student successfully completes one module that includes 49 percent or more of the number of days in the payment period, or a combination of modules that when combined contain 49 percent or more of the number of days in the payment period.

When determining if the student successfully completed 49% or more of the payment period, you must exclude scheduled breaks of five or more consecutive days and all days between modules.

You may not round up to reach 49 percent completion. For example, 48.7 percent completion may not be rounded up to the nearest *ones place value* to achieve 49 percent.

Important! The 49 percent is based on the number of days in the overall payment period, not 49 percent of the days in the module(s) in which the student was enrolled.

“Successfully completes” means the student earned a passing grade according to the program’s grading policy.

R2T4 WITHDRAWAL EXEMPTIONS

Student not considered withdrawn...

34 CFR § 668.22(a)(2)(ii)(A)

(2) Programs offered in modules

- iii.** Successfully completes at least half-time enrollment per institution's definition

34

A student who successfully completes coursework equal to or greater than the coursework required for your institution's definition of a half-time student for the payment period is not considered to have withdrawn for Title IV purposes.

"Successfully completes" means the student earned a passing grade according to the program's grading policy.

R2T4 AND WRITTEN CONFIRMATION

Student not considered withdrawn...

34 CFR § 668.22(a)(2)(ii)(A)

(3) Programs offered in modules

- i. Written confirmation that student will begin future module in same period
- ii. Module begins no later than 45 days after end of module student ceased attending in standard and nonstandard-term program

35

A student is not considered to have withdrawn for Title IV purposes if the institution obtains written confirmation (at the time that the student would have been a withdrawal) of the date that the student will attend a module that begins later in the same payment period or period of enrollment. The module to which the student is returning to must begin no later than 45 calendar days after the end of the module in which the student ceased attending. This 45-day rule is for standard and nonstandard-term programs only.

Important!

If a student is enrolled only in modules within a term (no full-term courses), then the 45-day timeframe applies if the student provides written confirmation to attend a later module within the term.

R2T4 AND WRITTEN CONFIRMATION

Student not considered withdrawn...

34 CFR § 668.22(a)(2)(ii)(A)

(4) and (5) Subscription-based and non-term programs

- Written confirmation that student will resume attendance in same period
- Date student returns no later than 60 days after student ceased attending

36

A student enrolled in a subscription-based or non-term program is not considered to have withdrawn for Title IV purposes if the institution obtains written confirmation (at the time that would have been a withdrawal) of the date that the student will resume attendance later in the same payment period or period of enrollment, and that date occurs no later than 60 calendar days after the student ceased attendance.

WITHDRAWAL DETERMINATIONS AND PRINCIPLES

A student's withdrawal date and the institution's date of determination that a student withdrew depend on whether an institution is required to take attendance.

INSTITUTIONS REQUIRED TO TAKE ATTENDANCE

38



The R2T4 regulations specify when an institution is required to take attendance in 34 C.F.R. 668.22(b)(3).

An institution is required to take attendance if –

- An outside entity (such as the institution's accrediting agency or a State agency) has a requirement that the institution take attendance, or
- The institution itself has a requirement that its instructors take attendance, or
- The institution or an outside entity has a requirement that can only be met by taking attendance or a comparable process, including, but not limited to, requiring that students in a program demonstrate attendance in the classes of that program, or a portion of that program.

Note that required attendance may be for an entire institution, department, or specific program.

REQUIRED TO TAKE ATTENDANCE

STUDENT'S WITHDRAWAL DATE

- **Always** last date of academic attendance
- Determined by institution's attendance records
- Includes students not returning from leave of absence



INSTITUTIONS NOT REQUIRED TO TAKE ATTENDANCE

41

NOT REQUIRED TO TAKE ATTENDANCE

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

INSTITUTION NOT REQUIRED TO TAKE ATTENDANCE IF —

- Attendance not required by outside entity
- No formal institutional attendance policy
- No institution or outside entity requirement only met by taking attendance (or comparable process)



42

An institution is not considered to be required to take attendance if it is not required by an outside entity, if the institution has no formal policy to take attendance, or if there is no institution/outside entity requirement that can only be met by taking attendance or using a comparable process.

NOT REQUIRED TO TAKE ATTENDANCE

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

INSTITUTION NOT REQUIRED TO TAKE ATTENDANCE IF FACULTY—



- Voluntarily take attendance
- Provide last date of attendance for students with all “F” grades to determine unofficial withdrawals

43

Note that an institution is not considered to be required to take attendance if its faculty members voluntarily take attendance, or if they provide a last date of attendance for students with all “F” grades so the institution can determine if a student unofficially withdrew.

WITHDRAWAL DATE - OFFICIAL NOTIFICATION

Question

What is the withdrawal date when the student provides official notification of intent to withdraw?

Answer

The withdrawal date is the *earlier* of...

**DATE STUDENT BEGAN
WITHDRAWAL PROCESS**

or

**DATE STUDENT OTHERWISE
PROVIDED NOTIFICATION**

- Also permitted to use the last date of an academically-related activity

44

The withdrawal date varies with the type of withdrawal when an institution is not required to take attendance.

An official withdrawal is when the student provides notification, to an office designated by the institution, of his/her intent to cease attendance in all classes. The regulation 34 C.F.R. 668.22(c)(5) states that an institution must designate one or more offices where a student may readily contact to provide that official withdrawal notification.

Your institution must have an official withdrawal process procedure that clearly defines the beginning of the withdrawal process.

A student may provide the official withdrawal notification in writing or orally to a designated official. Keep in mind that the institution must document oral notifications.

WITHDRAWAL DATE - SPECIAL CIRCUMSTANCES

Circumstances beyond student's control

34 CFR § 668.22(c)(1)(iv)

Withdrawal date accurately reflects when student ceased attendance

- Date circumstance occurred
- Later date if student continued attendance after circumstance occurred

45

A student can withdraw due to circumstances beyond his or her control. There is a special rule that defines the withdrawal date when (1) the student would have provided official notification but was prevented from doing so due to those circumstances, or (2) a second party notifies the institution of the withdrawal due to those circumstance on the student's behalf. The withdrawal date can be the date the special circumstance occurred, or it could be a later date if the student continued attendance after the circumstance occurred.

WITHDRAWAL DATE - SPECIAL CIRCUMSTANCES

Administrative withdrawals

34 CFR § 668.22(c)(1)(iv)

Withdrawal date varies

- Date enrollment terminated, or
- Last date of academically-related activity

46

A student can be administratively withdrawn by the school. When that occurs, the withdrawal date varies per the institution's policy. The withdrawal date can be the date that the school terminated the student, or it can be an earlier or later date as documented by an academically-related activity. However, an institution may not have an administrative withdrawal policy that waits until the midpoint of the term to withdraw a student, if the issue causing the administrative withdrawal occurred prior to the midpoint.

WITHDRAWAL DATE - SPECIAL CIRCUMSTANCES

Student dies

34 CFR § 668.22(c)(1)(iv)

Withdrawal date

- Date circumstance occurred that caused student's death, and
- Never later than date of student's death

47

WITHDRAWAL DATE - SPECIAL CIRCUMSTANCES

All other withdrawals without student notification

34 CFR § 668.22(c)(1)(iii)

Withdrawal date

- Midpoint of payment period or period of enrollment, or
- Last date of academically-related activity



ACADEMICALLY-RELATED ACTIVITY

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION



May use institution's documented attendance at academically-related activity in lieu of any other withdrawal date



Must document:

- Activity is academic or academically-related; and
- Student's attendance at activity



Applies to official and unofficial withdrawals

49

An institution that is not required to take attendance may use a student's last date of attendance at an academically-related activity, as documented by the institution, as the student's withdrawal date.

The last date of the academically-related activity may be earlier or later than the date the student began the withdrawal process (or otherwise provides official notification of intent to withdraw), or the midpoint for unofficial withdrawals. The student may not self-certify attendance at the activity.

This applies to either official or unofficial withdrawals, and it must be explained in the institution's R2T4 policy.

ACADEMICALLY-RELATED ACTIVITIES

Include, not limited to...

- Attending synchronous activity
 - Physically or online
 - Opportunity for interaction between instructor and students
- Submitting academic assignment
- Taking assessment or exam



50

34 C.F.R. 600.2 Definitions of the Institutional Eligibility regulations defines academic engagement as active participation by a student in an instructional activity related to the student's course of study, as defined by the institution in accordance with any applicable State or accrediting agency requirements.

These activities include, but are not limited to, the examples on this slide that are found in 34 C.F.R. 600.2.

ACADEMICALLY-RELATED ACTIVITIES

Include, not limited to...

- Participating in interactive instruction
- Participating in institution–assigned
 - Study group
 - Group project, or
 - Online discussion
- Interacting with instructor about academic matters



51

34 C.F.R. 600.2 Definitions of the Institutional Eligibility regulations defines academic engagement as active participation by a student in an instructional activity related to the student's course of study, as defined by the institution in accordance with any applicable State or accrediting agency requirements.

These activities include, but are not limited to, the examples on this slide that are found in 34 C.F.R. 600.2.

ACADEMICALLY-RELATED ACTIVITIES

Do not include, for example –

LIVING IN
INSTITUTIONAL
HOUSING OR
PARTICIPATING
IN MEAL PLAN



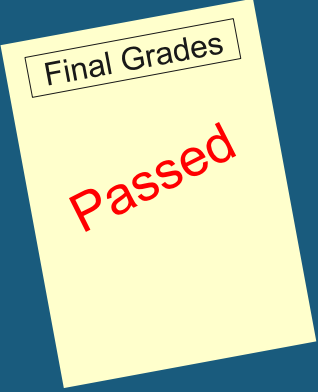
LOGGING INTO
ONLINE CLASS
OR TUTORIAL
WITHOUT
FURTHER
PARTICIPATION



PARTICIPATING
IN ACADEMIC
COUNSELING
OR
ADVISEMENT



34 C.F.R. 600.2 Definitions of the Institutional Eligibility regulations also includes examples of activities that are not considered to be academically-related activities.



Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

PASSING GRADES

Institution must determine if student completed period or withdrew

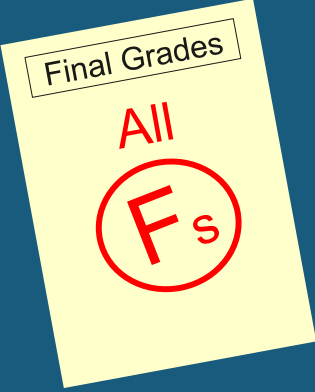
ONE PASSING GRADE OVER ENTIRE PERIOD OR PASSING GRADE IN LAST MODULE STUDENT SCHEDULED TO ATTEND IN PERIOD

- Not withdrawal

53

If a student earned a passing grade:

- In one or more courses over an entire period, **or**
- In the last module scheduled to attend in the period, **then**
- The institution may treat the student as a completer for the period.



Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

NO PASSING GRADES

Institution must determine if student completed period or withdrew

NO PASSING GRADES OVER ENTIRE PERIOD OR IN LAST MODULE STUDENT SCHEDULED TO ATTEND IN PERIOD

- **Unofficial withdrawal** unless documentation proves student completed period and earned grades

54

But if the student failed to earn a passing grade:

- In at least one course over an entire period, **or**
- In the last module scheduled to attend in the period, **then**
- The institution must treat the student as an unofficial withdrawal, unless the institution can document that the student completed the period and earned all “F” grades.

The student is an unofficial withdrawal unless the student meets any of the R2T4 withdrawal exemptions.

DATE OF DETERMINATION

DATE OF DETERMINATION

Regulatory definition

34 C.F.R. § 668.22(l)(3)

- Date institution becomes aware that student ceased attendance
- Different for official vs. unofficial withdrawals

56

The date of determination that a student withdrew is defined in the Return of Title IV regulations.

DATE OF DETERMINATION

Official Withdrawals

- Date of determination *later* of:
 - Student's withdrawal date, or
 - Date of notification of withdrawal



57

DATE OF DETERMINATION

Unofficial Withdrawals

ATTENDANCE REQUIRED

Should be no later than 14 calendar days after student's last date of attendance.

- May have policy to determine withdrawal in fewer than 14 days
- Includes holidays, breaks and weekends

ATTENDANCE NOT REQUIRED

Must be no later than 30 days after earlier of:

- End of payment period or period of enrollment, as appropriate
- End of academic year
- End of student's educational program

58

The date of determination for unofficial withdrawals is the date that the institution becomes aware that the student ceased attendance.

For institution's required to take attendance, the date of determination should be no later than 14 days after the student's last date of attendance as determined by the institution's attendance records.

For institution's not required to take attendance, the date of determination must be no later than 30 days after the end of (1) the payment period or period of enrollment, (2) academic year, or (3) the student's educational program, whichever occurs earlier.

DATE OF DETERMINATION

Return of Title IV (R2T4) Deadlines

WITHIN 30 DAYS OF DATE OF DETERMINATION

- Complete R2T4 calculation
- Notify student (or parent) of opportunity to accept all or part of Direct Loan post-withdrawal disbursement
- Notify student of grant overpayment

59

The date of determination that a student withdrew affects the following Return of Title IV (R2T4) deadlines:

- Completing the R2T4 calculation
- Notifying the student/parent of post-withdrawal disbursement loan funds
- Disbursing post-withdrawal grant and loan funds
- Returning unearned Title IV funds

DATE OF DETERMINATION

Return of Title IV (R2T4) Deadlines

NO LATER THAN 45 DAYS AFTER DATE OF DETERMINATION

- Return unearned Title IV funds
- Disburse post-withdrawal Title IV **grant** funds directly to student in excess of outstanding current (allowable) charges

60

The date of determination that a student withdrew affects the following Return of Title IV (R2T4) deadlines:

- Completing the R2T4 calculation
- Notifying the student/parent of post-withdrawal disbursement loan funds
- Disbursing post-withdrawal grant and loan funds
- Returning unearned Title IV funds

DATE OF DETERMINATION

Return of Title IV (R2T4) Deadlines

NO LATER THAN 180 DAYS AFTER DATE OF DETERMINATION

- Disburse post-withdrawal grant or loan funds to student's account for:
 - Outstanding current allowable charges
 - Other allowable charges with student authorization
- Disburse post-withdrawal loan funds directly to student in excess of outstanding current (allowable) charges

61

The date of determination that a student withdrew affects the following Return of Title IV (R2T4) deadlines:

- Completing the R2T4 calculation
- Notifying the student/parent of post-withdrawal disbursement loan funds
- Disbursing post-withdrawal grant and loan funds
- Returning unearned Title IV funds

Remember that you must receive acceptance confirmation from the student or parent before making a post-withdrawal disbursement of loan funds.



RESOURCES

Adds, drops, and withdrawals

Federal Student Aid Handbook

- Volume 3, Chapter 3, Pell Grant Recalculations
- Volume 4, Chapter 2, Direct Loan Disbursements
- Volume 5, Chapters 1 and 2, Withdrawals and Date of Determination

RESOURCES

Adds, drops, and withdrawals

Federal Regulations – 34 C.F.R.

- 690.80 – Federal Pell Grant recalculations
- 668.21 – Treatment of Title IV aid if student does not begin attendance
- 668.22(a) – R2T4 withdrawal exemptions
- 668.22(b) and (c) – Withdrawal dates
- 668.22(I)(3) – Definition of date of determination

64

Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

FSA TRAINING CENTER

fsatraining.ed.gov

Take advantage of the FSA Training Center!

- Learning tracks
- Training courses
- Recorded policy and how-to videos
- Software training

65

The FSA Training Center is a great resource for training! Create an account today for valuable free trainings on Title IV aid administration.

The FSA Fundamentals Training series and *FSA Basics for New Staff* are available in the FSA Training Center.

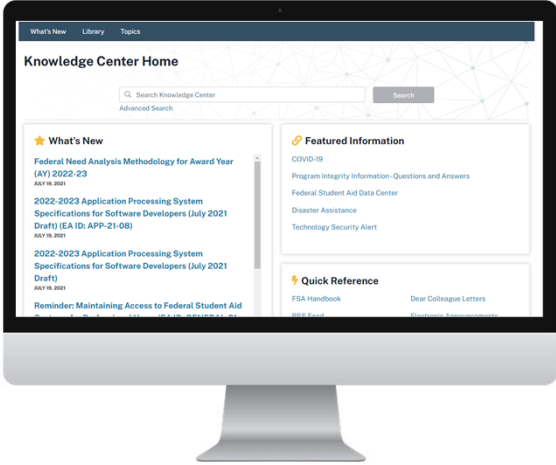
KNOWLEDGE CENTER
fsapartners.ed.gov/knowledge-center

Use the Knowledge Center for Title IV resources!

Subscribe for daily or weekly email updates. ↓

Knowledge Center Subscription

Subscribe to get the latest news and updates from the Knowledge Center.



66

The Knowledge Center is where you'll find links to laws, regulations, and guidance related to Title IV aid administration, including the FSA Handbook, Electronic Announcements and Dear Colleague Letters.

The Knowledge Center Subscription option is found at the bottom of the Knowledge Center home page.

FSA PARTNER CONNECT HELP CENTER

fsapartners.ed.gov/help-center/

Use *Contact Customer Support Form* in Help Center to ask policy questions.

Choose “Ask A Fed/Policy” from Topic dropdown list.

The screenshot shows a computer monitor displaying the 'Contact Customer Support' form. The form is titled 'Contact Customer Support' and includes a note: 'Please complete the Customer Support form if you have a question or would like to provide feedback. If you need further assistance, please contact the School Relations Center during its operating hours.' The form has two main sections: 'Contact Customer Support' and 'School Relations Center'. The 'Contact Customer Support' section includes fields for 'First Name', 'Last Name', 'Email Address', and a 'Topic' dropdown menu. The 'School Relations Center' section includes the phone number '1-800-848-0978' and 'Phone Support Hours: Monday-Friday, 8:00 A.M. to 8:00 P.M. Eastern Time'. The 'Topic' dropdown menu is open, showing a list of options: 'Select...', 'Select...', 'Account Access', 'Ask A Fed/Policy', 'FSA Handbook', 'Financial Aid Delivery', 'General', 'Knowledge Center', 'Partner Connect Feedback', and 'Partner Support'. The 'Ask A Fed/Policy' option is highlighted.

You may use the Contact Customer Support form for many FSA inquiries.

If you need further assistance, contact the School Relations Center at 1-800-848-0978.

TRAINING FEEDBACK

All attendees will receive email from FSA with online evaluation link

- Helps ensure quality training
- Informs FSA of areas for improvement
- Serves as effective tool for “listening” to our school partners



68

Please fill out the survey when you receive the email. We value your feedback!



Benedict.Dorsey@ed.gov

THANK YOU!



QUESTIONS

