

[Print This Page](#)[Print Help](#)[Close Window](#)**SUMMARY:**

Name: Rowdy Roadrunner

Permanent Address
Address: One UTSA Circle

City, State Zip: San Antonio, TX 78249
Phone: 210-458-8000

Local Address
Address:

City, State Zip:
Phone:

Social Security Number: 123456789
Date of Birth: 01/01/1969
Driver's License:
School Cross Reference:
Student ID:

Step 6: Return of Funds by the School

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

| Source | Amount for School to Return |
|---|-----------------------------|
| 1. Unsubsidized FFEL/Direct Stafford Loan | \$2,500.00 |
| 2. Subsidized FFEL/Direct Stafford Loan | \$454.91 |
| 3. Perkins Loan | |
| 4. FFEL/Direct PLUS (Graduate Student) | |
| 5. FFEL/Direct PLUS (Parent) | |
| P. Total loans the school must return: | \$2,954.91 |

| Source | Amount for School to Return |
|-----------------------------------|-----------------------------|
| 6. Pell Grant | |
| 7. Academic Competitiveness Grant | |
| 8. National SMART Grant | |
| 9. FSEOG | |
| 10. Other Title IV Grant Funds | |

STEP 8: Return of Funds by the Student

These outstanding loans consist either of loan funds the student has earned, or unearned loan funds that the school is not responsible for repaying, or both; and they are repaid to the loan holders according to the terms of the borrower's promissory note.

| Source | Amount for Student to Return |
|--|------------------------------|
| 1. Unsubsidized FFEL/Direct Stafford Loan | \$0.00 |
| 2. Subsidized FFEL/Direct Stafford Loan | \$2,295.09 |
| 3. Perkins Loan | |
| 4. FFEL/Direct PLUS (Graduate Student) | |
| 5. FFEL/Direct PLUS (Parent) | |
| R. Amount of Title IV loans the student is still responsible for repaying: | \$2,295.09 |

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 to the following sources in the order indicated, up to the total 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.

| Source | Amount for Student to Return |
|-----------------------------------|------------------------------|
| 1. Pell Grant | |
| 2. Academic Competitiveness Grant | |

3. National SMART Grant
 4. FSEOG
 5. Other Title IV Grant Funds
-

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Treatment Of Title IV Funds When A Student Withdraws From A Credit-Hour Program

| | | | |
|---|--|--|-------------|
| Student's Name | Rowdy Roadrunner | Social Security Number | 123-45-6789 |
| Date form completed | 10/15/2007 | Date of school's determination that student withdrew | 10/01/2007 |
| Period used for calculation (check one) | <input checked="" type="checkbox"/> Payment period <input type="checkbox"/> 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, .4486 = .449, or 44.9%)*

STEP 1: Student's Title IV Aid Information

| Title IV Grant Programs | Amount Disbursed | Amount that Could Have Been Disbursed | | | | | | | | | | | |
|---|----------------------|---|--|----|------------|---|--|----|------------|---|--|----|-------------------|
| 1. Pell Grant | \$2,155.00 | \$0.00 | E. Total Title IV aid disbursed for the payment period or period of enrollment. <table style="width: 100%;"> <tr><td style="width: 50%;">A.</td><td style="width: 50%; text-align: right;">\$2,805.00</td></tr> <tr><td colspan="2" style="text-align: center;">+</td></tr> <tr><td>B.</td><td style="text-align: right;">\$5,250.00</td></tr> <tr><td colspan="2" style="text-align: center;">=</td></tr> <tr><td>E.</td><td style="text-align: right;">\$8,055.00</td></tr> </table> | A. | \$2,805.00 | + | | B. | \$5,250.00 | = | | E. | \$8,055.00 |
| A. | \$2,805.00 | | | | | | | | | | | | |
| + | | | | | | | | | | | | | |
| B. | \$5,250.00 | | | | | | | | | | | | |
| = | | | | | | | | | | | | | |
| E. | \$8,055.00 | | | | | | | | | | | | |
| 2. Academic Competitiveness Grant | \$250.00 | \$0.00 | | | | | | | | | | | |
| 3. National SMART Grant | \$300.00 | \$0.00 | | | | | | | | | | | |
| 4. FSEOG | \$100.00 | \$0.00 | | | | | | | | | | | |
| 5. Other Title IV Grant Funds* | \$0.00 | \$0.00 | | | | | | | | | | | |
| A. \$2,805.00 Subtotal | | C. \$0.00 Subtotal | | | | | | | | | | | |
| + = F. \$2,805.00 | | | | | | | | | | | | | |
| Title IV Loan Programs | Net Amount Disbursed | Net Amount that Could Have Been Disbursed | | | | | | | | | | | |
| 6. Unsubsidized FFEL/Direct Stafford Loan | \$2,500.00 | \$0.00 | F. Total of Title IV grant aid disbursed + could have been disbursed for the payment period or period of enrollment. <table style="width: 100%;"> <tr><td style="width: 50%;">A.</td><td style="width: 50%; text-align: right;">\$2,805.00</td></tr> <tr><td colspan="2" style="text-align: center;">+</td></tr> <tr><td>C.</td><td style="text-align: right;">\$0.00</td></tr> <tr><td colspan="2" style="text-align: center;">=</td></tr> <tr><td>F.</td><td style="text-align: right;">\$2,805.00</td></tr> </table> | A. | \$2,805.00 | + | | C. | \$0.00 | = | | F. | \$2,805.00 |
| A. | \$2,805.00 | | | | | | | | | | | | |
| + | | | | | | | | | | | | | |
| C. | \$0.00 | | | | | | | | | | | | |
| = | | | | | | | | | | | | | |
| F. | \$2,805.00 | | | | | | | | | | | | |
| 7. Subsidized FFEL/Direct Stafford Loan | \$2,750.00 | \$0.00 | | | | | | | | | | | |
| 8. Perkins Loan | \$0.00 | \$0.00 | | | | | | | | | | | |
| 9. FFEL/Direct PLUS (Graduate Student) | \$0.00 | \$0.00 | | | | | | | | | | | |
| 10. FFEL/Direct PLUS (Parent) | \$0.00 | \$0.00 | | | | | | | | | | | |
| B. \$5,250.00 Subtotal | | D. \$0.00 Subtotal | | | | | | | | | | | |
| + = G. \$8,055.00 | | | | | | | | | | | | | |

*Do not include FWS, LEAP, or SLEAP

STEP 2: Percentage of Title IV Aid Earned

| | | |
|-------------------|---------------------------|---------------------------|
| 08/22/2007 | 12/15/2007 | 10/01/2007 |
| 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 50% 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. For a student who officially withdraws, enter the withdrawal date.

H. Percentage of payment period or period of enrollment completed
Determine the calendar days completed in the payment period or period of enrollment divided by the total calendar days in the payment period or period of enrollment (excluding scheduled breaks of five days or more AND days that the student was on an approved leave of absence).

| | | | | |
|----------------|--------|------------|-----|--------|
| 41 | \div | 116 | $=$ | 35.3 % |
| Completed days | | Total days | | |

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.

H. 35.3 %

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

Multiply the percentage of Title IV aid earned (Box H) times the total of the Title IV aid disbursed plus the Title IV aid that could have been disbursed for the payment period or period of enrollment (Box G).

| | | | | |
|--------|----------|------------|-----|----------------------|
| 35.3 % | \times | \$8,055.00 | $=$ | I. \$2,843.42 |
| Box H | | Box G | | |

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

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

J. Post-withdrawal disbursement

Subtract Total Title IV aid disbursed for the payment period or period of enrollment (Box E) from the amount of Title IV aid earned (Box I). This is the amount of post-withdrawal disbursement due. **Stop here**, and enter the amount in Box 1 on the Post-Withdrawal Disbursement Tracking Sheet.

| | | | | |
|------------|-----|------------|-----|-----------|
| \$2,843.42 | $-$ | \$8,055.00 | $=$ | J. |
| Box I | | Box E | | |

Step 4 continued ▶

Student's Name **Rowdy Roadrunner**Social Security Number **123-45-6789****STEP 4: Aid to be Disbursed or Returned CONTINUED****K. Title IV aid to be returned**

Subtract the amount of Title IV aid earned (Box I) from the Total Title IV aid disbursed for the payment period or period of enrollment (Box E). This is the amount of Title IV aid that must be returned.

$$\begin{array}{r} \$8,055.00 \\ \text{Box E} \end{array} - \begin{array}{r} \$2,843.42 \\ \text{Box I} \end{array} = \mathbf{K. \$5,211.58}$$

STEP 5: Amount of Unearned Title IV Aid Due from the School**L. Institutional charges for the payment period or period of enrollment**

| | |
|---------|------------|
| Tuition | \$4,567.10 |
| Room | \$0.00 |
| Board | \$0.00 |
| Other | \$0.00 |
| Other | |
| Other | |

$$\text{Total Institutional Charges} = \mathbf{L. \$4,567.10}$$

(Add all the totals together)

M. Percentage of unearned Title IV aid

$$100\% - \begin{array}{r} 35.3\% \\ \text{Box H} \end{array} = \mathbf{M. 64.7\%}$$

N. Amount of unearned charges

Multiply institutional charges for the payment period or period of enrollment (Box L) times the percentage of unearned Title IV aid (Box M).

$$\begin{array}{r} \$4,567.10 \\ \text{Box L} \end{array} \times \begin{array}{r} 64.7\% \\ \text{Box M} \end{array} = \mathbf{N. \$2,954.91}$$

O. Amount for school to return

Compare the amount of Title IV aid to be returned (Box K) to amount of unearned charges (Box N), and enter the lesser amount.

$$\mathbf{O. \$2,954.91}$$

STEP 6: Return of Funds by the School

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

| Title IV Programs | Amount for School to Return |
|---|-----------------------------|
| 1. Unsubsidized FFEL/Direct Stafford Loan | \$2,500.00 |
| 2. Subsidized FFEL/Direct Stafford Loan | \$454.91 |
| 3. Perkins Loan | |
| 4. FFEL/Direct PLUS (Graduate Student) | |
| 5. FFEL/Direct PLUS (Parent) | |

$$\text{Total loans the school must return} = \mathbf{P. \$2,954.91}$$

| | |
|-----------------------------------|--|
| 6. Pell Grant | |
| 7. Academic Competitiveness Grant | |
| 8. National SMART Grant | |
| 9. FSEOG | |
| 10. Other Title IV Grant Funds | |

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

Subtract the amount of Title IV aid due from the school (Box O) from the amount of Title IV aid to be returned (Box K).

$$\begin{array}{r} \$5,211.58 \\ \text{Box K} \end{array} - \begin{array}{r} \$2,954.91 \\ \text{Box O} \end{array} = \mathbf{Q. \$2,256.67}$$

STEP 8: Repayment of the Student's loans

Subtract the Total loans the school must return (Box P) from the Net loans disbursed to the student (Box B) to find the amount of Title IV loans the student is still responsible for repaying (Box R).

These outstanding loans consist either of loan funds the student has earned, or unearned loan funds that the school is not responsible for repaying, or both; and they are repaid to the loan holders according to the terms of the borrower's promissory note.

$$\begin{array}{r} \$5,250.00 \\ \text{Box B} \end{array} - \begin{array}{r} \$2,954.91 \\ \text{Box P} \end{array} = \mathbf{R. \$2,295.09}$$

► If Box Q is less than or equal to Box R, **STOP**.

The only action a school must take is to notify the holders of the loans of the student's withdrawal date.

► If Box Q is greater than Box R, proceed to Step 9.

STEP 9: Grant Funds to be Returned**S. Initial amount of Title IV grants for student to return**

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

$$\begin{array}{r} \\ \text{Box Q} \end{array} - \begin{array}{r} \\ \text{Box R} \end{array} = \mathbf{S.}$$

T. Amount of Title IV grant protection

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

$$\begin{array}{r} \\ \text{Box F} \end{array} \times \mathbf{50\%} = \mathbf{T.}$$

U. Title IV grant funds for student to return

Subtract the protected amount of Title IV grants (Box T) from the initial amount of Title IV grants for student to return (Box S).

$$\begin{array}{r} \\ \text{Box S} \end{array} - \begin{array}{r} \\ \text{Box T} \end{array} = \mathbf{U.}$$

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 to the following sources in the order indicated, up to the total 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 | Amount To Return |
|-----------------------------------|------------------|
| 1. Pell Grant | |
| 2. Academic Competitiveness Grant | |
| 3. National SMART Grant | |
| 4. FSEOG | |
| 5. Other Title IV Grant Funds | |

10/15/2007

Rowdy Roadrunner
One UTSA Circle
San Antonio, TX 78249

Dear Rowdy,

You recently withdrew from the University and we are writing to update you on how your withdrawal from UTSA impacts the financial aid you have received for this semester. Federal law governs how the University must determine the amount of financial aid that you are entitled to receive if you withdraw from school

The law requires that when you withdraw during a semester the amount of financial aid that you have earned up to that point is determined by a specific formula. If you received more assistance than you earned, the excess funds must be returned. The University may also be required to refund the U.S. Department of Education some of the financial aid funds that were used to pay for your tuition and fees.

The amount of assistance that you have earned is determined on a pro-rata basis. That is, if you completed 30 percent of the semester, you earn 30 percent of the assistance you were originally scheduled to receive. If you received excess funds that must be returned, you must repay any grant assistance you have received.

Our records indicate that you withdrew on: 10/1/2007

Total amount of grant funds disbursed were:

| | |
|-------|-----------|
| Pell | \$2155.00 |
| ACG | \$250.00 |
| SMART | \$300 |
| SEOG | \$100 |

We have returned the following amount on your behalf:

| | |
|-------|-----|
| Pell | \$0 |
| ACG | \$0 |
| SMART | \$0 |
| SEOG | \$0 |

Your required repayments:

| | |
|-------|-----|
| Pell | \$0 |
| ACG | \$0 |
| SMART | \$0 |
| SEOG | \$0 |

You must repay this amount to the University no later than 11/29/2007. To make repayment arrangements please contact Fiscal Services at (210) 458-8000. If you do not repay these funds by this date the University is required to refer the repayment obligation to the U.S. Department of Education. The Department of Education will contact you regarding the repayment of this obligation. In most cases when you owe an overpayment on financial aid funds received, and have not repaid it or made satisfactory arrangements, you become ineligible to receive other Federal student financial aid until this obligation is repaid.

If you have questions on how we performed the calculation you may contact Joyce Fox at (210) 458-4634 or Joyce.Fox@utsa.edu. If you have questions about making payment arrangements with the University by the date indicated above, please contact Fiscal Services at (210) 458-8000.

Sincerely
Office of Student Financial Aid and Enrollment Services

10/15/2007

Rowdy Roadrunner
One UTSA Circle
San Antonio, TX 78249

Dear Rowdy,

You recently withdrew from the University and we are writing to update you on how your withdrawal from UTSA impacts the financial aid you have received for this semester. Federal law governs how the University must determine the amount of financial aid that you are entitled to receive if your withdraw from school

The law requires that when you withdraw during a semester the amount of financial aid that you have earned up to that point is determined by a specific formula. If you received more assistance than you earned, the excess funds must be returned. The University may also be required to refund the U.S. Department of Education some of the financial aid funds that were used to pay for your tuition and fees.

The amount of assistance that you have earned is determined on a pro-rata basis. That is, if you completed 30 percent of the semester, you earn 30 percent of the assistance you were originally scheduled to receive. If you received excess funds that must be returned, UTSA will return these funds to your lender on your behalf. Any loan funds that you must return, you repay in accordance with the terms of the promissory note. That is, you must make scheduled payments to the holder of the loan over a period of time.

Our records indicate that you withdrew on: 10/1/2007

Total amount of loan funds disbursed were:

| | |
|--------------|-----------|
| Unsubsidized | \$2500.00 |
| Subsidized | \$2750.00 |
| Perkins | \$0 |

We have returned the following amount on your behalf:

| | |
|--------------|-----------|
| Unsubsidized | \$2500.00 |
| Subsidized | \$454.91 |
| Perkins | \$0 |

If you have questions on how we performed the calculation you may contact Joyce Fox at (210) 458-4634 or Joyce.Fox@utsa.edu.

Sincerely
Office of Student Financial Aid and Enrollment Services