

# READY TO SUCCEED SCHOLARSHIP (RTSS) STATE GRANT DISTANCE EDUCATION PILOT PROGRAM (SGDEPP) FREQUENTLY ASKED QUESTIONS



## REFUNDS

### HOW DO I BUILD A REFUND GROUP/INVOICE/LIST?

1. Sign in to Partner Interface and navigate to the appropriate program tab (SGDEPP or RTSS) on the Dashboard.
2. Ensure you have selected the appropriate year and, if applicable, branch campus to view.
3. Scroll down to the final container, labeled "Review Refunds for Distance Education Awards"/"Review Refunds for Ready to Succeed Awards" (depending upon the program).
4. Select the hyperlink you wish to view:
  - a. The "Refunds Needed" listings will show you students not yet added to a Refund Group.
  - b. The "Refunds Total" listings will show you all students with unprocessed refunds.
5. Select students from the listing you select by checking the appropriate box(es) in the left-hand column and clicking the "Add to Refunds Group" button.
6. Enter the date, in MM/DD/CCYY format, that you or your school plan to send all necessary funds noted in your Refund Group.
7. Click the "Add to Refund Group" button.
8. You will be taken back to the listing you originally selected.
9. If you wish to view the Refund Group you just created, click the "View Refund Group" link.

### WHAT IF I BUILD MY REFUND GROUP INCORRECTLY OR NEED TO REVISE IT LATER?

As long as your refund is still considered active (meaning PHEAA has not yet processed your refund and posted the payment to each student's record), you can add or delete students from your Refund Group, or delete your entire Refund Group.

#### To remove a student:

1. From the appropriate program tab (for the appropriate year and branch campus) of the Partner Interface Dashboard (SGDEPP or RTSS), scroll down until you locate the "View Refunds" container in the right-hand column of the tab.
2. Find your active Refund Group. If you have a list of Refund Groups, this will be the top link, and the only one without an associated date.
3. Click the appropriate blue hyperlink to open your Refund Group.
4. Locate the student or students that you wish to remove from your Refund Group.
5. Click the blue link labeled "Remove" to the left of each student you wish to remove from your Refund Group.

### To add a student:

1. From the appropriate program tab of the Partner Interface Dashboard (SGDEPP or RTSS), scroll down until you locate the "Review Refunds for Distance Education Awards"/"Review Refunds for Ready to Succeed Awards" (depending upon the program).
2. Select the desired hyperlink from the "Refunds Needed" listing. You may select students by term, or select "All."
3. Select students from the listing you select by checking the appropriate box(es) in the left-hand column and clicking the "Add to Refunds Group" button.
4. Either accept the date you originally entered when you initially built your Refund Group, or enter a new present or future date.
5. Click the "Add to Refund Group" button.

### To delete an entire active Refund Group:

1. From the appropriate program tab (for the appropriate year and branch campus) of the Partner Interface Dashboard (SGDEPP or RTSS), scroll down until you locate the "View Refunds" container in the right-hand column of the tab.
2. Find your active Refund Group. If you have a list of Refund Groups, this will be the top link, and the only one without an associated date.
3. Click the appropriate blue hyperlink to open your Refund Group.
4. Click the "Delete Refund Group" button in the upper right-hand corner of your active Refund Group.

## WHAT IS THE DIFFERENCE BETWEEN THE "REFUNDS NEEDED" AND THE "REFUNDS TOTAL" LISTINGS ON PARTNER INTERFACE?

1. The "Refunds Needed" listing only shows those refunds that have not yet been added to a Refund Group.
2. The "Refunds Total" listing shows all refunds that have not yet been processed. Refunds currently added to a refund group will display in this listing with a "(P)." Refunds only drop off this listing after PHEAA has processed and posted the payment to the student's record.
3. Please note that you may build a Refund Group using either listing.

## WHAT DOES IT MEAN IF MY REFUND GROUP IS DISPLAYING AS "CHANGED?" IS THERE ANYTHING I NEED TO DO?

Refund Groups display as "changed" if the invoice was built by the school but not processed by PHEAA prior to a disbursement being run. The disbursement allowed some or all of the previous refunds on the invoice to offset, which has lowered the amount our system is currently showing as due for the impacted record(s).

### If the school has already sent payment for the Refund Group:

If you already sent PHEAA payment for the amount that originally displayed on your invoice, please do not attempt to change or accept the changes to your Refund Group. Instead, allow the Refund Group to remain in its current state as our Financial Management department processes your refund. Any excess funds due back to your institution as a result of offsetting will be sent with the next roster. If you have already received your initial reconciliation roster, you will need to request an additional reconciliation roster to balance your funds.

### If the school has not yet submitted payment for the Refund Group:

If your school has not already sent PHEAA payment for the amount that originally displayed on your invoice, you may click the button in the upper right-hand corner of your Refund Group to accept the changes. You should then send any remaining refund balance displaying on your Refund Group to PHEAA.

## HOW DO I KNOW IF MY REFUND HAS BEEN PROCESSED?

Once PHEAA completes processing of the refund, your Refund Group will be assigned a date and will become inactive on Partner Interface. Instead of being able to access a list that you can edit, you will instead be able to click a link to access a PDF, which will serve as an invoice of your refund.

### To access a processed Refund Group:

1. From the appropriate program tab (for the appropriate year and branch campus) of the Partner Interface Dashboard (SGDEPP or RTSS), scroll down until you locate the "View Refunds" container in the right-hand column of the tab.
2. Find your inactive Refund Group. This Refund Group will display as a link with a date. If you have multiple processed refunds, please note that they display in reverse chronological order, with the most recently processed Refund Group displaying at the top.
3. Click the appropriate blue hyperlink (by date) to open your processed Refund Group.

## WHAT IS THE DIFFERENCE BETWEEN THE WAY REFUND AMOUNTS LOOK ON PARTNER INTERFACE AND ON FG3S? WHAT SHOULD I DO IF THE TWO SHOW DIFFERENT AMOUNTS?

Partner Interface displays official refunds that generate after a disbursement. The summary page of FG3S displays both official and estimated refunds due PHEAA, based upon information reported by the school between disbursements. If the Balance Due PHEAA is different on FG3S than the total value of all refunds listed on Partner Interface within the "Refunds Total" listing, you must request an additional reconciliation roster.

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