



**2023-24
CONSORTIUM AGREEMENT**

COMPLETE WITH BLACK INK ONLY.
ELECTRONIC SIGNATURES ARE NOT
ACCEPTABLE ON THIS FORM.

**THE FIRST TWO PAGES OF THIS AGREEMENT CONTAIN IMPORTANT INFORMATION.
RETAIN THEM FOR YOUR REFERENCE.**

A consortium agreement allows you to receive financial aid while concurrently enrolled for courses at The University of Toledo (home institution) and another institution (host institution). For the term of concurrent enrollment, your eligibility for financial aid will be based on the total credit hours attempted at both institutions that count toward your program of study. You are required to complete a separate consortium agreement for each term you will be attending another institution. The maximum number of consortium terms permitted is three, with the exception of Lorain County Community College participants.

DEADLINES:

To prevent a delay in the processing of your financial aid, your consortium agreement must be received by the UT Office of Student Financial Aid (OSFA) **TWO weeks prior to classes starting at UT** for the consortium term.

Term you will be attending the host school:	To prevent a delay in the processing of your financial aid, your consortium agreement must be received by:	Your consortium agreement WILL NOT be accepted after:
Summer 2023	May 1, 2023	June 5, 2023
Fall 2023	August 14, 2023	September 18, 2023
Spring 2024	January 2, 2024	February 6, 2024

Processing of your consortium agreement may take up to 5 business days. It is your responsibility to make payment arrangements at the host institution until your financial aid is disbursed to you.

CONSORTIUM AGREEMENT RESTRICTIONS:

- UT and the host institution reserve the right to not participate in a consortium agreement for any reason.
- You must be registered and attending at least 1 credit hour at UT in a course that counts toward your program of study to meet Federal Pell Grant and federal student loan enrollment requirements.
- You must be registered and attending at least 12 credit hours at UT to meet most institutional scholarship enrollment requirements. To review specific scholarships' terms and conditions, go to utoledo.edu/financialaid/scholarships.
- Participation in consortium agreements is limited to three terms. If you drop or withdraw from all of your classes at the host institution during a consortium term, that term will still be included as one of the three consortium terms permitted.

DISBURSEMENT OF FINANCIAL AID:

- Your financial aid will disburse to your UT student account based on The University of Toledo's disbursement schedule, the date a completed consortium agreement is submitted to UT, and the start date of your consortium term.
- Any fees due to UT will be paid from your financial aid. Any excess financial aid will then be refunded to you.

PAYING FEES AT YOUR HOST INSTITUTION:

- It is your responsibility to contact your host institution regarding their payment schedule and to make payment to your host institution for any charges incurred such as tuition, fees, and books until your financial aid can be disbursed to your UT student account.
- You may be required to pay the host institution prior to UT refunding your excess financial aid.
- Use your excess financial aid refund to pay for your courses at your host institution.
- Sign up for direct deposit through the myUT portal to ensure a fast and secure refund.

CONDITIONS OF THE AGREEMENT:

- You must be admitted to UT as a degree-seeking student.
- A consortium agreement will not be processed at UT for your first term of enrollment in a degree-seeking status or for your first term of enrollment in a readmit or transfer readmit status.
- Credit hours earned at the host institution must be transferred to UT within 15 days after the end of the term. An official transcript must be sent to the Office of Undergraduate Admission at UT. **Financial aid for subsequent periods of enrollment may be held until the official transcript has been received and reviewed.**
- Participation in future consortium agreements will be determined after a review of the term transcripts from both UT and the host institution.
- You are required to notify the UT Office of Student Financial Aid if you drop or withdraw from any or all of your courses.
- Credit hours taken at both institutions will be used when reviewing your Satisfactory Academic Progress (SAP) as a federal financial aid recipient at UT. Please review the SAP policy at utoledo.edu/financialaid/maintain-aid/satisfactory-academic-progress. Zero credit hours earned at either institution will result in immediate suspension of federal financial aid.

WHAT YOU NEED TO DO:

- File a 2023-24 Free Application for Federal Student Aid (FAFSA) if you intend to use any federal or state financial aid for your consortium term.
- Enroll at UT and the host institution (see federal financial aid enrollment requirements under “CONSORTIUM AGREEMENT RESTRICTIONS” on page 1).
- Complete PART I (STUDENT CERTIFICATION). Submit PART I to the UT Office of Student Financial Aid:

Upload to: *myUT.utoledo.edu*
“My Financial Aid”
“Secure Financial Aid Document Upload”

Mail to: The University of Toledo
Office of Student Financial Aid
2801 West Bancroft Street, Mail Stop 314
Toledo, OH 43606-3390

In person: Rocket Solution Central
1200 Rocket Hall

Fax to: 419.530.5835

- Provide your host institution’s financial aid office with PART II for completion. It is your responsibility to ensure that PART II is sent to and received by the Office of Student Financial Aid at UT.
- Provide your academic advisor with PART III for completion. It is your responsibility to ensure that PART III is sent to and received by the Office of Student Financial Aid at UT.

THE UT OFFICE OF STUDENT FINANCIAL AID AGREES TO:

- Disburse your financial aid.
- Monitor your Satisfactory Academic Progress and attendance.
- Maintain your financial aid records.
- Report information regarding your enrollment and financial aid as required.



**2023-24
CONSORTIUM AGREEMENT: PART I
STUDENT CERTIFICATION**

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If you are newly admitted to UT, or if you are a transfer or transfer readmit student, you cannot participate in a consortium agreement your first term or your first term back at UT. Participation in consortium agreements is limited to three terms. This consortium agreement is valid for ONE term only. You must submit a new agreement if you decide to take courses at a host institution for additional terms.

Provide the following information:

Your name:	Your Rocket Number:
Your street address:	City: _____ State: _____ Zip: _____
Your phone number:	Your major/program:
Host institution name:	Term of consortium (circle one): SU23 FA23 SP24
Host institution term start date:	Host institution term end date:
Number of credit hours to be taken during consortium term at host institution:	Number of credit hours to be taken during consortium term at UT:

REGISTERED COURSES AT HOST INSTITUTION:

<u>Subject and Course Prefix Number</u>	<u>Course Title/Name</u>	<u>Credit Hours</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

STUDENT CERTIFICATION: Please certify that you have read and understand the statements below.

- I am asking UT to include my enrollment hours at my host institution when determining my eligibility for federal and state financial aid. I may apply for financial aid at only one institution.
- I am enrolled in a degree-seeking program at UT and agree to only enroll in courses that are transferable and applicable to my degree program. I understand that I am required to meet with my academic advisor at UT to confirm that all courses taken at the host institution will transfer and are applicable to my degree program.
- I understand that I will receive financial aid from UT and all financial aid records for this period will be maintained at the UT Office of Student Financial Aid.
- I understand that certain financial aid programs will not recognize consortium credit hours to establish eligibility for disbursement.
- I understand that financial aid will be credited to my student account at UT on the scheduled disbursement date of the term and will be used first to pay UT tuition and required fees. Eligible refundable financial aid that creates an excess financial aid balance will be refunded to me.
- I understand that it is my responsibility to pay the host institution for any balance owed and that I am subject to their payment timetable.
- I will notify both institutions immediately of any changes in my enrollment status at either institution.
- I will transfer credit hours taken at the host institution to UT within 15 days after the date the term ends. I understand that if this is not done, financial aid for subsequent periods of enrollment may be held until the official transcript has been received and reviewed.

I authorize the host and home institutions to release enrollment, financial, and academic information to the Financial Aid and Registrar's Offices. I understand that this release also applies to other offices on a "need to know" basis. I certify that I have read and understand the procedures and requirements of the consortium agreement. I agree to comply with these procedures and requirements and understand that noncompliance will result in a loss of financial aid.

Student Signature

Date

Student Rocket Number

Student Last Name

Student First Name



**2023-24
CONSORTIUM AGREEMENT: PART II
HOST INSTITUTION FINANCIAL AID CERTIFICATION**

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TO BE COMPLETED/SIGNED BY HOST INSTITUTION FINANCIAL AID OFFICE:

Host institution name:			
Term student is enrolled:	Enrollment dates:	FROM:	TO:
Number of hours enrolled:	Total Cost of Attendance:		
			\$
Tuition/fees:	Room/board:		
\$			\$
Books/supplies:	Transportation:		
\$			\$
Personal/miscellaneous:	Other:		
\$			\$

Under this agreement, the host institution agrees to:

- Certify that the student has been accepted for enrollment in an academic program that meets Title IV financial aid eligibility requirements.
- Attach a copy of the student’s current registration and invoice to this form.
- Not award any financial aid to the student in this agreement.
- Provide school-specific consumer information to the student.
- Notify UT if the student fails to enroll or withdraws from school.
- Provide UT (upon request) with confirmation of the student’s course participation.
- Provide UT with the student’s official academic transcript upon completion of the agreement period.

This signed agreement acts as a release form for enrollment, financial, and academic information for this student. Your signature verifies that the student is registered for classes and that all information above is accurate.

Host Institution Financial Aid Signature

Date

Printed Name

Telephone Number

Printed Title

Fax Number

E-mail Address

**TO RETURN
THIS FORM:**

Upload to: *myUT.toledo.edu*
"My Financial Aid"
"Secure Financial Aid Document Upload"

In person: Rocket Solution Central
1200 Rocket Hall

Mail to: The University of Toledo
Office of Student Financial Aid
2801 West Bancroft Street, Mail Stop 314
Toledo, OH 43606-3390

Fax to: 419.530.5835

Questions? Contact Rocket Solution Central at 419.530.8700.

Student Rocket Number

Student Last Name

Student First Name



2023-24
CONSORTIUM AGREEMENT: PART III
UT ACADEMIC ADVISOR CERTIFICATION

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TO BE COMPLETED/SIGNED BY UT ACADEMIC ADVISOR OR ASSOCIATE DEAN:

A consortium agreement allows a student to receive financial aid while concurrently enrolled for courses at UT (home institution) and another institution (host institution). Eligibility for financial aid is based on the total credit hours attempted at both institutions for the term, provided the coursework is transferable and applicable to the student's degree program.

Table with 4 columns: Host Institution Course Name and Number, Credit Hours, UT Equivalency Course Name and Number, Program Usage*. Title: COURSES ACCEPTED FOR THE STUDENT'S DEGREE PROGRAM

*S = substitution, E = equivalent, R = required elective

I have reviewed the degree program and the above courses will be accepted for transfer and will count toward the student's degree requirements at UT (major or required electives).

Academic Advisor/Associate Dean Signature

Date

Printed Name

Department

Telephone Number

CONSORTIUM AGREEMENT: PART IV
HOME INSTITUTION FINANCIAL AID CERTIFICATION

TO BE COMPLETED/SIGNED BY UT OFFICE OF STUDENT FINANCIAL AID:

Student's Degree Program

Student's Combined Term Credits

Home Institution Financial Aid Signature

Date

TO RETURN THIS FORM: Upload to: myUT.utoledo.edu "My Financial Aid" "Secure Financial Aid Document Upload" Mail to: The University of Toledo Office of Student Financial Aid 2801 West Bancroft Street, Mail Stop 314 Toledo, OH 43606-3390

In person: Rocket Solution Central 1200 Rocket Hall Fax to: 419.530.5835

Questions? Contact Rocket Solution Central at 419.530.8700.