

Consortium / Contractual Agreement 2023-2024

University of Rochester Financial Aid Office

It is agreed and understood that the purpose of this document, pursuant to regulations set forth by the Higher Education Act of 1965, as amended, is to enable the following University of Rochester student to take courses at

_____ (Host Institution) which directly apply to the pursuit of a degree program at the University of Rochester (Home Institution) and to receive Federal Title IV financial assistance, based on eligibility, toward the cost of attendance at the Host Institution. The student is ultimately responsible for timely execution of this agreement and payment to both the host and home institutions of any charges related to their enrollment.

In the event that the disbursement of my financial aid results in a credit balance on my University of Rochester student account, I authorize the University of Rochester Bursar's Office to forward proceeds from my financial aid to the host institution's Bursar's Office.

Print Student's Legal Name

UR Student ID Number

Signature

Date

SECTION 1 - *This section is to be completed by the student. Please be sure to obtain the signature of the Dean of the College or attach a copy of your course approval form with all appropriate signatures.*

A) Academic Information

Please complete the following grid and signatures below, or attach a copy of your course approval form. If you attach a copy of your course approval form, you must still list the dates of your enrollment below. If you don't provide this information, the processing of your Consortium/Contractual Agreement will be delayed.

Course/Program Name	Credit Hours	Dates of Enrollment

Upon satisfactory completion (a grade of C or better), these courses have been approved to fulfill degree requirements at the University of Rochester. The student's enrollment status during the term indicated above will be considered when determining satisfactory academic progress in subsequent years.

CCAS Advisor (University of Rochester)

Date Signed

SECTION 2 - *This section is to be completed by the consortium/contractual (Host) institution.*

Host institution name and address:

Registrar's name and phone number:

(_____)_____

Bursar's Office Contact

Bursar's Office Address

Phone Number

Cost of Attendance (Host Institution)	Tuition & Fees	\$	Transportation	\$
	Room & Board	\$		
	Books & Supplies	\$	Other	\$

Financial Aid provided by Host Institution	\$
Length of enrollment period listed above	_____quarter _____semester
Student's enrollment status	____full time ____3/4 time ____1/2 time ____other

SECTION 3 – *To be completed by University of Rochester (Home Institution) Financial Aid Office.*

Anticipated Financial Aid	Federal Pell Grant	\$	Federal Parent PLUS Loan	\$
	Federal Direct Subsidized Loan	\$		
	Federal Direct Unsubsidized Loan	\$	Alternative Loan	\$

Financial Aid provided by Home Institution	\$
Institutional Charges due to the Home Institution	\$
Anticipated Payment to Host Institution	\$

SECTION 4 - *Both the home and the Host institution must sign off on this section.*

The Host institution certifies that the student has been accepted for enrollment in the courses or program listed in Section 1 and that the dates of enrollment are correct.

The Host institution agrees not to pay the student a Federal Pell Grant and/or campus based funds, or process a Federal Stafford or PLUS loan during the enrollment period listed in Section 1. Further, the Host institution agrees to notify the University of Rochester if the student withdraws from the program or courses before their conclusion. Satisfactory conclusion of the program will be evidenced by an academic transcript upon request of the student.

The University of Rochester agrees to provide payment to the Host institution, if the student is eligible, under the Federal Pell Grant and Title IV loan programs for the appropriate period of time. Payment will be made in such a manner as agreed upon between the University of Rochester and the Host institution.

University of Rochester

Counselor Signature Date

Name

Title

Phone/email address

Host Institution

Signature Date

Name

Title

Phone/email address

Consortium / Contractual Agreement Instructions 2023-2024

University of Rochester Financial Aid Office

PURPOSE

A consortium/contractual agreement is required each time a student participates in a program or attends courses at another institution, but will remain a matriculated student at UR, receiving financial assistance. University assistance cannot be used for courses at another institution; the most common type of aid processed under a consortium/contractual agreement is loans.

STUDENT CHECKLIST

There are many steps involved in completing a consortium/contractual agreement; **do not wait until the last minute to begin this process.** The steps to complete the agreement are as follows:

- ☐ Complete section 1 with your information. Attach a course approval form. Be sure to obtain the Dean of the College's signature on Section 1A.
- ☐ Forward the agreement to the Host institution; we advise that you make a copy of the agreement at each stage to avoid redoing the document if it is lost.
- ☐ The Host institution completes section 2 and their portion of section 4.
- ☐ Forward the agreement to the University of Rochester's Financial Aid Office for review and completion of section 3 and 4.
- ☐ Once the completed agreement has been received and reviewed by the Financial Aid Office, we can determine your eligibility for financial assistance and notify the Bursar's Office of where to send any potential refunds.
- ☐ **You must forward a copy of your bill from the host institution to the University of Rochester Bursar's Office email address (bursar@admin.rochester.edu). Be sure to indicate in the e-mail that this is regarding your consortium agreement.**

IMPORTANT POINTS

- Financial Aid Counselors are available to discuss your plans and how your future aid eligibility may be affected by your plans. All students are strongly encouraged to meet with their Financial Aid counselor prior to completing a consortium/contractual agreement.
- The Financial Aid Office will verify your enrollment with the Host institution before applying any aid to your account. This verification cannot take place until the class or program is in session.
- You should be prepared to pay the Host institution's tuition bill up front, if required. The Bursar's Office will not be able to refund any financial assistance until the beginning of the term, when your registration at the Host institution has been verified. If you have already paid the Host institution's tuition bill, the Host institution will refund you directly when they receive payment from the University of Rochester.

UR OFFICE INFORMATION

	Financial Aid Office	Bursar's Office
Website	www.enrollment.rochester.edu/financial-aid	https://www.rochester.edu/adminfinance/bursar
Phone	585-275-3226	585-275-3931
Email	finaid@rochester.edu	bursar@admin.rochester.edu
Mail	Financial Aid Office, Box 270261, Rochester, NY 14627	Bursar's Office, Box 270037, 330 Meliora Hall, Rochester, NY, 14627