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). Your eligibility for financial aid will be based on the total credit hours attempted at both institutions for the term of concurrent enrollment. 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. (Exception: LCCC participants)

**DEADLINES:** Agreements must be received by the Office of Student Financial Aid (OSFA) **TWO weeks prior** to classes starting at UT for the consortium term.

<table>
<thead>
<tr>
<th>Term you will be attending the host school:</th>
<th>Consortium must be received in OSFA by:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summer</td>
<td>May 2, 2016</td>
</tr>
<tr>
<td>Fall</td>
<td>August 8, 2016</td>
</tr>
<tr>
<td>Spring</td>
<td>December 26, 2016</td>
</tr>
</tbody>
</table>

It may take as long as two weeks to process your consortium agreement. 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 institutions reserve the right to not participate in a consortium agreement for any reason.
- You must be concurrently enrolled at the University of Toledo (for at least one credit hour) and the Host school to be eligible for federal aid.
- 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 re-admit status.
- The consortium process (home or host status) is limited to no more than three terms. Even 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, submission of a completed Consortium Agreement, and the start date of your consortium term.
- Any fees due to UT will be paid first from your financial aid. Then any excess financial aid will be refunded to you.
- You must be registered and attending at least 6 credit hours at UT to meet the requirements for federal campus-based aid programs such as Federal Perkins Loan, Federal Supplemental and Educational Opportunity Grant (FSEOG) and Federal Work-Study (FWS) and at least 12 credit hours at UT to meet the requirements for most institutional scholarships. Although, please review your scholarship terms and conditions which are available at [www.utoledo.edu/financialaid/scholarships](http://www.utoledo.edu/financialaid/scholarships) to be sure.

**PAYING FOR FEES AT YOUR HOST INSTITUTION:**

- Use excess aid refunded to you from UT to pay for your courses 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 aid can be disbursed to your UT account.
- You may be required to pay the host institution prior to excess aid being refunded to you from UT.
- Sign up for direct deposit through the UT 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 for your first term of enrollment at UT including transfer students or transfer re-admit students.
- 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 Admissions at UT. Financial aid for subsequent periods of enrollment will not be released until the official transcript has been received and reviewed.
- Participation in future consortiums will be determined after review of the term transcripts from both UT and the host institution.
- You are required to notify both institutions if you drop or withdraw from any or all of your courses.
- Credit hours taken at both institutions will be used to determine your Satisfactory Academic Progress (SAP) as a financial aid recipient at UT. Please review the SAP policy on our website at http://www.utoledo.edu/financialaid/forms.html. Zero credit hours earned at either institution will result in immediate suspension of federal financial aid.
- Consortiums are limited to three semesters.

WHAT YOU NEED TO DO:

- File a 2016-2017 FAFSA if you intend to use any federal or state aid for your consortium term.
- Concurrently enroll at UT for at least one class to be eligible for financial aid.
- Print a copy of your class registration and fee statement from your host institution.
- Complete Part I: STUDENT INFORMATION.
- Provide your host institution’s financial aid office with Part II for completion by them. We will accept a faxed copy or imaged copy of this section but it is your responsibility to follow through with the host institution to confirm it was sent to UT.
- Provide your academic advisor with Part III for completion. Return it with other sections of your consortium agreement.
- Make a copy of all parts for your records before submitting the paperwork to the appropriate office for processing.
- Submit completed Parts I,II, and III and copies of host institution’s class registration and fee statement to:

  In person: 
  UT Rocket Solution Central Office (RSC) 
  Room 1200, Rocket Hall

  Or mail it to:
  Office of Student Financial Aid 
  The University of Toledo
  2801 W. Bancroft St., MS 314
  Toledo, OH 43606-3390

UT FINANCIAL AID OFFICE 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.
If you are newly admitted to UT or are a transfer or transfer re-admit student you cannot participate in a consortium your first term back at UT. Consortium agreements are limited to three semesters. 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:

<table>
<thead>
<tr>
<th>Your name:</th>
<th>Your Rocket ID:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Street address:</td>
<td>City: State: Zip:</td>
</tr>
<tr>
<td>Your phone number:</td>
<td>Your Major/Program:</td>
</tr>
<tr>
<td>Host institution name:</td>
<td>Cumulative number of credit hours completed at UT:</td>
</tr>
<tr>
<td>Host term start date:</td>
<td>Host term end date:</td>
</tr>
<tr>
<td>Number of credit hours to be taken during consortium term at host institution:</td>
<td>Number of credit hours to be taken during consortium term at UT:</td>
</tr>
</tbody>
</table>

Registered Courses at Host Institution:

<table>
<thead>
<tr>
<th>Host Subject &amp; Course Prefix Number</th>
<th>Course Title/Name</th>
<th>Credit Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

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 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/or 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 Office of Student Financial Aid at UT.
- 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 the Office of Student Financial Aid at UT 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, all future financial aid at UT will be canceled.

I authorize the host and home institutions to release enrollment, financial, and academic information to the Financial Aid and Registrar’s Offices. 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 understand that noncompliance will result in a loss of financial aid.

Student Signature ___________________________ Date ___________________________

CONSORT 3 05/12/16 rz
**CONSORTIUM AGREEMENT: PART II**

TO BE COMPLETED BY HOST INSTITUTION FINANCIAL AID OFFICE

<table>
<thead>
<tr>
<th>Host institution Name:</th>
<th>Enrollment Dates: FROM:</th>
<th>TO:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Term student is enrolled:</td>
<td>Total Cost of Attendance: $</td>
<td></td>
</tr>
<tr>
<td>Number of hours enrolled:</td>
<td>Tuition/Fees $</td>
<td></td>
</tr>
<tr>
<td>Room/Board $</td>
<td></td>
<td></td>
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<tr>
<td>Room/Board $</td>
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<tr>
<td>Books/Supplies $</td>
<td></td>
<td></td>
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<tr>
<td>Transportation $</td>
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<tr>
<td>Personal/Misc. $</td>
<td></td>
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</tr>
<tr>
<td>Other $</td>
<td></td>
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</tbody>
</table>

Under this agreement, the host institution agrees to:

- Certify 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 your school.
- Provide UT with an official academic transcript upon completion of the agreement period.

This signed agreement acts as a release form for enrollment, financial, and academic information on 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 ____________________________
CONSORTIUM AGREEMENT: PART III
UT ACADEMIC ADVISOR CERTIFICATION

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 applicable to the student’s degree program.

<table>
<thead>
<tr>
<th>Host Institution Course Name and Number</th>
<th>Credit Hours</th>
<th>UT Equivalency Course Name and Number</th>
<th>Program Usage*</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

* 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

PART IV: HOME INSTITUTION FINANCIAL AID CERTIFICATION
(Completed by UT’s Office of Student Financial Aid)

<table>
<thead>
<tr>
<th>Student’s Degree Program</th>
<th>Student’s Combined Term Credits</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Home Institution Financial Aid Signature</th>
<th>Date</th>
</tr>
</thead>
</table>

Please return all pages to:
The University of Toledo
Office of Student Financial Aid
2801 W. Bancroft St., Mail Stop 314
Toledo, OH  43606-3390

Questions? Contact Rocket Solution Central at 419.530.8700 · Email: utfinaid@utoledo.edu

COMPLETE WITH BLACK INK ONLY. ELECTRONIC SIGNATURES ARE NOT ACCEPTABLE