

Please note: All consortiums are evaluated and approved at the discretion and final decision of the Financial Aid Director of the University of Montana.

I, _____, SS# _____ - _____ - _____, Phone # _____ request that a consortium/ contractual agreement be made on my behalf for _____ semester, 20_____.

STEP 1. Host Institution and address:

AND

Home Institution

The University of Montana
Financial Aid Office, Lommasson 218
Missoula, MT 59812
Phone: (406) 243-5373
Fax: (406) 243-4930

Classes to be taken at the Host Institution:

<u>Class #</u>	<u>Class Name</u>	<u>Credits</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

UM Credits (home):

If enrolling at Host and also at **Home** _____
enter total UM credits.

➤ I certify the above-named student has been approved for course work at the Host School and that the credits will be accepted toward the student's degree at The University of Montana.

UM Dean's or Chair's Signature **Printed Name/Title** **Date** **Telephone**

➤ I certify that I understand and agree to comply with all terms and conditions stated on the reverse side of this form and that the information provided on this form is true and complete to the best of my knowledge.

Student's Signature **Student's UM ID#** **Date**

STEP 2. Completed by Financial Aid at Host Institution

Semester or Quarter	_____
Tuition & Fees	\$ _____
Books & Supplies	\$ _____
Room & Board	\$ _____
Other Expenses	\$ _____
Total	\$ _____

Period of Enrollment:
From: _____
To: _____
Total Credits at Host: _____
Total of any Non-Federal Title IV aid from Host: \$ _____

Host Institution's Signature Printed Name & Title

Date Telephone

1. The Host and UM agree to enter into an agreement as allowed by Part 668.19, Student Assistance Gen. Provisions.
2. The Host institution agrees NOT to provide federal TITLE IV financial assistance to the student for the term listed.
3. In case the student withdraws from school, the Host institution agrees to promptly notify The University of Montana in writing.
4. The Host institution agrees to disburse all aid, including any refund to the student, provided by UM upon verification of enrollment if requested to do so.

STEP 3. U of MT Section

For UM FAO use only;
(Student, leave blank)
Total Credits _____ Semester
Tuition & Fees \$ _____
Books & Supplies \$ _____
Room & Board \$ _____
Other Expenses \$ _____
Total \$ _____

UM Financial Aid Signature

Date

RHACOMM	_____
RBAABUD	_____
ROASTAT	_____
UGASTDN	_____
SFAREGS	_____
RPAAWRD	_____

Student Certification minimum requirements:

1. Consortium will NOT be offered unless concurrently enrolled or until a minimum of one semester, with satisfactory academic progress, has been attained at The University of Montana.
2. During Fall or Spring Semester (not Summer) a consortium will not be granted unless the term at the host is a minimum of 15 weeks. In some cases the student may choose to enroll at UM concurrently to satisfy this requirement.
3. I understand that either Host or Home Institution may decline to participate in this consortium agreement.
4. I understand that I must be fully accepted in a certificate, undergraduate or graduate degree program at The University of Montana and that courses I am taking at the Host Institution must be transferable and apply toward my degree at the UM.
5. I understand that I must submit proof of my registration at the Host school before any Title IV Financial aid will be disbursed from The University of Montana.
6. I understand that it is my responsibility to arrange for, or pay for, costs at the Host Institution until my financial aid can be released from The University of Montana.
7. Aid can be disbursed only after I have an official award and verification of enrollment, and no earlier than the first day of classes based upon The University of Montana's calendar.
8. I understand that disbursement of my financial aid will be released directly to me and payments to the Host school are my responsibility..
9. I understand that it is my responsibility to make arrangements to transfer credits earned from the Host Institution to The University of Montana at the end of the Host Institution's term. A transcript from the Host Institution is required whether or not I complete or pass the course(s).
10. I understand that financial aid for future terms will not be released until transfer credits have been received and satisfactory progress has been met.
11. I understand repayment of financial aid, including loans, disbursed by The University of Montana may be required if I (1) drop during the refund period, (2) withdraw (officially or unofficially), or (3) credits are not transferred to The University of Montana.
12. By my signature on the front of this form, I authorize the Host Institution listed to release enrollment, financial and academic information to The University of Montana Financial Aid Office.

cc: Student's file
Consortium book
Business Services



**FINANCIAL AID OFFICE
MISSOULA, MT**

CONSORTIUM AGREEMENT PROCESS

For students receiving financial aid from The University of Montana and attending another institution.

- Step 1. List all courses to be taken in box one on the front of the Consortium Agreement. List class number, class name and number of credits for each course. If you are going to be enrolled at UM this semester at the same time, enter the total UM credits on the right side of Box 1.
- Step 2. Obtain your Dean or Department Chair's signature to ensure your classes are valid toward your degree at UM.
- Step 3. Sign and date the bottom of Box 1 only after understanding and agreeing to all of the conditions of the Student Certification section and the consortium/contract agreement.
- Step 4. Send the consortium to the Host Institution to complete box two. **Do not return to UM Financial Aid until everything is completed except Box 3.**
- Step 5. When boxes one and two are completed, make sure the form is returned to The University of Montana Financial Aid Office for review and signature as the home school. Please allow several weeks for the consortium to be validated and financial aid awarded. Distribution of financial aid at the start of each UM semester for Consortiums varies on several factors:
- Preferred method is for you to pay at the Host school and send a paid receipt to The University of Montana Financial Aid Office. The University of Montana Business Services will then release the check directly to you.
 - If you must use financial aid to pay the Host school, you must coordinate payment between Business Services and the Host school.
- Step 6. Upon completion of Step 5, and our completion of Box 3, we will notify the Host Institute of the final cost of attendance.

NOTE: You may be required to supply the host institution with your financial award notice from the home school.

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5. I understand that I must submit proof of my registration at the Host school before any Title IV Financial aid will be disbursed from The University of Montana.
6. I understand that it is my responsibility to arrange for, or pay for costs at the Host Institution, until my financial aid can be released from The University of Montana.
7. Aid can be disbursed only after I have an official award and verification of enrollment, and no earlier than the first day of classes based upon The University of Montana's calendar.
8. I understand that disbursement of my financial aid may be released directly to me if I have proven that I have paid with personal funds at the Host school, otherwise UM may choose to send my aid directly to the Host school for payment.
9. I understand that it is my responsibility to make arrangements to transfer credits earned from the Host Institution to The University of Montana at the end of the Host Institution's term. A transcript from the Host Institution is required whether or not I complete or pass the course(s).
10. I understand that financial aid for future terms will not be released until transfer credits have been received and satisfactory progress has been met.
11. I understand repayment of financial aid, including loans, disbursed by The University of Montana may be required if I (1) drop during the refund period, (2) withdraw (officially or unofficially), or (3) credits are not transferred to The University of Montana.
12. By my signature on the front of this form, I authorize the Host Institution listed to release enrollment, financial and academic information to The University of Montana Financial Aid Office.

STUDENT'S COPY: KEEP FOR YOUR RECORDS