

What is a Consortium Agreement?

A Consortium Agreement is a binding agreement between eligible schools which enables University of Pennsylvania students to receive various types of aid from University of Pennsylvania while being enrolled as a visiting student at another institution. University of Pennsylvania remains your Home Institution while the visiting school is referred to as the Host Institution. All components of the Consortium Agreement must be completed in full before the agreement will be processed and not all Host Institutions will participate. *If the Host Institution does not participate, University of Pennsylvania cannot process financial aid for the semester during which the student attends the Host Institution.*

When a University of Pennsylvania student plans to study as a visiting or non-matriculating student at another college or university for summer sessions or for a semester or two during the academic year, the student may be entitled to receive certain types of financial aid. Generally, if the institution the student plans to attend enters into a Consortium Agreement with University of Pennsylvania, the student may be eligible for the same federal financial aid they would be entitled to if enrolled at Penn for the same period. Consortium Agreements may be used for both domestic and international programs.

Instructions:

1. Student must confirm that the Host Institution will participate in a consortium agreement. Educational institutions are not required to participate in such an agreement. *If the Host Institution does not participate, University of Pennsylvania cannot process financial aid for the session(s)/semester during which the student attends the Host Institution.*
2. Students must have their Academic Advisor complete the Advisor section of the form and confirm the credit earned through the program listed on the agreement will be accepted toward the student's degree at the University of Pennsylvania, that the student will be full time, and completing normal academic progress.
3. Students must have the Host Institution complete the University of Pennsylvania Consortium Agreement and return it to the Student Financial Services (Room 100, Franklin Building). It is important to check with the Host Institution for processing time requirements to ensure the agreement is sent to them in enough time.

Process:

Students must have the separate academic permission form approved and completed by their school's academic advising unit before financial aid will be reviewed and processed.

Check with the Host Institution for all billing schedules. If payment is due to the Host Institution prior to the financial aid disbursing at University of Pennsylvania, the student is obligated to make appropriate arrangements with the Host Institution for payment. Be aware that financial aid will be disbursed based on University of Pennsylvania's disbursement schedule. Financial aid cannot be disbursed to a student account if there are missing financial aid requirements; therefore be sure to review Penn In Touch to confirm all financial aid requirements have been satisfied. Financial aid cannot be disbursed to a student account if a student has a prior term balance; balances must be paid in full prior to participating in the consortium agreement.

Financial aid funding will be applied to the Student Account, any federal excess funds will be paid to the student, and the student will be obligated to use funds to pay the Host Institution directly.

NOTE: Host Institutions are required to contact University of Pennsylvania Student Financial Services (SFS) if there are any changes to the student's enrollment after completing this Consortium Agreement due to the impact enrollment has on financial aid eligibility.



University of Pennsylvania Student Consortium
Agreement Academic Year 2024 – 2025

3451 Walnut St, Philadelphia, PA 19104 • (P) 215.898.1988 • (F) 215.573.5428 • sfsmail@pobox.upenn.edu

This form provides the legal basis required by the U.S. government for Penn to process Federal/State financial aid for a student matriculated at Penn but studying at another university or college for a summer session or one or more academic semesters.

To be completed by the student:

Student's Name: _____ Penn Id: _____

Host Institution: _____

Program Enrollment Dates: _____
Begin Date (mm/dd/yyyy) End Date (mm/dd/yyyy)

The Host Institution agrees to provide an academic transcript for the above student to University of Pennsylvania at the end of their program of study upon the written request of the student. The Host further agrees to notify University of Pennsylvania if the student withdraws or changes his/her enrollment status. University of Pennsylvania agrees to accept previously approved satisfactory work toward completion of University of Pennsylvania degree requirements and agrees to send eligible aid directly to the Host Institution.

To be completed by the Student's Academic Advisor:

I certify that the credit earned through the program listed above will be accepted toward the student's degree at the University of Pennsylvania, that the student will be full time, and completing normal academic progress.

Penn School Advisor Signature Date School/Program

Printed Name: _____ Title: _____

Telephone: _____ Fax: _____ Email: _____

To be completed by the Host Institution:

- University of Pennsylvania sends student aid directly to the student – they will be responsible to pay the Host Institution directly.
Program Enrollment Dates: _____
Begin Date (mm/dd/yyyy) End Date (mm/dd/yyyy)

- Student Enrollment Status/Number of Credits: (Financial aid may be adjusted based on enrollment status and tuition changes.)

Table with 2 columns: Fall 2024 Semester (# of credits), Spring 2025 Semester (# of credits), Summer One 2025 (# of credits), Summer Two 2025 (# of credits). Includes a section for full-time and at least half-time enrollment status.

- Please indicate in the appropriate space the Student Expenses at the Host Institution for all enrolled periods: (Please report expenses in U.S. dollars and estimate expenses not directly billed by your institution.) Worksheets from host institutions with various programs are not acceptable.

Table for Student Expenses: Tuition and Fees, Room and Board, Books and Supplies, Miscellaneous, Total Cost for the period of enrollment.

My signature indicates I have the authority to verify the student listed above is enrolled at the HOST school. As the HOST school, we will not process financial aid for this student during semester(s) indicated above.

- Signature for the Host Institution Financial Aid Office Representative: _____ Date: _____

Printed Name: _____ Title: _____

Host Institution Name & Address: _____

Telephone: _____ Fax: _____ Email: _____