



# Ponce Health Sciences University

## Student Financial Aid Manual

### 2023-2024



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# PHSU STUDENT FINANCIAL AID MANUAL

## INTRODUCTION

The Office of Student Financial Aid (OSFA) is committed to providing a high level of service and support to the students of PHSU. By providing this support we allow students to achieve their educational goals through the removal of financial barriers or obstacles on their road toward attending our institution to complete their professional career goals.

It is the mission of the Office of Student Financial Aid (OSFA) to provide the financial resources for students to attend PHSU and in doing so exhibit the highest level of quality and expertise in the service we provide.

This Financial Aid Student Manual is an important tool for maintaining an overview of the services and procedures relevant to OSFA and the financial aid awarding procedures.

The staff of the Office of Student Financial Aid is available to assist you and answer any questions that you may have regarding your money management. Technical assistance is provided in the completion and processing of all relevant financial aid applications, including loan applications.

**Please feel free to visit our office in the one Stop Service area at PHSU East Campus, or you can call us at 787-840-2575 ext. 5668, 4734, 4836, 4736 or send us an e-mail to: [psmfinstu@psm.edu](mailto:psmfinstu@psm.edu)**

## SERVICES OF THE OFFICE OF STUDENT FINANCIAL AID

The composition of the OSFA consists of the Executive Director of Financial Aid, the Associate Director of Financial Aid, one Financial Aid Specialist, two Financial Aid Officers, and one Administrative Assistant. Working as a team, we offer the following basic services, as well as other functions related to administrative responsibilities of the department:

- Provide information about financial aid programs.
- Application and verification process of Federal Application for Student Aid (FAFSA) and loan applications.
- Entrance counseling sessions for new borrowers.
- Exit counseling sessions for students graduating or withdrawing from Ponce Health Sciences University.
- Technical assistance in the completion of all forms/applications.

## GENERAL INFORMATION AND POLICIES

### PRIVACY OF INFORMATION

All documents submitted on behalf of a financial aid applicant are strictly confidential. Without the written consent of the applicant, no information is released to anyone, including faculty members and/or program directors. If parents request non-disclosures, a student does not have accessibility to the documents submitted by the parents. Ponce Health Sciences University does have the right to disclose information relevant to the determination of the financial aid for which a student has applied or received and the conditions set forth by the specific aid program. Disclosure will be done according to school policy, therefore, please refer to the PHSU Student Policy Manual.

## RIGHTS AND RESPONSIBILITIES OF A STUDENT

In accepting a financial aid award from PHSU you acknowledge certain rights and responsibilities.

You have the right to:

- Know what financial aid assistance is available, including all federal, state, and institutional aid programs and what policies or regulations govern these programs.
- Know the deadlines for submission of applications for aid and the procedures to be followed.
- Know the cost of attendance at Ponce Health Sciences University and the refund policy.
- Know how the office determines your financial need, including the determination and amount of the expected family contribution.
- Know the source and amount of each type of financial aid offered to you.
- Know the method by which aid is determined and disbursed or applied to your account.
- Apply for additional assistance when increased financial need can be demonstrated and funds are available.
- Expect and receive complete confidentiality about financial aid awarded by our office.

You have the responsibility to:

- Complete all application forms accurately and thoroughly. Comply with enrollment requirements related to financial aid eligibility. You must be enrolled at least half-time to receive aid consideration, but you should be aware that some programs require full-time enrollment (see specific program descriptions for more information).
- Know and comply with priority dates for application for aid in order to receive consideration for all programs.
- Know and comply with the University's refund procedures.
- Read and understand all information sent to you and all forms you are asked to sign, keeping copies for your records.
- Accept responsibility for all agreements you sign.
- Use funds awarded to you solely for educational expenses incurred while attending Ponce Health Sciences University.
- Repay all educational loans according to the repayment provisions agreed upon at the time the loan was accepted and the promissory note signed.
- Return in a timely manner all corrections, additional information, or documentation requested by our office or the agency to which you submitted your application.
- Report any change in your financial situation from that which you reported on the Free Application for Federal Student Aid (FAFSA).
- Report any wages, loans, grants, or scholarships received from sources external to the university for and during the academic year in progress.
- Know and comply with the policies for Satisfactory Academic Progress.
- Maintain continuous access to the PHSU email, [psmfinstu@psm.edu](mailto:psmfinstu@psm.edu), which is the official intercommunication link between the students and the Office of Student Financial Aid. If there might be any objection of this email process inform

the Financial Aid of the reasons and the prime means of immediate communication with you.

## **FALSIFICATION OF DATA**

Falsification of any part of the financial aid application may result in denial, withdrawal, and/or demand for repayment of financial aid funds disbursed. Since the Ponce Health Sciences University utilizes the “Free Application for Federal Student Aid (FAFSA)” for establishing student aid eligibility, any misrepresentation may be subjected to sanctions under provisions of the United States Criminal Code.

## **NEW ADMISSIONS/TRANSFERS**

The Office of Admissions forwards the list of those students that have been accepted, at which time a financial aid informational packet is sent to the new student. Transfer students will also receive financial aid informational packets once they have been accepted.

## **RETURNING STUDENTS**

Those students returning to Ponce Health Sciences University for a different award year must submit all the documentation that is required for the award year he or she is seeking financial aid for.

## **FOREIGN STUDENTS**

A copy of the U.S. citizenship documents or Permanent Resident Visa is required of all foreign students before obtaining scholarships, grants, and/or loans.

Foreign students attending Ponce Health Sciences University and wishing to apply for private loan funds must provide documentation of the Immigration Office and have a co-signer who meets all the required criteria of the lending institution.



## LEAVE OF ABSENCE

This is a function of the Registrar's Office. The purpose of this policy is to establish the definition, policy and process for students requesting a Leave of Absence at Ponce Health Sciences university.

### *Scope*

This policy applies to all students at PHSU. Authority to review and approve a leave of absence is held with the Registrar, Financial Aid Director/Manager, and Chancellor.

### *Definitions*

Leave of Absence: an authorized temporary interruption of a student's program of studies due to documented extenuating personal circumstances or medical reasons.

### *Policy*

A student must request from the Registrar's office a LOA at least 30 days prior to the LOA commencement date, unless medical circumstances require immediate authorization (e.g., automobile accident). A personal or medical leave may be authorized when a student is experiencing compelling personal or medical circumstances that are temporarily affecting his/her academic progress. The student must submit a physician's note certifying the medical problem or reason. The total time of leave cannot exceed 180 days within a 12-month period. A student who fails to return after an authorized LOA will be academically withdrawn and a R2T4 calculation will be performed and subsequently an exit counseling instructional letter will be sent to the student.

### *FA Applicability*

The student on an approved leave of absence will be eligible for an "In-School Deferment" for delaying payment of educational loans. A student who takes an unapproved leave of absence is not given an "In-School Deferment". The student that does not return on the specified termination date of the absence period, will lose the "In-School Deferment" status and the six month "grace period" will begin retroactively as of the original first day of the leave of absence. In addition, a USDE Title IV refund calculation will be performed and any required funds will be returned to the federal government by the institution and/or the student.

## REPEATING A COURSE

Students repeating a course for improving the grade and maintenance satisfactory Academic Progress within the specific time frame, according to PHSU policies will be given just one opportunity for financial aid for that course. Please refer to the PHSU Student Manual for specific information. If the course is failed or non-passed, the student will be eligible to repeat the course with financial aid, according to the maximum number of repeats permitted by academic policies.

## STUDENTS CONVICTED OF POSEION OR SALES OR DRUGS

In December 2020, the FAFSA Simplification Act was enacted into law as part of the Consolidated Appropriations Act of 2021. The FAFSA Simplification Act amended Section 484 of the Higher Education Act of 1965 (HEA), making several important changes to student eligibility criteria. One of these is the elimination of the prohibition on receiving Title IV aid for students with drug-related convictions.

For the 2023-2024 award year, the Selective Service and drug conviction questions will remain on the FAFSA. However, having a drug conviction while receiving Title IV aid will no longer impact a student's Title IV aid eligibility, and a student who has a drug conviction may be eligible to receive Title IV aid if they meet all other eligibility criteria.

Comment codes 53, 54, 56 and/or 58 will still be included in the ISIR for the 2023-2024 award year, but the Department of Education will include language in the comment codes indicating that no further action needs to be taken by the student or school, and such students are eligible for Title IV aid if they meet all other eligibility requirements.

Please, refer to the Dear Colleague Letter GEN-21-04 for more information about the implementation of these changes.

## SATISFACTORY ACADEMIC PROGRESS

The institution of higher education participants of federal programs of student assistance programs, must have Satisfactory Academic Progress standards. The standards for federal aid recipients must be at least as strict as those standards set for students in the same programs of study who do not receive federal aid.

## EVALUATION PERIOD

According to federal regulations the school must determine equal time segments, or evaluation periods, to review a student's academic progress. For programs of one year or less, the school must measure SAP at the end of each payment period; for all other programs, the school must measure SAP, at a least, on an annual basis. (Federal Regulation: 34 CFR 668.34 (a)(3).

The Administration of PHSU maintains the review of SAP according to federal regulations: programs of a year or less are reviewed by period of enrollment. The Satisfactory Academic Progress of a student might be reviewed as required by any administrative or programmatic sanction; in addition, as required by any funding sources that provides financial aid resources for eligible PHSU students.

## **GRADUATE PROFESSIONAL STUDENTS**

All full-time and part-time students awarded financial aid must comply with the PHSU SAP policy. Although for some programs the SAP is evaluated annually at the end of the Academic Year, the student must maintain a good academic standing per period of studies (semester, quarter, trimester) to ensure a SAP that will insure completion of their program degree goal with the award of financial assistance.

## ***STUDENTS NOT MEETING THE SAP REQUIREMENTS MAY LOSE THEIR FINANCIAL AID ELIGIBILITY***

### **STANDARD REQUIREMENTS**

- I. Cumulative Grade point Average (GPA) - Maintain a GPA as required by the program.
- II. Minimum Pace of Degree Progress (PACE) - The students must maintain the successful completion of courses per period of studies, thereby ensuring graduation within the maximum timeframe.
- III. Maximum Timeframe - May not exceed the maximum length of the program as required by academic program curriculum and established by PHSU.
- IV. Comply with other requirements as established by the Academic Department.

### **STANDARD REQUIREMENTS**

The Federal Department of Education has long stated that a student becomes ineligible for Title IV funds (or new awards) whenever it becomes mathematically impossible for the student to achieve the grades and/or timeframe required under SAP to graduate. A student in conjunction with the academic advisor must continually review the pace of academic progress to ensure meeting the PHSU SAP policy. The student not meeting the academic progress might be considered for continual Financial Aid by a SAP appeal aid receiving a positive response from the corresponding PHSU Appeal Committee.

### **REPETITION OF COURSE WORK 34 CFR 668.34 (A) (6)**

If a school allows repeated courses to replace previously passed courses, it can exclude grades for prior attempts when calculating a student's GPA, but must include credits from all attempts when calculating the maximum timeframe. Students may receive Title IV aid for only ONE repeat of a previously passed course. Students who

repeat failed coursework may receive aid for multiple attempts until a passing grade is obtained.

### STATUS OF SAP NOTIFICATION

At the end of the grading period for the Academic Year, the Promotions Committee and the Academic Dean will notify the student of the non-compliance with the satisfactory academic progress due to not obtaining the minimum academic progress as set forth in the PHSU SAP policy and indicates the deadline and process for appealing this status. The Promotions Committee will provide each department with a list of the students determined in non-compliance including the Registrar's and the Student Financial Aid Office.

### SUSPENSION OF FINANCIAL AID

The Office of Student Financial Aid may also forward a communication to those students that the PC has indicated as not meeting the academic progress. The students will be advised that their financial aid has been suspended and will not receive any additional disbursements, until the SAP is re-established, the student has submitted an appeal and received a decision that allows financial aid to re-evaluate the case.

### APPEALING PROCESS

The student should refer to the specific program section in the PHSU Catalog, the department Dean/Director and of the Vice President of Student Affairs for specifics regarding the appeal process that usually has a 5-day period from receipt of the Promotions Committee notification of SAP status. The appeal process provides the opportunity for PHSU to determine whether the student might be able to reach the SAP standard by the end of the next period of evaluation. If the student would not be able to reach the SAP in one probationary period, then PHSU can approve an Academic Plan according to its policies and procedures, permitting the student to complete their educational goal within the maximum timeframe.

### REINSTATEMENT OF FINANCIAL AID

If PHSU approves the student's appeal, the financial aid might be reinstated, however with a status of "Probation", for one payment period. If the student does not successfully reach SAP standards upon the end of initial probationary period, the student may continue to study, however, will be suspended from receiving any financial aid until reestablishing SAP standards. If an academic plan was the decision of the Appeal Committee, the financial aid will be reinstated, as long as the student proceeds successfully with the established plan of studies.

## SATISFACTORY ACADEMIC PROGRESS (SAP) SUMMARY TABLE

Program Name	Program Code	Minimum GPA Required	Maximum Timeframe	SAP Review	Additional Requirements
Doctor of Philosophy in Biomedical Sciences	PHBM	3.00	8 years	Annually	Qualifying Examination Doctoral Dissertation Professional Behavior Requirement
Master of Science in Medical Sciences	MSMS	3.00	2 years	End of each term	Comprehensive Qualifying Examination (CQX) Professional Behavior
Doctor in Medicine	MD	70%	6 years	End of each term	Medical Licensure Exam (passing score in USMLE Step 1 & USMLE Step 2CK and taking the USMLE C5) Clinical Practice Examination (CPX) Professional Behavior
Doctor in Clinical Psychology	PSYD	3.00	8 years	Annually	Comprehensive Examination Clinical Practice Examination (CPX) Doctoral Dissertation Professional Behavior Requirement
Doctor of Philosophy in Clinical Psychology	PHPS	3.00	8 years	Annually	Comprehensive Examination Requirement Clinical Practice Examination Dissertation Proposal Dissertation Requirement Professional Behavior Requirement
Master of Sciences in School Psychology	MSSP	3.00	5 years	Annually	Comprehensive Examination Requirement Professional Behavior Requirement
Professional Certificate in Family and Couples Therapy	CFCT	Pass	2 years	End of each term	Professional Behavior Requirement
Post Graduate Certificate of Neurosciences of Learning	CNSL	Pass	3 years	End of each term	Professional Behavior Requirement
Master of Public Health	MPH	3.00	4 years	End of each term	Integrative Learning Experience (ILE) Overall Comprehensive Exam
Doctoral Degree in Public Health in Epidemiology	DRPH	3.00	8 years	End of each term	Integrative Learning Experience (ILE) Overall Comprehensive Exam Dissertation Requirement
Bachelor of Sciences in Nursing	BSN	2.50	5 years	End of each term	Must complete 67% of all credits attempted Professional Behavior Requirement
Master of Sciences in Nursing	MSN	3.00	4 years	End of each term	Professional Behavior Requirement

### FINANCIAL AID PROBATION

A student failing to meet the required academic standards of the school will lose their eligibility for financial aid. The student may formally request a review of their case to the Student Promotion Committee. If the appeal for reconsideration of the academic status is positive and/or establishes an academic plan, an opportunity for reconsideration of financial aid will be in effect a probationary status for the next period of enrollment. At the conclusion of the probation period, the student must have achieved compliance with the school's academic standards in order to continue with the financial aid eligibility.

### REFUND POLICY

#### INSTITUTIONAL REFUND POLICY FOR CAMPUSES IN PUERTO RICO

(Complete withdrawals and or DROP of individual courses)

#### Semester/Quarter/Trimester Programs

1. Registration deposit guaranteeing admission is non refundable.
2. Students withdrawing prior to start of classes will receive complete refund for tuition and fees.

3. After beginning classes there will be no refund on fees.
4. Students withdrawing on or before the end of the first week of classes will receive 80% refund on tuition.
5. Students withdrawing after the first week of classes or during the second week of the particular semester or trimester will receive 50% refund on tuition.
6. After the second week of classes there will be no refund.

Refer to the PHSU calendar provided by the Registrar's Office that details important dates.

## **INSTITUTIONAL REFUND POLICY FOR THE ST. LOUIS, MO CAMPUS**

(Complete withdrawals and or DROP of individual courses)

### **Semester Programs**

1. Registration deposit guaranteeing admission is non refundable.
2. Students withdrawing prior to start classes will receive complete refund for tuition and fees.
3. After beginning classes there will be no refund on fees.
4. Students withdrawing on or before Friday of the second (2<sup>nd</sup>) week will receive 75% refund of tuition.
5. Students withdrawing on or before Friday of the sixth (6<sup>th</sup>) week will receive 50% refund of tuition.
6. Students withdrawing on or before Friday of the tenth (10<sup>th</sup>) week will receive 25% refund of tuition.
7. After the tenth week of classes there will be no refund.

### **Trimester Programs**

1. Registration deposit guaranteeing admission is non refundable.
2. Students withdrawing prior to start classes will receive complete refund for tuition and fees.
3. After beginning classes there will be no refund on fees.
4. Students withdrawing on or before Friday of the second (2<sup>nd</sup>) week will receive 75% refund of tuition.
5. Students withdrawing on or before Friday of the fifth (5<sup>th</sup>) week will receive 50% refund of tuition.
6. Students withdrawing on or before Friday of the eighth (8<sup>th</sup>) week will receive 25% refund of tuition.
7. After the tenth week of classes there will be no refund.

## **TITLE IV REFUND POLICY**

The University will determine the percentage of attendance and the amount of financial assistance that the student did not earn when a student withdraws, does not return from an approved leave of absence, is expelled, or otherwise fails to complete the enrollment

period for which the student was charged. The Department of Education Title IV funds will be returned according to the federal regulations and within a forty-five (45) day period from the official date of determination of withdrawal.

All other non-Title IV will be refunded according to institutional refund policy. The student's first year registration deposit guaranteeing admission is not refundable.

## THE PERCENTAGE OF THE PAYMENT PERIOD OF ENROLLMENT

**COMPLETED (Percentage of completion)** for a program measured in credit hours, is equal to the number of calendar days attended divided by the total calendar days in the period (semester, quarter or trimester).

If a student's percentage of completion of a period is up to 60%, then the school must calculate the amount of unearned funds that must be returned to the Department of Education Title IV Student.

Financial Assistance Programs by the student and/or the school. The School uses the software provided by the Federal Government for calculating the refunds.

**If the withdrawal occurs after completion of more than 60% of the payment period or period of enrollment, the percentage of earned funds is 100%, therefore, no refund.**

The return of funds will be done in the following order within a 45 day period of date of determination of withdrawal:

- Unsubsidized Direct Loans
- Subsidized Direct Loans (only applicable to undergraduate students)
- Direct Graduate Plus Loan
- Direct Parent Plus Loan
- FSEOG
- Other Title IV Assistance Programs that might be available at PHSU, the student may visit the OSFA for a detailed review of the process.

## MONTHLY REVIEW OF TITLE IV REFUNDS

The Office of Student Financial Aid established a monthly revision process to ensure Title IV refunds are processed in a correct and timely manner.

The Associate Director of Financial Aid or its designee will review all cases of Title IV refunds process every month as part of the month closing experience. The review of cases will be performed using the withdrawal report extracted from the SIS. The report will be generated using the first and last day of the month to retrieve all cases processed as withdrawals during that period.

The report will be compared with the refunds processed during the month.

The revision of cases will include the verification of the file documentation including the certification of withdrawal, the R2T4 calculation sheet, and the report from the FA software. During this process deficiencies identified will be documented and corrected as part of the month closing process to guarantee timely and correct processing of returns.

Any deficiencies identified will be reported to the Director of Financial Aid and the Vice President of Student Affairs and will be documented as part of the performance evaluation of the FA officers. The information will also be used to train and retrain FA employees to ensure compliance with Title IV regulations.

## FINANCIAL AID AWARDING PROCESS

### I. COST OF EDUCATION/EDUCATIONAL BUDGETS

Financial Aid is the economic resource available for the payment of the Cost of Education expenses related to a particular field of studies. The Cost of Education includes the following items:

- Tuition and Fees
- Books and Educational Materials
- Equipment
- Room and Board
- Transportation
- Personal Expenses
- Child Allowances
- Special Electives
- Computer Rental/Purchase
- Other Relevant Expenses

The **STUDENT'S EDUCATIONAL BUDGET** represents an approximation of the amount of expenditures for a particular Class and Year of studies (FIRST, SECOND, THIRD, OR FOURTH, etc.)

The student's educational budget is the foundation for the determination of financial aid awards. These budgets are distributed annually and are also available in the OSFA for review.



The financial obligation is primarily the responsibility of the student and their family. That is why it is extremely important to discipline yourself with a well-thought-out budget for using your money during the academic year. Developing a realistic budget-and sticking to it-gives you a head start towards a financially secure future.

## II. STUDENT ELIGIBILITY

- Student must be U.S. citizen or permanently reside in the U.S.
- Student must be enrolled or accepted for enrollment at least as a half-time student at Ponce Health Sciences University.
- If currently enrolled, the student must maintain satisfactory academic progress according to the norms established by the school.
- Student cannot be in DEFAULT in any Federal Program or owe any refund at a school previously attended.
- Male students between the ages of 16 to 26 years of age, who are not presently a member of the armed forces, must register with Selective Services (this requirement was eliminated from the FAFSA requirement for 2021).
- Student must show financial need to be eligible for loans and scholarships that are need based.

## III. REQUIRED DOCUMENTS

The candidate for financial aid, in addition to having the previously mentioned requirements, must have presented the following documents by the deadline which usually occurs during the last week of April or May prior to the commencement of the Award Year for which the financial aid is being sought:

- A FAFSA or RENEWAL OF FAFSA that has been processed by the U.S. Department of Education.
- Ponce Health Sciences University documents: “Request for Aid and Loans” / “Student Authorization”.
- Master Promissory Note (MPN), which is the loan application (for first time borrowers)
- Evidence of citizenship or naturalization.
- Any other documentation required by Federal Regulations and any other funding source.

Those students that are selected by the Federal Government for “Verification” will be required to present documentation to verify the data presented in the FAFSA. The selected student will be informed of the documentation that must be presented. No financial aid award will be granted or disbursed until the verification process is completed.

## Verification

All cases selected for verification will be notified by the school to the student notifying of the required documentation to evidence the information provided. Students are also instructed that no funds will be disbursed until the verification process is completed.

Students selected for verification will receive specific instructions from the OSFA on the documents and date needed to complete the process.

Documents needed are:

1. Signed and completed appropriate (Dependent or Independent) Verification Worksheet
2. For tax filers, signed copies of the Tax Return completed (PR or IRS form)
3. Income source and signed statement of income source (non-tax filers)
4. Tax responsibility data

Note that the Verification W/S contains the remaining needed information to document the verification process.

Every student must complete a Verification W/S based on its status (Dependent or Independent). This document must be completed and returned to the OSFA. Items subjected to verification are:

- Family household size
- Students in family at post-secondary level
- Adjusted gross income
- Tax responsibility
- Pension paid
- IRA/Keogh deductions
- Other income and or interest earned subject to tax

Once the student presents the required documentation if needed a correction to the FAFSA will be performed using the FAA Access utility provided by the USDE and upon the processing of the new ISIR the school then will proceed to disburse funds to the student.

Schools constantly receive documents that may contain conflicting information which must be reviewed and resolved. Some sources of conflicting information are:

- Requested or unsolicited tax documents
- Initial or subsequent Student Aid Reports or Institutional Student Information Records
- C Flags or Comment Codes on SAR or ISIR documents

- Verification worksheets or signed statements

### *Unsolicited Information*

The regulations do not distinguish between information that the school receives because of its own request and that which is unsolicited. If anyone working in an official capacity at the institution receives information—via email, regular mail, fax or in person—the information is considered received for financial aid purposes.

The school is not permitted to ignore or shred documents that may substantiate the student or parents eligibility for federal funded financial assistance.

### *Institutional Responsibility*

The institution as a whole is responsible for notifying the financial aid office of any information that may affect a student's eligibility for Title IV programs. Information received by any institutional office is relevant and its effect on student's eligibility is pertinent. Such information must be communicated to the Financial Aid office and any conflicts resolved before originating and/or disbursing financial assistance.

In order to solve conflicting information, the OSFA collects documentation, recalculates EFC and submits corrections to CPS, as appropriate. No disbursements are allowed until conflicting information is resolved.

### *C Code Resolution*

“C” codes are generated by CPS through data matches to point out a possible question about FAFSA data or to inform the applicant that an assumption was made on missing or inconsistent FAFSA data. Resolution of ISIR/SAR C codes or submission of correction data is not required for the system to calculate an EFC; however, institutions are required to retain documentation of ISIR/SAR C code resolution. Examples of questionable data from the data match that would result in ISIR/SAR C codes include: Pell grant or federal loan overpayments; no confirmation for qualifying veteran; no confirmation of US citizenship; no confirmation for eligible non-citizen status; not registered for Selective Service; and a FAFSA response indicating drug related convictions.

### *Unusual Enrollment Verification Procedure*

The Department of Education has implemented federal regulations in an effort to prevent fraud and abuse in the Federal Student Aid Program by identifying students that have received federal Pell Grants and/or Direct Loans at multiple institutions for the last four consecutive funding years.

The Office of Student Financial Aid at Ponce Health Sciences University will review the student's completed evaluation report including all official academic transcripts from all colleges and universities attended during the review period. If federal Pell Grants and/or Direct Loans were received and credit hours were not earned at each of the institutions attended, additional documentation will be requested. Documents must be emailed to [psmfinstu@psm.edu](mailto:psmfinstu@psm.edu).

All required documentation must be received and the UEH flag must be resolved before a student is eligible to receive federal student aid.

#### IV. EVALUATION PROCESS

Upon receipt of the documents for each student, the staff of the OSFA reviews the forms, determines the educational need of applicant, prepares and forwards the Award Notification (notification of the financial aid being offered).

The amount of allocated funds to the student depends upon the economic need that the student demonstrates through a process known, as "need analysis".

The first step in this process is the determination of the Expected Family Contribution (EFC) by the Federal Government through the personal income data presented by the student and his family in the FAFSA to the US Department of Education. This presentation of data must be submitted annually to the US Department of Education.

The second step involves the following basic calculation:

Student Educational Budget

-Expected Family Contribution

**= FINANCIAL NEED**

The third step consists in the awarding of Financial Aid. The student may not receive financial assistance from all funding sources, need based or non-need based, in excess of the stipulated financial need. A need-based source requires that the student demonstrated financial need through the need analysis of the federal government. If a student demonstrates no financial need, he may borrow funds from non-need based funding sources for an amount that does not exceed the total cost of education as approved by the school. Those students that will be recommended for scholarship programs will be presented to the Scholarship Committee for approval of awards. The students awarded any financial aid will receive an "Awards Notification" indicating the amount of the aid and the educational budget used in the awarding process. This notification is sent electronically to the student's PHSU email. The student is told the timeframe for presenting any questions regarding the awards; if none are submitted then the financial aid award is considered to be accepted in its entirety by the student.

## V. DISBURSEMENT OF FINANCIAL AID

At the beginning of each Award Year (academic year), upon completion of the registration period and commencement of classes, the OSFA will proceed to inform the Accounting Department of the student's awards. The Accounting office will determine if any funds will be disbursed directly to the student. Disbursements will occur, if possible, at the beginning of each semester, quarter, trimester, or midterm of a certification program, however, this depends upon several factors such as application and approval dates of the aid, electronic transfer date, academic calendar's periods of enrollments and the administrative procedures required prior to disbursements. Confirmation of the academic progress by the Registrar and OSFA verifies that the same coincides according to federal program regulations is required prior to disbursement.

The student receiving aid will receive a "Disbursement Notification" from the OSFA, indicating the projected date that Accounting might begin accrediting the student's account and providing any applicable credit balance. A receipt of the disbursement transactions will be given to the student each semester or trimester. In addition, the Accounting office will periodically inform each student of the outstanding balance with the school.

## VI. CHANGES TO FINANCIAL AID AWARDS

The student who desires to increase the original request of the loan or cancel a portion of the loan, and or any other adjustments, must provide a written request to the OSFA. The request should be presented prior to the end of the first semester or trimester of the actual Academic Year. The deadline of this period for adjustment occurs in November. Refer to the OSFA Annual Calendar for specific date.

## VII. CERTIFICATION OF FINANCIAL AID NEED OR AWARDS

Certification of the student's educational expense budget, financial need and/or financial aid award will be provided upon request of the student. The OSFA will require at least three (3) days for the processing of this request.

## TYPES OF FINANCIAL AID PROGRAMS

The financial aid programs available are of four major classifications:

- GRANTS – funds given without any repayment commitment.
- SCHOLARSHIPS – monies awarded for specific reason, such as economic need, academic preparation, etc.

- LOANS – monies made available by an approved Department of Education Direct Loan Program with a repayment obligation and interest on principal.
- ASSISTANTSHIP/FELLOWSHIP – funds available to a student for a specialized activity in a specific discipline; recipients may receive a stipend.

## GRANTS AND SCHOLARSHIPS, ASSISTANTSHIP/FELLOWSHIP

The Office of Student Financial Aid, as well as other departments of Ponce Health Sciences University, receives notification of grants, fellowships, assistantships, etc. Notification of the purpose, amount of award, requirements, deadlines and other specific information will be posted and whenever possible, distributed directly to the student by PHSU email communication. Specific information is available at the OSFA. The different divisions of the US Armed Forces provide scholarship support to our students for commitment in their different branches. The Commonwealth of Puerto Rico offers through the Puerto Rico Counsel Education (CEPR) several programs. At present PHSU receives from CEPR funds for “Ayuda Suplementaria Graduada” (State Grants Funds) whereby PHSU select the candidates.

## INSTITUTIONAL SCHOLARSHIPS

The Board of Directors of Ponce Health Sciences University will determine the availability of Institutional Scholarship Funds. The Scholarship Committee will coordinate the awarding procedures of the institutional scholarship to any student.

## FEDERAL LOAN PROGRAMS-US DEPARTMENT OF EDUCATION TITLE IV

### *Federal Direct Loan Program*

Federal Direct Loans are the Department’s major form of self-help aid and are available through the Federal Direct Loan Program.

(As a result of the Budget Control Act of 2011, SEC. 502, subsidized loans cannot be awarded to graduate and professional students if the loan period begins on or after July 1<sup>st</sup>, 2012).

### *Direct Unsubsidized Loan*

This loan is essentially the same as the Subsidized loan except that the borrower is responsible for the interests that accrued while in school. Grace period of six months commences upon graduation or withdrawal. The borrower has a ten year repayment term. Accrued and unpaid interest will eventually be capitalized. These loans should be paid off as quickly as possible. The capitalization terms are found in the promissory note that the student must sign prior to disbursement of funds. The loan interest rates are established annually by federal government and the OSFA announces current rates. As

per federal regulations, an origination fee is deducted from the approved awarded amount of the student.

### *Graduate PLUS Loan*

As a graduate or professional student, you are now eligible to borrow under the PLUS Loan Program up to the cost of attendance minus other estimated financial assistance. The terms and conditions applicable to Parent PLUS Loans (a federal loan program that permits parents to obtain funds to meet any pending educational cost) also applies to Graduate and Professional PLUS Loans. The features of this loan program include: a) requires that you do not have an adverse credit history, b) repayment beginning on the date of the last disbursement of the loan, c) a fixed interest rate of 7.54% July 1<sup>st</sup>, 2022 until June 30<sup>th</sup>, 2023, Federal Direct PLUS Loan program requires an application and a signed Master Promissory Note (MPN); to do so, visit [www.studentaid.gov](http://www.studentaid.gov).

**Note:** For Graduate PLUS loans, forbearances and deferments are available if you qualify; contact DL Servicing at **1-800-848-0979** for more information.

### *Alternative Loan Program*

Alternative loans are private loans that can supplement student's federal loans. Unlike federal loans, the Federal Government does not guarantee these loans. The specific lending institution designates the funds. An approval, therefore, is based upon the applicant's credit history and other requirements of the lending institution. The availability of these funds should be verified before applying.

### *Historical Private Lender List*

PHSU does not deny or otherwise impede the student's choice of a private lender or cause unnecessary delay in loan certification of these loans. The following is a list of the three private loans that have been most commonly selected by our students during previous academic years, however, we reiterate that the student may select any other lender they esteem will meet their financial need.

- Discover: [www.discover.com/student-loans](http://www.discover.com/student-loans)
- Sallie Mae: [www.salliemae.com/student-loans](http://www.salliemae.com/student-loans)
- Wells Fargo: [www.wellsfargo.com/student/graduate-loans/med-school](http://www.wellsfargo.com/student/graduate-loans/med-school)

### **FEDERAL DISBURSEMENT POLICY**

A school must notify the student in writing (paper or electronic) when Direct or Grad PLUS loan funds are being credited to a student's account. The notification should include the following:

- Date and amount of disbursement
- Student's (or parent's) right to cancel all or part of the loan or disbursement

- Procedures and the time by which the student (or parent) must notify the school that he/she wishes to cancel the loan or disbursement

Under the US Department of Education regulations, you have the right to cancel all or part of the loan(s) within 14 days of the date of loan notice indicating the funds accredited to your account in the Accounting Office. If you wish to cancel all or part of the loan(s) prior to a refund being generated (if eligible), please request it by email or visit the OSFA or the Accounting office. If you decide to cancel all or part of the loan(s) after you received a refund check or direct deposit (if eligible), you must submit an email request to [psmfinstu@psm.edu](mailto:psmfinstu@psm.edu) or make the request in person.

## COD DISBURSEMENT DATE REPORTING

A disbursement of Title IV, HEA Program funds occurs on the date that the institution credits the student's ledger account or pays the student or parent directly. 34 C.F.R 688.164(a)

Federal Register/Vol. 78, No. 40 published 2/28/2013 indicates that for disbursements that occur on or after 4/1/2013 an institution is required to submit disbursement information no later than 15 days after the institution makes a disbursement or becomes aware of the need to make an adjustment to previously reported disbursement date.

The Associate Director of Financial Aid will perform a revision and reconciliation of COD reported dates at least on a bi-weekly basis to ensure compliance with COD reporting requirements and regulations. During this process, the reconciliation tool in PowerFaid will be used to create and update COD push the information to the COD platform and update the dates reported for the disbursements.

As an additional control process, the Financial Aid Office will use the disbursement detail report prepared by the Bursar's Office to complete the monthly internal reconciliation to which the COD reports will be compared.

After doing the update the officer will lock the actual date of disbursement option on the Packaging/Award data view to prevent it from being changed by other PowerFaid processes.

Please refer to the step by step Manual for COD Reconciliation.

## STUDENT REFUND FROM A CREDIT BALANCE

If your total assistance for the period of students exceeds the direct charges (tuition, fees, room & board) on your account, you are entitled to a refund of the difference for



use toward other educational expenses. The Accounting office issues refunds to students after final enrollment status has been determined and the funds have been disbursed. Refunds are generally a direct deposit to the student's bank account or a paper check given directly to the student. The refund is completed in a period no later than 14 days after the student account reflects a credit balance. For more information, contact the Accounting office.

## REFUSING A CREDIT BALANCE REFUND CHECK

Sometimes a refund check represents more loan funds than a student does not want to apply to his/her other educational expenses. The student may reduce or cancel the loan anytime during the enrollment period. The student must request in writing that the Financial Aid Office reduce the loan. If the funds are being disbursed to the student, he/she must present to the Accounting Office the amount of funds to be sent to the USDE thereby accrediting the same to the loan account for adjustment. The OSFA must be kept abreast of this adjustment by the student and/or the Accounting Office.

## FEDERAL (TITLE IV) FINANCIAL AID RECIPIENTS REFUND POLICY

Consistent with the federal regulations, if the student ceases to be enrolled in PHSU, the amount of federal aid that must be returned to the federal government is based on the percentage of time the student remained in attendance during an academic term. Students are entitled to retain only that portion of federal student aid they earned based on the time in attendance. The percentage of earned is determined by the days attended in comparison to the total days in the period of enrollment.

If a student is dismissed, withdraws or stops attending before the first day of classes, all federal aid is returned to the appropriate program. Students who remain enrolled through at least 60% of the payment period (semester/trimester) are considered to have earned 100% of the aid received and will not owe a repayment of Federal Title IV funds.

When a student has received Federal Title IV funds in excess of their eligibility, it is the student's responsibility to return the unearned funds to Ponce Health Sciences University. The Federal Government requires Ponce Health Sciences University to return the unearned funds for the student to the appropriate programs. The university will calculate the amount and notify the student.

Students who have earned zero credits for any period of enrollment must receive from the Registrar confirmation of enrollment to ensure eligibility for Title IV funds; if not, then they will have Federal Title IV funds returned as per the federal requirements, unless they can prove they completed the semester.

## ENTRANCE AND EXIT COUNSELING

An entrance counseling session must be conducted, prior to the release of the first disbursement of the first Federal Direct Loan and/or other loans made by the borrower for attendance at our school. During these sessions the specifics of the student's responsibilities as a borrower will be reviewed as well as the specifics of the loan. This counseling session may be conducted in our office or through the federal government website link to [www.studentaid.gov](http://www.studentaid.gov).

Every student that graduates or withdraws from the school must complete an exit counseling. This is a process completed electronically in the federal government site [www.studentaid.gov](http://www.studentaid.gov). The Financial Aid office notifies the students of their responsibility to complete the exit counseling and provides information via email about the steps to be followed to comply with this requirement. Information of a summary of the entire amount of loans that have been disbursed to the student, the responsibilities of repayment and the different options for postponement if necessary, are provided in the site during the exit interview.

## MONEY MANAGEMENT TIPS

If you receive financial aid...

- Financial aid is intended to support a very modest student lifestyle, including only the basics: tuition and fees, room and board, books, and a small amount for personal expenses such as clothing, laundry, haircuts, long distance charges, an occasional movie or dinner out, and so on. Financial aid is NOT intended to pay for your car, iPhone, cigarettes or spring break trip, marriage, etc.
- For each expenditure ask yourself: Do I really need this? If you are taking out student loans to cover "extras" do you really want to be paying interest years after graduation for things you could do without for now? Your time at PHSU is a terrific chance to meet and mingle with people of many interests and cultures. Think of this as a free source of entertainment and enrichment.
- Protect your future: Don't borrow more than what you need. If you don't need all of the loans you've been offered, you may decline or reduce them, you only need to contact the Financial Aid office and/or the Accounting office.
- Consider the cost of your living arrangements. Is that luxury apartment really a good deal? Do the math. In an apartment, in addition to rent, you will have to purchase and cook your own food, get yourself to class, come up with a rent deposit, pay for utilities, and possibly buy furniture. Add up

all the costs associated with apartment living and select the one that has the most reasonable cost. You might have to find yourself a roommate(s) to help with the cost, however, the selection of the person requires compatibility to your own living dynamics.

- Be careful with credit cards. If you don't have the cash for a purchase, you probably can't afford it. However, if you have a reasonable budget for personal expenses and can pay off your credit card in full each month, you will be building a good credit for your future.
- Don't use an ATM card for an individual purchase if a fee is involved. Do you really want to pay \$2.25 for a \$1.50 taco? These little fees add up fast.
- Give yourself an allowance, for those social activities that might be as vital as academics. Know what you can afford to spend on goodies each month and make a withdrawal. Divide that into weekly envelopes to help you stay within your budget.
- Direct deposit is your friend. A check in hand is easily spent. Have your earnings and financial aid deposited into your savings or checking account, and take it out only when you need it.
- If you're having problems making ends meet, visit the OSFA. We're happy to help you work out a reasonable budget.

## U.S. DEPARTMENT OF EDUCATION OFFICE OF THE OMBUDSMAN GROUP

If you have been unable to solve a problem with your federal student loan, you can ask the Federal Student Aid Ombudsman Group for assistance. As an alternative to filling out the form on the page, you may contact the Ombudsman Group through one of these methods:

### **Postal Mail:**

U.S Department of Education  
FSA Ombudsman Group  
PO Box 1843  
Monticello, KY 42633

### **Phone:**

1-877-557-2575

### **Fax:**

606-396-4821

## FINANCIAL AID STAFF DIRECTORY

Position	Employee Name	Employee Email Address
Financial Aid Director	Vacant	
Associate Director	Mrs. Janira Narvaez	jnarvaez@psm.edu
Financial Aid Officer	Mrs. Shaira Zengotita	szengotita@psm.edu
Financial Aid Officer	Mrs. Leslie Castro	lecastro@psm.edu
Financial Aid Specialist	Vacant	

### OFFICE HOURS

Monday to Friday: 8:00-11:30 AM – 1:00-4:30 PM  
Friday: Administrative work (Appointment only)

### MAILING ADDRESS

PO Box 7004  
Ponce, PR 00731

### PHONE NUMBER

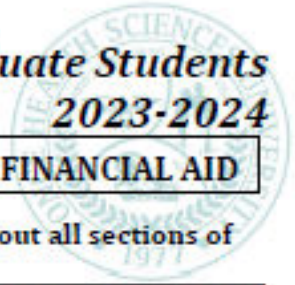
787-840-2575 ext. 5668, 4734, 4736, 4836

### EMAIL ADDRESS:

psmfinstu@psm.edu

**ANNEX A:**  
**REQUEST FOR AID AND LOANS FORM**

## Loan Request Form for Graduate Students 2023-2024



**OFFICE OF STUDENT FINANCIAL AID**

Students who wish to have Direct Loans applied to their account will need to fill out all sections of this form.

**STUDENT BORROW INFORMATION**

Student Name:	Student ID #:
Campus Program:	Campus Location: <ul style="list-style-type: none"> <li><input type="checkbox"/> MAIN CAMPUS</li> <li><input type="checkbox"/> SAN JUAN CAMPUS</li> <li><input type="checkbox"/> ST. LOUIS CAMPUS</li> <li><input type="checkbox"/> ONLINE</li> </ul>
Email Address:	Date of Birth:
I will live with: ( ) Boarding ( ) With Parents ( ) Student with dependents:	<b>*Boarding means if you have rent expenses. Evidence may be requested*</b>

**HEALTH PROFESSIONS STUDENTS (AMOUNT BASED ON PROGRAMS)**

I have reviewed my 2023-2024 Financial Aid offer and wish to request:

( ) Initial Request                      ( ) Decrease Award                      ( ) Cancellation

Graduate Students	St. Louis Campus: Educational Programs included: PSYD <b>\$20,500 Unsubsidized per year</b>	
MD: I, II, III Year	\$41,611	<b>*FOR MAIN AND ST. LOUIS CAMPUSES*</b>
MD: IV Year	\$43,833	
Clinical Psychology (PSYD OR PHPS) I,II,III YEAR	\$33,694	<b>*ALL PROGRAMS LOCATED AT MAIN CAMPUS* EXCLUDES ST. LOUIS CAMPUS</b>
Clinical Psychology (PSYD OR PHPS) IV, V YEAR	\$35,083	
Doctor of Public Health	\$33,000	
MSMS, MSN, MPH, PHD	\$20,500	

Graduate Student Unsubsidized	FALL	SPRING	SUMMER (IF APPLIES)	TOTAL
Graduate Student (QTR) Unsubsidized	QTR 1	QTR 2	QTR 3	TOTAL
<b>Graduate Plus Request Amount</b>				<b>TOTAL</b>
Student Borrower Signature:			Date:	

\*An origination fee will be taken out for the Direct Unsubsidized/Direct Grad Plus Loan.  
\*If your financial aid award exceeds your charges, you will receive a refund.

**ANNEX B:**  
**STUDENT AUTHORIZATION FORM**

**OFFICE OF STUDENT FINANCIAL AID**

**STUDENT AUTHORIZATION FORM**



I authorize the Financial Aid Office of Ponce Health Sciences University (PHSU) as an agent of administration of federal funds:

- To provide relevant information of my financial aid allocated as a student to any agency duly authorized to audit according to federal, state and institutional requirement.
- To obtain from the Office of the Registrar at PHSU any relevant information related to my registration and/or Satisfactory Academic Progress.
- To complete the necessary procedures required by federal regulations and internal controls of the institution when the student is selected for the process of "verification".
- To share with PHSU - Finance Division the information concerning my official assignment of Financial Aid, and so that they may accredited my funds to my student account.
- To inform the Office of Financial Aid and/or Finance Division of any additional Financial Aid that has been approved from any Federal State, Local or Private entity (ex. Veterans, US Army, Vocational Rehabilitation)

I understand that:

- Providing false documentation/information to receive Financial Aid is a crime that can lead to imprisonment, \$20,000 fine, or both.
- My application for Institutional Financial Aid will not be valid until PHSU receives the approval of the Initial or renewal FAFSA for the appropriate academic year. In addition, completion of any verification requirements or missing documentation relating to receiving financial aid.
- To be eligible for Title IV funds from the Department of Education (federal government) financial aid programs (Direct Loan, Pell Grant, Federal Work Study), I must be accepted or enrolled at least half-time at the school.
- I must maintain satisfactory academic progress according to the academic policies of the school that have been established under regulations prescribed by the Department of Education/Federal Government (Federal Register).

I certify that:

- I have been explained that as a condition of funding for Financial Aid from the federal or state government, I must not distribute, possess, or unlawfully use any controlled substances/drugs during the period for which I receive any aid.
- I have received orientation regarding the right to cancel my loans subject to the following time limits: up to fourteen (14) days after the accreditation of funds to my account.
- I will comply with the procedures and schedules established by the PHSU regarding the management of financial aid program.
- I have received an explanation of the eligibility requirements, disbursement, and repayment of funds applicable to each financial aid program.
- I understand and agree that my Financial Aid will be accredited to my student account, and I will receive any credit balance as a check or direct deposit as registered.
- I understand that the parking, disability insurance and health insurance fees will be reflected in my account charges (if applicable) and that my financial aid may be used to cover those additional expenses. I also understand that my signature on this document represents my agreement to cover those additional expenses with my financial aid. If I wish to cover the additional expenses with private funds, I must request it in writing prior to the funds disbursement.

Name of Student: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_



**ANNEX C:**  
**VERIFICATION FORM (V4)**



## Standard Verification Worksheet (V4) 2023-2024 Office Student Financial Aid



### Federal Student Aid Programs

Your Free Application for Federal Student Aid (FAFSA) was selected for verification which compares your FAFSA information to your (parent's or spouse) financial documents. This is a federal requirement under 34CFR. If there are any differences, corrections will be made to the FAFSA and sent to the U.S. Department of Education for confirmation.

#### What you must do:

- Contact Ponce Health Sciences University Financial Aid Office if you have questions completing this form 787-840-2575 or by email [finsta@psm.edu](mailto:finsta@psm.edu).
- **Dependent students:** you and the parent who signed your FAFSA.
- **Independent students:** you and your spouse (if apply)
- Hand in, or email your completed form to the Financial Aid Office.
- Do not make any additional income/ household size/ number in college corrections to the FAFSA once this form has been submitted.

#### Please Select:

Dependent Student

Independent Student

### A. STUDENT INFORMATION

\_\_\_\_\_  
Last Name      First Name      M.I

\_\_\_\_\_  
Student ID #

\_\_\_\_\_  
Permanent Address

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
City/State/Zip

\_\_\_\_\_  
Student Email

\_\_\_\_\_  
Alternate or Cell Phone Number

\_\_\_\_\_  
Student Phone Number

Please note that the student must complete either number one or two below. One must be signed at the institution. Two must be notarized.

#### 1. Must Be Signed at the Institution

The student appear in person to **Ponce Health Sciences University** to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as but not limited to, a diver's license or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to receive and reviewed the student's ID. In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

#### 2. Must Be Signed With Notary

If the student is unable to appear in person at **Ponce Health Sciences University** or verify his or her Identity, the student must provide to the institution:

- a) A copy of the unexpired valid government-issued photo identification (ID) that is acknowledged in the notary statement below, such as but not limited to a diver's license, other state-issued ID, or passport; and
- b) The original notarized Statement of Educational Purpose provided below.

**G. STATEMENT OF EDUCATIONAL PURPOSE:**

**Statement of Educational Purpose**

I certify that, I \_\_\_\_\_ (Print student name) am the individual signing this Statement of Educational Purpose and that the federal student Financial assistance I may receive will only be used for educational purposes and to pay the cost of attending in PHSU for 2023-2024.

\_\_\_\_\_  
(Student's Signature)                      Student's ID Number                      Signature Date

Signature of school Official \_\_\_\_\_ Date: \_\_\_\_\_

By my signature below, I certify that I am a school official authorized to review the identification submitted on behalf of this student and I saw an original government-issued form of identification of the aforementioned student on this date.

**Notary's Certificate of Acknowledgement**

State of city \_\_\_\_\_ on \_\_\_\_\_, before me, \_\_\_\_\_  
(City/Country)                      (date)                      (Notary's Name)

personally appeared, \_\_\_\_\_ and proved to me on basis of satisfactory evidence of  
(Print the name of signer)

identification \_\_\_\_\_. To be the above-name person who signed the foregoing instrument.  
Type of unexpired government-issued photo ID provided

Witness my hand and official seal \_\_\_\_\_ (Notary Signature).

My commission expires on \_\_\_\_\_ (Date)

**ANNEX D:**  
**UEH VERIFICATION FORM**



OFFICE OF STUDENT FINANCIAL AID  
 PONCE HEALTH SCIENCES UNIVERSITY  
 UNUSUAL ENROLLMENT HISTORY VERIFICATION  
 2023-2024

Free Applications for Federal Student Aid (FAFSAs) were identify for “Unusual Enrollment History” by the U.S. Department of Education (ED) because of the student having received Pell Grants and/or Federal Direct Loan funds at multiple institutions in recent years. UEH flags require that the current institution review the student’s enrollment history and determine whether the student is enrolling only long enough to receive cash refunds of federal student aid.

**NOTE:** The Financial Aid Office, in the process of reviewing a student’s UEH flag, will check the National Student Loan Data System (NSLDS) for complete enrollment history.

**A. STUDENT INFORMATION**

Last Name	First Name	MI	PHSU Student ID
Address (include apt. no.)			Date of Birth
City	State	Zip	Student Email
Alternate or Cell Phone Number			Student Phone Number

The U.S. Department of Education determined that you have an Unusual Enrollment History regarding the receipt of Pell Grant and/or Federal Direct Loan funds.

**WHAT YOU SHOULD DO:**

1. Review the National Student Loan Data System (NSLDS) for prior schools attended at which you received federal financial aid such as Federal Pell Grants and Federal Direct Student Loans.  
 Access NSLDS by going to [https://nsldsfa.ed.gov/nslds\\_SA/](https://nsldsfa.ed.gov/nslds_SA/) and log in.

2. List all colleges or universities (*including PHSU*) attended during the academic periods that include **2019-2020, 2020-2021, 2021-2022, 2022-2023**. If you need additional space, please attach a separate page.

Name of College or University	Dates of Attendance (Month/Yr. to Month/Yrs.)	Pell Grant and/or Loans received		Did you earn credits(s)?	
		<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
		<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
		<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
		<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
		<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No
		<input type="radio"/> Yes	<input type="radio"/> No	<input type="radio"/> Yes	<input type="radio"/> No

**SECTION I: TO BE COMPLETED BY STUDENT**

During the academic periods that include 2019-2020, 2020-2021, 2021-2022 and 2022-2023, did you receive a *Pell Grant and/or Federal Direct Loan* while at Ponce Health Sciences University?

- Yes. Sign and date below. Return this form to the **PHSU Financial Aid Office**.  
**STOP – If you answered YES, you do not have to complete the remainder of this form.**
- No Proceed to Section II on REVERSE SIDE.

By signing this form, I certify that all of the information reported on it is complete and correct.

**WARNING:** If you purposely give false or misleading information on this form, you may be fined, sentenced to jail, or both.

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

**SECTION II: TO BE COMPLETED BY STUDENTS THAT ANSWERED "NO" IN SECTION I**

Obtain an Official academic transcript for any college or university attended during the academic periods that include 2018-2019, 2019-2020, 2020-2021, and 2021-2022.

The Unusual Enrollment History (UEH) verification requirements do not allow schools to accept a student's self-certification in place of an academic transcript or grade report. If you received financial aid at a school previously attended, you will have a record of attendance at that school and will be required to submit a transcript.

Students unable to obtain an official academic transcript from a previously attended school may be allowed to submit an unofficial transcript or grade report if they provide a written statement detailing why a former school, they attended will not release an official transcript.

**Official transcripts should be sent to:**

**Ponce Health Sciences University  
Financial Aid Office  
PO BOX 7004  
Ponce PR 00732**

- Check this box if you have recently submitted official transcripts to the College and they are already on record.
- Check this box IF YOU DID NOT EARN ANY ACADEMIC CREDIT(S) AT A COLLEGE OR UNIVERSITY

WHERE YOU RECEIVED A PELL GRANT AND/OR FEDERAL DIRECT LOAN. Proceed to Section III.

By signing this form, I certify that all of the information reported on it is complete and correct.

**WARNING:** If you purposely give false or misleading information on this form, you may be fined, sentenced to jail, or both.

\_\_\_\_\_  
Student's Signature

\_\_\_\_\_  
Date

**ANNEX E:**  
**VERIFICATION FORM (V5)**



## Standard Verification Worksheet (V5) 2023-2024 Office Student Financial Aid



### Federal Student Aid Programs

Your Free Application for Federal Student Aid (FAFSA) was selected for verification which compares your FAFSA information to your (parent's or spouse) financial documents. This is a federal requirement under 34CFR. If there are any differences, corrections will be made to the FAFSA and sent to the U.S. Department of Education for confirmation.

#### What you must do:

- Contact Ponce Health Sciences University Financial Aid Office if you have questions completing this form 787-840-2575 or by email [finstu@psu.edu](mailto:finstu@psu.edu).
- **Dependent students:** you and the parent who signed your FAFSA.
- **Independent students:** you and your spouse (if apply)
- Hand in, or email your completed form to the Financial Aid Office.
- Do not make any additional income/ household size/ number in college corrections to the FAFSA once this form has been submitted.

Please Select:

Dependent Student

Independent Student

### A. STUDENT INFORMATION

\_\_\_\_\_  
Last Name      First Name      M.I.

\_\_\_\_\_  
Student ID #

\_\_\_\_\_  
Permanent Address

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
City/State/Zip

\_\_\_\_\_  
Student Email

\_\_\_\_\_  
Alternate or Cell Phone Number

\_\_\_\_\_  
Student Phone Number

### B. HOUSEHOLD INFORMATION

List the full names, ages, relationship (to you) of all household members below. Only indicate the college or university for persons who will attend at least half time in a degree, diploma or certificate program at an eligible postsecondary educational institution any time between July 1, 2023 and June 30, 2024. If you need more space, attach a separate page.

Dependent or Independent students include:

- Yourself, your spouse (if married) and your parent(s), including a stepparent, even if you don't live with your parent(s)
- Your parent(s)' other children, even if they don't live with your parent(s), if (a) your parent(s) will provide more than half of their support from July 1, 2023, through June 30, 2024, or (b) the children would be required to provide parental information when applying for federal student aid; and
- Other people, if they now live with you and your parent(s) provide more than half of their support and will continue to provide more than half of their support through.

Full name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)

Note: We may require additional documentation if we believe the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.



**C. INCOME INFORMATION FOR:**

**Student, Spouse (if married) and Parents Tax Filers**

1. \_\_\_ Student \_\_\_ Spouse \_\_\_ Parent Check here if a 2021 Tax Return Transcript(s) is provided.
2. \_\_\_ Student \_\_\_ Spouse \_\_\_ Parent Have Used the IRS DRT in FAFSA on the WEB to transfer 2021 IRS income tax return information into the student's FAFSA.
3. \_\_\_ Student \_\_\_ Spouse \_\_\_ Parent Have not yet used the IRS DRT in FAFSA on the WEB, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA once the 2021 IRS income tax return has been filed.
4. \_\_\_ Student \_\_\_ Spouse \_\_\_ Parent The student is unable or chooses not to use the IRS DRT in FAFSA on the WEB, and instead will provide the institution with a 2021 IRS Tax Return Transcript(s).

A 2021 IRS Tax Return Transcript may be obtained through:

- **Online Request**- go to [www.irs.gov](http://www.irs.gov), under the Tools heading on the IRS homepage; click "Get a Tax Transcript" and then click "Get transcript Online or Mail". Make sure to request the "IRS Tax Return Transcript" and Not the "IRS Tax Account Transcript."
- **Telephone Request** – 1-800-908-9946 Paper Request Form – IRS Form-E2 or IRS Form 4506-T

**D. INCOME INFORMATION FOR:**

**REQUIRED FOR: VS**

**Student, Spouse (if married) and Parents Nontax Filers**

\_\_\_ Student, \_\_\_ Spouse (if married), \_\_\_ Parent Were not employed and had no income earned from work in 2021.

\_\_\_ Student, \_\_\_ Spouse (if married), \_\_\_ Parent Were employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided. (Provided copies of all 2021- IRS W-2 forms issued to the student, spouse (if married) parents by their employers). List every employer even if the employer did not issue an IRS W-2 form or an equivalent document.

Employer's Name	IRS W-2 Provided? (Yes or No)	Annual Amount Earned in 2021
<b>TOTAL AMOUNT OF INCOME EARNED FROM WORK</b>		<b>\$</b>

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority.

A 2021 Confirmation of nonfiling may be obtained through:

- From the IRS using the Form 4506-T and checking box 7.
- Form the Puerto Rico tax authority requests the Form SC 6088 A.

## E. INCOME INFORMATION FOR:

\_\_\_\_\_ 1. Tax Filers with special circumstances (TFSC) \_\_\_\_\_ 2. Amended Tax Return (ATR)

### INDIVIDUALS GRANTED A FILING EXTENSION BY THE IRS

\_\_\_\_\_ Student, \_\_\_\_\_ Spouse (if married), \_\_\_\_\_ Parent Individuals filing for and extension must provided:

- A copy of IRS Form 4868 and a copy of the IRS Approval of the extension of Time to File U.S. Individual Income Tax Return, "that was filed with the IRS for tax year 2021;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the Individual an additional extension of the filing time for tax year 2021; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2021 and, if self-employed a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2021.

### INDIVIDUALS WHO WERE VICTIMS OF IRS TAX-RELATED IDENTITY THEFT (TFSC)

\_\_\_\_\_ Student, \_\_\_\_\_ Spouse (if married), \_\_\_\_\_ Parent, A Tax Return Data Base View (TRDBV) transcript obtained from IRS that includes all of the income and a statement signed and the date by tax filer indicating that they were victims of Identity Theft and that the IRS is aware of the tax-related identity theft.

### AN INDIVIDUAL WHO FILED AN AMENDED IRS INCOME TAX RETURN FOR TAX YEAR 2021 (ATR)

\_\_\_\_\_ Student, \_\_\_\_\_ Spouse (if married), \_\_\_\_\_ Parent

- A 2021 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed) or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; and
- A signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

### INDIVIDUALS WHO FILED NON-IRS INCOME TAX RETURNS (TFSC)

An individual who filed or will file a 2021 income tax return with the relevant taxing authority of a U.S. territory, Commonwealth of Puerto Rico, or with a foreign central government must provide:

\_\_\_\_\_ Student, \_\_\_\_\_ Spouse (if married), \_\_\_\_\_ Parent A signed copy of his or her income tax return that was filed with the relevant taxing authority (Guam, the U.S. Virgin Islands) or commonwealth (Puerto Rico and the Northern Mariana Islands).

\_\_\_\_\_ Student, \_\_\_\_\_ Spouse (if married), \_\_\_\_\_ Parent A copy of his or her tax account information that was filed with the tax authority for American Samoa.

\_\_\_\_\_ Student, \_\_\_\_\_ Spouse (if married), \_\_\_\_\_ Parent Who filed and income tax return with tax authorities Not mentioned above, i.e. a foreign tax authority, and who indicates that is unable to obtain the tax account information free of charge.

## F. SIGN THIS WORKSHEET:

Each person signing certifies that all information reported is complete and correct. Each person also understands that if any section is left blank, any document(s) that are listed as "required" but not submitted is considered incomplete and aid will NOT be granted. **WARNING:** Knowingly providing false or misleading information on this worksheet may result in being fined, sentenced to jail, or both.

Student \_\_\_\_\_

Date \_\_\_\_\_

Parent \_\_\_\_\_

Date \_\_\_\_\_

## G. STATEMENT OF EDUCATIONAL PURPOSE:

Please note that the student must complete either number one or two below. One must be signed at the institution. Two must be notarized.

### 1. Must Be Signed at the Institution

The student appear in person to Ponce Health Sciences University to verify his or her identity by presenting an unexpired valid government-issued photo identification (ID), such as but not limited to, a driver's license or passport. The institution will maintain a copy of the student's photo ID that is annotated by the institution with the date it was received and reviewed, and the name of the official at the institution authorized to received and reviewed the student's ID. In addition, the student must sign, in the presence of the institutional official, the Statement of Educational Purpose provided below.

### Statement of Educational Purpose

I certify that, I \_\_\_\_\_ (Print name) am the individual signing this Statement of Educational Purpose and that the federal student financial assistance I may receive will only be used for educational purposes and to pay the cost of attending in PHSU for 2023-2024.

\_\_\_\_\_  
(Student's Signature)

\_\_\_\_\_  
Student's ID Number

\_\_\_\_\_  
Signature Date

Signature of school Official \_\_\_\_\_ Date: \_\_\_\_\_

By my signature below, I certify that I am a school official authorized to review the identification submitted on behalf of this student and I saw an original government-issued form of identification of the aforementioned student on this date.

### Notary's Certificate of Acknowledgement

State of city \_\_\_\_\_ on \_\_\_\_\_, before me, \_\_\_\_\_  
(City/Country) (date) (Notary's Name)

personally appeared, \_\_\_\_\_ and proved to me on basis of satisfactory evidence of  
(Print the name of signer)

identification \_\_\_\_\_ To be the above-name person who signed the foregoing instrument.  
Type of unexpired government-issued photo ID provided

Witness my hand and official seal \_\_\_\_\_ (Notary Signature).

My commission expires on \_\_\_\_\_ (Date)

**ANNEX F:**  
**VERIFICATION FORM (V1)**



## Standard Verification Worksheet (V1) 2023-2024 Office Student Financial Aid



### Federal Student Aid Programs

Your Free Application for Federal Student Aid (FAFSA) was selected for verification which compares your FAFSA information to your (parent's or spouse) financial documents. This is a federal requirement under SACFR. If there are any differences, corrections will be made to the FAFSA and sent to the U.S. Department of Education for confirmation.

#### What you must do:

- Contact Ponce Health Sciences University Financial Aid Office if you have questions completing this form: 787-840-2575 or by email [finaid@puh.edu](mailto:finaid@puh.edu).
- **Dependent students:** you and the parent who signed your FAFSA.
- **Independent students:** you and your spouse (if apply)
- Hand in, or email your completed form to the Financial Aid Office.
- Do not make any additional income/ household size/ number in college corrections to the FAFSA once this form has been submitted.

#### Please Select

Dependent Student

Independent Student

### A. STUDENT INFORMATION

REQUIRE FOR: V1

\_\_\_\_\_  
Last Name      First Name      M.I

\_\_\_\_\_  
Student ID #

\_\_\_\_\_  
Permanent Address

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
City/State/Zip

\_\_\_\_\_  
Student Email

\_\_\_\_\_  
Alternate or Cell Phone Number

\_\_\_\_\_  
Student Phone Number

### B. HOUSEHOLD INFORMATION

REQUIRED: V1

List the full names, ages, relationship (to you) of all household members below. Only indicate the college or university for persons who will attend at least half time in a degree, diploma or certificate program at an eligible postsecondary educational institution any time between July 1, 2023 and June 30, 2024. If you need more space, attach a separate page.

#### Dependent or independent students include:

- Yourself, your spouse (if married) and your parent(s), including a stepparent, even if you don't live with your parent(s)
- Your parent(s)' other children, even if they don't live with your parent(s), if (a) your parent(s) will provide more than half of their support from July 1, 2023, through June 30, 2024, or (b) the children would be required to provide parental information when applying for federal student aid; and
- Other people, if they now live with you and your parent(s) provide more than half of their support and will continue to provide more than half of their support through.

Full name	Age	Relationship	College	Will be Enrolled at Least Half Time (Yes or No)

Note: We may require additional documentation if we believe the information regarding the household members enrolled in eligible postsecondary educational institutions is inaccurate.

**C. INCOME INFORMATION FOR: REQUIRED FOR: V1**

**Student, Spouse (if married) and Parents Tax Filers**

1. \_\_\_ Student \_\_\_ Spouse \_\_\_ Parent Check here if a 2021 Tax Return Transcript(s) is provided.
2. \_\_\_ Student \_\_\_ Spouse \_\_\_ Parent Have Used the IRS DRT in FAFSA on the WEB to transfer 2021 IRS income tax return information into the student's FAFSA.
3. \_\_\_ Student \_\_\_ Spouse \_\_\_ Parent Have not yet used the IRS DRT in FAFSA on the WEB, but will use the tool to transfer 2021 IRS income tax return information into the student's FAFSA once the 2021 IRS income tax return has been filed.
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- **Online Request**- go to [www.irs.gov](http://www.irs.gov), under the Tools heading on the IRS homepage; click "Get a Tax Transcript" and then click "Get transcript Online or Mail". Make sure to request the "IRS Tax Return Transcript" and *Not* the "IRS Tax Account Transcript."
- **Telephone Request** – 1-800-908-9046 Paper Request Form – IRS Form-E2 or IRS Form 4506-T

**D. INCOME INFORMATION FOR: REQUIRED FOR: V1**

**Student, Spouse (if married) and Parents Nontax Filers**

\_\_\_ Student, \_\_\_ Spouse (if married), \_\_\_ Parent Were not employed and had no income earned from work in 2021.

\_\_\_ Student, \_\_\_ Spouse (if married), \_\_\_ Parent Were employed in 2021 and have listed below the names of all employers, the amount earned from each employer in 2021, and whether an IRS W-2 form is provided. (Provide copies of all 2021- IRS W-2 forms issued to the student, spouse (if married) parents by their employers). List every employer even if the employer did not issue an IRS W-2 form or an equivalent document.

Employer's Name	IRS W-2 Provided? (Yes or No)	Annual Amount Earned in 2021
<b>TOTAL AMOUNT OF INCOME EARNED FROM WORK</b>		<b>\$</b>

Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2022 that indicates a 2021 IRS income tax return was not filed with the IRS or other relevant tax authority.

A 2021 Confirmation of nonfiling may be obtained through:

- From the IRS using the Form 4506-T and checking box 7.
- Form the Puerto Rico tax authority requests the Form SC 6088-A.

**E. INCOME INFORMATION FOR:****REQUIRED FOR: V1**\_\_\_\_\_ 1. Tax Filers with special circumstances (TFSC) \_\_\_\_\_ 2. Amended Tax Return (ATR)**INDIVIDUALS GRANTED A FILING EXTENSION BY THE IRS**

\_\_\_\_\_ Student, \_\_\_\_\_ Spouse (if married), \_\_\_\_\_ Parent Individuals filing for and extension must provide:

- A copy of IRS Form 4868 and a copy of the IRS Approval of the extension of Time to File U.S. Individual Income Tax Return, "that was filed with the IRS for tax year 2021;
- A copy of the IRS's approval of an extension beyond the automatic six-month extension if the Individual an additional extension of the filing time for tax year 2021; and
- A copy of IRS Form W-2 for each source of employment income received for tax year 2021 and, if self-employed a signed statement certifying the amount of the individual's Adjusted Gross Income (AGI) and the U.S. income tax paid for tax year 2021.

**INDIVIDUALS WHO WERE VICTIMS OF IRS TAX-RELATED IDENTITY THEFT (TFSC)**

\_\_\_\_\_ Student, \_\_\_\_\_ Spouse (if married), \_\_\_\_\_ Parent, A Tax Return Data Base View (TRDBV) transcript obtained from IRS that includes all of the income and a statement signed and the date by tax filer indicating that they were victims of Identity Theft and that the IRS is aware of the tax-related identity theft.

**AN INDIVIDUAL WHO FILED AN AMENDED IRS INCOME TAX RETURN FOR TAX YEAR 2021 (ATR)**

\_\_\_\_\_ Student, \_\_\_\_\_ Spouse (if married), \_\_\_\_\_ Parent

- A 2021 IRS Tax Return Transcript (that will only include information from the original tax return and does not have to be signed) or any other IRS tax transcript(s) that includes all of the income and tax information required to be verified; and
- A signed copy of the 2021 IRS Form 1040X, "Amended U.S. Individual Income Tax Return," that was filed with the IRS.

**INDIVIDUALS WHO FILED NON-IRS INCOME TAX RETURNS (TFSC)**

An individual who filed or will file a 2021 income tax return with the relevant taxing authority of a U.S. territory, Commonwealth of Puerto Rico, or with a foreign central government must provide:

\_\_\_\_\_ Student, \_\_\_\_\_ Spouse (if married), \_\_\_\_\_ Parent A signed copy of his or her income tax return that was filed with the relevant taxing authority (Guam, the U.S. Virgin Islands) or commonwealth (Puerto Rico and the Northern Mariana Islands).

\_\_\_\_\_ Student, \_\_\_\_\_ Spouse (if married), \_\_\_\_\_ Parent A copy of his or her tax account information that was filed with the tax authority for American Samoa.

\_\_\_\_\_ Student, \_\_\_\_\_ Spouse (if married), \_\_\_\_\_ Parent Who filed and income tax return with tax authorities Not mentioned above, i.e. a foreign tax authority, and who indicates that is unable to obtain the tax account information free of charge.**F. SIGN THIS WORKSHEET:****REQUIRED FOR: V1**

Each person signing certifies that all information reported is complete and correct. Each person also understands that if any section is left blank, any document(s) that are listed as "required" but not submitted is considered incomplete and aid will NOT be granted. **WARNING:** Knowingly providing false or misleading information on this worksheet may result in being fined, sentenced to jail, or both.

Student \_\_\_\_\_

Date \_\_\_\_\_

Parent \_\_\_\_\_

Date \_\_\_\_\_

## **ANNEX G:**

### **Pell Lifetime Eligibility Use 2023-2024**