

# Application for Consortium/Contractual Agreement

I, \_\_\_\_\_, SS# \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_, Phone # \_\_\_\_\_ request that a consortium/ contractual agreement be made on my behalf for \_\_\_\_\_ semester, 20\_\_\_\_, between:

**1. Host Institution**

AND

**Home Institution**

Carroll College  
 Financial Aid Office  
 1601 N Benton Ave  
 Helena, MT 59625  
 Phone: (406) 447-5425  
 Fax: (406) 447-4533

**Classes to be taken at the Host Institution:**

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

**Home Credits:**

If enrolling at Host and also at **Home** enter total Carroll 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 Carroll College.

\_\_\_\_\_  
 Carroll College Dean's or Chair's Signature      Printed Name/Title      Date      Telephone

**2. Completed by Financial Aid at Host Institution**

Total Credits \_\_\_\_\_ Period of Enrollment  
 From \_\_\_\_\_  
 To \_\_\_\_\_

Semester or Quarter \_\_\_\_\_

Tuition & Fees \$ \_\_\_\_\_

Books & Supplies \_\_\_\_\_

Room & Board \_\_\_\_\_

Other Expenses \_\_\_\_\_

Total \$ \_\_\_\_\_

\_\_\_\_\_  
 Host Institution's Signature      Printed Name & Title

\_\_\_\_\_  
 Date      Telephone

**3. Carroll College Section**

Total Credits \_\_\_\_\_ Semester \_\_\_\_\_

Tuition & Fees \$ \_\_\_\_\_

Books & Supplies \$ \_\_\_\_\_

Room & Board \$ \_\_\_\_\_

Other Expenses \$ \_\_\_\_\_

Total \$ \_\_\_\_\_

\_\_\_\_\_  
 Carroll Financial Aid Signature

\_\_\_\_\_  
 Date

- The institutions named above agree to enter into an agreement as allowed by Part 668.19, Student Assistance Gen. Provisions.
- The Host institution agrees NOT to provide financial assistance to the student for the term as listed.
- In case the student withdraws from school, the Host institution agrees to promptly notify Carroll College in writing so that adjustment or cancellation of aid can be made where appropriate.
- The Host institution agrees to disburse all aid provided by Carroll College upon verification of enrollment when requested.



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      Date

### **Student Certification**

1. Consortium will NOT be offered until a minimum of one semester, with satisfactory academic progress, has been attained at Carroll College.
2. I understand that either Host or Home Institution may decline to participate in this consortium agreement.
3. I understand that I must be fully accepted in a certificate, undergraduate or graduate degree program at Carroll College and that courses I am taking at the Host Institution must be transferable and apply toward my degree at Carroll College.
4. I understand that I must submit proof of my registration at the Host school before any Title IV Financial aid will be disbursed to me from Carroll College.
5. 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 Carroll College.
6. Aid can be disbursed only after I have an official award and verification of enrollment, earlier than the first day of classes based upon Carroll College's calendar.
7. 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 Carroll College may choose to send my aid directly to the Host school for payment.
8. I understand that it is my responsibility to make arrangements to transfer credits earned from the Host Institution to Carroll College at the end of the term of the Host Institution. A transcript from the Host Institution is required whether or not I complete or pass the course(s).
9. I understand that I will be required to repay financial aid for courses at the Host Institution if credits are not transferred to Carroll College. I understand that financial aid for future terms will not be released until transfer credits have been received and satisfactory progress has been met.
10. I understand repayment of financial aid, including loans, disbursed by Carroll College may be required if I (1) drop during the refund period, (2) withdraw (officially or unofficially), or (3) credits are not transferred to Carroll College.
11. By my signature on the front of this form, I authorize the Host Institution listed to release enrollment, financial and academic information to Carroll College Financial Aid Office.

cc: Student's file  
Consortium book  
Business Office

**CARROLL COLLEGE  
FINANCIAL AID OFFICE**  
**Consortium/Contractual Agreement Process**

**For students receiving financial aid from Carroll College 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. If you are going to be enrolled at Carroll this semester at the same time, enter the total Carroll 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 Carroll.
- Step 3. Sign and date the bottom of the form only after understanding and agreeing to all of the conditions on the front and back of the application.
- Step 4. Send the consortium to the Host Institution to complete box two. Do not return to the Carroll College Financial Aid Office until everything is completed except Box 3.
- Step 5. When boxes one and two are completed, make sure the form is returned to the Carroll College 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 Carroll 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 Carroll College Financial Aid Office. The Carroll College Business Office will then release the check directly to you.
  - If you must use financial aid to pay the Host school, you must coordinate payment between Carroll's Financial Aid Office, Business Office 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.**