



Permission to Enroll (PTE) Financial Aid Consortium Overview

Eligible students at the University of Maryland, College Park (UMD) (**Home Institution**) with departmental approval to take course(s) at another institution (**Host Institution**) can use the PTE Financial Aid Consortium process to use their combined enrollment at both institutions to receive a financial aid disbursement at UMD.

Student Requirements for a PTE Financial Aid Consortium

- Complete the FAFSA or MHEC One App for the correct academic year
- Has completed all federal and institutional financial aid verification requirements
- Meet and maintain UMD's [Satisfactory Academic Progress \(SAP\) requirements](#)
- Enrolled in 11 credits or less at UMD during the Fall, Spring, or Summer term
- *Permission to Enroll or a Request for Transfer or Inclusion of Credit* approved by the student's academic department

PTE Financial Aid Consortium Deadlines

- **Fall & Spring Semester:** All PTE financial aid consortium documents **must** be submitted by the end of UMD's schedule adjustment (add/drop) period for the semester. See the [UMD Official University Calendar](#) for dates.
- **Winter Session:** PTE financial aid consortia are not accepted for this semester.
- **Summer Session:**
 - If enrolled for Summer classes at UMD, consortium documents must be submitted by the end of UMD's schedule adjustment (add/drop) period for the enrolled session. See the [UMD Extended Studies Summer Semester Calendar](#).
 - If not enrolled for Summer classes at UMD, consortium documents must be submitted by the first day of class at the Host Institution.

PTE Financial Aid Consortium Process

1. Obtain approval from your academic department and register for the approved course(s) at the Host Institution.
2. Submit the following documents to the Office of Student Financial Aid (OSFA) at finaid-pte@umd.edu:
 - ✓ **The approved *Permission to Enroll or Request for Transfer or Inclusion of Credit* form from your academic department;**
 - ✓ **A completed and signed *Permission to Enroll Financial Aid Consortium Agreement* (see page 2 of this form), signed by the student and the Host Institution;**
 - ✓ **A copy of your unofficial transcript from the Host Institution confirming your enrollment;**
 - ✓ **A copy of your billing statement or account summary from the Host Institution.**

A new Permission to Enroll form is required for additional or modified course enrollment(s).
3. OSFA will adjust your financial aid based on your combined enrollment at UMD and the Host Institution **AFTER** the end of the semester's [schedule adjustment period](#). Financial aid will be disbursed to your UMD student billing account within 3-5 business days after the end of the schedule adjustment period. If your financial aid exceeds your billed UMD charges, the excess aid will be refunded to you.
 - You may use the refund to pay the charges at the Host Institution or education-related expenses. Students are encouraged to sign up for [Direct Deposit](#) to facilitate timely refund payments.
4. Submit an official transcript to the [UMD Registrar](#) with your final grade(s) at the end of your Host Institution's course(s).

Terms of Agreement

- In general, an approved PTE Financial Aid Consortium does not result in additional financial aid. Students should budget according to their current financial aid offer.
- Students may not receive federal or state financial aid at more than one institution at the same time. UMD may adjust a student's financial aid if the student also receives financial aid at the Host Institution.
- Financial aid cannot be disbursed until a student is registered for a minimum number of credits per term. Most federal loans require half-time (6+ credits) enrollment, and most grants and scholarships require full-time (12+ credits) enrollment. See our [website](#) for enrollment requirements.
- Financial aid will be disbursed according to federal, state, and institutional policies. **You are responsible for making payments to the Host Institution. UMD is not responsible for late fees, enrollment changes, or other penalties due to late payment at the Host Institution.** Please contact the Host Institution to confirm payment deadlines and payment options.
- You must notify UMD if you drop or withdraw from any PTE approved course(s) at the Host Institution. Our office reviews changes to a student's enrollment level and may adjust your financial aid according to federal, state, or institutional policies. Failure to complete enrolled coursework or leaving your program on an unsatisfactory basis may result in a financial aid adjustment or cancellation.
- Submit all forms to OSFA at least 30 days before the semester starts, but no later than the above deadlines. Send all PTE Financial Aid Consortium documents to finaid-pte@umd.edu. Consortium requests will be reviewed within 7-10 business days of submission. OSFA will adjust your financial aid based on your combined enrollment at UMD and the Host Institution **AFTER** the end of the semester's [schedule adjustment period](#).

If you have any questions about this process, please call the Office of Student Financial Aid at 301-314-8377 (option 2) or email finaid-pte@umd.edu.



Permission to Enroll (PTE) Financial Aid Consortium Agreement

STUDENT INSTRUCTIONS:

Complete and sign Section I and send the form to the Host Institution's Financial Aid office for certification. After the Host Institution completes and signs Section II, submit the completed form and all required documentation outlined in Section III to finaid-pte@umd.edu.

SECTION I: Student Information (Must be completed by the student)

Student Name: _____ UID: _____

Student's Phone Number: _____ Student's Email: _____

Name of Host Institution: _____ Host Institution Student ID: _____

Consortium Period: *Calendar Year* 20_____ *Academic Semester (select one):* _____ Fall _____ Spring _____ Summer _____

By signing this agreement, I attest that the course(s) indicated on the attached unofficial transcript are intended to count towards completion of a degree program at the University of Maryland, College Park (UMD).

I, the student, agree to:

- Submit a copy of my unofficial transcript and billing statement confirming enrollment at the Host Institution.
- Notify the UMD Office of Student Financial Aid of any changes in my enrollment at the Host Institution.
- Take responsibility for the payment of tuition, fees, and other billed expenses at both UMD and the Host Institution by all published due dates.
- Have all of my federal and state financial aid processed only at UMD for the entire Consortium Period.
- Submit an official transcript to UMD Office of the University Registrar upon completion of my classes at the Host Institution.

I authorize the Host Institution to confirm my enrollment and provide UMD with the information requested in Section II below.

Student Signature: _____ Date: _____

SECTION II: Host Institution Information (Completed by the Host Institution)

The student listed above plans to enroll at your Institution (Host) with the intent of transferring the earned credits towards their degree or certificate at UMD. The student plans to use financial aid funds to help cover the course(s) approved as part of the Consortium Agreement. As the student's Home Institution, UMD will be responsible for determining the student's financial aid eligibility, disbursing aid, monitoring academic progress, keeping records, and returning funds. This Consortium Agreement will allow UMD to disburse financial aid based on the student's combined enrollment at both institutions. Once any balance due to UMD has been paid, UMD will refund any excess financial aid to the student. The student is responsible for payment of all charges at the Host Institution. The Host Institution agrees to provide UMD with the following information.

Name of Host Institution: _____

Enrollment Period:

Calendar Year: 20_____

Academic Semester: Fall Spring Summer

Dates of Enrollment: From _____ to _____

Number of credits enrolled for the enrollment period: _____

Term/Semester Cost of Attendance	
Tuition:	_____
Mandatory Fee(s):	_____
Housing:	_____
Food:	_____
Books and Supplies:	_____
Other Expenses:	_____
Total Cost of Attendance: _____	

Host Institution Certification: The Host Institution agrees to NOT process federal or Maryland state student financial aid for the student named in Section I.

Name and Title of Authorized Financial Aid Representative

Signature

Date

E-mail Address: _____ Telephone Number: _____

SECTION III: Submission Instructions

Submit the following documents to the Office of Student Financial Aid (OSFA) at finaid-pte@umd.edu:

- ✓ An approved **Permission to Enroll (PTE) or Request for Transfer, or Inclusion of Credit** form from your academic advisor for the requested term.
- ✓ The completed and signed **Permission to Enroll Financial Aid Consortium Agreement** signed by the student and the Host Institution.
- ✓ A copy of your unofficial transcript from the Host Institution confirming your enrollment
- ✓ A copy of your billing statement or account summary from the Host Institution

Submit all forms to OSFA at least 30 days before the semester starts, but no later than the deadlines below. Please allow 7-10 business days for initial review. **OSFA will adjust your financial aid based on your combined enrollment at UMD and the Host Institution AFTER the end of the semester's schedule adjustment period.**

- **Fall & Spring Semesters:** All PTE financial aid consortium documents **must** be submitted by the end of UMD's schedule adjustment (add/drop) period for the semester. See the [UMD Official University Calendar](#) for dates.
- **Winter Session:** PTE financial aid consortia are not accepted for this semester.
- **Summer Session:**
 - If enrolled for Summer classes at UMD, PTE financial aid consortium documents must be submitted by the end of UMD's schedule adjustment (add/drop) period for the session. See the [UMD Extended Studies Summer Semester Calendar](#) for dates.
 - If not enrolled for Summer classes at UMD, PTE financial aid consortium documents must be submitted by the first day of class at the Host Institution.

If you have any questions about this process, please call 301-314-8377 (option 2) or email finaid-pte@umd.edu.

OSFA STAFF USE ONLY

Received all required documents:

- *Approved Permission to Enroll or Request for Transfer or Inclusion of Credit form*
- *Completed Permission to Enroll Financial Aid Consortium Agreement*
- *Unofficial transcript from the Host Institution confirming enrollment*
- *Copy of the student's Host Institution billing statement or account summary*

Anticipated Enrollment:

Credits at UMD: _____

Credits at Host: _____

Total Credits: _____

Added student to PTE Consortium Roster

Added Memo note

Updated PTE status indicator

Processed overrides

Approved: _____ Denied: _____

Reviewed by (OSFA Staff Initials): _____ Reviewed Date: _____

Comments: