

**Instructions:**

Please complete and submit this form in a sealed envelope.

Awards & Financial Aid Office, 202 Robertson Hall  
Carleton University, 1125 Colonel By Drive, Ottawa, ON, K1S 5B6  
Email: [Awards@carleton.ca](mailto:Awards@carleton.ca)

Personal Information		
Last Name	First Name	Carleton Student / Applicant number 
Citizenship Status <input type="checkbox"/> American <input checked="" type="checkbox"/> Dual American/Canadian <input type="checkbox"/> Other		Social Security Number (SSN) 
I hold a <input type="checkbox"/> Student Visa <input checked="" type="checkbox"/> Diplomatic Visa	Date of Birth:	Email Address:
Canadian Address (while attending Carleton University): Street _____ City/Town _____ Province _____ Postal Code _____		
American Address: Street _____ City/Town _____ Province _____ Postal Code _____		
Academic Information		
<input type="checkbox"/> Bachelor Degree	<input type="checkbox"/> Master's Degree	<input type="checkbox"/> PhD Degree
Program name	Major or concentration	Program Year (eg. Yr1, Yr2, Y3, Y4)
I have or will be registering full time for the following academic sessions:		
<input type="checkbox"/> Fall term (SEPT - DEC) Year: _____	<input type="checkbox"/> Winter term (JAN - APRIL) Year: _____	<input type="checkbox"/> Summer term (MAY - AUG) Year: _____
Funding Information / Loan Profile		
I am a first time U.S. student loan borrower: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Requested Loan Type(s): (Check all that apply) <input type="checkbox"/> Subsidized Loans (undergraduate only) <input type="checkbox"/> Unsubsidized Loans <input type="checkbox"/> Parent PLUS Loans (dependent student) <input type="checkbox"/> Graduate PLUS Loans (graduate only)	<input type="checkbox"/> I am requesting a letter of anticipated aid for my student VISA application.  Deadline: _____
Please indicate the amount of income you expect to receive during the study period from the following:		
Scholarships: \$ _____ Bursaries: \$ _____	RA: \$ _____ TA: \$ _____	Other awards (please specify): \$ _____

**To be considered for U.S. Direct Loans, you must:**

- ✓ Complete the **Free Application for Federal Student Aid (FAFSA)**. Ensure that you specify Carleton University as the institution you wish to attend.  
**Carleton's federal school code is: G08368**
  - ✓ Complete and E-sign a **Master Promissory Note (MPN)**. Parents borrowing funds through a Direct PLUS loan for Parents must also complete a Master Promissory
  - ✓ All first time borrowers must participate in student on-line entrance counseling. If this is your first student loan, please complete the **Direct Loan Entrance Counseling** module.
  - ✓ Complete and E-sign the **Annual Student Loan Acknowledgment**
  - ✓ Once the Awards & Financial Aid Office at Carleton University has determined your eligibility, **you will be contacted via email concerning all pertinent information related to the administration and processing of your U.S. Direct Loans.**
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- Yes, I have completed the Free Application for Federal Student Aid (FAFSA) Application online
  - Yes, I have completed a US Direct Subsidized/Unsubsidized Loan Master Promissory Note (MPN) online with the US address that matches my completed FAFSA. **Note: this online MPN process must be completed for each academic year that US Direct Loan funding is requested**
  - Yes, I have completed the US Parent Plus Loan Master Promissory Note (if applicable)
  - Yes, I have completed Entrance Counselling online for my application for US Direct Loans at Carleton University *Note: This is a one-time only requirement for first time borrowers of the US Direct Loan program.*
  - Yes, I have completed the Annual Student Loan Acknowledgment

**Important Information:**

1. Students in receipt of U.S. Direct Loans are required to maintain **satisfactory academic progress**.
2. Changes to course load, including dropping a course or withdrawal, may result in ineligibility for all or part of your student loan funding (refer to **Return of Title IV Funds Policy**)
3. The Higher Education Reconciliation Act (HERA) specifies that a program offered by a foreign school that uses telecommunications as a method of delivery is not eligible for student loan funds. "Telecommunications" is defined as "the use of television, audio, or computer transmission, including open broadcast, closed circuit, cable, microwave, or satellite, audio conferencing, computer conferencing, or video cassettes or discs." At Carleton University, this includes courses via CUTV, Tapes to You Service and Carleton University OnLine (CUOL). **Students must carefully consider which courses they register in to comply with the legislation and to maintain their eligibility for student loan funding.**

**Student's Declaration and Signature:**

- ◆ I declare that I am not enrolled in or plan to take any study abroad opportunities at a US institution or a non-Title IV eligible institution during the term/s for which I am applying for funding. Participation in any such study abroad opportunities disqualifies me for funding.
- ◆ I declare that I am not enrolled in or plan to take any distance education or online courses during the term/s for which I am applying for funding. Participation in distance education and online courses disqualifies me for funding.
- ◆ I understand that if I am eligible to receive US Direct Loan funds, Subsidized, Unsubsidized, Parent Plus or Graduate Plus Carleton University will first apply the loan disbursements towards outstanding tuition/miscellaneous fees on my Carleton Student Account. If at that point my fees have been paid, and I am entitled to any refunds that are generated by the disbursement, I can request the refund through Carleton Central and it will be issued to me by the Business Office:
- ◆ I declare that the above information is true and accurate. I understand that I must inform the Awards & Financial Aid Office at Carleton University of any change in my circumstances, including but not limited to changes in enrolment, student status, awards, academic probation, living arrangements, contact information, etc. I acknowledge that it is my responsibility to read and understand the Satisfactory Academic Progress (SAP) and Return of Title IV Funds Policies.

Student's signature: \_\_\_\_\_ Date: \_\_\_\_\_

Parent's signature: \_\_\_\_\_ Date: \_\_\_\_\_

**(Required only if receiving parent plus loan)**

**For further information, please contact:**

Awards & Financial Aid Office, 202 Robertson Hall  
Carleton University, 1125 Colonel By Drive, Ottawa, ON, K1S 5B6  
(Tel): 613-520-3600 or 613-520-2600 ext. 8501  
email: [awards@carleton.ca](mailto:awards@carleton.ca) (please reference U.S. Student Aid in the email subject line)

*At Carleton University, we recognize and respect the importance of privacy. Personal information that we collect is kept confidential. In accordance with section 41 of the Freedom of Information and Protection of Privacy Act, Carleton University will only use the information in its custody or control in the following circumstances: where the individual identifies the particular information and consents to its use; for the purpose for which it was collected or a consistent purpose (i.e. a purpose which the individual might have reasonably expected).*