Knowledge Transfer Summary (KTS)

Important Reminders

We represent the first point-of-contact operations for the Registrar, Student Accounts, Financial Aid, and ’Cane Card. Students should not be referred directly to those offices unless it is 100% certain they should be (most likely, it will not be the case). Instead, we should use our website resources, teammates, and training materials to determine the best course of action. If you are in doubt, contact leadership for clarity.

Need Quick Contacts/References? = See “Quick Reference Guide” knowledge article

Addresses

- ’Canes Central / Student Accounts Physical Address
  - 1307 Stanford Drive
  - Harold Long Jr. and H.T. Smith Student Services Building, 1st Floor
  - Coral Gables, FL 33146
- Student Accounts PO Box
  - University of Miami
  - P.O. Box 025551
  - Location 20
  - Miami, FL 33102-5551

Latest Updates

July 27, 2025

July 15, 2025

July 7, 2025

June 18, 2025

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Service Level Agreements (SLAs)

Standard SLAs

- Financial Aid = 15 business days for Undergraduate students, 10 business days for Graduate/Law students
  - Document Submission (Undergraduate) = 15 business days
    - Exception: The timeframe for newly submitted MPN and Entrance Counseling documents to show as "Complete" is 3-5 business days from the date the student confirms he/she completed them online if **and only if** the student already accepted the Awards
      - Otherwise, accept awards then disbursement should occur and these documents should show as "Complete" within the 3-5 business day disbursement window
  - Document Submission (Graduate/Law) = 10 business days
    - Exception: The timeframe for newly submitted MPN, Entrance Counseling, and Credit Counseling (if student has received approval after a denial for GRAD PLUS Loan) documents to show as "Complete" is 3-5 business days from the date the student confirms he/she completed them online if **and only if** the student already accepted the Awards
      - Otherwise, accept awards then disbursement should occur, and these documents should show as "Complete" within the 3-5 business day disbursement window
      - For more information about Credit Counseling, see Graduate PLUS Loan section of Federal Aid Types
  - Document Submission (Online MBA,GRBUO) = 10 Business days
- Registrar = 5 business days
- Student Accounts = 5 business days
- Note = SLAs are simply worst-case scenario projections of the of time it can take for processes to occur
  - Processes may occur much quicker than the stated SLA
  - If SLAs are violated, Associates will escalate to a Specialist for review

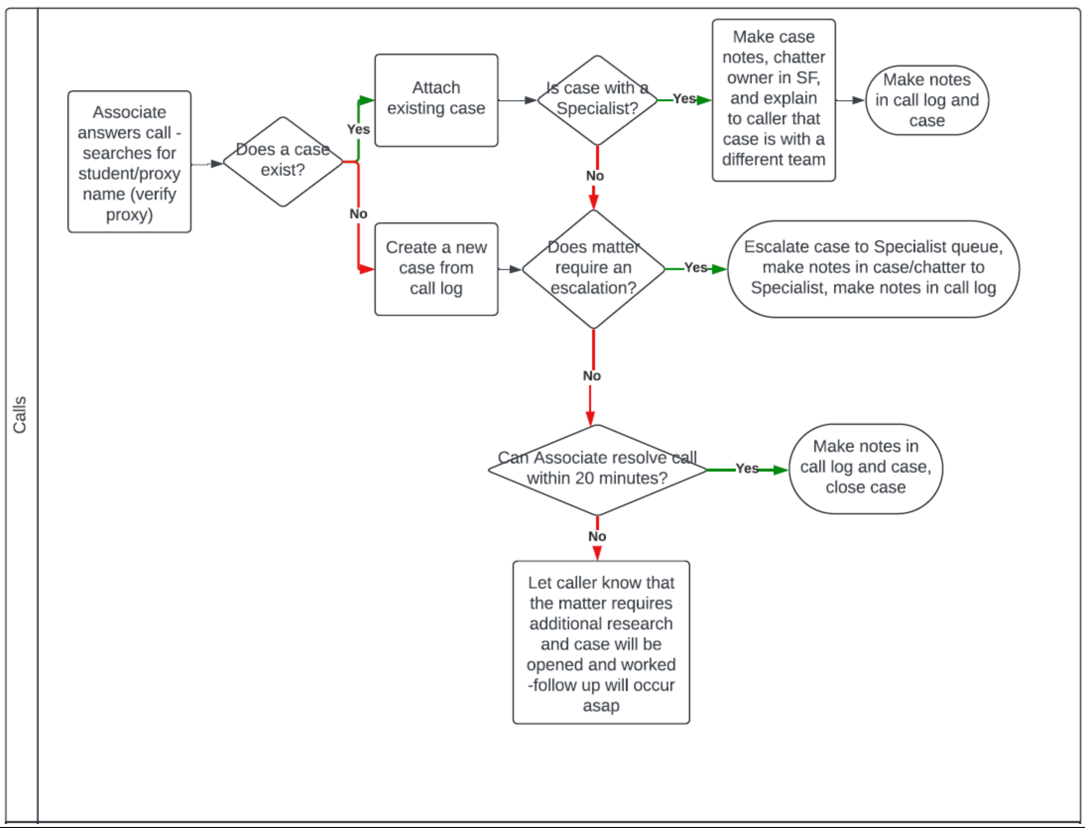
Associate Business Processes

- All 'Canes Central Employees are responsible for handling the following:
  - Call center Operations
  - Virtual Cases
  - In-Person Walk-Ins
- Depending on the type of interaction, there is a different process flow
- Call Center Operations
  - For every call, we need to either make a new case or attach an existing one (like a walk-in record does)
    - How will this look on Salesforce?
      - Within a call log, you can create a new case or search for an existing one
  - Call Center Interaction Case Process for Associate:
    - **If there is an existing case open**
      1) Associate will take ownership as long as case is not already in a Specialist queue or with a Specialist
         a) If case is already in Specialist queue or with a Specialist, make case notes and chatter case owner

2) Associate will try to resolve case during the phone call, so it can be closed after the call
    a) *If a call exceeds 20 minutes, you need to let caller know that you will continue to work on their case at a later time*
3) If Associate determines that existing case needs to be handled by a Specialist, it can be escalated for assistance

- **If there not an existing case open**
    1) Create case, solve issue in moment, and close on spot
    2) Create case, determine that additional work needs to be done in order to solve case, keep it open
        a) *If a call exceeds 20 minutes, you need to let caller know that you will continue to work on their case at a later time*
    3) Create case, escalate case to Specialist for assistance

- **Reminder**: All notes will be seen by students/parents



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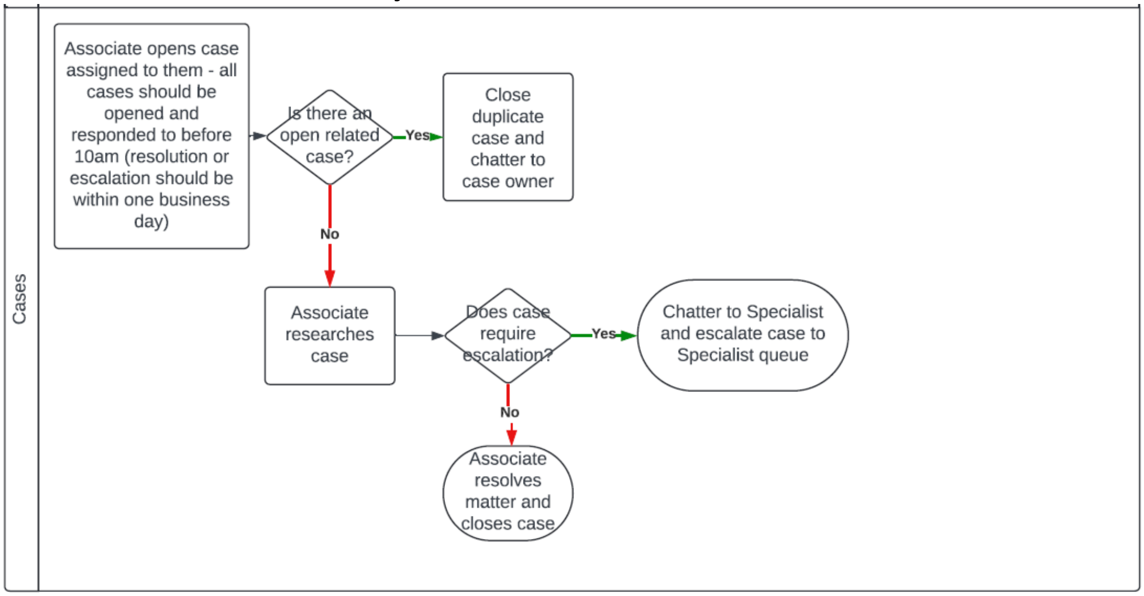
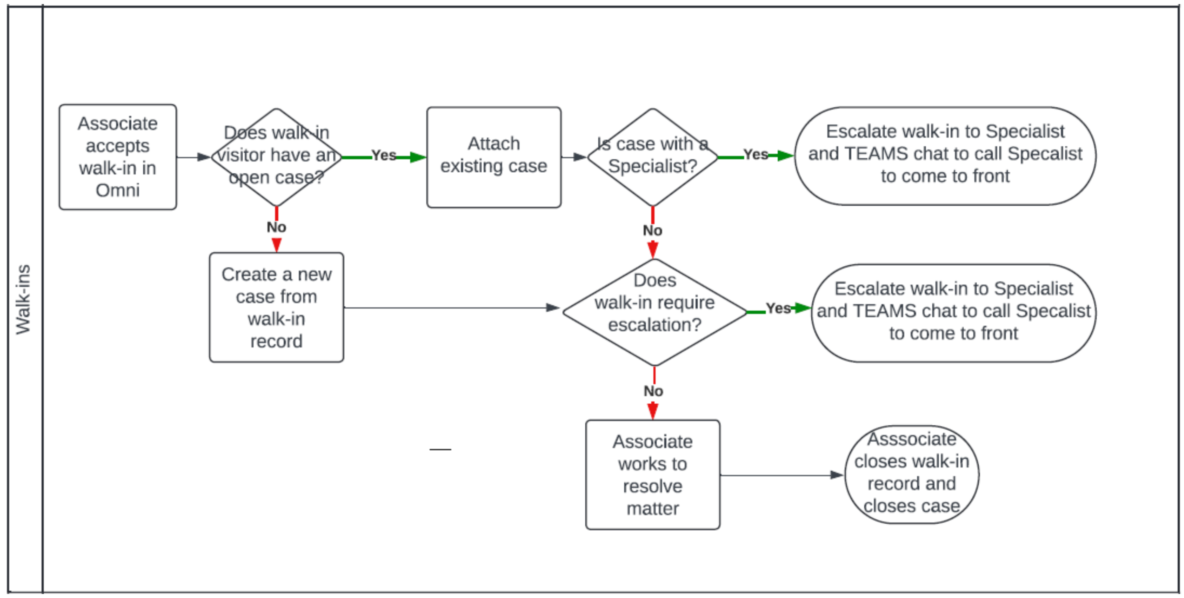
- Virtual Cases
  - Cases will be distributed each morning to all Associates, regardless of schedule for that day
    - We should communicate that we aim to pick up all new cases by the next business day and to reach out that day
  - 

- In-Person Walk-Ins
  - If scheduled for Walk-Ins, Associates will sit on the floor in lobby and be available for walk-in interactions with students
  - All Walk-In records need to have either a new case created or an existing case attached
    - **If there is an existing case open**
      - Associate will take ownership as long as case is not already in a Specialist queue or with a Specialist
        - If case is already in Specialist queue or with a Specialist, make case notes and chatter case owner
      - Associate will try to resolve case during the walk in, so it can be closed after the interaction
      - If Associate determines that existing case needs to be handled by a Specialist, it can be escalated for assistance
        - Escalation will take place through the Walk-In record and a message will be sent to the appropriate Specialist chat in Microsoft Teams
    - **If there not an existing case open**
      - Create case, solve issue in moment, and close after the interaction
      - Create case, determine that additional work needs to be done in order to solve case, keep it open
      - Create case, escalate case to Specialist for assistance
        - Escalation will take place through the Walk-In record and a message will be sent to the appropriate Specialist chat in Microsoft Teams



Case 3 Strikes SLA for Students/Proxies

- You should try multiple means to make contact with your case submitter in order to address the concerns; however, you do not want to simply send an email or make a call and wait for a response as a response may never come
- To facilitate the expeditious completion and closure of our cases, you should attempt the following in this order to make contact with your submitter:
  - **STRIKE 1**
    - Day 1 (The day you pick up the case) = Contact the submitter via the submitter's preferred method of contact
  - **STRIKE 2**
    - Day 2 (The next morning if no response) = Contact the submitter again via another method (e.g., if the preferred method was email, call)
  - **STRIKE 3**
    - Day 2 (Later that same day if no response) = Contact the submitter again via the submitter's preferred method of contact
      - Mention you have attempted to reach the submitter 3 times
      - Mention if you don't hear back from the submitter by 8:00 a.m. tomorrow you will consider the issue resolved and will close the case
  - **YOU'RE OUT**
    - Day 3 (The next morning if no response) = Close the case
- Of course, in these situations, if you are able to provide answers during the 3 strikes via email and/or voicemail, please do
  - Do not simply leave the submitter high and dry if you can avoid it

Case 3 Strikes SLA for Case Owners

- Case owners should respond to all emails on their cases and chatters from the team within a timely fashion in order to provide timely service
- To facilitate the resolution of cases in instances, all team members should follow these steps when chattering a Case Owner:
  - **STRIKE 1**

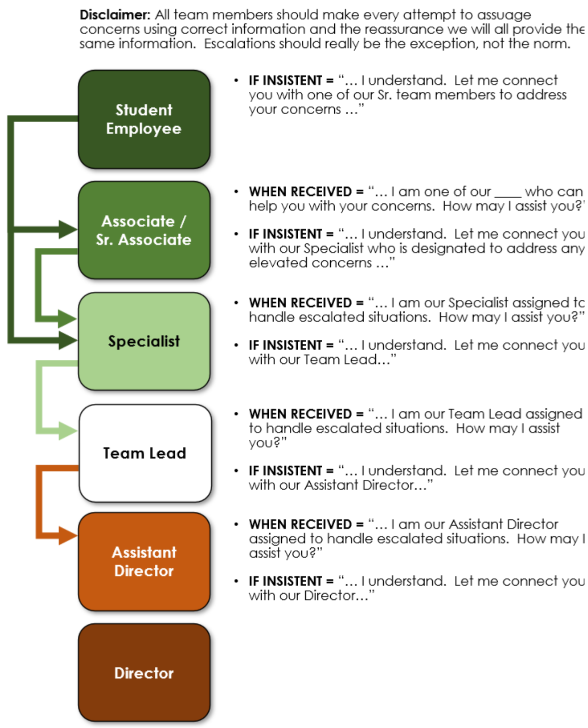
        - Chatter to the Case Owner to provide a summary of your interaction and what you envision are the "next steps"
    - **STRIKE 2**
        - If the Case Owner has not yet responded to the student since the last email from the student or chatter from a team member (i.e., 1 interaction point since the Case Owner's last communication), chatter the Case Owner again to (a) mention the student reached out again and (b) provide a summary of your interaction and what you envision are the "next steps"
    - **STRIKE 3**
        - If the Case Owner has not yet responded to the student since the last 2 emails from the student or 2 chatters from a team member (or a combination of 2 interactions), chatter the Case Owner and Betsy Lopez, so all individuals are alerted
            - Inform the student you are chattering "our leadership group" so that someone can ensure the student receives a response ASAP
            - Do not provide the names of the people you are chattering and simply say "it is a group of people who are all there to help out"
        - Mention in the chatter that the student reached out again and provide a summary of your interaction and what you envision are the "next steps"
- Of course, in these situations, if you are able to resolve the case for the student through your interactions, please do
    - Then simply chatter to the case owner you were able to resolve the issue and let the Case Owner know the case can be closed

Case Pick up and Response SLA

- **Submitted New Case in Virtual Services Queue (Associates) =** We should communicate that we aim to pick up all new cases by the next business day and to reach out that day
- **Escalated New Case in Specialist Queue (Specialists) =** We should communicate that we aim to pick up all new cases within two business days
- **Current Case, Chattering Case Owner =** We should communicate that we aim to get in touch "as soon as possible" instead of providing a specific timeframe because we just don't know specifically when that will happen. The hope is this outreach will occur that day or the next business day
    - Note: We should also take the opportunity to educate students that they can also chat to their case owner via the Student Log In link on our website. They go to My Cases → Open Cases → click the case → chatter under Feed like we do

De-escalation SLA

- We know that students and proxies will often ask to speak with a supervisor without going through the proper chain of command
- This SLA is not to bypass the proper chain of command but rather to give specific details on how to approach situations in which you have worked through the proper channels, but a student or proxy is still upset and still demands that a supervisor intervene
    - **Note:** This isn't a mechanism to escalate every situation where a supervisor is mentioned to a supervisor without going through the normal process to reach a resolve
    - The leadership team will review all of these escalations thoroughly and use the situations as training opportunities
- **Steps:**
    1) Student or proxy demands a supervisor

2) Express empathy, say "Let's see if I can assist you and we'll go from there," and try to work through their concern via our normal policies and procedures
   - Pause, place someone on hold, and/or ask for assistance to simply take a breath, gather your thoughts, and double/triple-check your knowledge
   - It's always a great idea to consult your teammates but also your manager in these moments to make sure we're all on the same page on how to move forward
3) Reach a resolution
   - If you can resolve → Great!
   - If you can't resolve but it is a CC issue → Escalate the current case to Specialist queue
   - If you determine the issue is actually a referral to another unit → Explain and refer
4) Escalate to a supervisor if necessary
   - If the student or proxy still demands to speak with a supervisor after you have tried your level best to resolve the issue—even if your answer is 100% the answer and you tried to reiterate that—escalate through this process:
     - **Escalation Pathway**
       - 

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   - **Never say a supervisor is not on site, not present, or not able to speak with them, and never refuse to give a supervisor's name if the person is adamant … just follow the pathways above**
     - We never want to suggest that as there should be a path for us to resolve concerns without them escalating beyond 'Canes Central
     - If someone genuinely is not present, then mention that the person is unavailable at this time, but you will have that person contact them ASAP

- **File a "Formal Complaint"**
  - If someone asks to make a formal complaint, move through the steps outlined above.

- **General Best Practices to Support Your Team**
  - The Basic 4
    1) **Empathize** = Validate their feelings, apologize on behalf of the team, and mention all calls are recorded and cases are documented so we will review and communicate with our team as needed to address their concerns
    2) **Correct** = Research past experiences and, assuming we handled them appropriately, mention it appears based on your review it looks like they have been given correct information in line with our protocols in the past
    3) **Echo** = Reiterate the correct information communicated by other team members via case emails, call logs, notes, etc.
    4) **Reassure** = Let them know we are always here to help and make them feel they can always reach out to us in the future for assistance
  - Do
    - Communicate with Confidence
      - Remember: You control the situation
    - Keep it Professional and Respectful
      - And feel empowered to ask others to do the same
    - Explain the WHY and HOW
      - Provide complete clarity and offer solutions
    - Pause and Find Out
      - Use resources and seek answers before anything
    - Peer Coach
      - If you notice incorrect information, say something
    - Chatter Case Owners
      - Provide a summary of the interaction, your direct insight, and specific "next steps"
    - If you can resolve the case, do it
      - Chatter the Case Owner to close it out
    - If you take student as a Walk In or answer the phone and student has an existing case, take over the case if you can work it through to completion
      - Chatter your teammate that you got it
  - Don't
    - Be Rude or Profane
      - Don't let others be either
    - Recommend Cases/Walk Ins to "Confirm" or Bypass
      - Stick to SLAs and only recommend if beyond scope
    - Recommend Duplication to Dispute Resolve
      - If an accurate resolve is provided, explain and move forward
    - Tell Students to Request Specialists
      - Trust Associates to make the best decision

FA Endowed (Donor) Scholarship SLA

- Once the donor scholarship placeholder is changed out with the named scholarship, the Endowed Scholarship will be removed and the new award will show, but it will not be disbursed until the thank you letter and release form are received by Advancement
  - There will also be a hold on the account until this occurs

    - It takes approximately 3-5 business days for disbursement and the hold to be removed once these items are submitted
- Click here for more details

FA FAFSA Show on PF as Received SLA

- We should communicate 15 business days here but it normally uploads and shows as Received within 3-5 business days

FA IDOC Document Review SLA

- 3-5 business days for uploaded items to be reviewed and decided upon for completion by IDOC
    - Note: This is different from the standard document processing SLA of 15 business days

FA Loan Origination and Disbursement SLA

- Origination Date Deadlines for Federal Loans (i.e., Grad PLUS, Parent PLUS, Sub, and Unsub)
    - These can only originate up to a specified date, which is **1 week before the last day of Finals** for a semester
        - The official dates will be communicated to the team
    - Students cannot originate loans for a term after this date, which means they may need to pursue private loan options that would allow for a "prior" term origination
        - These loans cannot be originated for a prior academic year
    - Scenarios
        - **Fall Only Loans =** Cannot originate after specific date in Fall
        - **Spring Only and Fall/Spring Loans =** Cannot originate after specific date in Spring
        - **Summer Only Loans =** Cannot originate after specific date in Summer
            - Note: Summer loans are treated separately from Fall/Spring and there is no such thing as a Fall/Spring/Summer loan for students (other than those in UOnline)
                - There are rare exceptions to this if the student was enrolled in Spring and is currently enrolled in Summer (see Betsy to discuss)
- Grad PLUS, Sub, and Unsub Loans
    - 3-5 business days once all awards are accepted and documents are completed
        - "Completed" for MPN, Entrance Counseling, and Credit Counseling (if student has received approval after a denial for GRAD PLUS Loan) is from the date the student confirms he/she completed them online
    - **Exception =** If it is a student who is graduating in the Fall and who had their aid prorated and/or adjusted after they applied for graduation (e.g., Swapped Grad PLUS for Unsub to help with interest rates), the origination and disbursement takes a little more time
        - Communicate 5-7 business days in this case
    - Another 24-48 hours for refunds to be issued after disbursement
- Parent PLUS and Private Loans
    - These loans can take up to 15 business days from the date the loan information is approved by the government or lender and sent to the University for origination to appear on PowerFAIDS
    - PRIVATE LOANS: Allow 15 business days from the day the loan posts on PowerFAIDS (the date that the note is put in comments) for the loan to disburse to the account
        - For students who have a Fall/Spring private or plus loan that was already certified the semester prior, their loan will be disbursed within 15 business days from the 10 days before classes begin

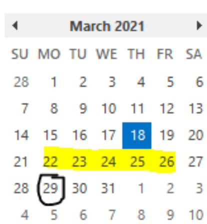
        - Example: A student's F/S private loan that was certified on 9/2/22, will be disbursed for the Spring within 15 business days of 1/7/23 (the 10 days prior to the Spring term start)
    - If someone says their loan has not posted to their aid awards, we need to confirm the items below before we can determine if (a) it was submitted correctly or (b) it violates the SLA:
        1) **Date loan approved**
            - This will determine if it is within or exceeding the SLA for escalation purposes (assuming all other items below are 100% correct)
        2) **Semesters/time period of approved loan (e.g., Fall, Spring, full year, etc.)**
            - Students and parents must enter the proper semesters or months for the loan as it will impact origination/disbursement
            - If they entered this wrong to not span their desired semesters, they need to work with the lender to amend them
        3) **Amount of approved loan**
            - We need to see how much it was approved for
            - If they requested the maximum for these loans, they should accept or decline their offered federal aid from UM before anything
            - This may hold up the posting of the loans
        4) **School approved loan was for (i.e., University of Miami)**
            - Sometimes they did everything but entered the wrong school or they originally intended to attend another school
            - This needs to say University of Miami or it will not be processed
                - <u>Note:</u> UM may be listed as UM Coral Gables (for GRAD MED too), UM Law, and/or UM Med (not GRAD MED) so students need to select the proper school with their lender
        5) **Borrower has completed all required documents with loan servicer before loan was sent to UM for certification**
            - The SLA for loan certification/posting will only begin once the borrower has completed everything required of them by their loan servicer
    - **If the items above are checked and are correct,** please have the caller or submitter review these items and attach screenshots so we can see what they see
        - If an Associate determines everything is correct and the SLA has been exceeded, they will escalate to an FA Specialist
    - **If not**, have them make the necessary corrections and/or tell them to wait the SLA
        - You may be able to screen some of these out over the phone and direct people to correct their loan information by going through these
    - See Loan Revision for information on how to revise or add onto a loan
- <u>Online MBA Disbursement SLA</u>
    - By Friday of the 2nd week of classes
        - It takes 3-5 business days if awards are accepted and loan documents are received for the funds to disburse, once disbursement begins
            - Note: This is different from other programs in that disbursements are not initiated until the end of the second week of classes

FA Overaward SLA

- The FA Processing Team has an automated "Overaward task" that notifies the processing team once an Overaward shows on a student's FA account in PF

    - Overawards may appear for a period of time as the processing team manually adds scholarships, waits for waivers to roll over from Flywire, etc.
    - This "Overaward task" will only show once the FA team "re-determines" the student's account
    - Therefore, you may see an Overaward before the FA Specialists do as you are reviewing a student's account live
        - FA Specialists are looking to be notified by the task
            - For more information, please see "Overawards" section in KTS

FA Packaging SLA

- SLA Specifics
    - Only students who have completed all of their documents are able to be packaged
    - Students will receive an award letter once they are packaged so they need to hang tight for this
    - Award letters will begin to be sent during specific timeframes
        - These are fluid and changes will be communicated to the team as needed
    - Once packaging begins, the FA team will package newly eligible students the following week
    - Students who have completed all of their documents and who were not packaged yet once packaging begins (see below) should hang tight through 1 full business week (i.e., Monday through Friday) as they should be picked up for packaging that next week
        - **Be sure to confirm all documents are completed!**
            - **Remember:** MPN and Entrance Counseling are not required for packaging, just disbursement
        - If students are not packaged after waiting 1 full business week, Associates will escalate to a FA Specialist to review and package, as long as the student is not selected for Verification (see "Messages" to determine if selected for Verification and/or see in "Documents" if the student was required to complete a Verification worksheet)
        - For example, if a student calls on the 18th (blue below) and the student just completed all documents that week, the student needs to wait the entire next week (yellow below) for packaging and, if they are not packaged by the 29th (circled below), they can reach out to us
            - 

- Recommendation for Online MBA (GRBUO)
    - Have the students fully-register for both mini-terms contained within a larger semester from the onset as it will facilitate aid packaging, help avoid payment issues/concerns, and avoid retro-adds/drops
    - Also, register as soon as possible once MATR will help facilitate the packaging process
- GRAD/LAW FA Processing Responsibility
    - **Michelle Pestaina**
        - Law
    - **April Norelus**
        - Arts & Sciences
        - Communication
        - GRAD MED

        - Nursing and Health Studies
    - **Eisha Henry**
        - Architecture
        - Business
        - Education
        - Engineering
        - Music
        - RSMAS

- Summer Packaging Dates
    - UGRD
        - Continuing Students = Students must be registered, and 1st billing notice has gone out to be packaged (i.e., they have a balance from enrollment)
        - New Students = Refer students to Admission until the day their 1st semester bill is presented when they transition to ’Canes Central but packaging should happen by 10 days after registration
        - New Accelerated ABSN Students = Students must be registered
    - GRAD/LAW
        - Continuing Students =
            - LAW = Students must be registered, and must be tuition calc’d so the tuition charges can be seen
            - GRAD = Students must be registered, and must be tuition calc’d so the tuition charges can be seen
        - New Students =
            - LAW = Handshake students to Anne Cruz-Alvarez (amcruzalvarez@law.miami.edu), Dean Hussmann Schroll (kschroll@law.miami.edu) and admissions@law.miami.edu as they will handle all FA questions for NEW LAW students until the release date of the 1st semester bill when they transition to ’Canes Central
                - **Try to answer as many questions as you can though before you refer and maybe you’ll resolve the issue**
                - **Remember:** We handle the student accounts side and these students will also fully- transition to us after the release date of the 1st semester bill
            - GRAD = Students must be registered, and must be tuition calc’d so the tuition charges can be seen
- Fall/Spring Packaging Dates
    - UGRD
        - Continuing Students = Packaging for Fall/Spring typically begins in the beginning of the Summer since FA packages for the entire academic year
        - New Students = Refer students to Admission until the day their 1st semester bill is presented when they transition to ’Canes Central but packages are released by admission decision dates
        - Continuing Accelerated ABSN Students = Students must be registered and Summer grades must be posted, then packaging will begin
    - GRAD/LAW
        - Continuing Students =
            - LAW = Packaging typically begins sometime during the Summer
            - GRAD = Packaging typically begins sometime during the Summer

            - New Students =
                - LAW = Handshake students to Anne Cruz-Alvarez (amcruzalvarez@law.miami.edu), Dean Hussmann Schroll (kschroll@law.miami.edu) and admissions@law.miami.edu as they will handle all FA questions for NEW LAW students until the release date of the 1st semester bill when they transition to 'Canes Central
                    - **Try to answer as many questions as you can though before you refer and maybe you'll resolve the issue**
                    - **Remember:** We handle the student accounts side, and these students will also fully-transition to us after the release date of the 1st semester bill

FA SAP Appeal Response SLA

- 15 business days after the day the appeal was submitted in Dynamic Forms

FA Verification SLA

- 15 business days from the date of when the last required document is marked as Received
- 2 Messages Show Status
    - Messages may be particular to the academic year (i.e., if so, it will list the academic year)
    - **1st Message =** Says the student is selected for verification is underway
        - If you only see 1 message, stick with this 15-business day verification SLA
            - The 15-business day SLA begins from the date of last document marked as Received
    - **2nd Message =** Once this process is complete, there will be a 2nd Message in PowerFAIDS that says verification is complete
        - Once you see this 2nd message, go with the FA Packaging SLA
    - Sample Messages:
        -

2nd	VER: Verification Comp.	Selection Set	Federal Verification is complete for 2021-22
1st	VER:Selected for Verif	Selection Set	Student Selected for Federal Verfication for the 2021-22 award year.

OSAS Check Sent/Cashed SLA

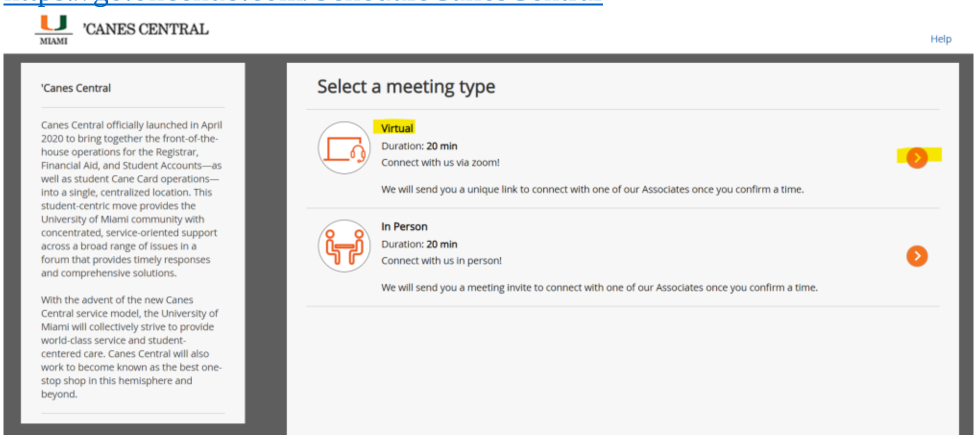
- Always confirm the date a check was sent to UM for posting and that it was sent to the appropriate P.O. Box or Physical Address
- All checks should arrive and be posted to a student's account within 10 business days

OSAS Refund Check SLA

- Once funds have been disbursed to an account, it takes 24-48 hours for a refund to been initiated, if there is not an S06 service indicator blocking the refund from being initiated. Depending on the method of refund, it can take the following amounts of time to reach the student:
    - Paper Checks
        - Could take up to 10 business days to arrive if a refund was sent to a student via a paper check
        - Note: The refund email notice says 3-5 days and most arrive within that window, but we should communicate 10 business days at the latest
    - Direct Deposit
        - Could take 1-3 business days (depending on student's bank) once refund is posted to billing statement
- Student Refund Check Cancellation Form

- Can take 3-5 business days for the form to be processed
  - Depending on the method of refund (paper check or direct deposit), follow above SLA
    - This is assuming that student is still owed a refund
- If paper check was the initial method of refund, student will need to wait the 10-business day SLA before submitting the form

Virtual Appointments Process

- Virtual appointments are available upon request only
- Process to Request a Virtual Appointment
  1. If a student or proxy wishes to request a virtual appointment with an Associate, they must first have an open case
     - **Call =** If a caller is requesting a virtual appointment, create a case and then proceed with Step 2
  2. Once there is an open case, request the student or proxy to tell you a specific date and time for the appointment
  3. When a date and time has been confirmed, reach out directly to Betsy so she can open the requested appointment slot on the virtual appointment website
  4. Once Betsy confirms that the appointment is available, Associate will visit the appointment link and schedule the appointment for the student or proxy
     - https://go.oncehub.com/ScheduleCanesCentral
     - 

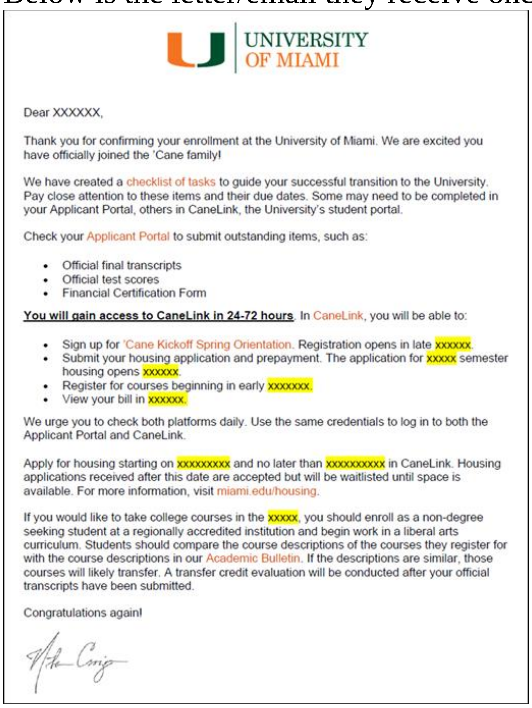
     - Once the calendar appointment becomes available, you can select it and schedule using the student or proxy information
  5. After scheduling the virtual appointment, you may send the link to the student or proxy
  6. When appointment comes up, attend and assist the student or proxy!

Systems

Boomi

- Contact George Holbrook via Teams or george.holbrook@miami.edu

CaneLink

- Tip Sheets
  - https://canelink.it.miami.edu/training/canelink/tip-sheets-and-tutorials/index.html
  - https://canelink.it.miami.edu/new-experience/index.html
- Access to CaneLink
  - All NEW GRAD/LAW obtain CaneLink access at the point of application
  - Accelerated BSN and DCIE students obtain CaneLink access at the point of application
  - All other NEW UGRD applicants do not obtain CaneLink access until they deposit
    - Once they deposit, it can take 24-72 hours for this access to be granted
    - Below is the letter/email they receive once they deposit
    - 

UNIVERSITY OF MIAMI

Dear XXXXXX,

Thank you for confirming your enrollment at the University of Miami. We are excited you have officially joined the 'Cane family!

We have created a checklist of tasks to guide your successful transition to the University. Pay close attention to these items and their due dates. Some may need to be completed in your Applicant Portal, others in CaneLink, the University's student portal.

Check your Applicant Portal to submit outstanding items, such as:

- Official final transcripts
- Official test scores
- Financial Certification Form

You will gain access to CaneLink in 24-72 hours. In CaneLink, you will be able to:

- Sign up for 'Cane Kickoff Spring Orientation. Registration opens in late xxxxxx.
- Submit your housing application and prepayment. The application for xxxxx semester housing opens xxxxxx.
- Register for courses beginning in early xxxxxxx.
- View your bill in xxxxxx.

We urge you to check both platforms daily. Use the same credentials to log in to both the Applicant Portal and CaneLink.

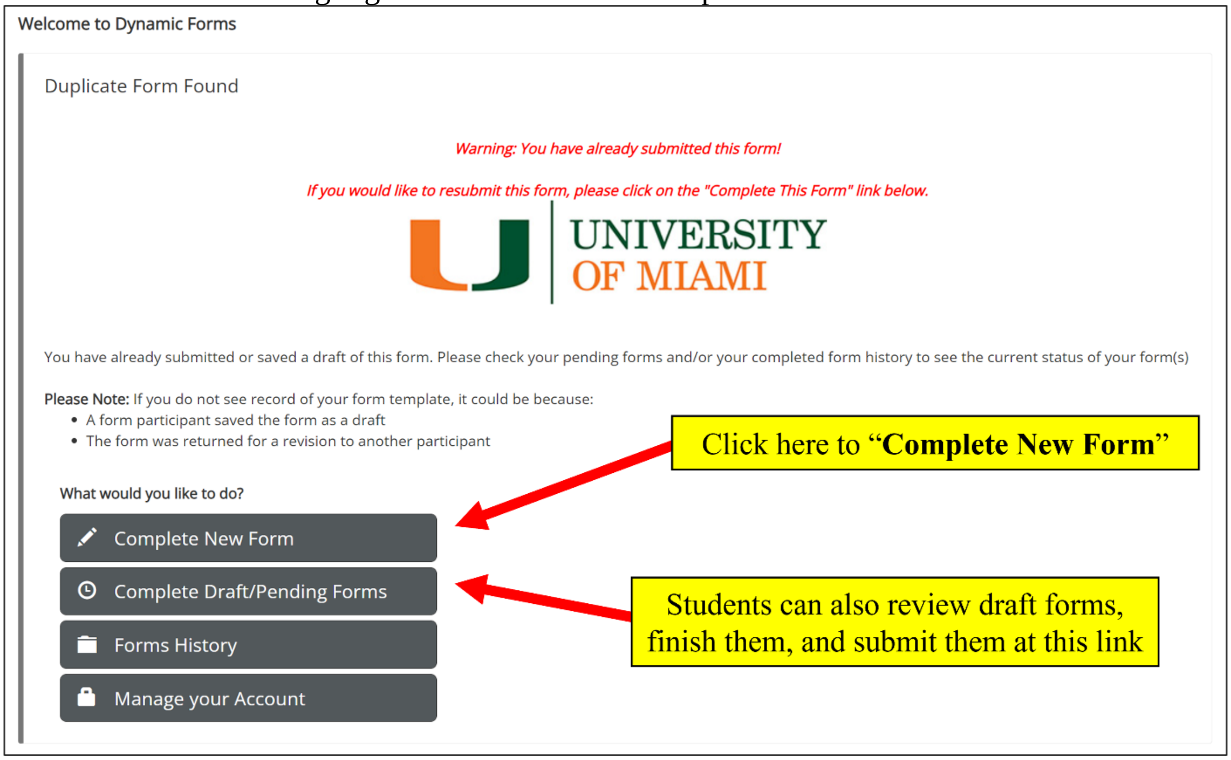
Apply for housing starting on xxxxxxxxx and no later than xxxxxxxxxx in CaneLink. Housing applications received after this date are accepted but will be waitlisted until space is available. For more information, visit miami.edu/housing.

If you would like to take college courses in the xxxxx, you should enroll as a non-degree seeking student at a regionally accredited institution and begin work in a liberal arts curriculum. Students should compare the course descriptions of the courses they register for with the course descriptions in our Academic Bulletin. If the descriptions are similar, those courses will likely transfer. A transfer credit evaluation will be conducted after your official transcripts have been submitted.

Congratulations again!

- Duplicate CaneLink Records
  - This typically occurs when a former student or applicant applies to a new program at the University but under a new name (e.g., married name)
  - If this is identified, provide contact information to UMIT to combine the two records into one
  - The record that was created first (e.g., maiden name) will be the master record
    - The duplicate record (e.g., married name) will be the record that is merged into the original and then deleted
    - If, once duplicate records are merged, a student needs to change his/her/their name, address, etc., he/she/they must go through the normal procedures to do so (e.g., Bio-Demo Form)

Dynamic Forms

- Sometimes students will receive an error message when they go to re-submit a Dynamic Form they already completed (see below)
    - Have them follow the highlighted directions to re-complete
    - 

Flywire

- Payment Guide = https://osas.miami.edu/_assets/pdf/accountservices/Documents/flywire-guide.pdf
    - This is accessible to students from our website → Billing and Payment → Online Payments
- Payments will always pay the oldest charges first, not necessarily the oldest term
- Aid will not pay backward, only the current term and forward
    - If someone wants to use aid from the current term to pay a prior term, they must receive a refund—assuming one is owed to that person—and then they are welcome to use the refund to pay the prior term if the person chooses to do so
- Students enrolled less than full-time will have a temporary hold placed on their account for 4 business days so FA can review the COA before a refund is released
    - This can lead to excess being applied to charges, if new ones pop up that become the oldest charges on the account, which can eliminate the possibility of a refund
- Billing notifications should be sent to the students preferred email address in CaneLink
- Once proxies update their email in their CaneLink proxy home, the new email address should replace the old one in Flywire in the daily file at 8:30 a.m. the next business day
    - New billing notices from that point forward should go to the updated email
- Proxies on Flywire roll from CaneLink but, if they are removed in CaneLink, they are not always auto removed in Flywire
    - If the person being removed is still listed as a proxy in CaneLink, recommend the student remove the person's proxy access in CaneLink before this is escalated
    - Once this is done, Associate can escalate to an OSAS Specialist is this is not removed from Authorized users the next business day

IDOC

- Check out https://pages.collegeboard.org/idoc to view the student view via the Overview slideshow
- The site above is the site students will use to access this
- The SLA for uploaded items to be reviewed and decided upon for completion is 3-5 business days

NetPartner (PowerFAIDS) External Link

- https://financialaid.miami.edu/NetPartnerStudent/PgAcceptAwards.aspx

PowerFAIDS

- Duplicate/SSN Issues on PowerFAIDS Records
  - Identify duplicate records
  - Verify SSN and EMPLID on duplicate records, or that last 4 digits of SSN are student EMPL
  - Example:

SSN	Last Name	First Name	Alternate	Tracking	Award Year
xxx-xx-0049	[redacted]	[redacted]	55030049	IP	2024

  - Student needs to complete the SSN update form on Boomi, so SSN can be updated in CaneLink
  - Once a student has valid SSN in CaneLink, escalate case to Financial Aid Specialist so they can assist with merge of PowerFAIDS records
  - SLA is 2-3 business days for merge to be completed
    - SLA for financial aid packaging for student starts at the time of merge
      - 5 business days after merge is completed
- Notes
  - Communicates to Flywire nightly on Monday-Thursday night
  - The blue bar at the top will tell you if they are a dependent (DEP) or independent (IND) student
- Address 1
  - Pulled from FAFSA (usually permanent address)
- Address 2
  - Pulled from CaneLink (usually local address)
- Awards
  - Status
  - Created Date
- Budgets
  - Adjusted Total
  - Health Insurance
- Comm Log
  - Create Date
  - Letter Info
- Comments
  - Award Year-Specific Comments
  - Global Comments

- Disbursements
  - Net Sched Amt = What will be applied to a student's account
  - Tran Date = Shows when the funds were disbursed
  - Tran Amount = Shows how much was disbursed
- Documents
  - Status
  - Effective Date
  - The following documents will appear on PowerFAIDS under "Documents" but are not to be communicated to students as they are only for internal use:
    - Conflict Resolution Required
      - **Note:** This is different from the **"Conflict-Add'l Info May Be Required"** Document, which is not private. This document is a visible placeholder to students to simply let them know they may be requested to submit additional documents so they should keep an eye on this and submit ASAP
    - NSLDS Close to Max
      - **Note:** This is different from the **"NSLDS Resolution"** Document. Look at Messages for the **"NSLDS Resolution"** Document for how to proceed.
        - If in the process of taking care of the "NSLDS Resolution" document the student needs FA to complete a form for the lender, have the student submit via the Document Submission Form with (a) their portion already complete and (b) specific instructions on where to send it
    - Outside Scholarship XXX Check
- FM Summary
  - This is a summary of the information the student listed on the FAFSA
  - Year in School
- General
  - IP = Incomplete for Packaging
  - RP = Ready for Packaging
  - AW = Awarded
  - AR = Award Letter Sent
  - ID = Incomplete Disbursement
  - RD = Ready for Disbursement
  - DM = In Disbursement
  - RR = Requires Review
- Loans
  - Drop Down Menu = Use the menu in the top left to toggle between loans
  - Student Info
  - School Info
  - Status
    - Credit Decision = Shows if credit was denied or not
    - Credit Requirement Met = If it says "Yes," then the student has an endorser; confirm with the student that the new credit counseling and the new MPN were also completed so the loan can disburse
  - History
    - Booking Notice means the disbursement is booked with the DOE, which is the 2nd step in the origination process

- Messages
- POE
    - Units = Credits enrolled at census date for aid
    - Federal SAP
    - Alternate SAP = UM merit aid SAP
- User Medium String
    - SAP FL BF
    - SAP EASE
    - SAP FSAG
- User String
    - FA Interest = Student indicated they would be interested in financial aid and so they will be packaged
    - FL Res Certify = Shows if the student's state aid has been certified by the state

Salesforce

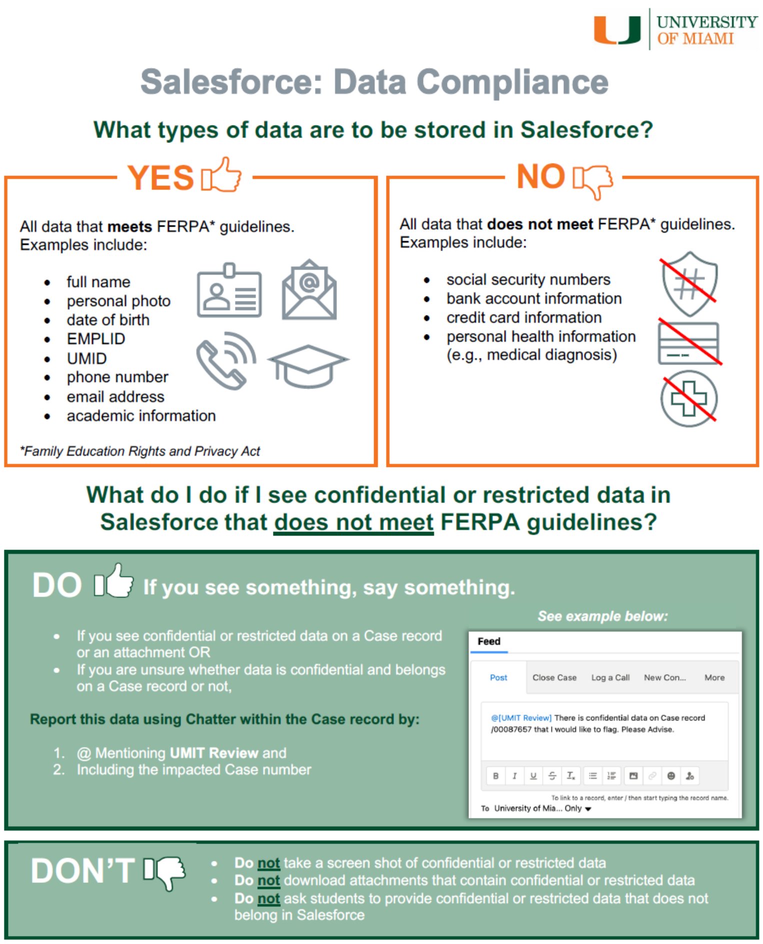
- Duplicate Records
    - Identify suspected duplicate Contact Records
    - Confirm emails of each of the duplicate records with the Contact
    - Take action to merge Contact Records
        - **Merge 2 Contact Records**
            - Enter the emails for both Contact Records here
            - Note: The orange columns will be completed by Leadership as the merge is performed
        - **Merge 3+ Contact Records**
            - Submit Demand with UMIT and request them to merge the records
                - **Website =** https://uhealth.service-now.com/esc?id=sc_cat_item&sys_id=3f1dd0320a0a0b99000a53f7604a2ef9
                - **Primary Contact =** Your Name and Email
                - **Project Name =** Salesforce Merge Contact Records
                - **Describe what this project will entail =** Please merge the Contact Records for the following email addresses: ___________, ___________, and ___________
                - **Business Justification =** These are the same student/proxy
                - **Current Process =** These records are separate and need to be combined
- Incorrect Email/Name Combination, Birthday, or Missing C#
    - Identify incorrect information
    - Verify changes with caller
    - Submit Demand with UMIT and request them to merge the records
        - **Website =** https://uhealth.service-now.com/esc?id=sc_cat_item&sys_id=3f1dd0320a0a0b99000a53f7604a2ef9
        - **Primary Contact =** Your Name and Email
        - **Project Name =** Salesforce Correct Contact Records
        - **Describe what this project will entail =** Please correct the Contact Record associated with email by XXX (date)
        - **Business Justification =** This record is incorrect
        - **Current Process =** The record is not accurate and needs to be corrected

- Submitter Role
  - Submitter Roles in Salesforce dictate if and who receives a case closed e-mail and/or survey

Role	Closed Case E-mail	Survey
Student	Yes – Contact	Yes – Contact
Proxy	Yes – Contact	Yes – Contact
Prospective Student	Yes – Submitter	No
Visitor	Yes – Submitter	No
Employee (with contact)	Yes – Contact	Yes – Contact
Employee (no contact)	Yes – Submitter	No

  - Proxy
    - Change all administrators from Proxy to Referrer
  - Referrer
    - Will receive detailed case closed email about the student and the case reason, category, and subcategory

- Data Compliance and FERPA guidelines
  - If you see confidential or restricted information in Salesforce follow the steps outlined below:
    - Chatter @UMIT Review in the case and include ONLY the following language:
      - "There is Confidential data on Case Record (insert Case Number by typing "/" and the case number) that I would like to flag. Please advise."



- Virtual Appointment Host Codes
  - Associate 3 = 007600
  - Associate 4 = 723809
  - Associate 5 = 210075
  - Associate 8 = 026788
  - Associate 9 = 221990
  - Associate 10 = 981078
- Automatic Communication for FA Specialists
  - When a case is owned by an FA Specialist and is in an "Awaiting _____" status, there are 2 automatic e-mails that will go to the Contact/Submitter after 3 and 5 days, respectively that says the team member is still working on the case
  - Here is the actual automatic e-mail verbiage:

> Dear {!Case.Contact_First_Name__c},
>
> We wanted to let you know we are still working on your financial aid case {!Case.CaseNumber}. This is normal as these cases may take time to resolve. Please know we will be in touch with you as soon as we are able to complete your request.
>
> Thank you,
> University of Miami
> 'Canes Central

Billing and Payment

1042-S

- International students who are employed on-campus must complete the Foreign National Information System (FNIS) process using the online form to ensure they are taxed appropriately
- Specifics
  - International/foreign student tax form for students who are foreign nationals and who receive excess scholarships that are subject to taxation
    - The taxable portion is subject to federal tax withholding
  - Students in F, J, Q or M visa status are taxed at a 14% rate, while students in all other visa statuses are subject to a 30% tax rate
  - Some international students' countries of origin have a tax treaty with the United States and can claim exemption from US taxes
    - Students receiving taxable awards who may be able to claim a tax treaty will receive an e-mail in February from the Payroll Office to provide a completed and signed form W-8BEN to grant the tax withholding exemption
  - Some international students will only receive a 1042-S while others may receive both a 1042-S and W-2
    - In the latter case, tax treaty exempt wages will be reported on the 1042-S and taxable non-treaty exempt wages will be reported on the W-2
    - These students with the 1042-S and the W-2 may be required to file an income tax return with the US, and they can use GLACIER Tax Prep, which is an online tax preparation system for nonresidents for tax purposes in F and J statuses
    - Students who have questions on GLACIER Tax Prep should go through their ISSS Advisor
      - If the question is **specific about taxes**, W2s, etc., and not something handled through us for 1042-S, 1098-T, etc., **refer to Payroll, not ISSS**
  - These will be mailed out by March
  - Payroll will issue this form to those students who are affected, using data from Student Accounts and Financial Aid
  - The amounts included in this calculation are not based on the year they were charged or credited, they are based on the year of the semester
    - For example, Spring 2020, Summer 2020, and Fall 2020 would all be included in 2020, even if charges/credits were not in the year 2020
    - This is different from the 1098-T
  - Students' Visa and Bio-Demo information need to be accurate in CaneLink for this process to run smoothly
  - Qualified Tuition & Fees = Does not include housing, parking, dining, health insurance, and Health & Counseling Fees
    - Includes in the net calculation the removals and the prorations (e.g., remote learning)
  - Scholarships = Includes scholarships, grants, endowed funds, and waivers
  - Check the IRS site for details and the most up-to-date information
- International Student Scholar Services' (ISSS) Role
  - They also receive questions from students about the 1042-S
  - They plan to send out the following communications to students:

- Comm prepared by Payroll to all current UGRD and GRAD students on taxation of excess scholarship funds now that 1042-S has been released
- Comm to incoming (new) UGRD and GRAD students months prior to their arrival
- Comm to continuing UGRD and GRAD students at the beginning of each new semester

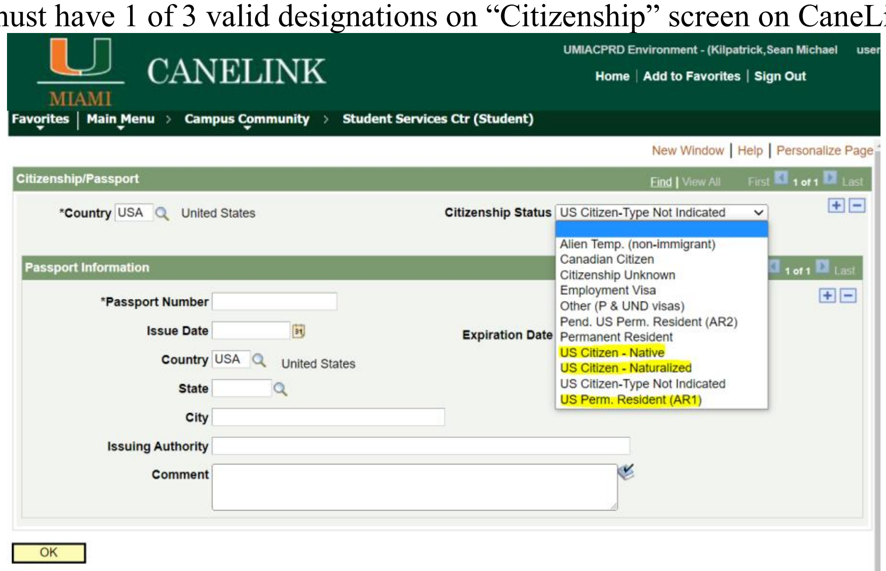
- Escalations
  - **Read the FAQs and try to resolve 1st**
    - **Click here to learn review**
  - **Use the Excel file in the CC Team folder to know the amounts**
  - If no 1042-S was received and the student meets the "Specifics" above, students can visit https://www.hr.miami.edu/working-at-the-u/payroll-forms/index.html, click on "Federal Tax Forms," and click the 1042-S link to request this
    - You can also provide student with the Payroll contact information (305-284-3004) or handshake over to Mileidis Roman (m.roman1@miami.edu)
  - If the issue is a dispute with the numbers, Associates should try to resolve and determine the items that went into the calculation, so it matches the Excel file above
    - If this calculation isn't working, see Betsy
    - If, at that point it can't be figured out, Betsy may advise you to escalate to OSAS

1095-B

- This is a health insurance tax document
- Students can obtain this by going to https://www.aetnastudenthealth.com/, logging in, and downloading the form

1098-T

- Only available for the following students:
  - US Citizens and Permanent Residents
    - They must have a valid Social Security Number (SSN) on file to obtain a 1098-T
    - They must have 1 of 3 valid designations on "Citizenship" screen on CaneLink



-
- If a US Citizen or Permanent Resident does not have the correct designation on CaneLink, they can fill out and submit a Bio-Demo Form on Boomi
  - **Note:** If students' designation on CaneLink was not updated during the calendar year of the 1098-T they are requesting, a 1098-T will not be able to be generated for them

        - If a student who is not a U.S. Citizen or Permanent Resident requests a 1098-T AND they have a SSN or ITIN (Individual Taxpayer Identification Number) escalate to Student Accounts.
    - Must have been during the calendar year and received credit in a credit-based, degree-seeking program to receive a 1098-T
- Mailed and post-marked by January 31st
    - Also available electronically on CaneLink for active students
- International Students and DACA Students do not get a 1098-T
- If someone who is not eligible for the 1098-T insists they need this form, they must submit the request in writing via a case, and an Associate would escalate to OSAS
    - The student must have a correct SSN on file before escalation
- <u>Escalation Step-by-Step</u>
    - First, check if the student is Domestic or International
        - If Domestic, they should have an SSN on file
            - If student meets these requirements, explain to them that they should have received the 1098-T in the mail
                - Post marked and sent on or around January 31st
            - If it has been 2 weeks since January 31st and the student has not received the 1098-T form in the mail or is unable to see the 1098-T form online, escalate to OSAS for assistance
                - **Note:** Before escalating, check to make sure the student has 1 of 3 acceptable designated statuses on "Citizenship" screen on CaneLink
                    - US Citizen – Native, US Citizen – Naturalized, US Perm. Resident (AR1)
        - If International, they should have a service indicator on CaneLink
            - Confirm that student has a valid SSN on file
                - If there is no SSN on file, have them submit their SSN information to SSN update form on Boomi
                - Once SSN is on file, escalate to OSAS for assistance
            - If student does not have a SSN at all, they are not eligible to receive a 1098-T
- <u>Contents</u>
    - Box 1 of the 1098-T reports the payments received for qualified tuition and related expenses, applied to accounts in the calendar year, regardless of the semester to which the payments are applied
    - Box 4: Adjustments made for a prior year
    - Box 5: Scholarships or grants
    - Box 6: Adjustments made to scholarships or grants for a prior year
    - Box 8: Half-time status
    - Box 9: Graduate student status
- <u>Adjustments</u>
    - Any adjustments made to charges from a prior term that are made in a new year will be reflected on the 1098-T for the new year in Boxes 4 and 6
    - The prior year 1098-T will not be adjusted
- <u>Deadline</u>
    - March 15 (3/15) is the deadline students can request one to be made
        - Do not escalate to OSAS after this date

        - Simply state "the University's 1098T information has already been filed with the IRS" so we can no longer issue them
        - Remind them to get in touch in February next year if they need assistance

529 Plan

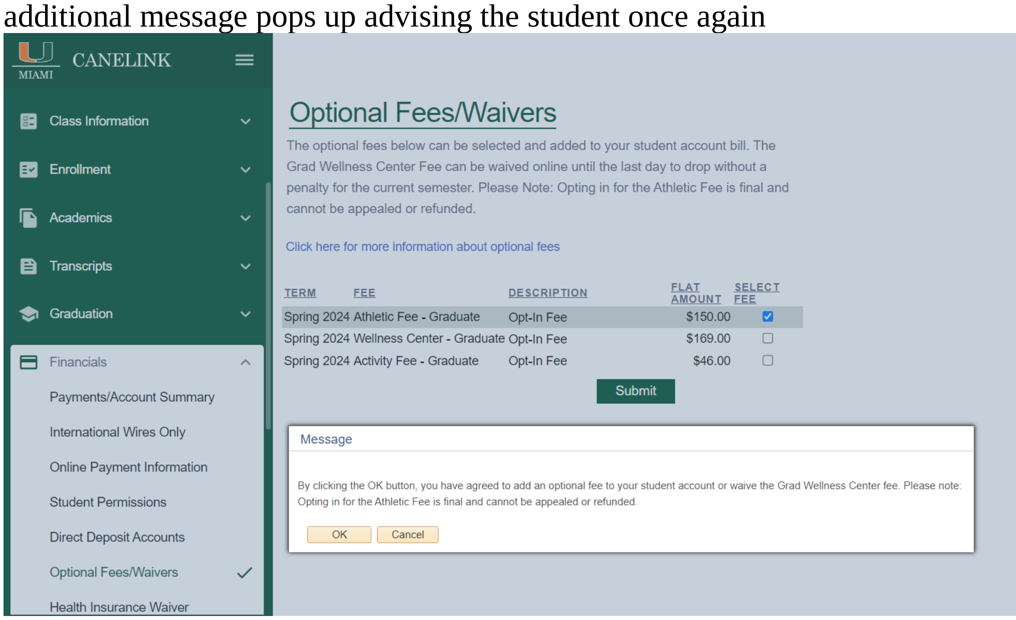
- Checks should be cut by 529 provider/family and sent to the Cashier's Office P.O. Box address
- There is no wire option***
    - Please note: Any 529s that have a contract with Flywire will be able to send wire payment to us
    - This is not to be advertised to students as not all 529s are eligible to send wire payments
        - SLA for posting onto the bill: 3-5 business days
            - If not posted within 5 business days, escalate to Student Accounts with screenshot confirmation of payment for review

Activity Fee

- Some students may have the option to "Opt-In" via CaneLink
    - Review the Tuition and Fee charts to determine eligibility
    - See Optional Fees/Waivers for more details

Athletic Fee

- Some students (mainly GRAD/LAW) can "Opt-In" in via CaneLink
    - Review the Tuition and Fee charts to determine eligibility
    - See Optional Fees/Waivers for more details
- As of December 4, 2023, the opt in fee/waiver page has been updated to state that opting for the Athletic Fee is **final** and **cannot** be appealed or refunded
    - Please note that when the student selects the Athletic fee and clicks on the Submit button, an additional message pops up advising the student once again



    - If a student accidentally opts-in for the Athletic Fee and wishes to remove it, remind them of the pop-up message they agreed to which states the fee is final and cannot be appealed
        - **NOTE**: If a student is insisting that this fee be removed, send an email inquiry to the point of contact listed in Optional Fees/Waivers section

Billing Notice

- When
    - This is sent to all students who have any balance every Monday

- Who
  - Students with balances
  - Proxies of students with balances
- What's Included
  - Billing notices are net of Anticipated Aid, meaning that if there is Anticipated Aid that either would bring the balance to $0 or would yield a refund once it is disbursed, the student would not receive a billing notice
  - Billing notices are not sent to students who have a balance of $10 or less
- Disputes
  - Speak with Betsy so she can liaise with Stephanie to research if/when students actually received the billing notice if you need research on this
  - In general, trust anyone who fits the criteria above is receiving this notice
- Past Due Balances and Anticipated Aid on Future Balances
  - If a student has a Past Due Balance when Tuition Calculation for the upcoming term occurs, and has Anticipated Aid that covers both the upcoming and past term dollar amount, the balance to pay will show as $0 on Flywire
    - The student will still have a Financial Hold (S03) if they have a true balance for a past term
    - Since balance will show as $0, student will need to pay at Cashier's Office in order for payment to be made and hold to be lifted
      - Cashier payment methods include personal check, cashier's check, and money order

Bill Pay Options/Payment Overages

- Refer to our Billing and Payment site or other areas of the KTS for all billing and payment options
- Students **cannot** pay with cash, credit cards or e-checks at the Cashier's window
  - Click here to see acceptable payment types at the Cashier's
- Students **cannot** pay online if their balance is already $0, even if it is $0 because there is Anticipated Aid
  - In these cases, students **can** do any of the following:
    - Complete what they need to do to have their aid disburse
    - Revise down or cancel their Anticipated Aid and once completed, pay the balance
    - Pay via check at the Cashier's window as they will manually accept the payment for the student (Anticipated Aid will remain)
- Students **cannot** pay additional funds onto their account if they have a true balance of $0 (i.e., no Anticipated Aid)

Cane Express

- Adding Funds
  - There are three (3) ways a student, or proxy, can deposit funds into a Cane Express Account
    - Credit Card Deposits: To process an online deposit into a Cane Card using a credit card, log into your CaneLink account and select the "Cane Express Balance and Transactions" link on the "Cane Card" box
    - Cashier Office Deposits: You can visit the Cashier's office on campus and make a deposit into your account by check or money order
    - Mailed Deposits: You may mail a check to add funds to your Cane Express account. Make the check payable to the University of Miami and send it to:

- University of Miami
  Cane Express Account
  PO Box 025551
  Miami, FL 33102-5551
- Please include your full name and student ID number to ensure accurate processing. Mailed deposits can take up to 10 days and appear on the student's Cane Express account

- Balance Inquiries and Additions
  - Delegates are unable to access these accounts via their CaneLink access
  - Students have two options:
    - Download the GET app to view balances and add funds
    - Go through the main CaneLink screens to request a balance inquiry or add funds (Note: Balance inquiries through this portal are sent to Dining Services who will reach out to the student with the information)
  - If a student does not use all available Cane Express funds at the end of a semester (e.g., Spring), the funds will remain on the account and roll over to the next semester (e.g., Fall)
    - This differs from Dining Dollars not used at the end of a semester, which have rollover limits depending on the term (Fall/Spring). For more information, see Dining section
- Withdraw/Refund Funds
  - A refund of any remaining funds is only given if the student's CaneLink balance is paid in full
  - Students must submit a case to 'Canes Central and an Associate will escalate to an OSAS Specialist
  - Students should only withdraw funds when they graduate or leave UM
    - This is not automatic; a case must be submitted
  - When a student withdraws funds, the Cane Express account cannot be reopened until the next semester

Cashier's Office

- Accepts the following:
  - Personal checks
  - Money order / cashier's check
    - As of December 9, 2024, cash is **no longer accepted** at the Cashier's Office for payments to student accounts
      - Employees can pay at the Cashier's with cash for administrative purposes
- They will accept payments if the balance is $0 because of Anticipated Aid
  - They will not accept payments for a true balance of $0

Collections

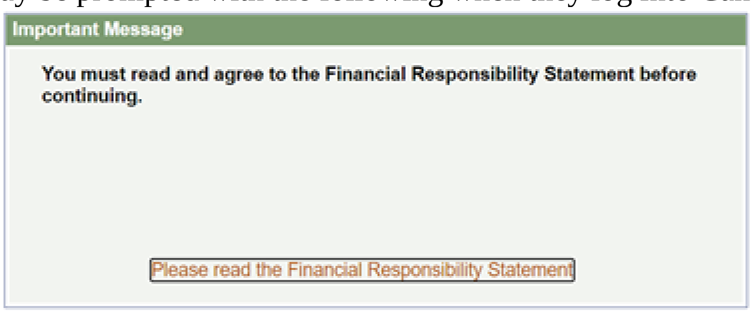
- If a student walks in or case is submitted regarding a Collections issue, student will be told that 'Canes Central does not handle collections cases and will be hand shook to, or given (if via phone call), the Collections email
  - Collections@miami.edu
- If a case is submitted regarding a Perkins loan, handshake the student to the Collections department for assistance
- Make sure that if student has multiple issues, 'CC Associate handles all other issues first, then handshakes the student to the Collections email after

- o Note: If a student has a Past Due hold but their balance is in Collections and they want to request a temporary hold lift, since this falls under OSAS, we would not escalate but just handshake over to Collections for discussion of both issues
- Collections Holds
  - **S19** – Account in Collections
  - **S22** – Collections hold that blocks all enrollment activity

Emergency Short-term Loans

- Note: This should not be advertised as it should only be requested in extreme circumstances with the prior approval of Leadership
  - Only available to be requested to Financial Aid leadership for extreme emergencies
  - Only available to be requested if student has a **loan pending disbursement**
- UGRD max amount = $500
- GRAD/LAW max amount = $1,000

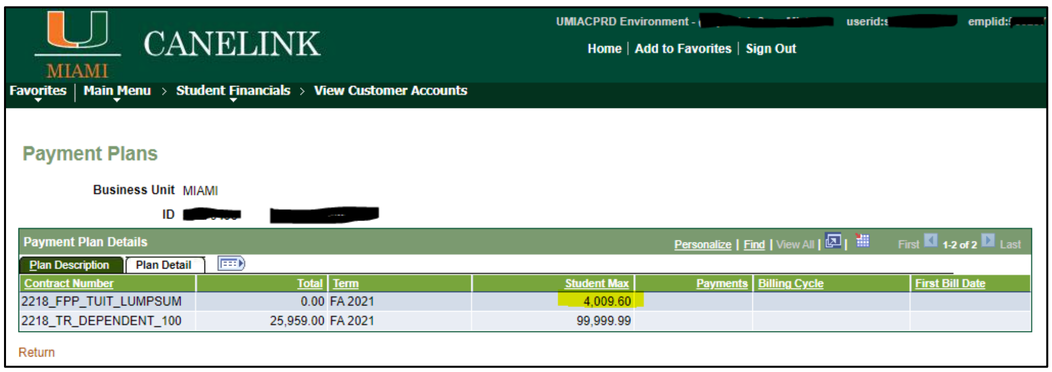
Financial Responsibility Statement

- Students may be prompted to review the University's Financial Responsibility Statement when they log into CaneLink
- This doesn't mean they have a balance or a new charge; it's simply that they need to review this verbiage, so they confirm they are aware
- They may be prompted with the following when they log into CaneLink:
  - 

- Click here to review the Financial Responsibility Statement
- When students are required to complete the FRS acknowledgement, they will see a "FRS Not Accepted by Student" hold placed on their account
  - This hold will impact the students' ability to add or drop a course. For this hold to be removed, students must review and acknowledge the FRS
  - Once the FRS is acknowledged, the hold will be removed immediately, and students will be able to navigate normally through CaneLink

Florida Prepaid (FLPP)

- Billing Timeline
  - FLPP is billed after census
  - Deferments are posted until then (Note: Boomi Form must be completed)
  - Until payment is made by FLPP the credit is not actual funds and the refund will not go out
- Billing Process
  - Once they complete the Boomi form, the payment options they selected should be effective until the funds are depleted or until FLPP is changed or cancelled
    - Exception = If they want Summer FLPP funds, they must complete this form for Summer only when they are billed for the summer in which they wish to use the funds
    - If they want to make any changes to what they previously submitted, they need to submit a new form
  - Process = Boomi Form Completed → Student Notifies FLPP to authorize UM as a billing institution → Deferment placed on bill when bill presented → FLPP billed → Funds received → Deferment removed / payment placed
- Boomi Form Process
  - This is a multi-step process (see screenshots in the section below):
    1) Student completes the online Boomi Form (see www.canescentral.miami.edu/forms)
    2) Student is provided a download link to save the submitted form
    3) Student must print the form
    4) Student must obtain the contract owner's wet signature on the printed form
    5) Student will need to scan/image the signed form and upload through the link provided (Note: If they cannot find this link, it can be found at the bottom of www.canescentral.miami.edu.forms/ where it says "Boomi Form Dashboard")
    6) Once all steps are complete, the form should be processed withing 5 business days
  - Note: The account owner or beneficiary must also submit the Transfer Form to the State of FL
- Boomi Form or FLPP Issues Rejections
  - Boomi form could be rejected because:
    - The form is not complete
    - The form is not signed
    - The student has not submitted the Transfer Form
    - The information on the form does not match the FL Prepaid database
  - The benefit payment options on the Boomi Form and the Transfer Form must be the same
    - OSAS will reach out to the student if there is a discrepancy between these forms
- Restricted vs. Unrestricted
  - Restricted = Most commonly selected option. Plan is billed for 15 credits (FL state tuition equivalent) of tuition/fees and the average dorm rate (FL state tuition equivalent) may be added.
  - Unrestricted = Plan is billed the total dollar amount up to the total plan value. Can choose to pay as (a) a lump-sum payment or (b) a fixed credit hour or dollar amount
- Dormitory/Housing Authorization
  - We learned that students who live off campus can still bill FLPP for this amount and it would be able to apply to their account and issue a refund if a refund is due
  - People can learn more here: https://www.myfloridaprepaid.com/faq/housing-expenses-covered/
- Deferment vs. Posted Amounts
  - Deferment credit will be added to the student account once the Boomi Form is processed
  - Deferments drop off once the funds are received from the State
  - Deferments only appear on an account if the balance is not covered in full by other funds

- If you receive specific questions about deferments and the amount they are being posted for, please review and follow these steps
    - If other funds pay out while the deferment is posted, the deferment will be lowered dollar-for-dollar as the deferment can only be posted for the exact balance remaining
    - This doesn't mean the student will not see the greater, full amount pay out
        - OSAS will still bill for all eligible funds as requested on the Boomi Form
        - The **payment may be the same, lower, or higher** than the deferment, depending on how many funds are in the account, what FLPP option the student selected, or another issue
    - If we no longer see the deferment and/or if the deferment is lowered, check CaneLink to see the amount that will be billed to FLPP:
        - Go to View Customer Accounts → Payment Plans
        - Check for FPP line item with a Status of "Active"
            - Note: It must say "Active," not "Cancelled"
        - Click the "Plan Detail" tab
        - Amount in the "Student Max" column is the amount to be billed
        - 

    - If the amount to be billed is listed as "Cancelled" and/or lower than the student expected, they should contact FLPP on their own to inquire about their remaining FLPP balance
    - If we cannot figure out the FLPP issue (*as a last resort*), escalate to OSAS Specialist

FT-1 Tuition Verification Request

- This is for reimbursement to employers
- "Print Term Statement" from Flywire may suffice so ask the person to try this first
    - Otherwise, Associates can review a case and escalate as needed
    - If escalated, list the specific terms that must be included in this request

Gramm-Leach-Bliley Act (GLBA)

- As a general rule, we do not provide any specific information about a student's account or financial aid information without first following the identity verification steps listed under the FERPA Guidelines and Verification section
- If we are not able to verify the identity of student or proxy after following verification steps, we can only provide information "in general", but no specific details about information on a student's account
- Under GLBA, we can speak about a student's bill to a non-proxy up until the release date of the **first semester** billing notification
    - After that time, proxy access for Billing and Payment Information **must** be fully granted and verified prior to discussing a student's billing information

Holds

- **S01 = Bad Check**
    - Will be applied after 2 returned checks
    - If applied, student cannot pay via personal check or e-check; only certified funds
    - If you explain this and the account but there are continued questions about the returned checks and why they were returned and/or the impact on the hold, escalate to an OSAS Specialist
- **S02 WOFF = Account Written Off**
    - Removed when balance is settled
- **S02 NOAR = Account not to be sent to AR Collect**
- **S03 = Past Due/Financial**
    - S03-Past Due Hold blocks adding courses ONLY
        - S03 hold does not block dropping courses/withdrawal
    - Hold Application
        - **This goes on 30 days after the bill was due**
            - **If the charges were added after the bill was due,** the hold will be placed onto the account 30 days after the oldest charge on the account
        - The hold will lift automatically within 30-45 minutes from the time the balance is paid
            - The only exception to this is if the balance is paid with a check
                - If paid with check, the hold will be lifted in 5 days when the funds are cleared
    - Hold Application and Anticipated Aid
        - Anticipated Aid is not yet disbursed and applied/paid to an account so if there are unpaid charges, there will be a Past Due hold on the account
        - Once the Anticipated Aid disburses and pays toward the account, the hold will be automatically lifted within 30-45 minutes
    - Hold Application and Monthly Payment Plans (MPP)
        - Students on a MPP should not have a Past Due hold
        - If an MPP is set up after a Past Due hold is applied to a student's account, that hold will be lifted but it will not be lifted automatically
            - Instead, these holds will be mass-released in batches by the OSAS processing team on a weekly basis
            - Thus, if someone didn't see it lift the week they set up the MPP, it should be lifted the following week
    - Temp Hold Lift Requests
        - **General Sentiment to Communicate**
            - Students need to pay to have this removed; work with them and guide them through what they still need to do to get this resolved
            - Never offer the hold lift as a possibility unless it is called for in a given situation as it should be done in a situation where true proof of payment is there; instead, mention this only gets lifted when a balance is paid in full
        - **Before You Request the Lift**
            - Check enrollment to see if enrolled in 0 credits before you escalate
            - If in 0 credits and they want a hold lift request, keep the parent case and escalate a child case just in case the hold lift is not granted
                - If the hold lift isn't granted, you must have the tough conversation with the student that they either (a) need to pay their balance or (b) need to plan to postpone their return until a later semester after they are able to pay their balance

- Tell them "It is what it is" but help them discuss the withdrawal and readmission process (Inactive Status is not possible since "all financial obligations must be satisfied")
- Talk to them about their payment options in full

- **Process for Temp Lift Requests**
  - **Note: If a student comes in prior to their registration date, OSAS will consider a temporary lift request at their scheduled registration time**
    - If hold lift is granted, OSAS will add an override onto students' account up through their actual registration date. This way, student would not have to return at a later time
    - OSAS hold will roll back on after 5:00 PM on students' registration date, so it is important that they register on that date
    - Always work with the student to get them to do what they need to solve the issue … don't just go for the hold lift
    - Students can then see us when they can register (or add/drop) to request a hold lift if needed but they should have already been working to do what they need to do

  1) Talk to the student about the balance and what needs to be done to pay
     - Develop an action plan and have the student take as many actions as possible at that time
  2) Obtain as much proof as possible, especially screenshots of MPN/EC completion, Thank You Letter completion, and PowerFAIDS Awards, Documents, and Awards by POE or Disbursements (so it shows amount per term), etc.
     - You need to paint the picture of what has been done to satisfy the balance
     - This proof will greatly streamline OSAS' review
  3) Escalate proof in a Chatter post to OSAS for a decision
     - They should make all hold decisions
     - If there is no proof, specify there is no proof or no plan to pay
  4) Tell the student that there is no guarantee the hold will be lifted, and feel free to mention your uncertainty that it will be lifted if there is no proof
     - Note: It's not that OSAS doesn't want to lift holds, it's that they need as much information as possible to lift holds when it is appropriate to do so
     - Don't suggest that "they" "refused" to lift the hold

- **How Long is hold Lifted?**
  - Technically, it's until the next CaneLink "batch job" runs around 8:00 p.m. that night unless there is an S11 hold
    - **If there is no S11 hold, we should communicate until end of business though** (i.e., 5:00 p.m.) just in case so students don't wait until 8ish
  - If there is an S11 hold, check the end date for that hold; that's when the S03 will go back on the account
- **Drops or Retro-Drops that Eliminate a Balance**
  - Follow process above

- <u>Hold Lift Timeframe After Payment</u>
  - Payment Method:
    - <u>MPP, credit/debit</u>: 30-45 minutes
    - <u>Personal check, e-check:</u> 5 days to allow for funds to clear

- **S05 = No Cancellation-Do Not Cancel**
  - Stops students that have the S15 hold from being cancelled

- **S06 = Do not Refund**
    - Refunds are normally sent out within 24-48 hours after funds are disbursed to accounts unless the student has a *S06 Do Not Refund* hold with the *FA Excess Credit* Reason Description
    - This hold is not visible to students, only administrators through *Manage Service Indicators*
    - This hold is automatically placed on some students' accounts—this is placed on all GRAD/LAW accounts—once funds are disbursed to prevent an overaward
        - All GRAD/LAW refunds are reviewed by FA before they are sent
    - The hold will automatically roll off in 4 business days, which gives FA time to review/correct issues
        - This hold will be manually removed before 4 business days if FA reviews this quicker
- **S11 = OSAS Override**
    - Stops the S03 from going onto the student's account even if there is a balance larger than $500
- **S15 = Cancellation**
    - Students cannot do anything in CaneLink, but they should still be able to access Blackboard to see their classes. It is one of the cells at canelink.miami.edu (before logging in … see screenshot below) or the direct link is courses.miami.edu
    - 

    - <u>Hold Lift Requests</u>
        1) Talk to the student about the balance and what needs to be done to pay
            - Develop an action plan and have the student take as many actions as possible at that time
        2) Obtain as much proof as possible, especially screenshots of MPN/EC completion, Thank You Letter completion, and PowerFAIDS Awards, Documents, and Awards by POE or Disbursements (so it shows amount per term), etc.
            - You need to paint the picture of what has been done to satisfy the balance
            - This proof will greatly streamline OSAS' review
        3) Escalate proof in a Chatter post to OSAS for a decision
            - They should make all hold decisions
            - If there is no proof, specify there is no proof or no plan to pay
        4) Tell the student that there is no guarantee the hold will be lifted, and feel free to mention your uncertainty that it will be lifted if there is no proof
            - Note: It's not that OSAS doesn't want to lift holds, it's that they need as much information as possible to lift holds when it is appropriate to do so
            - Don't suggest that "they" "refused" to lift the hold
    - <u>Hold Lift Timeframe After Payment</u>
        - Payment Method:

        - Personal check, e-check, credit/debit, MPP: 30-45 minutes
- **S19 = Sent to AR Collect**
- **S23 = Financial Responsibility Statement Not Accepted**

Letter of Expense

- If a student needs a breakdown of their bill or a "letter of expense" for their company, payer, etc., offer the following in this order:
    1) Tell the student the University now uses the .pdf "Print Term Statement" in Flywire and direct the student on how to find and download this
        - This should always be our first option
        - You can always educate the student on how to do this in the future—this is important!—and also provide the download to them if you would like
    2) If for some reason the student comes back and states that isn't enough and they need more information, find out exactly what they need and then create your own Letter of Expense using the Letter of Expense template in Box → CC Team → Letters → "Letter of Expense Template"
            - Ask the student to include exactly what needs to be included

Monthly Payment Plan (MPP)

- Basics
    - Must sign up with an account that allows for electronic withdrawals (credit card or e-check)
        - Typically, a Checking Account, not a Savings Account
            - Students and proxies should consult their bank if they have questions about their account type before they sign up
    - $1,000 minimum balance
    - 3% administration fee
    - 4 monthly installments
        - 3 monthly installments available for those who miss 1st payment deadline to set it up
        - Students who enroll in the MPP on the day of the 1st MPP installment due date may be charged the 1st installment that day
    - Can miss 1 payment and the payments will readjust to 3 payments because the 1st and 2nd payments will double up
        - Additional missed payments will result in cancellation of the MPP
    - Anticipated aid – This is taken into account when determining the balance of the MPP
- Email Notices
    - Students and proxies of students who are on MPPs receive email notices about them
- Eligibility
    - Employees and Executive MBA students are not eligible for the MPP
    - No MPP is available in the Summer
- Rebalance After New Credit Applied
    - **Associates:** Escalate to Student Accounts for any inquiries
- Cancel
    - **Associates:** Escalate to Student Accounts for any inquiries
- Withdrawal from UM
    - **Associates:** Escalate to Student Accounts for any inquiries
- Missed Payments
    - **Associates:** Escalate to Student Accounts for any inquiries
- New Charges

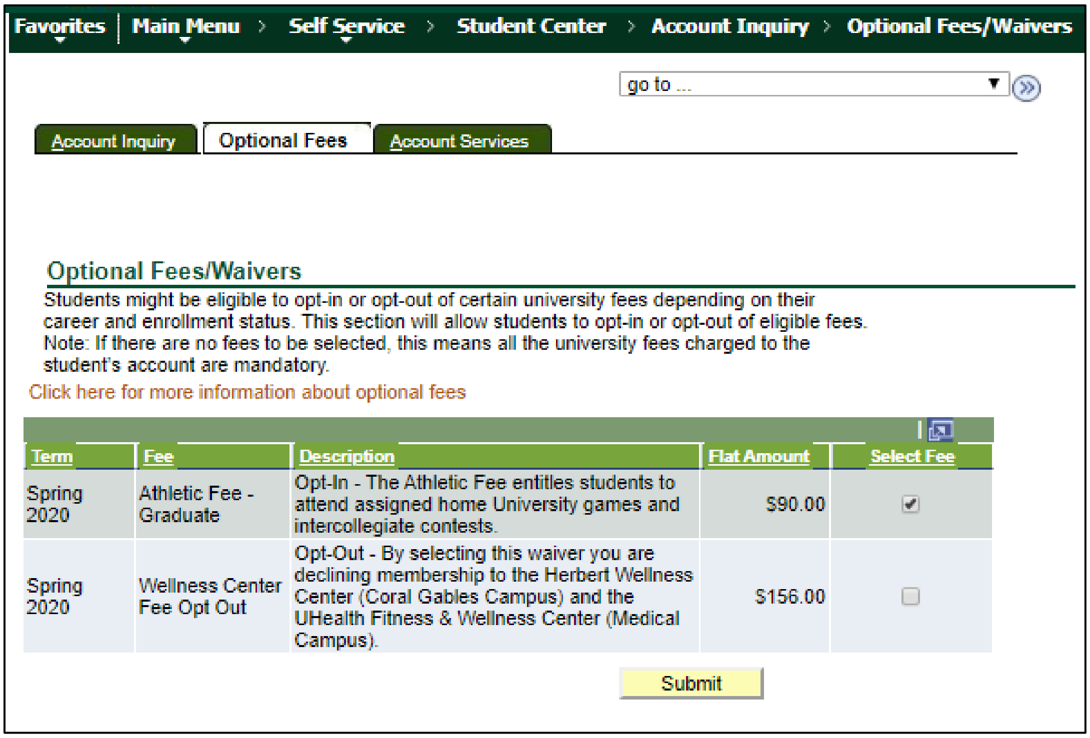
    - **Associates:** Escalate to Student Accounts for any inquiries
- Additional Payments to Balance or MPP
    - **Associates:** Escalate to Student Accounts for any inquiries
- Adding/changing/updating the payment method:
    - **Associates:** Escalate to Student Accounts for any inquiries
- Not Eligible for MPP Hold (S08)
    - If the MPP is cancelled due to non-payment, an S08 Not Eligible for MPP hold will be placed on the student's account. This hold will prevent the student from enrolling in the Monthly Payment Plan for the following semester
    - **Associates:** Escalate to Student Accounts for any inquiries
- Courtesy Outreach from OSAS about MPP
    - OSAS may email students if they miss payments (e.g., on an MPP) as a heads up that they are at risk of a new balance and/or cancellation from an MPP
        - This could come from a specific person
    - **Associates:** Escalate to Student Accounts for any inquiries

Online MBA Program Billing and Payment Process

- Bills = Will be on same bill release and billing notification schedule
- Past Due Holds = Treated the same as all other students

Optional Fees/Waivers

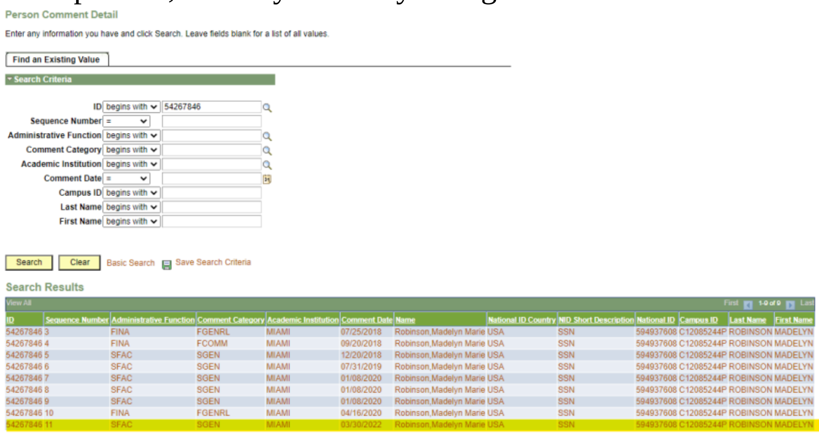
- Some students may be eligible to "Opt-In" or "Opt-Out" specific fees
    - This is determined by the type of student it is (e.g., LAW, GRAD, UGRD, etc.), the number of credits the student is enrolled in (e.g., part-time or full-time), and the semester enrolled (e.g., Fall, Spring, or Summer)
    - The specifics of what fees are "optional" are outlined in the Tuition in Fees charts
- The "Opt-in" and "Opt-Out" process must be completed each semester by the specified deadlines, or the fees will remain as posted on the students' accounts
    - See Activity Fee for details
    - See Athletic Fee for details
    - See Student Health and Counseling Fee for details
    - See Wellness Center Fee for details
- For most of these fees, students "Opt-In" or "Opt-Out" via CaneLink → Student Center → Optional Fees/Waivers

- 

- <u>Deadlines</u>
  - Typically, no deadlines to Opt-In to fees
  - There is a deadline to waive the [Wellness Center Fee] and [Health Insurance]
  - If students miss the deadlines, the ability to "Opt-In" or "Opt-Out" in CaneLink will be greyed out and the fee will remain for the semester; remind the student to do this by the deadlines in the future
- <u>Student Fee Removal Requests/Opt-In or Opt-Out Assistance</u>
- While most student fees are mandatory, there are situations where a student may be eligible to request a fee waiver/fee reversal
  - These situations include withdrawal from UM, opt-in/opt-out errors, opt-in/opt-out appeals, and other fee appeals
- These cases used to be escalated to OSAS for review. As of December 18, 2023, Associates will now reach out to the appropriate contact person to assist the student
  - **Associate** = Reach out to appropriate contact person, do **not** CC student to the email. When emailing, include student EMPL and term that they are inquiring about. The designated contact person in Housing, Wellness Center, Athletic, etc., will communicate directly with the Associate regarding the outcome of their fee request. 'Canes Central Associate will keep the case open for 72 hours to allow a response
- **NOTE:** If the deadline has passed to opt-out of a fee, or if a student has accidentally opted-into an optional fee and is insistent that it be waived, Associate will proceed with reaching out to appropriate contact to inquire if the fee(s) can be waived
- Contact List
  - **Opt-In/Opt-Out Inquiries**
    - **Wellness Center Fee**: Danny Atherton (d.atherton@miami.edu) and Chris Booth (cbooth@miami.edu)
    - **Athletic Fee**: John Cantalupo (j.cantalupo@umiami.edu) and Lindsey Bonner (l.cugno@umiami.edu)

    - **University Mandatory Student Fees (Activity, Health and Counseling Center Fee, Student Center Fee)**: Danny Atherton (d.atherton@miami.edu)
  - **University Mandatory Student Fees** (Students who dropped/withdrew, waiver requests)
    - **Health and Counseling Center Fee, Student Center Fee, and Activity Fee**: Daniel Atherton (d.atherton@miami.edu)
    - **Health Insurance**: Daniel Atherton (d.atherton@miami.edu) and Linda Walker (lwalker@miami.edu)
    - **Wellness Center Fee**: Chris Booth (cbooth@miami.edu)
    - **Athletic Fee**: John Cantalupo (j.cantalupo@umiami.edu) and Lindsey Bonner (l.cugno@umiami.edu)
  - Other Fees (Program-Specific Fees)
    - The Senior Business Officer (SBO) from a student's Program of Study must approve and submit the fee request to the Office of Student Accounts for approval
- Within 72 hours of the case being open:
  - If request is approved, Associate will inform student and close case
  - If request is denied, the Associate will inform student and close case
    - If student wants to appeal a denied request, we will communicate that to contact person and let student know that it is in contact person's hands to decide
  - If we do not hear from contact person in 72 hours, Associate will close case and inform student that they need to await a response from the contact person
- Email Template to send to contact person:
  - Dear XXX, I am reaching out to bring to your attention a matter involving [Student Name and C#], who recently contacted 'Canes Central with inquiries and concerns pertaining to the (Fee Name). [Add details of which mirror the escalations you typically sent to OSAS. EXAMPLE: [Student Name] is a part-time trying to waive the Wellness Center fee in CaneLink from her Spring 2024 account but is unsuccessful. Please see the screenshots below]. Since {Student Name} has requested to appeal/waive this fee, I wanted to reach out to you for assistance. Please note 'Canes Central will be keeping this case open for 72 hours so please respond directly to this email regarding the outcome of the students' fee appeal. 'Canes Central will communicate this information to the student.
- UMI Summer University Internships
  - Effective as of Summer 2021, fees associated with summer enrollment for students **who are only taking the UMI University internship 1-credit course** will be waived
    - This is initiated by the Assistant VP of Budget Personnel, who pulls the list of students **registered only in the 1-credit UMI course** and waives fees prior to the summer session beginning
  - If students are registered for additional credits/courses beyond the 1-credit UMI course than all applicable charges would apply as normal
  - If students have questions about this, they can reach out to the Toppel Center directly via this email: toppel-internships@miami.edu

OSAS Comments

- OSAS may place comments in CaneLink under "Person Comment Detail" for OSAS transactions (e.g., FLPP changes, fee waivers, etc.) To access comments, navigate to Campus Community →Comments→Comments-Person→Person Comment Detail
- This is a great place to check for any notes on changes to students' accounts as you work to assist students and proxies, and as you clarify changes to their Account Summary
  - 

Person Comment Detail

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

ID begins with 54267846
Sequence Number =
Administrative Function begins with
Comment Category begins with
Academic Institution begins with
Comment Date =
Campus ID begins with
Last Name begins with
First Name begins with

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-9 of 9 Last

ID	Sequence Number	Administrative Function	Comment Category	Academic Institution	Comment Date	Name	National ID Country	NID Short Description	National ID	Campus ID	Last Name	First Name
54267846	3	FINA	FGENRL	MIAMI	07/25/2018	Robinson,Madelyn Marie	USA	SSN	594937608	C12085244P	ROBINSON	MADELYN
54267846	4	FINA	FCOMM	MIAMI	09/20/2018	Robinson,Madelyn Marie	USA	SSN	594937608	C12085244P	ROBINSON	MADELYN
54267846	5	SFAC	SGEN	MIAMI	12/20/2018	Robinson,Madelyn Marie	USA	SSN	594937608	C12085244P	ROBINSON	MADELYN
54267846	6	SFAC	SGEN	MIAMI	07/31/2019	Robinson,Madelyn Marie	USA	SSN	594937608	C12085244P	ROBINSON	MADELYN
54267846	7	SFAC	SGEN	MIAMI	01/08/2020	Robinson,Madelyn Marie	USA	SSN	594937608	C12085244P	ROBINSON	MADELYN
54267846	8	SFAC	SGEN	MIAMI	01/08/2020	Robinson,Madelyn Marie	USA	SSN	594937608	C12085244P	ROBINSON	MADELYN
54267846	9	SFAC	SGEN	MIAMI	01/08/2020	Robinson,Madelyn Marie	USA	SSN	594937608	C12085244P	ROBINSON	MADELYN
54267846	10	FINA	FGENRL	MIAMI	04/16/2020	Robinson,Madelyn Marie	USA	SSN	594937608	C12085244P	ROBINSON	MADELYN
54267846	11	SFAC	SGEN	MIAMI	03/30/2022	Robinson,Madelyn Marie	USA	SSN	594937608	C12085244P	ROBINSON	MADELYN

Overpayments

- General Rule
  - Cannot accept overpayments on accounts
  - Essentially, if the balance is $0 or completely covered by posted credits (not Anticipated Aid) then no additional payments can be applied via check, 529, etc.
- Anticipated Aid Exception
  - If the balance is going to be paid by Anticipated Aid but, without the Anticipated Aid there would still be a balance, students can pay up to what would be that balance at the Cashier's window via check, cashier's check, 529 payments, etc.
- Florida Prepaid Exception
  - Florida Prepaid can still pay toward accounts that are already paid off in line with the account holders' plan

Pick Up a Check Process

- Check Distribution is only available on Tuesdays and Thursdays
  - Only students who were asked to come by and pick up a check from Check Distribution should be allowed to do so
  - Review the process below and check the email if a student arrives
- Students
  - For the most part, paper checks can no longer be picked up in person
  - The only exception is if there is absolutely no address and Check Distribution specifically tells a student via email to come by and pick it up
  - Review the "Pick Up a Check Process" knowledge article to learn more (or click here)
- Vendors, Faculty, and Staff
  - They do come by to pick up checks when they cannot be mailed
  - They may come to pick up their own or to pick up for others
  - Review the "Pick Up a Check Process" knowledge article to learn more (or click here)

Refund Checks

- <u>Common Verbiage about Refunds</u>
  - Refunds are issued throughout the semester to students who are eligible due to an excess on their account. Students who are expecting to receive a refund from their Financial Aid awards will typically see a refund initiated within 24-48 hours after their financial aid disburses to their account unless they have a S06 hold. This hold is an administrative hold—it is not visible to students—but is typically applied to **Graduate and Law** students' accounts to allow for one last review of all Financial Aid awards prior to the release of the refund. This hold can take up to 4 days to be released. Once released and once a refund has been initiated, depending on the method of refund, the refund will typically be issued within 1-3 business days (direct deposit) or up to 10 business days (paper check)
- <u>Rule of Thumb</u>
  - A good rule of thumb is that, if the refund hasn't gone out yet and it is a day after the funds were disbursed, check to see if an S06 hold exists
    - If there is no hold, simply communicate the standard 24-48 hours
    - If there is a hold, explain what the hold means and that the account is under review, and then the proper refund amount should be released within 4 days
- <u>S06 Holds</u>
  - Refunds are normally sent out within 24-48 hours after funds are disbursed to accounts unless the student has a *S06 Do Not Refund* hold with the *FA Excess Credit* Reason Description
  - This hold is not visible to students, only administrators through *Manage Service Indicators*
  - This hold is automatically placed on some students' accounts—this is placed on all GRAD/LAW accounts—once funds are disbursed to prevent an overaward
    - All GRAD/LAW refunds are reviewed by FA before they are sent
  - The hold will automatically roll off after 4 days, which gives FA time to review/correct issues
    - This hold will be manually removed before 4 days if FA reviews this quicker
- <u>Large Refunds</u>
  - Large refunds should trigger you to pause to make sure the student did not accidentally receive an over-award that they may need to pay back
  - If anything exceeds the threshold below, question it, check their awards in Flywire (e.g., tuition waiver) compared to their Awards in PowerFAIDS to make sure they line up, and let the student know to submit a case if there seems to be an issue
    - UGRD = $3,000+, GRAD = $7,500+
  - Be careful not to over-recommend cases because some refunds greater than this amount will be just fine if someone lives off-campus, etc.
- <u>Small Refunds</u>
  - Refunds under $10 are not issued
- <u>Direct Deposit vs. Paper Checks</u>
  - **Refunds cannot be issued to proxies**; they must be issued to students per FERPA regulations
  - If direct deposit is not set up, checks will be mailed to the **local address**
    - If the **local address is not available, the permanent address** will be used
      - OSAS tries to avoid sending them to dorms so it will change to permanent address
    - If there is no usable address, OSAS will try to contact the student for an alternative
  - Paper checks should arrive within 10 business days after the Refund hits the account (Note: The email notice says 3-5 days in which most arrive, but it could take up to 10 days)
    - Day 1 = Refunds are processed via Workday at 5:30 p.m., the day refund posts to account
    - Day 2 = Refund checks are printed and delivered to Check Distribution by 4:30 p.m.

        - Day 3 = Checks are mailed
        - Day 4-10 = Arrives!
    - Paper checks can no longer be picked up in person (see Pick Up a Check Process too)
        - The only exception is if there is absolutely no address and Check Distribution specifically tells a student via email to come by and pick it up
- Refund E-mail Verbiage
    - This is a sample of the e-mail sent to students when they receive a refund:

From: saccounts@miami.edu
Date: April 14, 2021 at 5:37:20 PM EDT
[redacted]
Subject: Refund Notification
Reply-To: saccounts@miami.edu

UNIVERSITY OF MIAMI

Dear 'Cane,

A refund check has been initiated from your student account and should arrive to the address listed on CaneLink within 3-5 business days of this notification.

Note: If the refund is a result of Financial Aid excess and enrollment or billing changes are made that may affect your cost of attendance at the University of Miami, your financial aid awards may be adjusted. These adjustments may lead to aid reductions that can cause an outstanding balance on your student account.

You have the option to receive future refunds directly to an authorized bank account of your choice within 24-48 hrs. by signing up for direct deposit on CaneLink. If you need assistance doing so, please contact our office for more information.

Thank you,

Office of Student Accounts

- Cancel Paper Checks
    - Students who are sent paper checks should wait up to 10 business days to receive them
    - Requests to cancel paper checks and re-issue refunds should not be made until 10 business days have passed so that checks have enough time to arrive
        - Student would then complete Student Refund Check Cancellation Form (see below)
        - Refund checks that are sent to a student's old address, do not need to wait the 10 business days for the check to arrive to that address
            - They can submit the form for processing but make sure that the student indicates that they no longer reside at that address in the comment box of
                - If this is not indicated, the form will be denied
    - If students received a refund check by mistake and they need to re-pay the funds (e.g., over-award), the student should simply cash the check and repay the funds online via CaneLink
        - If student does not want to cash the check and wants it to be cancelled so the funds can apply toward the balance, they should be instructed to submit the Student Refund Check Cancellation Form after SLA has passed
            - Do not escalate cases for this situation
- Student Refund Check Cancellation Form
    - If a student has been issued a refund and it has passed the 10-business day SLA to receive a refund check, but has not exceeded the timeframe of 6 months, they should be advised to fill out this form in Boomi

        - Before Associate sends student link to the form, we should advocate for the student to either set up direct deposit, or confirm/update their address on file for a new paper check
        - Form will take 3-5 business days to be processed
    - After student completes the form, the process flow will go to the following departments
        1. Check distribution will review to determine if the check has been cashed or if they have it in office
        2. Controller for processing
            - Note: when the status of Boomi form is with Controller, the Detailed Status area in Boomi will show as blank
        3. OSAS to determine if refund is still owed
        4. Refund will out to student via preferred method
    - **No more escalations to OSAS for reversing refund checks if refund is within 6 months old**
        - Students must login to online Refund Check Cancellation form via Boomi
            - If a student is unable to access Boomi, that would be the only reason we can escalate to OSAS for assistance
                - Don't refer students to UMIT for Boomi access
    - **Note**: Refund checks that are not cashed within 180 days will expire. A student would need to request a new refund check or direct deposit after 180 days, by submitting a case to 'Canes Central and having the case escalated to OSAS for assistance
- Direct Deposit Refunds Sent to Closed Account
    - If a student states that a refund was sent to a bank account that is now closed, they will need to be directed to speak with their banking institution to obtain the funds
        - If the University has already sent the funds out, we are unable to reverse this, the student is responsible for contacting their banking institution to find an alternative way to receive the funds

Refund of Payments

- Credit Card Payments
    - If a credit card payment to a student account has been successfully processed and the student/proxy is requesting to cancel the payment, OSAS is unable to reverse the charge
        - The only option would be to dispute the charge with their credit card company (do not communicate this to students, just for our information), otherwise the payment will remain as it will not be able to be reversed by the University

Return of Loan Funds

- Two ways:
    1) Student submits Loan Revision Form → Loan revised down → New balance on account → Pay balance
    2) Student returns refund to Cashier's Office → CC Chatter's to OSAS to place hold on account and notify FA → OSAS notifies FA → FA revises loan so no more refund appears

Returned Payments (e.g., Checks)

- UM will try to cash a check twice, automatically and without notice
- If it cannot be cashed, there is a $20 fine for returned checks
- May trigger an S01 hold (see Holds for details)
- If you click on the returned check information in Flywire, you will see some details about the WHY

- If you cannot fully-explain why and/or the student doesn't know why, escalate to an OSAS Specialist to dig deeper and assist

ROTC

- It is a Third Party Sponsor, not a scholarship
    - Thus, for students who are eligible, the deferral should be applied and the Past Due hold will remain on the account until the payment is received
- Students must complete all requirements mandared by ROTC to be marked as eligible
    - Students need to submit items via their portals for approval by the military per their guidelines
    - Once approved by the military, ROTC will provide a list to OSAS to apply to the account
- All tuition-restricted aid awards reduce the ROTC award since the ROTC award is tuition restricted
- May get the ROTC Scholarship (for tuition only) and ROTC Grant (for other charges)

Scholarships/Waivers

- Tuition Waivers = Posted through OSAS
    - If not posted, handshake the student to the college/school/advisor for their program who awarded it so inquire as to if/when it was submitted
    - Once submitted, it follows the proper SLA
    - If the student comes back and says they spoke with someone and it still isn't showing but the person said it was submitted, find out who the student spoke with and connect with you, the student, and that person via email, and ask that person to follow up on their end to the status as waiver would be posted by OSAS within the SLA once submitted
        - That person will need to follow up with their budget manager to see what's happening
- **LAW Tuition Waivers**
    - In general, it is very rare LAW students will be offered a tuition waiver for a 2^{nd}+ semester; this is something they typically only offer as a one-time thing
        - Defer to what is posted in PowerFAIDS or submitted by LAW per normal
- Internship Stipends = Posted through OSAS
    - If not posted, handshake the student to the college/school/advisor for their program who awarded it so inquire as to if/when it was submitted
    - Once submitted, it follows the proper SLA
    - If the student comes back and says they spoke with someone and it still isn't showing but the person said it was submitted, find out who the student spoke with and connect with you, the student, and that person via email, and ask that person to follow up on their end to the status as waiver would be posted by OSAS within the SLA once submitted
        - That person will need to follow up with their budget manager to see what's happening
- College/School Scholarships = Posted through FA
    - Learn more here

Special Pricing

- Some programs (i.e., Academic Plan/Subplan) carry special tuition pricing that is different from the standard tuition rates
- Some programs, courses, etc. also carry their own special fees
    - For example, the School of Nursing charges their ABSN students a flat rate per semester regardless of the number of credits enrolled
        - They are also charged a program fee for their program
- If we cannot figure out a program's special pricing
    - Call Center: Advise the student to submit a case so an Associate can assist

  - Associates: See our Special Pricing Folder in Box
    - "CC Team" → "Special Pricing"

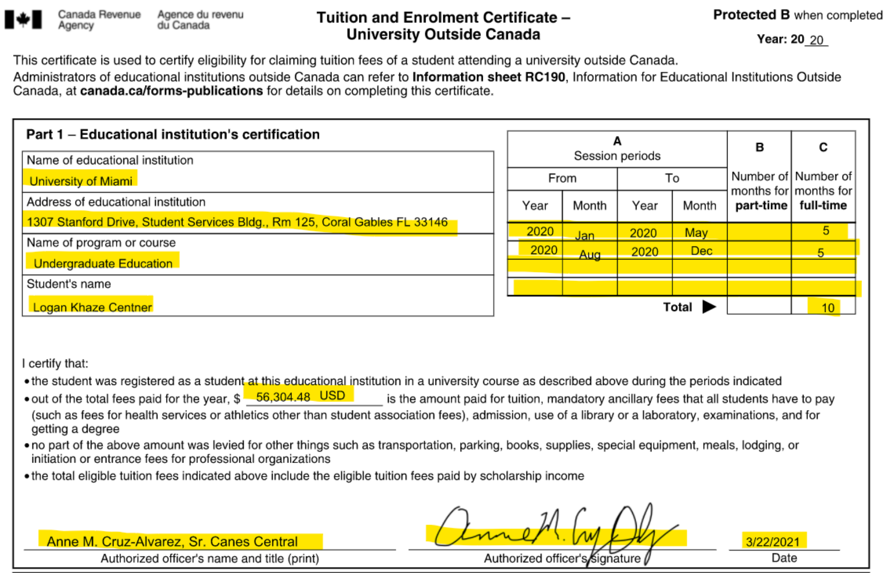
Student Health & Counseling Fee

- Can be added in the summer even if not enrolled by submitting a request to Student Health
  - Student must have been enrolled the prior Spring and be enrolled for the subsequent Fall
- In addition, student must be in the State of Florida and local to the South Florida area to receive services as Telehealth services will continue to be provided in the summer
  - After **May 20th**, any student not meeting eligibility requirements will no longer be able to continue with services or begin new services with either the Counseling Center or Student Health Service
- Below are the website links that discuss eligibility requirements
  - Counseling Center: https://counseling.studentaffairs.miami.edu/services/elligibility/index.html
  - Student Health Service: https://studenthealth.studentaffairs.miami.edu/general-information/eligibility-and-summer-access/index.html

Third Party Sponsor

- Not needed if no direct invoice is needed by the organization
- Formal contract between UM and another entity to provide financial support for a student for mandatory tuition and fees
  - Must be submitted 60 days prior to term payment deadline
  - A "Transfer to Third Party Deferment" will appear on the bill until payment is received
  - Sponsor is billed after census
- thirdparty.osas@miami.edu
- **Note:** If student comes in person as a walk-in for Third Party inquiries, you can escalate to OSAS
- Companies cannot directly wire funds to pay a student's account without going through this process since this is taxable
- Refunds
  - Refunds almost never come from third party payments
  - Refunds that appear after a third party payment is made are almost always from something else
  - Be sure to research and provide correct information on where a refund is from
  - This is common for VA payments
- Parking
  - In general, 3rd party contracts do not cover parking
  - Communicate 3rd parties do not cover parking and they could contact their 3rd party provider for information on what is and is not covered
  - If there is pushback and if needs a deeper look from the UM side on the 3rd party contract after you communicate the information above, escalate
- Admission Deposits
  - Students who submit a deposit and are on a 3rd party but contact CC to have their admission deposit back—perhaps they were told to do so by the 3rd party—should be told this isn't possible
    - UM will not return this
    - Instead, these funds will be applied toward any other fees or charges on their bill (e.g., parking)
    - Do not escalate

TL11A

- Canadian Student Tax Form
- Check out the "How do students complete a Canadian Tax Form TL11A?" knowledge article for additional details presented to the student to complete prior to submission
- Associate Process (after Student Portion outlined in the knowledge article)
    - We complete Section 1; only the fields completed below need to be completed (Note: The screenshot is an example of a normal student who attended a full year)
        - 

Canada Revenue Agency / Agence du revenu du Canada

Tuition and Enrolment Certificate – University Outside Canada

Protected B when completed

Year: 20 20

This certificate is used to certify eligibility for claiming tuition fees of a student attending a university outside Canada. Administrators of educational institutions outside Canada can refer to **Information sheet RC190**, Information for Educational Institutions Outside Canada, at **canada.ca/forms-publications** for details on completing this certificate.

Part 1 – Educational institution's certification

Name of educational institution: University of Miami

Address of educational institution: 1307 Stanford Drive, Student Services Bldg., Rm 125, Coral Gables FL 33146

Name of program or course: Undergraduate Education

Student's name: Logan Khaze Centner

A Session periods From Year	Month	To Year	Month	B Number of months for part-time	C Number of months for full-time
2020	Jan	2020	May		5
2020	Aug	2020	Dec		5
			Total ▶		10

I certify that:
- the student was registered as a student at this educational institution in a university course as described above during the periods indicated
- out of the total fees paid for the year, $ 56,304.48 USD is the amount paid for tuition, mandatory ancillary fees that all students have to pay (such as fees for health services or athletics other than student association fees), admission, use of a library or a laboratory, examinations, and for getting a degree
- no part of the above amount was levied for other things such as transportation, parking, books, supplies, special equipment, meals, lodging, or initiation or entrance fees for professional organizations
- the total eligible tuition fees indicated above include the eligible tuition fees paid by scholarship income

Anne M. Cruz-Alvarez, Sr. Canes Central — Authorized officer's name and title (print)

Authorized officer's signature

3/22/2021 — Date

    - You will need to know the tuition, mandatory fees, and health insurance amounts
    - The amount will need to be written in USD at the end to specify
    - The amount that needs to be listed is not date-based like the 1098T
        - Add the data for the terms within the calendar year; thus, it should be listed as Spring, Summer, and Fall
        - The Spring and Fall terms are 5 months
        - The Summer is 2 months
        - The grid on the right-hand corner cannot exceed 12 months within one year
    - The form does require a signature
        - Make sure to print and sign with blue ink and write the date in the international format (i.e., DD/MM/YYYY)

Tuition Deposits

- Tuition deposits have historically applied toward both tuition and fees
- OSAS has always used a manual process to apply tuition deposits toward fees if needed but technically, tuition deposits should only apply toward tuition
- OSAS has decided to **stop** the manual process of applying the tuition deposit toward fees, which means students may contact us, especially those on 100% Tuition Remission, wondering why their deposit isn't covering their fee balance
    - If this is the case when a student calls or creates a case, explain that "tuition deposits are set up to cover tuition directly but I can escalate your case to the Student Accounts processing team so they can review to see if there is any possibility of applying it toward your fees"
        - This will not be guaranteed
        - They will review case-by-case
        - This is an escalation to OSAS

- Tuition deposits are not typically refundable
  - If a student has other funds paying their bill, the tuition deposit will remain on the account as a credit
    - This credit can be applied to any future charges on the student's bill
  - While not common, there could be a scenario where a deposit is approved to be refunded to student
    - An example of this would be cancellation of a Study Abroad program after a deposit was made, or cancellation of a Housing deposit if a student did not get on-campus housing
      - **Note**: If a student contacts 'Canes Central and says that their Deposit was approved to be cancelled/refunded to them, do not escalate to OSAS
      - This process should be handled on the back end, the department in charge of the deposit will communicate this to OSAS
      - Associates can refer students back to the department in charge of the deposit for a status update

Tuition Drop Schedule and Fees

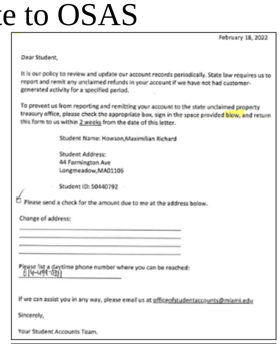
- Tuition is refunded (if eligible) in line with the Tuition Drop Schedule listed on our Billing and Payment website
- Fees are only refunded when a student drops within the 100% tuition drop timeframe
  - There are no prorated refund amounts if a student drops after that timeframe

Tuition Remission

- Eligibility
  - Employees should contact HR Benefits to learn about their specific eligibility
    - Call (305) 284-3004 or fill out online inquiry form at http://www.miami.edu/benefits/ask
    - They can learn more at https://my.hr.miami.edu/benefits-and-wellness/work-life/tuition-benefits/index.html
  - **Refer any inquiries related to Tuition Remission to http://www.miami.edu/benefits/ask, not OSAS**
    - HR will discuss eligibility, etc. with the employee
- What if not on Bill?
  - Students who believe they should receive tuition remission and have already been billed for the semester must go through HR Benefits
  - If we receive a case regarding questions about Tuition Remission
    - Associates will need to confirm (a) the student is enrolled (does not have to be full time) (b) check to make sure the student is billed and all other forms of aid, etc. are correct, (c) inquire with the student about their perceived tuition remission benefits, and (d) confirm that the student has a valid SSN on CaneLink
      - If no SSN on file, do not send to HR until student updates it
    - If received as a case, email Denise Flores (dkflores@miami.edu) to let her know that an SSN is in CaneLink
    - HR will liaise with OSAS as needed to address tuition remission inquires and get tuition remission posted on the bill
- FYI … Process for OSAS to get Tuition Remission to Appear on Bill
  - This information is sent to OSAS via a file from HR Benefits
  - Employees not included on the initial list will be processed on a case-by-case basis as OSAS is notified by HR Benefits

  - For continuing students, the amount used the prior year is used as an estimate until the official numbers are received by OSAS
  - HR will send a file to OSAS every Thursday with updates that will be loaded for the Monday billing notice
- <u>Employee Fees (not Dependents)</u>
  - Employees must waive the Student Health Insurance each year, even if they use the University's insurance for employees
  - Employees must waive the Wellness Center Fee each semester
  - Employees (enrolled part-time) who want to add the Athletic Fee need to do so via CaneLink
  - Employees (enrolled part-time) remaining fees should be waived automatically once tuition remission is applied but it is recommended they review their account each semester
    - If an employee is enrolled in a full-time course load, they will be charged the mandatory Activity fee
      - Activity fee is unable to be waived by TR, employee will be responsible for payment of this fee
    - If an employee is not using TR (ex. PhD student) but would otherwise be entitled to TR and therefore entitled to have fees waived, Associates can make the request by contacting the appropriate Sr. Business Officer, as outlined in the <u>Optional Fees/Waivers</u> section
  - If fees from a prior term were not removed by needed to be removed because the employee was on tuition remission, Associates will handshake to appropriate Sr. Business Officer contact, as outlined in the <u>Optional Fees/Waivers</u> section
- <u>TR and Financial Aid</u>
  - Employees/dependents on tuition remission for UGRD programs are not eligible for UM Merit Scholarships
    - If an employee leaves UM and the employee's dependent had been offered a UM merit scholarship (e.g., President's scholarship) but it had to be removed due to TR, the scholarship can be reinstated after the employee leaves as long as the student was meeting SAP
  - Employees/dependents on tuition remission for UGRD programs would need to complete the CSS Profile for the UGRD FA team to determine if the student could be eligible for UM need-based aid (e.g., Coral Grant)
  - Employees/dependents on tuition remission for UGRD programs are required to apply for EASE
    - This will require them to complete the appropriate FL residency documentation
    - If they then qualify for EASE, EASE will first show as Anticipated Aid until FL aid is disbursed after census
    - Once FL aid is disbursed, the EASE will pay into the account, and it will most likely reduce tuition remission because (a) EASE can only pay toward required tuition and fees and (b) tuition remission can only pay toward tuition
      - This could result in a new balance on the account since the full amount of EASE and the full amount of tuition remission were showing as paying toward the account while EASE was listed as Anticipated Aid
      - The student is responsible for paying the resulting balance
        - **NOTE**: Course Materials/'Canes Course Pack fee is included as a mandatory fee for full-time Undergraduate students
- For continuing students going into a new academic year, tuition remission award amounts are projected until the official amounts are provided for the Fall bill
  - These award amounts will be adjusted accordingly to reflect actual tuition remission once this information is provided for the Fall bill

Unclaimed Checks

- Refund checks that go un-cashed after a period of time (typically 1 year) must be closed out as "unclaimed checks"
- This will show as the following on the student's account as the Refund will be zeroed out and the Unclaimed Check designation will appear
05/13/2021	05/13/2021	Refund	$0.00 −
09/11/2019	09/11/2019	Refund	$374.90
05/13/2021	05/13/2021	Refund	($374.90)
05/26/2021	05/26/2021	Federal Direct Unsub Loan	$0.00 +
05/26/2021	05/26/2021	Unclaimed Check (1/19 - 12/19)	$374.90
- Students can be refunded that amount if they contact the University and ask
    - Unclaimed Refunds letter
        - Tell people to complete the unclaimed check letter and email to the email on the letter
        - If we receive the completed form as a case, handshake them to the e-mail address provided in the letter officeofstudentaccounts@miami.edu
        - If someone states they already reached out to the email and never received a response, escalate to OSAS
            - 

              February 18, 2022

              Dear Student,

              It is our policy to review and update our account records periodically. State law requires us to report and remit any unclaimed refunds in your account if we have not had customer-generated activity for a specified period.

              To prevent us from reporting and remitting your account to the state unclaimed property treasury office, please check the appropriate box, sign in the space provided blow, and return this form to us within 2 weeks from the date of this letter.

              Student Name: Howson,Maximilian Richard

              Student Address:
              44 Farmington Ave
              Longmeadow,MA01106

              Student ID: 50440792

              ☑ Please send a check for the amount due to me at the address below.

              Change of address:

              Please list a daytime phone number where you can be reached:
              614-491-0311

              If we can assist you in any way, please email us at officeofstudentaccounts@miami.edu

              Sincerely,

              Your Student Accounts Team.
        - If someone asks about these funds and has not received the letter
            - **Associate =** Escalate to OSAS to re-issue the Refund check

Verification of Good Financial Standing

- Sometimes 3rd parties need to verify student financial status to ensure they are in good standing (e.g., FBI needs to confirm an applicant is in good financial standing)
    - If we are approached about this, Associates can do the following if and only if they are presented with an approved authorization to share such information in which the student in question signed off:
        1. Confirm the student's authorization form before you share anything
        2. Review the student's account to make sure the balance is $0 but does not have any Write Offs and is not in Collections
            a. Note: Sometimes an overall balance may say $0 but the student has Write Offs or is in Collections and, in these cases, you cannot sign off the student is in good standing
        3. If the true balance is $0 with no Write Offs and is not in Collections, sign off on the statement of good standing for the 3rd party
        4. Scan and save a copy of what you signed as well as the Authorization Form to the case
        5. Close the case

Wellness Center Fee

- GRAD "Opt-Out" via CaneLink by Last Day to Drop Without a "W" each semester

  - Review the Tuition and Fee charts to determine eligibility
    - During the Summer semester, the Wellness Center fee will not be auto-charged for full-time Graduate students
    - Enrolled students would only "Opt-In" if they wanted the Wellness Center fee
  - See Optional Fees/Waivers for more details
- If a student accidentally opted into the wellness center fee and would like to opt-out or vis-versa (opted out but now want access to the wellness center)
  - **Associates**: Follow the Optional Fee process, detailed in the Optional Fees/Waivers section
- Do not refer GRAD students to OSAS to ask for a fee waiver if they miss the deadline
  - If the student misses the deadline, the fee will remain for the semester; remind the student to do this by the deadline in the future
    - If the student can provide extenuating circumstances for missing the deadline to opt-out of the fee, we can send an email to Danny Atherton (d.atherton@miami.edu) and Chris Booth (cbooth@miami.edu)
      - See Optional Fees/Waivers for more details on this process
- An online student who gets a 'Cane Card through our new process can use that card to access the Wellness Center but they must first purchase a membership in the Wellness Center business office for it to activate
  - The Wellness Center can either accept credit card in person at the Business Office or send the charge to be added to the student's account

Wire Transfer/Bank Transfer

- There are two different ways for students to wire funds, which depend on the type of wire:
  1) Domestic Wires
     - Completed via Flywire by clicking "Payments/Account Summary" under "Financials" in CaneLink
     - Flywire receives these funds on behalf of the University
     - Funds received by Flywire and then delivered to UM within 2-3 business days
     - Once payment is received by Flywire, it will be automatically guarantees to UM
  2) International Wires
     - Completed through CIBC (Canadian Imperial Bank of Commerce) by clicking "International Wires Only" under "Financials" in CaneLink
     - Offers preferred exchange rates and allows students to pay in their home currency
       - Some currencies are not supported due to regulations, sanctions, etc.
     - Currency exchange wire quotes are valid for 72 hours (excluding weekends and Canadian holidays) to help avoid currency price/exchange fluctuations
     - CIBC receives these funds on behalf of the University
     - Funds received by CIBC and then delivered to UM
     - Students can track the status of their payment in the CIBC portal
     - The receipt is in the CIBC portal by clicking on the envelope icon next to payment
- Students can pay through 1 payment in Flywire and a wire through CIBC but they need to keep track of what they paid and how
  - This isn't ideal and should not be recommended
- Student's banks could charge their own fees for wire transfers, but these are not covered here
  - Students should consult their own banks to learn if they would receive wire charges on their end
- Wire over-payments should not be made but, if somehow, they were, the excess funds would be returned to the account they were paid from as we cannot refund that money

Write Offs

- A Write Off means UM made some sort of decision on the student's debt; it doesn't necessarily mean the student no longer owes anything
    - You will see the term "Write Off" on their Flywire Account Activity as a line item
- Some Write Offs occur when students are in Collections as part of the Collections process (click here to learn more)
- Special Write Off Population
    - The list of students below received Write Offs on/around 8/16/2021 but were not notified. If they contact us and ask about the Write Off, please do the following:
        - Mention to them it looks like they have a Write Off on their account
        - Tell them you will create a case for them and ask a team member to touch base with them with more specifics about this
        - Create a case for the student through our access (be sure to complete all fields)
        - Escalate the case automatically to the Student Accounts Specialist Queue
        - Chatter Post to @Stephanie Cevallos Vargas—be sure it tags her—and copy and paste the following:
            - *This student was on the overpayment/write off list from 8/16/2021. Can you please touch base with this student to discuss the meaning of the Write Off?*

EMPLID	Last Name	First Name
54417399	Adams	Andrew
50439367	Dyson Jr	Derrick
54479112	Moore	Taina
54583197	Naemi	Sonya
54583774	Oliver	Timothy
54480524	Ramirez	Rolando
50112819	Sookdeo	Vandana
54465270	Locklear	Clarence
51509564	Alford	Colissa
54258566	Anderson	Daniella
54308620	Guerra	Alexa
54261699	Hervera	Belen
50141725	Scaramutti	Carolina
50470621	Essegian	Derek
50080881	Grosso	James
50411326	Oluwole	Sofia
50345231	Trewick	Nareka
54226378	WOLDE	TIZETA

Financial Aid

2nd + Bachelor's Degree (e.g., ABSN)

- See "Special Programs"

Aggregate Loan Limits

- Students should be told to review this regularly at https://studentaid.gov/understand-aid/types/loans/subsidized-unsubsidized

Aid Award Types and Application Restrictions

- Aid cannot be applied toward the balance on a prior academic year (e.g., 2024-2025 cannot pay back into 2023-2024)
  - Students are welcome to use refunds from a new year to then pay a prior year balance online but the system will not do this automatically
- Some funds are strictly need-based funds and can only be offered if the student has need:
  - Need-based Aid
    - SEOG
      - These funds are limited; once exhausted, there are no more to give out
      - UM receives a block grant (total amount of funds without regards to individual students) and – with certain rules – it is left to UM to determine which students are eligible for funds
      - We prioritize students by need
        - Students with the lowest EFC must be prioritized ahead of those with higher EFCs
        - In any given year, a student may or may not receive the award depending on how many other students meet the criteria to receive it
    - FSAG and FSEG
      - These funds are limited; once exhausted, there are no more to give out
      - UM receives a block grant (total amount of funds without regards to individual students) and – with certain rules – it is left to UM to determine which students are eligible for funds
      - We prioritize students by need
        - Students with the lowest EFC must be prioritized ahead of those with higher EFCs
        - In any given year, a student may or may not receive these awards depending on how many other students meet the criteria to receive them
    - Subsidized Loans
    - Pell
    - Federal Work Study (FWS)
  - Treated as Need-based Aid only if the student has need and other awards; not treated as Need-based Aid if the student has no need at all (not just unmet need)
    - EASE
    - Bright Futures
- Some funds are restricted to pay only to specific items:
  - No Tuition/Fee Restrictions
    - Coral Grant
    - Endowed Scholarships (most of them)

- FL Bright Futures
- Gates Scholarships
- Stamps Scholarships
- Jenkins Scholarships* (this is the UM-matched portion of the Jenkins)

- Fee Restricted
  - Athletic Grad Schlp Fees
  - Athletic UG Schlp – Fees
  - Athl Grad – Fees (Sum)
  - Athl UG Schp – Fees (Sum)
- Tuition Restricted
  - Athletic Grad Schlp – Tuition
  - Athletic Grad Schlp – Tuition (Int)
  - Athletic UG Schlp – Tuition
  - Athl Grad Schlp – Tuition (Sum)
  - Athl UG Schlp – Tuition (Sum)
  - Athl UG Schlp – Tuition (Int)
  - Canes Achievement
  - Hammond
  - Hurricane Scholarship
  - Jenkins Scholarships (this is the donor's money portion of the Jenkins)
  - PLUS One
  - Presidents Scholarship
  - Presidents Music 1
  - Presidents Music 2
  - Presidents BFA Scholarship
  - Presidents ARCH Scholarship
  - Singer
  - Weeks (Marta Weeks)
- Tuition and Fee Restricted
  - FL EASE

- *Awards with On-Campus Housing Impact
  - **Jenkins Scholarships (No Tuition/Fee Restrictions)**
    - If the student is local (i.e., parents live in the Miami-Dade or Broward county), the student can live at home
    - If the student is not local, the student must live on campus
    - Even though the full COA is covered under this scholarship, the covered housing limit is the equivalent of a double room or a 4/2 in the UV
  - **UDreamers**
    - If the student is local (i.e., parents live in the Miami-Dade or Broward county), the student can live at home
    - If the student is not local, the student should live on campus
  - **Stamps Scholarships (No Tuition/Fee Restrictions)**
    - Students can live on campus, off campus, or at home
    - Stamps Leadership Award = Full COA is covered
    - Stamps Ensemble Students = Tuition, Fees, Room, and Board is covered
  - **Steven Witkoff Scholarship**
    - This is the 1 donor scholarship that requires on campus housing
    - This is only 1 recipient per year

- Full COA is covered

Aid Enrollment Thresholds

- Fall/Spring
  - Different types of aid require different thresholds of minimum enrollment
    - **Sub**, **Unsub**, **Grad PLUS**, and **Parent PLUS** require at least half-time enrollment
      - This is a federal regulation so it cannot be appealed or waived
      - **Cancelled Aid based on Enrollment**
        - This aid will be cancelled for those enrolled less than half-time
        - If a student gets enrolled half-time after aid was cancelled:
          - **UGRD**: Wait for the Packaging SLA (1 business week) to pass for awards to be added back
            - If SLA Violated, escalate to FA Specialist
          - **GRAD/LAW**: Complete Loan Revision Form
    - **Pell**, **SEOG**, **Bright Futures**, and **Federal Work Study (FWS)** can be enrolled in any amount of credits
      - FWS just requires the student to be active, usually in 6 credits or more
      - The amount of Pell Grant and FL Bright Futures awards are dependent on the number of credits a student is enrolled in
    - **EASE, FSAG, and Jose Marti** require full-time enrollment unless that enrollment is because of Office of Disability Services (ODS) accommodations
      - **Cancelled Aid based on Enrollment**
        - This aid will be cancelled for those enrolled less than full-time
        - If a student gets enrolled full-time after aid was cancelled, the cancelled aid will be added back in line with the Packaging SLA (from the date the student enrolled full-time)
        - Communicate the Packaging SLA from that date (see Enrollment Request Search for this date)
        - If SLA violated, escalate to FA Specialist
    - **Institutional merit- and need-based aid** (e.g., President's Scholarship, Coral Grant, etc.) requires full-time enrollment unless that enrollment is because of ODS accommodations
      - **Cancelled Aid based on Enrollment**
        - This aid will be cancelled for those enrolled less than full-time
        - If a student gets enrolled full-time after aid was cancelled, the cancelled aid will be added back in line with the Packaging SLA (from the date the student enrolled full-time)
        - Communicate the Packaging SLA from that date (see Enrollment Request Search for this date)
        - If SLA violated, **escalate** to FA Specialist
- Summer
  - See Summer Aid for details
- See Prorate Aid for additional details
- See Enrollment Limits for additional details

Aid Interest/Eligibility

- UGRD Aid Interest
    - When a student applies for admission at UM, there is a section of their application that will ask if they are interested in being considered for need-based aid
        - The Financial Aid Interest Update form will now live in Slate, the program used for UG Admission applications
        - For admitted students that are now handled by 'Canes Central (after bill release), if a student needs to update their FA interest to "yes," escalate to Financial Aid
    - If an UGRD International student marks "no" to Financial Aid interest on their admission application, they are unable to change this later and are unable to apply for need-based aid consideration
- GRAD/LAW Aid Interest
    - The FA Interest field in PowerFAIDS has nothing to do with whether GRAD/LAW will receive an aid package; as long as they do a FAFSA, they will be packaged in line with packaging SLA and timing once the FA team starts packaging for a specific term
    - If a student is not packaged after packages are worked and released, it's probably some delay on the FA processing team's side
        - If the SLA passes and packages should be sent, Associates should **escalate** to an FA Specialist
- Eligibility (Financial Aid Course Audit/FACA)
    - Students can only receive federal and State aid for degree-required credits
        - IEP students are not eligible for Financial Aid
        - Students completing a Professional Certificate program are not eligible for Financial Aid
    - If additional majors, minors, cognates, etc. are not required of a degree, they will not be covered once the total amount of credits required of the degree are exceeded

Anticipated Aid

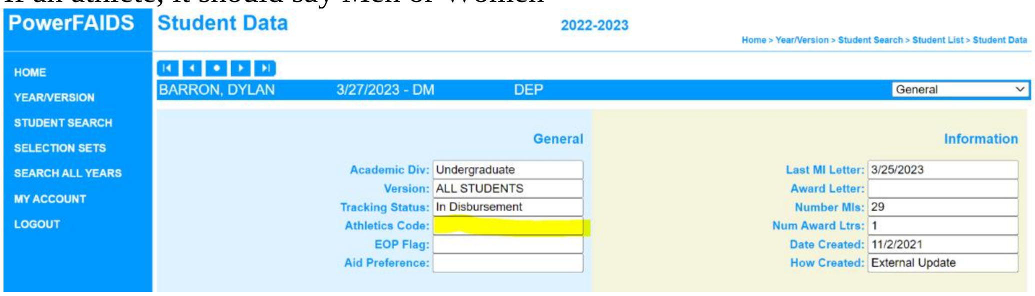
- Financial Aid Awards will show as Anticipated Aid on Flywire the day after being Accepted in PowerFAIDS
- Awards will show as Anticipated Aid until they are disbursed
- Anticipated Aid will eventually fall off at sometime during the semester
    - Students may see a new "balance" when this happens since the Anticipated Aid isn't factored in
    - When trying to figure out why an Award has not disbursed and is still showing as Anticipated Aid, it's important to look at PowerFAIDS *Awards*, *Documents*, and *Disbursements* for the current term to see why

Application for Graduation

- Learn more about the Registration and Records process by clicking here
- Students may be able to prorate some aid for their last semester if they graduate in Fall (see Prorate Aid)
- FA must adjust EFC after students apply for graduation
    - When FA adjusts from a Fall/Spring Expected Family Contribution (EFC) to a Fall only EFC, the components within the EFC (both the Student Contribution and Parent Contribution portions) are not always simply cut in half
    - The Student Contribution portion of the EFC ($2,500) does not change; only the Parent Contribution portion adjusts
    - During this adjustment, each record will need to be reviewed to ensure that the student is not over-awarded in either need-based aid OR total aid so they do not exceed the cost of attendance

   - It is unlikely this adjustment will change their Fall aid; however, it is not outside of the realm of possibility

Athletes

- If a student is an Athlete, they receive Financial Aid assistance from Dwight Samuels (das382@miami.edu)
- To check if a student is an Athlete that should be sent to Dwight for Financial Aid assistance, look at the "General" screen of PowerFAIDS
   - Should be blank if they are not an athlete
   - If an athlete, it should say Men or Women
   - 

Bar Loans

- Before students pursue a bar loan, we should recommend they take the full amount of their Unsub and Grad PLUS loans for that year as they may have better interest rates (need to compare)
- The FA Loans Department does process these if they come to UM but only to simply list the graduation date of the student (or expected graduation date)
   - If the student already graduated, they do not need to go through UM for these loans
- These loans are not educational loans; they are essentially personal loans that may or may not roll through the University
   - These do not go into COA so students could be at full COA with their Unsub and Grad PLUS loans and still be eligible to receive these funds
   - The money is refunded directly to the student and not applied to an account
- Students must seek out bar loans on their own through a private bar loan lender
   - We cannot ever recommend specific private lenders but we can provide students with the elmselect website (https://www.elmselect.com/v4/school/485/program-select) so they can see examples of what companies students have used in the past for bar loans
- These are credit-based
- Students can apply 1 time
- Students can apply 1 year before graduation or up to 6 months after graduation
- The maximum amount they can borrow is approximately $15,000, but students must consult their lender
   - The amount awarded is not dictated by UM; it's dictated by the lender
- Disbursement timeframes for these loans is dictated between the student and the lender

BBAY (Borrower-Based Award Year)

- Our aid year currently spans the Fall, Spring, and Summer
   - For example, the 2020-2021 aid year includes Fall 2020, Spring 2021, and Summer 2021
- The University is not transitioning to BBAY yet; however, the Accelerated BSN (ABSN) program is transitioning to follow their own aid years—this is so they no longer span two aid years for this 1 year program—as follows:
   - Spring Admits = Spring, Summer, and Fall aid year

- Summer Admits = Summer, Fall, and Spring aid year

Benacquisto Scholarship

- This scholarship used to be called the "Florida Incentive Scholarship (FIS)"
- New Non-Florida residents will no longer be accepted into the Benacquisto Scholarship Program beginning in the 2022-2023 academic year
  - Continuing students who are Non-Florida residents and were already awarded this scholarship will be able to keep it throughout the entire length of the award as long as they meet the necessary SAP requirements
- Once they deposit, students should log into their State of FL portal and inform the State of FL they are planning to attend UM to ensure they are included on the roster of awards that will come to UM from the State of FL
  - List of awardees and budgeted amount will come from the State of FL each summer around the end of July/beginning of August
- There will be an estimated (EST) amount placed on the bill as Anticipated Aid until the final amount is released and disbursed after census
- The Benacquisto award amount is calculated based on the State of FL COA while accounting for other State of FL awards
  - **Example (Prior Academic Years):**
    - 2021- 2022 State Cost of Attendance is $24,844 (12,422 per semester), which is provided by the state
    - Eligible students will receive an award equal to the per-term institutional in-state cost of attendance (State COA), minus the sum of the Bright Futures (BF) award and an award associated with the National Merit® (NM) process
      - Benacquisto Scholarship Award = State COA – (BF + NM)
      -

Fall 2021 TUITION	Charges	Credits
Tuition Undergraduate	26,556.00	
Activity Fee (Undergraduate)	167	
Athletic Fee (Undergraduate)	102	
Hlth & Counsel Ctrs Fee UGRD	202	
Student Center Fee	190	
Wellness Center Fee Undergrad	163	
Parking Permit Tax	36.18	
Resident Semester Only Permit	516.82	
TUITION	**$ 27,933.00**	
Benacquisto Scholarship		$ 9,257.00
Florida Academic Scholars (F)		$ 3,165.00
FLORIDA COST OF ATTENDANCE (per semester)		**$ 12,422.00**
Singer Scholarship		$ 25,887.00
Effective Access to Student Ed		$ 1,421.00
UM COST OF ATTENDANCE		**$ 39,730.00**

      - *As you can see from the example above the Singer scholarship was reduced to meet COA of $39,730.
- Learn more at https://www.floridastudentfinancialaidsg.org/

Cancel and Reinstate Aid

- Students who are under-enrolled and have their aid cancelled as a result can have their aid reinstated if they get fully enrolled
- Inform the student about why their aid was cancelled and the add deadline they must adhere to in order to register for a full course load
- Process to Reinstate Once Fully Enrolled:
  1) Confirm full-time enrollment and check for the date they became enrolled as a full-time student.
  2) After 1 business week from the date they are enrolled full time, the POE screen should update in PowerFAIDS and you should see the student is "full time". If you see this, advise the student

that they should see their aid post to their account by the next week. If it has passed the 1 business week, escalate case to FA

3) If after 1 business week after enrollment the POE screen shows "Half" or "Three quarters" time but full-time credits, that indicates that there may be an issue and the case can be escalated to Financial aid.

Census Date

- What is this?
  - This is the date the University takes an official snapshot of enrollment that is used as in the final, official calculations of aid that can be awarded to a student in line with federal regulations
  - The credits a student is enrolled in on this date is critically important as it could have major implications on their aid eligibility or that semester and beyond (via SAP)
  - This date is the day after the Last Day to Drop Without a "W" at UM
- Impact on Aid for that Semester
  - Federal grants are locked in after census date (e.g., Pell and SEOG)
  - Federal loans can still be adjusted after census date as long as students are eligible based on enrollment and other criteria of the loan (e.g., Grad PLUS, Parent PLUS, Sub, and Unsub loans)
    - Federal loan eligibility is based on the number of credits enrolled in when the loan goes to disburse, not credits at census
  - State of FL aid may be adjusted after census date but it will be reviewed accordingly
    - Bright Futures always adjusts based on enrollment
  - Institutional aid is normally locked in after census date (e.g., President's Scholarship, Coral Grant, etc.)
  - BENAQUISTO – CAN'T DROP ANY CLASSES
  - Cases like this should only be escalated if there are reasons outside the ordinary that led to the issues (e.g., student was dropped from course by advisor but not re-added by the advisor as was supposed to
- Retro-Adds and Census
  - Students who are granted retro-adds that, pre-Census, would have made them eligible for certain forms of Financial Aid—see Aid Enrollment Thresholds—may no longer be able to obtain those funds
    - Federal grants cannot be adjusted since they are locked at Census
    - Federal loans may still be adjusted
      - Federal loan eligibility is based on the number of credits enrolled in when the loan goes to disburse, not credits at census
    - State of FL aid may or may not be adjusted, except for Bright Futures which always adjusts within the SLA timeframe
      - If beyond the SLA, cases like this should only be escalated if there are reasons outside the ordinary that led to the issues (e.g., student was dropped from course by advisor but not re-added by the advisor as was supposed to)
    - Institutional aid may not be adjusted since it is normally locked
      - Cases like this can be escalated after asking the student why they were late in adding classes to bring them up to the correct course load status
      - Financial Aid processing team will determine whether the aid can be reinstated
- SAP and Census Date
  - Classes that are retro-added/dropped may not change aid amounts (see above) but it will have an impact on SAP (e.g., credits attempted, credits completed, GPA, etc.)

Certificate Programs

- Only 3 GRAD certificate programs at UM are eligible for federal FA (i.e., Unsub and Grad PLUS loans): 1 UOnline accounting program and 2 UOnline finance programs

Common Questions

- Can I get additional aid?
  - Check COA for potential increase options
  - Check if full sub/unsub awarded
  - Explore other funding options (e.g., PLUS loans, private loans, MPPs, outside scholarships, etc.)
  - If the student accepted all self-help aid (e.g., Sub loans, Unsub loans, and FWS) and there has been a significant change in income, a Request for Review may be appropriate but this should not always be a go to option; instead, use the information above (see Request for Review for more information)
- What aid am I eligible for?
  - This is not an escalation!
  - Discuss FAFSA, process, aid options, etc. and go in depth about these
  - Clearly state that official determination will be communicated to them after review
- Does UM meet 100% of financial need for students?
  - UM strives to meeting 100% of UGRD need in the 1st year
    - In subsequent years, however, this is not always guaranteed if direct and indirect costs increase, need increases, students move off-campus, etc.

Community Assistants (CAs)

- CAs are given a housing and meal plan waiver/scholarship, which is factored into their aid packages and counts against the COA
  - They also receive a stipend but that is not factored into COA as it is paid like a regular employee
  - The CA is responsible for any additional room and/or dining costs not covered by compensation
  - Here is an example of the compensation package from the 2021-2022 academic year:

	A	B	C	D	E
1	**2021-2022 First Year RA**			**2021-2022 First Year UV & LSV CA**	
2	Stipend (21 pay periods)	$ 2,080.00		Stipend (21 pay periods)	$ 2,500.00
3	RA Room Rate	$ (12,620.00)		CA Room Rate	$ (14,000.00)
4	RA Room Credit	$ 12,620.00		CA Room Credit	$ 14,000.00
5	RA Dining Credit (for meal plan)	$ 2,300.00		CA Dining Dollar Credit	$ 500.00
6	RA Dining Balance (projected)	$ (421.00)		Net Gain	$ 2,500.00
7	Net Gain	$ 1,659.00		**Total Dollar Compensation Value**	**$ 17,000.00**
8	**Total Dollar Compensation Value**	**$ 17,000.00**		** $200 increase for each year of experience	
9	** $200 increase for each year of experience				
10					
11	**Note:** 2020-2021 Rate pending the 2021-2022 costs				

  - Example of how it shows in PowerFAIDS:

Resident Assistant - Room	No	$4,250.00	Accepted	01/12/2021

- The amounts that will be awarded will be sent by the department to FA for posting
  - If there is room in the COA, the awards may just be added to their award packages
  - If there is no room in the COA, their aid packaged could be adjusted in the following order in order to include the CA award in the COA:
    1) COA housing budget would be adjusted because the student is typically in a more expensive housing rate
    2) COA meal budget typically stays the same as FA allows for the standard 19-meal plan and it is the second most expensive allowance; however, if a student selects the unlimited meal plan, FA can adjust for that
    3) Since CAs do not typically use FWS, FA will remove FWS if they confirm they are not using FWS

4) If the CAs declined their loans, FA will remove these
5) Other awards could be adjusted to fit in the CA award (e.g., Coral Grant or International Student Grant) with a dollar-for-dollar swap if a student is already at 100% of COA
   - CAs would receive a revised award letter once these adjustments are made; this is when the CAs will see specifically how things had to be adjusted in order to include the CA awards
- If the CAs need more specific information at this time as to how this new aid will impact their current aid, Associate escalate to a FA Specialist
  - Specialists may not be able to tell the student anything else as they too are unable to provide exact numbers but, if needed, you can escalate and mention to the student the Specialist may not be able to provide any additional figures but you will have the student meet with the Specialist just in case

Consortium Agreements

- These are very limited
- LAW
  - **Non-UM Students Coming to UM**
    - Non-UM students may enroll at UM for a period of time during their law program
    - Consortium paperwork must be obtained from their home University
    - They must be fully-enrolled (i.e., not on a waitlist) before they submit the paperwork to UM for processing as it can only be completed for enrolled courses
    - Students submit this paperwork via the "**Document Submission**" form through our CC → Forms website
  - **UM students Going to Non-UM Programs**
    - UM students can enroll at another ABA-accredited program during their law program
    - Students submit the "**Law School Consortium Agreement**" form through our CC → Forms website to request UM to obtain COA information from the school they are visiting
    - UM then awards the student FA based on that COA
    - If the student accepts those awards, they are paid out (refunded) directly to the student and the student needs to use that money to directly pay the other school
      - This has to be done since there are no UM charges on a UM account
    - Any left over funds after they pay the other school are used for the living costs portion of their COA

Coral Grant

- Used to help cover unmet need
- If a student received it last year and it is missing this year but there was no significant change to EFC and no SAP issues, Associates can escalate to a FA Specialist for review
- In most cases, employees on tuition remission should not receive Coral Grant; however, their dependents may, depending on their need
- If EFC goes up, Coral Grant goes down
- If qualify for more self-help aid (i.e., FWS or subsidized/unsubsidized loans), Coral Grant goes down
- If FL Bright Futures goes up, Coral Grant goes down dollar-for-dollar because awarded based on need after federal awards
- If FL Bright Futures goes down, Coral Grant does not change
- See Prorate Aid for questions on proration

Cost of Attendance (COA)/Budget

- COA and Budget are synonymous
- Typically, there is a 3-5% increase in tuition and fees each year
- Tuition position is set up based on projected full-time enrollment of 15 credits for UGRD (see below for GRAD/LAW)
- COA can only be set once a student is set up with a Period of Enrollment (POE)
  - Once POEs are set, the FA team will begin awarding
- Students will be set up with a COA in PowerFAIDS manually as they are awarded
  - Even students who do not submit a FAFSA will get a COA
- Semester Deadlines
  - **Last Day to Submit COA Appeal Form for a semester** (UGRD and GRAD/LAW) = **Last Day of Classes**
    - Because of the normal 15 business day SLA, make sure the student completely fills out form and submits. Confirm everything is there in Dynamic Form and escalate to FA to process if within 15 business days before the Last Day of Classes
      - Associates - Chatter to say why you're escalating to process this due to potential timing issues with this and loan origination
    - If after the Last Day of Classes, no more forms can be submitted
- Increases/Appeals
  - Things to discuss when talking about appeals:
    - If COA is increased, grants and scholarships will not go up
    - If COA is increased, students may qualify for more federal loans or private loans
    - **Off campus housing** amounts are standard per COA and may not match their exact lease
      - Housing allotments are surveyed every couple years to see if needs to be adjusted
      - GRAD
        - Equivalent to ½ of an average 2/2 apt in a student-friendly neighborhood (similar to UV Cane Model cost)
        - Anyone can file COA for reasons listed on the COA form (e.g., medical)
        - If 1st semester and has concerns because already rented a place and/or are facing homelessness, can escalate case for review and consideration
        - If they selected they live with parent instead of off-campus, they need signed lease to be considered for COA increase
      - UGRD
        - Equivalent to the UV Cane Model cost
        - Can submit
      - Recommend all these students moving from on-campus to off-campus housing contact Housing directly to ensure they successfully backed out of on-campus housing if they haven't yet done so
  - **COA Appeal Forms must be used for …**
    - **Direct Costs** (e.g., Lakeside Village, University Village, UM Health Insurance, etc.) = This is any item that is charged through the student account and appear on a UM bill
      - **Bills must be posted** before this can be reviewed and decided on so do not recommend students submit COA appeals for these until bills are released
    - **Indirect Costs** (e.g., computer allowance for lost, stolen, or damaged computer, off-campus housing, Disability Services testing, etc.) = This refers to any items that are not charged on the student account like off-campus housing

            - Students can submit these COA appeals any time after the form is released; however, **these will not be reviewed/processed until the bills are posted**
                - The 15-business day document SLA begins the day bills are posted
        - If a GRAD/LAW is in person, they can simply meet with a Specialist instead of doing a form
    - As of the 2023-2024 academic year, an allowance for a computer is being included in the standard Cost of Attendance for students. Students will only be able to complete a Cost of Attendance Appeal for a computer if it has been lost, stolen, or damaged
    - **Different COA Appeal Forms**
        - GRAD/LAW
            - General Cost of Attendance Appeal Form
                - Note: Medical expenses are not appealable through COA form. Only living arrangements for medical reasons **not** medical expenses. Do not escalate.
            - UM Health Insurance
                - If submitted at the end of the Fall semester and the student is attending the Spring semester, FA will split the health insurance on the budget evenly between the Fall and Spring to allow for a Fall/Spring Grad PLUS loan to be awarded and disbursed
        - UGRD
            - General form

CSS Profile

- Undergraduate students are only required to submit the CSS Profile once during the application process
- Dependent Students up to Age 26
    - Dependent students who are 26 years old or older do not need to include parent information
    - They can put all 0s in the Profile for parent information as needed
- Corrections
    - Once the CSS Profile is submitted, any corrections would need to be completed manually
    - Students/proxies would need to print the CSS Profile, cross out what information is outdated or incorrect, hand-write the new information in that place, and upload the corrected document to IDOC
    - CSS Profile challenges hotline = (844) 202-0524
- Non-custodial Parent
    - If a student does not have contact with the non-custodial parent, the student would need to fill out the waiver form and provide the required 3rd party letter that will appear in the documents list
    - The waiver is located on IDOC. Information about and a link to the waiver is available at www.miami.edu/ncpw
- Independent Students
    - These students can enter all 0s in the parent information portion of the Profile if needed
    - See Independent Student Criteria for more information
- Waivers
    - Fee waivers for the CSS Profile needs to be requested through College Board as UM is not involved in this process (see https://cssprofile.collegeboard.org/fee-waivers for information)
    - If a student is asking not to submit the CSS Profile, let them know they would then not be considered for UM aid, R4Rs, or COVID-Appeals so they should do this if they want this consideration

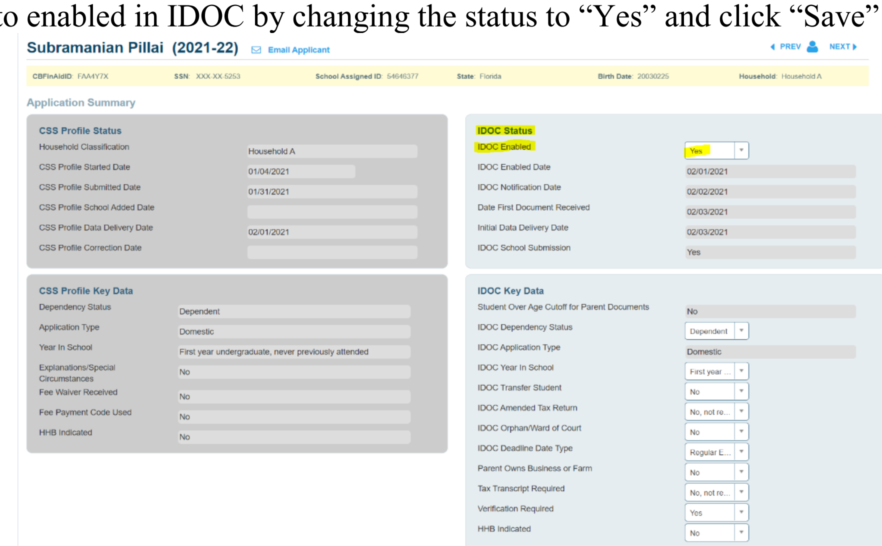
        - If they only have TR or only want state aid, they can submit a case to be considered for a CSS Profile waiver **(THIS IS NOT RECOMMENDED AND SHOULD NOT BE ADVERTISED)**
- Re-do Request for UGRD Out 1 Year
    - UGRD students who were out for approximately 1 year may be asked to re-complete the CSS Profile and other documents to receive aid (in addition to the FAFSA)
        - This can be due to Leave of Absence, Inactive Status, and Withdrawals
- UM Aid
    - Students are not eligible for any UM aid if their FM EFC makes them a "no need" student
        - Financial Aid may waive the CSS Profile if they see this as it wouldn't be necessary at this point
        - Financial Aid may also waive NCP documents if FM (FAFSA) or IM (CSS Profile) EFC for just the custodial parent makes the student "no need"

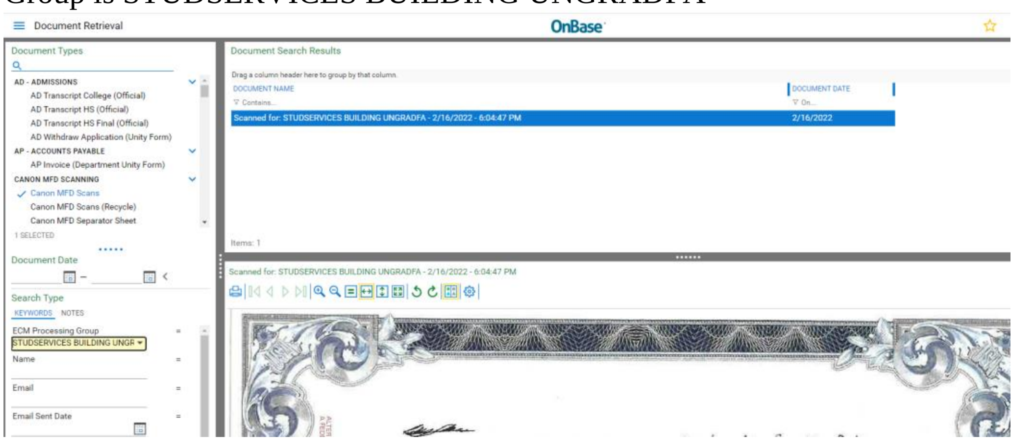
Disbursements

- Disbursements begin 10 calendar days before the semester begins
    - For more information about disbursement SLAs, see the FA Loan Origination and Disbursement SLA section
- Federal funds will be disbursed once all documents are received, and awards are accepted; they will take 3-5 business days to disburse and post on the account
    - **Note**: Once in "AW" (Awarded) Status on PowerFAIDS, students need to take action on their offered Federal Aid (example: Federal Loans and Federal Work-study), in order for other aid to disburse.
        - Once accepted, reduced, or declined, any remaining aid will disburse
- State Aid typically does not disburse until on or around census date for a semester
- When funds are disbursed on PowerFAIDS (visible on the "Disbursements" screen), it will take approximately 1 business day to be reflected on CaneLink/Flywire

Document Submission/IDOC

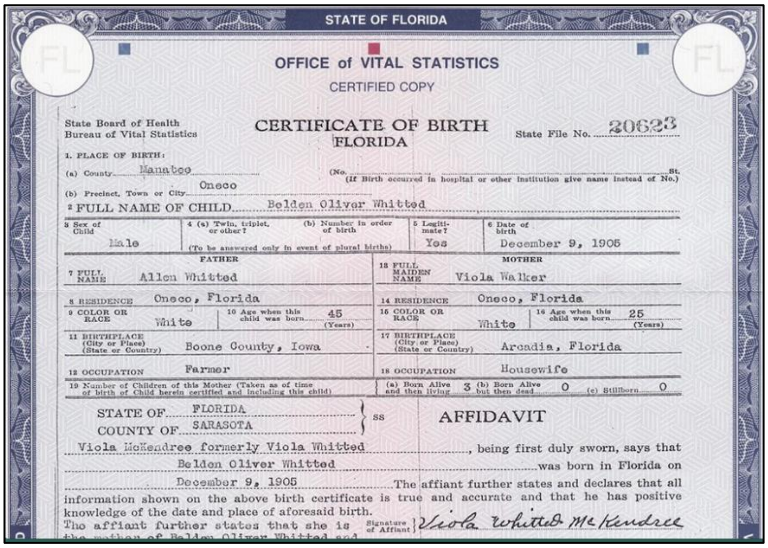
- Students are instructed to submit documents in various ways
    - Check PowerFAIDS Documents and Messages so we know what is being requested (i.e., Not Received) and see how the student is instructed to submit it
    - A list of the public FA forms is accessible at www.canescentral.miami.edu → "Forms"
    - Other, private forms that are accessible online will be sent to students via Messages on PowerFAIDS (i.e., CaneLink for students)
- Documents cannot be submitted until they are requested, or they will not be reviewed properly
- Notarization
    - All documents that come in either via mail or via the Document Submission portal must be notarized (if it tells them to notarize it on their form/request)
        - These items must be provided in these cases:
            - Original Document Affidavit (see Forms site)
            - Government-issued Photo ID
            - Document Proving Citizenship (if citizenship documents are being submitted)
        - These must all be submitted together, or they should not be accepted
    - We do not need the notarized Original Document Affidavit if the documents are submitted in person

- <u>Re-do Request for UGRD Out 1 Year</u>
  - UGRD students who were out for approximately 1 year may be asked to re-complete the CSS Profile and other documents to receive aid (in addition to the FAFSA)
- <u>IDOC</u>
  - Website = https://pages.collegeboard.org/idoc
  - University of Miami School Code = **5815**
  - Check Documents and Messages first but, in general, this is used for new/prospective UGRD students who are completing the CSS Profile AND students who are undergoing verification
  - <u>Color Codes</u>
    - Pink = Custodial parent
    - Blue = Student
    - Green = Non-custodial parent
  - <u>Doc Upload / Submission Issues</u>
    - Students **MUST include a title on the document** when they submit through Doc Upload or it may not be re-indexed or reviewed properly
      - If a student has already uploaded a document once (e.g., Verification Worksheet) and is being asked to resubmit, they will need to change the title on the new document being uploaded so it does not match the first one (e.g., Verification Worksheet 2)
        - If the title is not changed, student will not be able to upload new document
    - If the Doc Upload is not re-indexed (i.e., shows a name) but the student believes he/she submitted the proper forms, they should call per below and ask for the document to be re-indexed
    - Students who have issues submitting any documents to IDOC must contact IDOC at:
      - Phone = (866) 897-9881
        - Hours = 9:00 a.m. – 10:00 p.m. EST, M-F
      - Chat = Available via their website
        - Hours = 9:00 a.m. – 10:00 p.m. EST, M-F
  - For the student view see screenshots of IDOC screens in the "Where do I upload items or obtain general forms in IDOC if I am requested to submit them through the IDOC interface?" knowledge article
  - Students may not be able to access IDOC because their account is not enabled. You can switch them to enabled in IDOC by changing the status to "Yes" and click "Save"
    - 

- Tax Documents
    - Unless otherwise specified in Documents and Messages—check there first—all tax documents must be submitted securely via http://miami.edu/mytaxes
- Original Documents Accepted In Person – UGRD Only as Grad FA has Specialists here to accept these documents
    - **Note: We can process Identity Verification Form for UGRD, GRAD, and LAW students**
    - **OnBase Process**
        1) Make color copies of documents. (Do not include the Original Document Affidavit)
        2) Stamp color copies (each page) with the (a) date stamp and (b) copy of original stamp
        3) Print and Sign your name on the color copies (each page)
        4) Add the 5# of the student to each document
        5) Locate the proper cover letter for UGRD and place on top of the documents being submitted
            - If you are submitting a document that is a picture ID (ex. Citizenship documents) you do not need to submit a Driver's License
        6) Place documents, cover letter up, on the top tray of the printer
        7) Scan the documents into the "ECM-uMiami-OnBase-Scan" email from the Address Book
        8) Confirm the document was e-mailed to "ECM-uMiami-OnBase-Scan" by doing the following at the copier
            - Press Status Monitor/Cancel on the copier
            - On the touch screen click on "Send" at the top
            - Click on "Log"
            - There you will see that the document was sent to "ECM-uMiami-OnBase-Scan"
        9) Inform the student the processing team will take it from there and it should be processed within the Document Submission SLA
        10) Verify in OnBase the document is in the appropriate folder (takes 30-60 minutes)
            - Find the document in Onbase under Canon MFD Scans and the ECM processing Group is STUDSERVICES BUILDING UNGRADFA
            - 

        11) Shred the documents

- **Birth Certificate**
  - Must show birth in the United States
  - Example:



STATE OF FLORIDA
OFFICE of VITAL STATISTICS
CERTIFIED COPY

State Board of Health
Bureau of Vital Statistics

CERTIFICATE OF BIRTH
FLORIDA

State File No. 20623

1. PLACE OF BIRTH:
(a) County Manatee (No. St. (If Birth occurred in hospital or other institution give name instead of No.)
(b) Precinct, Town or City Oneco
2 FULL NAME OF CHILD Belden Oliver Whitted

3 Sex of Child	4 (a) Twin, triplet, or other? (b) Number in order of birth (To be answered only in event of plural births)	5 Legitimate?	6 Date of birth
Male		Yes	December 9, 1905

FATHER		MOTHER	
7 FULL NAME	Allen Whitted	13 FULL MAIDEN NAME	Viola Walker
8 RESIDENCE	Oneco, Florida	14 RESIDENCE	Oneco, Florida
9 COLOR OR RACE	White; 10 Age when this child was born 45 (Years)	15 COLOR OR RACE	White; 16 Age when this child was born 25 (Years)
11 BIRTHPLACE (City or Place) (State or Country)	Boone County, Iowa	17 BIRTHPLACE (City or Place) (State or Country)	Arcadia, Florida
12 OCCUPATION	Farmer	18 OCCUPATION	Housewife

19 Number of Children of this Mother (Taken as of time of birth of Child herein certified and including this child) (a) Born Alive and then living 3 (b) Born Alive but then dead 0 (c) Stillborn 0

STATE OF FLORIDA
COUNTY OF SARASOTA } ss AFFIDAVIT

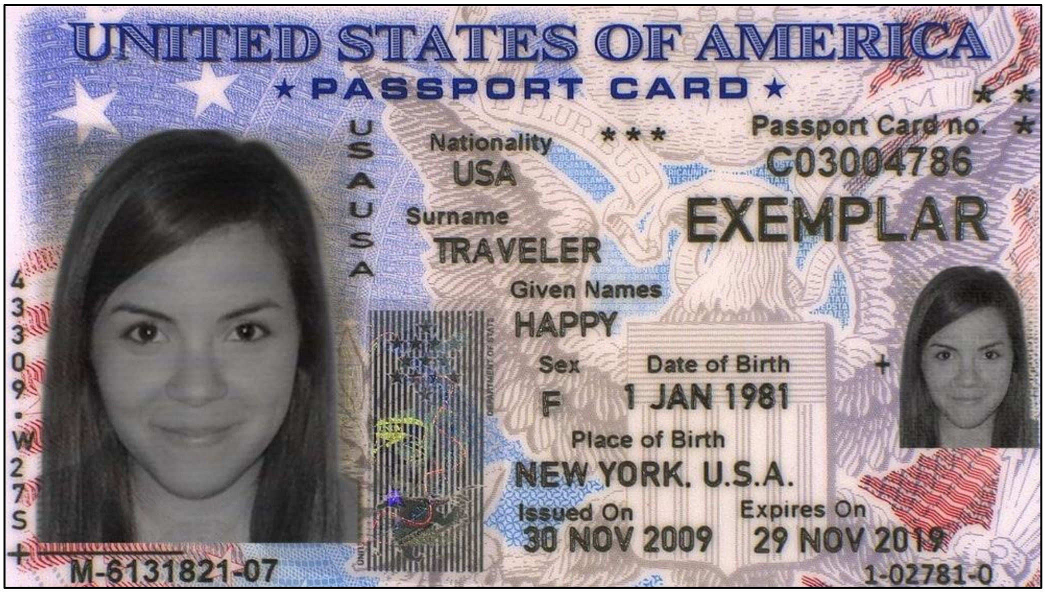
Viola McKendree formerly Viola Whitted, being first duly sworn, says that Belden Oliver Whitted was born in Florida on December 9, 1905 The affiant further states and declares that all information shown on the above birth certificate is true and accurate and that he has positive knowledge of the date and place of aforesaid birth.
The affiant further states that she is Signature of Affiant } Viola Whitted McKendree

- **Certificate of Naturalization**
  - Example:

- **Certificate of Citizenship**
  - Example:

- **US Passport**
  - US Passport does not need to be signed. Either picture page or entire passport (with no signature) will be acceptable
  - Example:

- **US Passport Card**
  - Example:



- **Eligible Non-Citizen (Green Card)**
  - Need copy of both sides
  - Example:

Donor Loans

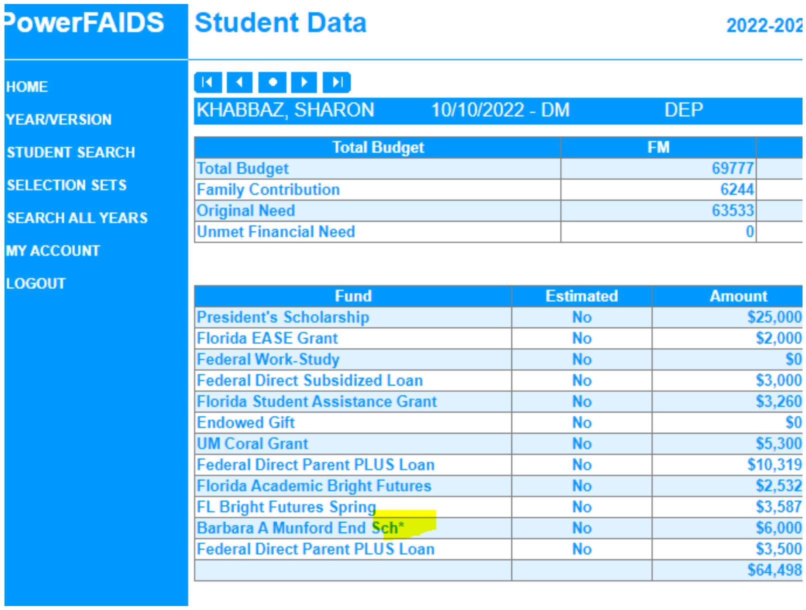
- Donor loans are funds set aside within a college/school by a donor and the college/school assumes all risk associated with allowing a student to borrow these funds
- LAW Donor Loans
  - These loans include:
    - Bar Exam SLF
    - GLAFAC LOAN FUND
    - Goshgarian, Aram P.
    - Heckerling, Philip
    - Kaplan, Abraham
    - Law School Alumni
    - Meyer, Baron de Hirsch
    - SBA Loan Forgiveness
    - Sowards, Hugh
  - Interest Rate = Typically in line with Grad PLUS but communicated in MPN process

- **These should not be communicated by CC Team**
  - Students will be awarded these directly by LAW if they qualify
  - If a student inquires about these, handshake them back to LAW for assistance
- **Process for Awarding (Post-Decision to Award by LAW)**
  1) Issued loan by LAW
  2) LAW submits to FA processing team via the online scholarship submission form for administrators (on GRAD website)
     - If this information is submitted as a case by a LAW employee, ask the person to submit via the scholarship submission form
     - If this request is submitted by a student, find out who awarded it and handshake the student back to that person to inquiry about the details and ask the person to submit via the scholarship submission form
  3) FA places the award amount on the student's Awards in PowerFAIDS
     - This is listed as Pending
     - It is not something that can be accepted by the student
  4) Student is notified by ECSI that they must complete the LAW Donor MPN
     - OSAS manages this process with ECSI
     - Once OSAS confirms the MPN has been completed, OSAS waits for the student's "right to cancel" timeframe to pass and then notifies FA the MPN and right to cancel days have passed so they can administratively Accept the Award and it can be disbursed
  5) The disbursement then occurs within the normal Disbursement SLA timeframe
- **Issues (Post-Decision to Award by LAW)**
  - Escalate to OSAS
  - They can speak with students about interest rates, MPNs, etc.

Endowed (Donor) Scholarships

- We tend to see Donor Scholarships applied after the 1st year if students qualified, but they typically replace Coral Grant dollar-for-dollar
  - When that happens, the student cannot get their full Coral Grant in addition to the Donor Scholarship
  - Some students will say they just want the Coral Grant instead but simply explain the following:
    - This is an honor and speaks to their academic excellence
    - This is something they will be able to put on their resume as they received a scholarship
  - If all else fails, tell them it will remain, and they will need to complete the requirements to receive these funds
- These will appear as general "Endowed Scholarships" until they are changed out for an actual donor named award
  - The names of the scholarships awarded can change year-by-year
  - E-mail Christina Ward (c.ward@miami.edu) if they are not applied but were applied in the prior aid year
- Once these are changed out, the Endowed Scholarship will be removed and the new award will show, but it will not be disbursed until the Student Impact Statement and Information Release form are received by Advancement
  - There will also be a hold on the account until this occurs
  - It takes approximately 3-5 business days for disbursement and the hold to be removed once these items are submitted

- Remember the * on the Award is the donor's name that needs the Student Impact Message and the Information Release



Total Budget	FM
Total Budget	69777
Family Contribution	6244
Original Need	63533
Unmet Financial Need	0

Fund	Estimated	Amount
President's Scholarship	No	$25,000
Florida EASE Grant	No	$2,000
Federal Work-Study	No	$0
Federal Direct Subsidized Loan	No	$3,000
Florida Student Assistance Grant	No	$3,260
Endowed Gift	No	$0
UM Coral Grant	No	$5,300
Federal Direct Parent PLUS Loan	No	$10,319
Florida Academic Bright Futures	No	$2,532
FL Bright Futures Spring	No	$3,587
Barbara A Munford End Sch*	No	$6,000
Federal Direct Parent PLUS Loan	No	$3,500
		$64,498

- If a student received an Endowed Scholarship last year and you see it listed on their aid awards and you confirm there was no large change to EFC and no SAP issues, Associate can e-mail Christina Ward from the case (do not escalate) and ask if this award can be posted again for the current year

Enhancement Grant

- Used to award to students if R4R is successful

Entitlement PJ and Monthly Stipends

- Entitlement PJ is internal and used by FA for the purpose of increasing the COA so that the students non-federal funding can be added
  - It does not mean that the student has additional room in their COA for federal aid
  - We should not initially share this with students, as to not confuse them
    - If a student sees Entitlement PJ on their financial aid Cost of Attendance and asks about it, they should just be told that their current scholarships exceed their COA and as a result, they have no federal eligibility

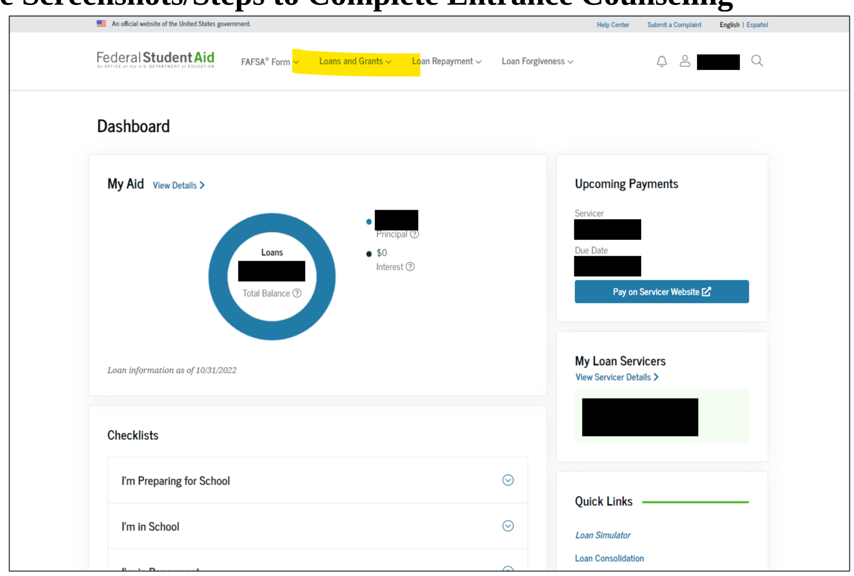
- Fenske, Tyler | 8/8/2022 - RD | IND | Budgets

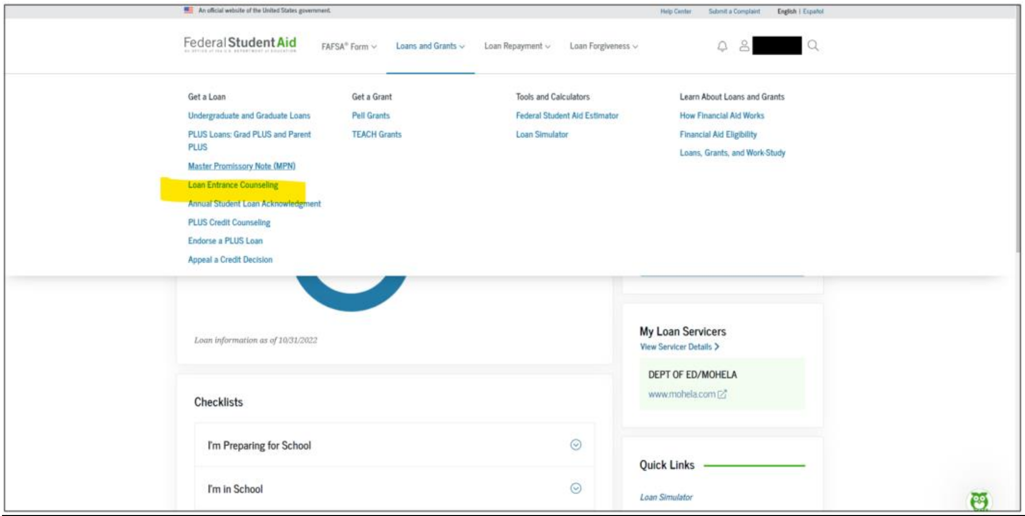
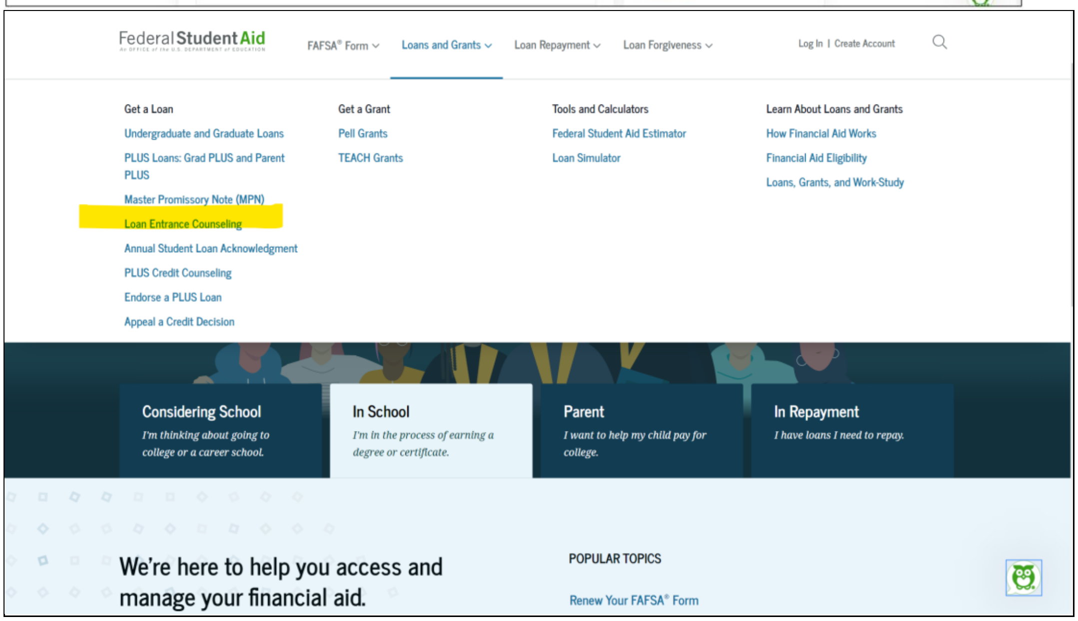
Budget Category		Default Amt	Adjustment	Adjusted Total
	Tuition	$18,480.00	$0.00	$18,480.00
Grad Fall		$9,240.00	$0.00	$9,240.00
Grad Spring		$9,240.00	$0.00	$9,240.00
	Books & Supplies	$1,880.00	$0.00	$1,880.00
Grad Fall		$940.00	$0.00	$940.00
Grad Spring		$940.00	$0.00	$940.00
	Miscellaneous	$2,190.00	$0.00	$2,190.00
Grad Fall		$1,095.00	$0.00	$1,095.00
Grad Spring		$1,095.00	$0.00	$1,095.00
	Transportation	$1,400.00	$0.00	$1,400.00
Grad Fall		$700.00	$0.00	$700.00
Grad Spring		$700.00	$0.00	$700.00
	Required Fees	$1,202.00	$0.00	$1,202.00
Grad Fall		$601.00	$0.00	$601.00
Grad Spring		$601.00	$0.00	$601.00
	Loan Fees	$2,400.00	$0.00	$2,400.00
Grad Fall		$1,200.00	$0.00	$1,200.00
Grad Spring		$1,200.00	$0.00	$1,200.00
	Housing	$16,430.00	$0.00	$16,430.00
Grad Fall		$8,215.00	$0.00	$8,215.00
Grad Spring		$8,215.00	$0.00	$8,215.00
	Meals	$7,282.00	$0.00	$7,282.00
Grad Fall		$3,641.00	$0.00	$3,641.00
Grad Spring		$3,641.00	$0.00	$3,641.00
	Entitlement PJ	$0.00	$10,000.00	$10,000.00
Grad Fall		$0.00	$5,000.00	$5,000.00
Grad Spring		$0.00	$5,000.00	$5,000.00

The College Board. PowerFAIDS® Web Client Version 27.3.0.48

- Normally, awards (e.g., stipends, fellowships, etc.) posted through FA show the various disbursement dates of each payment in the Disbursements menu
  - You can communicate those disbursement dates of the various stipend line items if you see multiple for 1 award in 1 semester
  - Note: Students are generally aware of these dates
- If there is only 1 disbursement dated line item, but you see that not all of the funds were disbursed like in the sample below, it would need to be escalated to FA to determine when the other disbursements would roll out (unless you see Comments otherwise)

Entrance Loan Counseling

- Student can confirm at www.studentaid.gov if this is expired and/or completed for the proper loan
  - If the student has declined loans in prior academic years but want it this academic year and 12 months have passed, the student will need to submit a new Entrance Counseling since no disbursements have occurred in 12 months
- If this is not expired, there is no need to redo as it will come over into the UM system and be marked as Received once the loan is originated
- **Sample Screenshots/Steps to Complete Entrance Counseling**
  - 

- 
An official website of the United States government
Help Center
Submit a Complaint
English | Español
Federal Student Aid
FAFSA® Form
Loans and Grants
Loan Repayment
Loan Forgiveness
[redacted]
Get a Loan
Undergraduate and Graduate Loans
PLUS Loans: Grad PLUS and Parent PLUS
Master Promissory Note (MPN)
Loan Entrance Counseling
Annual Student Loan Acknowledgment
PLUS Credit Counseling
Endorse a PLUS Loan
Appeal a Credit Decision
Get a Grant
Pell Grants
TEACH Grants
Tools and Calculators
Federal Student Aid Estimator
Loan Simulator
Learn About Loans and Grants
How Financial Aid Works
Financial Aid Eligibility
Loans, Grants, and Work-Study
Loan information as of 10/31/2022
My Loan Servicers
View Servicer Details
DEPT OF ED/MOHELA
www.mohela.com
Checklists
I'm Preparing for School
I'm in School
Quick Links
Loan Simulator
- 
Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION
FAFSA® Form
Loans and Grants
Loan Repayment
Loan Forgiveness
Log In | Create Account
Get a Loan
Undergraduate and Graduate Loans
PLUS Loans: Grad PLUS and Parent PLUS
Master Promissory Note (MPN)
Loan Entrance Counseling
Annual Student Loan Acknowledgment
PLUS Credit Counseling
Endorse a PLUS Loan
Appeal a Credit Decision
Get a Grant
Pell Grants
TEACH Grants
Tools and Calculators
Federal Student Aid Estimator
Loan Simulator
Learn About Loans and Grants
How Financial Aid Works
Financial Aid Eligibility
Loans, Grants, and Work-Study
Considering School
I'm thinking about going to college or a career school.
In School
I'm in the process of earning a degree or certificate.
Parent
I want to help my child pay for college.
In Repayment
I have loans I need to repay.
We're here to help you access and manage your financial aid.
POPULAR TOPICS
Renew Your FAFSA® Form

Exit Loan Counseling

- Must be completed by anyone who graduates, withdrawals, or enrolls less than half-time AND borrowed Grad PLUS, Sub, Unsub, Perkins, Nursing, and/or other Donor loans
- Complete at www.studentloans.gov
- No hold will be placed onto a student's account if they do not complete this
  - **Exception =** Med is required to have an Exit Loan hold placed on their accounts per federal guidelines
- No Document will be added as a required Document in PowerFAIDS
  - Thus, nothing should prevent students who complete a program at UM from receiving aid for another program at UM if the student has not yet completed the Exit Loan Counseling
  - If, for some reason, this shows as a required Document on PowerFAIDS but a student has not yet completed their program and this document is holding up Disbursement, have the student create a case and an Associate can escalate to a FA Specialist for assistance
- Sample E-mail

EXIT COUNSELING REQUIRED

Federal regulations require that a student loan borrower who withdraws from the University, applies to graduate, or changes their enrollment status to less-than-half-time must complete Exit Loan Counseling. For information regarding the University's enrollment policy visit www.registrar.miami.edu. Exit Loan Counseling is required even if you are leaving temporarily, have plans to return to the same degree program or will begin a new program of study.

Exit Loan Counseling provides you with important information relating to the loans you received and a review of your rights and responsibilities as a student loan borrower. Exit Loan Counseling will include specific information relating to Federal Direct Loans, Perkins, Nursing, and/or Donor Loans. Exit Loan Counseling does not include private education loans.

Please follow the instructions below.

Exit Loan Counseling Federal Direct Loans

Visit www.studentaid.gov. Click on "Login" to an existing profile or "Create Account" to create a new profile.
For assistance, please visit www.studentloans.gov or call: 1-800-557-7394.

Exit Loan Counseling Perkins, Nursing, and/or Donor Loans

Visit https://heartland.ecsi.net. Click on 'Sign In" to an existing profile or "Register" to create a new profile.
For assistance, please visit www.heartland.ecsi.net or call 1-888-549-3274.

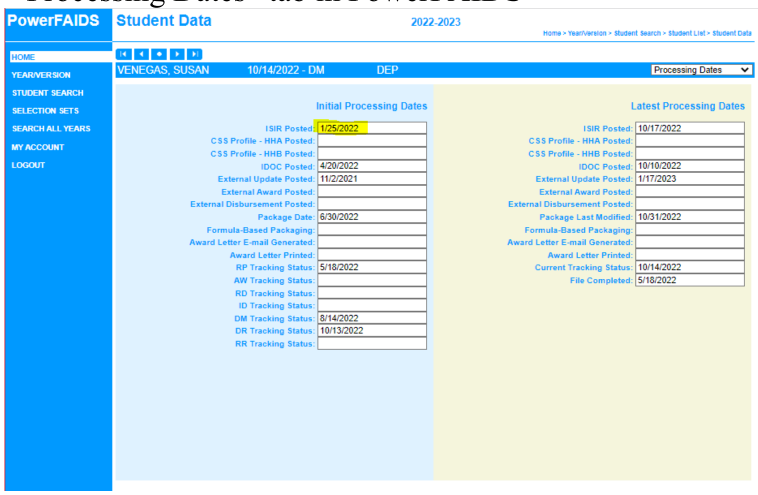
If you have questions about the Exit Loan Counseling requirement or process:

- Undergraduate, Graduate, and Law students please contact 'Canes Central to submit a case.
- Medical students please e-mail medfinaid@miami.edu.
- Online students please contact Student Support.

FAFSA

- Students need to complete this every academic year if they would like to be considered for federal aid
  - This is not required for state aid like EASE or Bright Futures
- Eligible non-citizens may qualify for federal aid based on the criteria listed at https://studentaid.gov/understand-aid/eligibility/requirements/non-us-citizens
- It takes approximately 3-5 business days for the FAFSA to show in PowerFAIDS once completed, but communicate the 15 business day SLA
- School Codes
  - UGRD = 001536
  - GRAD (includes Nursing and non-MD Medical graduate programs) = 001536
  - MED (only for MD students) = E00533
  - LAW = E00532
- Wrong School Codes
  - Wrong school codes need to be corrected by the student who would need to do so via https://studentaid.gov/
- Special Programs
  - See "Special Programs" to learn more about when/how to adjust the FAFSA School codes for various dual degree programs
- UGRD
  - Requires parent and stepparent information regardless of their level of financial support
  - Students should list the custodial parent (whom they live with) or both parents if both parents are married
  - **Re-do Request for UGRD Out 1 Year**
    - UGRD students who were out for approximately 1 year may be asked to re-complete the CSS Profile and other documents to receive aid (in addition to the FAFSA)
- Accelerated BSN (ABSN)
  - Must mark themselves as a 5^{th} year other student
  - Must indicate this is a 2^{nd} Bachelor's degree
  - Do not select graduate student as this is an undergraduate program
- Changing from UGRD to GRAD/LAW Status for Current UM UGRD Students
  - See Special Programs
- FAFSA Not Received
  - If a student states he/she has completed the FAFSA, but you do not see it marked as "Received" in PowerFAIDS, do the following:
    - Ask student if recently made a change to FAFSA online (e.g., school code)
      - If so, they would need to get a confirmation their change was processed
        - Once they get the confirmation, the ISIR SLA kicks in
          - See FA FAFSA Show on PF as Received SLA
    - Check CaneLink to see if student has an SSN on file, this is needed to link the FAFSA to PowerFAIDS
      - Also check to see if student has duplicate PowerFAIDS accounts due to SSN error
    - Ask for a screenshot that the student successfully completed the FAFSA for the appropriate academic year
    - If you confirm the student submitted correctly, ask the student which school code the student put on the FAFSA
    - If the school code is correct and the SLA has passed from the date the FAFSA was submitted and/or school code corrected, whichever was last, escalate to Financial Aid to review

- <u>Official FAFSA Date</u>
  - Used to determine if a student has met the priority deadline
    - "Processing Dates" tab in PowerFAIDS



- <u>What does UM do?</u>
  - **UM does not interpret tax information entered on the FAFSA nor provide guidance on how taxes will impact FAFSA calculations**
    - UM only receives the EFC and then applies federal guidelines to award financial aid
      - Some level of "interpretation" only exists if someone is (a) submitting a Request for Review (R4R), (b) submitting a CSS Profile for an initial IM review, or (c) undergoing verification in the sense that UM must review all submitted documents, confirm numbers, and perhaps ask for additional documents based on those reviews so that UM may finalize a student's aid offer
      - **Students and parents who have specific questions about FAFSA components** and/or how their financial information will be considered must consult with Federal Student Aid
        - Contact = https://studentaid.gov/help-center/contact
        - FAFSA Site = https://studentaid.gov/h/apply-for-aid/fafsa
      - **How should I handle concerns?**
        - Address what you can, in general, about what FAFSA is, when it needs to be completed, the DRT tool, etc. But if someone wants to get into the "weeds" with taxes or how their information will appear on FAFSA components, refer them to the resources above
        - It doesn't hurt to provide information on both resources in these instances and explain the WHY!
          - People don't know what they don't know
          - Use the opportunity to educate them
- <u>2024-2025 FAFSA Changes</u>
  - The FAFSA has changed quite a bit for the 2024-2025 academic year as part of the FAFSA Simplification Act
    - **Changes will include:**
      - EFC will convert to SAI (Student Aid Index)
      - Number of kids in college will no longer be a factor
      - All FAFSA submitters will be required to submit tax information using the IRS Data Retrieval Tool (DRT)

- **What does this mean?**
    - We cannot provide tax advice, help students fill out the FAFSA, or speak to what is or is not included in the FAFSA line items
        - Address what you can, in general, about what FAFSA is, when it needs to be completed, the DRT tool, etc. But if someone wants to get into the "weeds" with taxes or how their information will appear on FAFSA components, refer them to the resources above
        - It doesn't hurt to provide information on both resources below and explain the WHY!
            - People don't know what they don't know
            - Use the opportunity to educate them
        - Students and parents who have questions about their taxes should consult an accountant/tax professional
            - We should simply inform them to submit their taxes appropriately and in line with IRS guidelines
            - This is especially important since they will be required to use the IRS Data Retrieval Tool (DRT) beginning with the 2024-2025 FAFSA
        - Students and parents who have questions about the FAFSA should be directed to reach out to Federal Student Aid at https://studentaid.gov/help-center/contact

- FAFSA Deadline
    - The deadline to submit a FAFSA is June 30, at the end of the academic year (e.g., June 30, 2025, for the 2024-2025 FAFSA)
        - If a student needs to adjust a submitted FAFSA (e.g., school code) but the deadline passed for them to access it, we can escalate to FA to see if there is anything they can do
        - Do not escalate if they never completed a FAFSA and can no longer … it is what it is!

Federal Loan Interest Rates

- New rates always take effect on July 1st
- Any loans disbursed before July 1st pay the old interest rate
- Any loans disbursed after July 1st pay the new interest rate
- These rates are fixed for the life of the loan and do not change
- The semester a student is using the loan for does not affect the interest rate, the date of actual loan disbursement does
    - For example, students taking courses during the Summer should complete their loan work as soon as possible so disbursement can occur before the rates increase yearly on July 1
- https://studentaid.gov/understand-aid/types/loans/interest-rates

- **July 1, 2025 – June 30, 2026**

Interest Rates for Direct Loans First Disbursed on or After July 1, 2025, and Before July 1, 2026

Loan Type	Borrower Type	Fixed Interest Rate
Direct Subsidized Loans and Direct Unsubsidized Loans	Undergraduate	**6.39%**
Direct Unsubsidized Loans	Graduate or Professional	**7.94%**
Direct PLUS Loans	Parents and Graduate or Professional Students	**8.94%**

- **Loan Interest Calculation Formula (from Entrance Loan Counseling)**

01 Student Loan Interest Accrues

Interest accrues daily on federal student loans, even when you're in school and not making payments. The amount of interest that accrues per day:

- is calculated by dividing the interest rate on your loan (as a decimal) by the number of days in a year, and then multiplying that by the outstanding principal balance.

For example, on a $10,000 Direct Unsubsidized Loan with a 6.8% interest rate, the amount of interest that accrues per day is $1.86:

(0.068 / 365) X $10,000 = $1.86

Interested in Your Interest?

Keep track of the amount of interest that accrues on your loans and the outstanding principal balance by periodically checking Aid Summary on your StudentAid.gov account. We'll explain what you can do to lower your total interest costs in the next step.

Federal Loan Limits

- Limits are based on credits completed/earned
- https://studentaid.gov/understand-aid/types/loans/subsidized-unsubsidized#how-much-can-i-borrow

Loan Limits in the Direct Loan Program		
Academic Year	**Dependent Students (except students whose parents are unable to obtain PLUS loans)**	**Independent Students (and dependent undergraduate students whose parents are unable to obtain PLUS loans)**
First-Year Undergraduate Annual Loan Limit	$5,500—No more than $3,500 of this amount may be in subsidized loans.	$9,500—No more than $3,500 of this amount may be in subsidized loans.
Second-Year Undergraduate Annual Loan Limit	$6,500—No more than $4,500 of this amount may be in subsidized loans.	$10,500—No more than $4,500 of this amount may be in subsidized loans.
Third-Year-and-Beyond Undergraduate Annual Loan Limit	$7,500 per year—No more than $5,500 of this amount may be in subsidized loans.	$12,500—No more than $5,500 of this amount may be in subsidized loans.
Graduate or Professional Student[1] Annual Loan Limit	Not applicable	$20,500 (unsubsidized loans only)
Subsidized and Unsubsidized Aggregate Loan Limit	$31,000—No more than $23,000 of this amount may be in subsidized loans.	$57,500 for undergraduates—No more than $23,000 of this amount may be in subsidized loans. $138,500 for graduate or professional students—No more than $65,500 of this amount may be in subsidized loans. The graduate aggregate limit includes all federal loans received for undergraduate study.

-

Academic Year	**Credit Threshold** (Remember: This is credits completed, which does not include credits in progress)
First-Year UGRD (Freshman)	0-29
Second-Year UGRD (Sophomore)	30-59
Third-Year UGRD (Junior)	60-89
Fourth-Year UGRD (Senior)	90+

- Mid-Year Class Update and Additional Loan Funds
  - If a student completes enough credits to move to the next class level (e.g., Freshman to Sophomore), they may be eligible for additional federal loan funds
  - If a student contacts 'CC regarding this, Associate can confirm that the student is eligible to receive additional loan funds
  - Associate can escalate to UGRD Financial Aid Specialist, they will manually update FAFSA to reflect the new class level and award the student additional loans if eligible

Federal Loan Origination Fees

- Origination is the date the file is transmitted to the Department of Education to begin disbursement
- Percentage of the loans that is deducted by the government prior to disbursement
- https://studentaid.gov/understand-aid/types/loans/interest-rates
- Loan fees change by year
- The origination fees taken from the loan prior to disbursement will depend based on the date the loans are originated (see timeframes below)

Loan Fees for Direct Subsidized Loans and Direct Unsubsidized Loans

First Disbursement Date	Loan Fee
On or after 10/1/20 and before 10/1/26	1.057%
On or after 10/1/19 and before 10/1/20	1.059%

Loan Fees for Direct PLUS Loans

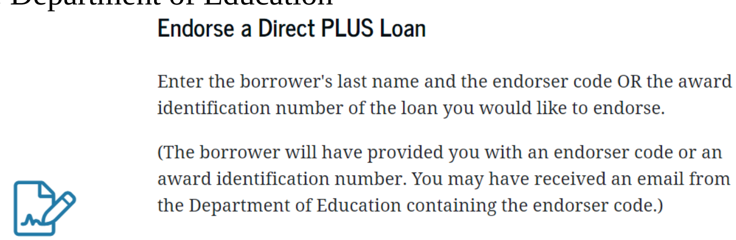
First Disbursement Date	Loan Fee
On or after 10/1/20 and before 10/1/26	4.228%
On or after 10/1/19 and before 10/1/20	4.236%

- Loans first disbursed prior to Oct. 1, 2019, have different loan fees.

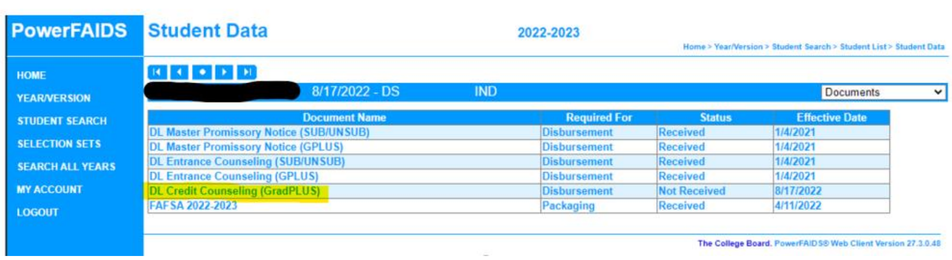
Federal Loan Repayment

- Notes
    - Students must be enrolled at least half time
    - Loan servicers will communicate the payment plan to the student
    - Can view loan servicer at www.studentaid.gov under the loan itself or "My Federal Student Aid"
- Grad PLUS
    - 6-month deferral upon graduation
- Parent PLUS
    - A deferral must be requested, or it will need to go into repayment after disbursement
- Subsidized
    - 6-month deferral upon graduation
- Unsubsidized
    - 6-month deferral upon graduation

Federal Loan Types

- Grad PLUS
  - GRAD only
  - Automatically added to FA package based on FAFSA and FA review
  - Maximum borrow amount = Full COA
  - Requires a credit check from the government after the award is accepted and before it can be disbursed
    - Credit denials are sent to students directly by the Department of Education, not by the University
      - If denied, students can be reconsidered by (a) appealing the credit decision, (b) applying with an endorser, (c) completing credit counseling, and (d) completing a new promissory note
      - Student can go to https://studentaid.gov/plus-app/grad/landing to log in to see these details and take action
      - If a student is obtaining an Endorser and they need an "Endorser Code" or "Award ID", this information is visible on the Denial letter sent to student from the Department of Education
      - 

    - Can see "Credit Decision" in PowerFAIDS → Loans → Specific Loan from the drop down box → Status
      - If "Credit Requirement Met" = "Yes," then the student has an endorser
      - A message will appear on the "Messages" screen of PowerFAIDS which states that when a student is approved after a denial, they need to complete Credit Counseling
      - 

      - The Credit Counseling requirement will also appear on the "Documents" screen
      - 

Document Name	Required For	Status	Effective Date
DL Master Promissory Notice (SUB/UNSUB)	Disbursement	Received	1/4/2021
DL Master Promissory Notice (GPLUS)	Disbursement	Received	1/4/2021
DL Entrance Counseling (SUB/UNSUB)	Disbursement	Received	1/4/2021
DL Entrance Counseling (GPLUS)	Disbursement	Received	1/4/2021
DL Credit Counseling (GradPLUS)	Disbursement	Not Received	8/17/2022
FAFSA 2022-2023	Packaging	Received	4/11/2022

        - Once a student completes the Credit Counseling requirement, it will take approximately 3-5 business days for the information to be sent from the Department of Education to the Grad/Law Financial Aid processing team

        - If a student tells you they were initially denied for the GRAD PLUS, got approved, and have completed the Credit Counseling at least 5 business days ago, escalate to the Grad/Law processing team for review and update
  - Clear Credit Freeze/Flag
    - People can find their credit is frozen for various reasons
    - The loan can still be offered if the student clears the credit freeze with their credit bureau
      - **LAW**
        - If we offer a Grad PLUS loan and the student Accepted it in PowerFAIDS, it will get denied if there is a flag on the credit
          - Once they do, we must **escalate a case** to FA Specialist to re-initiate the Grad PLUS loan so it re-runs the credit
        - If credit is frozen, please have the student ensure that all 3 credit bureaus have been released prior to accept the loan
        - Freezes on credit that are resolved prior to an Accepted Grad PLUS in PowerFAIDS shouldn't impact disbursement
      - **GRAD**
        - If we offer a Grad PLUS loan and the student Accepted it in PowerFAIDS, it will get denied if there is a flag on the credit
          - The stu**dent must apply for the Grad PLUS on https://studentaid.gov/plus-app/grad/landing** so their credit is run again for the loan to process
        - Freezes on credit that are resolved prior to an Accepted Grad PLUS in PowerFAIDS shouldn't impact disbursement
        - If credit is frozen, please have the student ensure that all 3 credit bureaus have been released prior to accepting the loan
  - Credit is good for 180 days so a new application should not impact credit
    - Any new loan originations for the Summer term, the new academic year, etc. would require a new credit run if the 180 days have expired
  - 6-month deferral upon graduation
- Parent PLUS
  - UGRD only (1st-time degree-seekers and 2nd + Bachelor's Degree if still dependent)
  - Dependent students only
  - Parents must apply for these loans directly through the Department of Education
  - Maximum borrow amount = Full COA
  - Requires a credit check from the government before this can be awarded
    - Credit denials are communicated to parents at the time of application
      - If denied, the parent would need to select the option to notify the University of the denial so additional unsubsidized loans can be awarded
        - Additional unsubsidized loans should then be awarded the Friday after this information is received by the University from the Department of Education
      - If denied, parents can be reconsidered by (a) appealing the credit decision, (b) applying with an endorser, (c) completing credit counseling, and (d) completing a new promissory note
  - A payment deferral must be requested or, it will need to go into repayment after disbursement
  - **Details =** https://studentaid.gov/understand-aid/types/loans/plus/parent
  - **Demo of Parent PLUS Application** = https://studentaid.gov/plus-app/parent/landing on the right under "Log In to Start" (it says "View Demo")

- Subsidized
  - UGRD only
  - Requires need
  - Automatically added to FA package based on FAFSA and FA review
  - 6 month deferral upon graduation
- Unsubsidized
  - UGRD and GRAD
  - Does not require need
  - Automatically added to FA package based on FAFSA and FA review
  - Not automatically added for GRAD in the summer to prevent issues with loan limits in the past
    - We would need to check to see if the student exceeded the loan limit for the year and, if not, Associate would escalate to a FA Specialist for the loan to be reviewed and added to their FA package
  - 6-month deferral upon graduation

Federal Work Study (FWS)

- Covers 60% of student employment wages, which makes it appealing for on-campus employers to hire students with FWS as they would only need to pay 40% of students' wages
- This type of aid will never show as "Anticipated Aid" on Flywire since it is set aside to pay as a percentage of a student's wages that would have to be earned directly through the student employee position
- Student just needs to be active in the semester; there is no minimum enrollment threshold but it's not typically awarded unless part-time or higher
  - Students who aren't enrolled in Summer but are enrolled for the following Fall may still be eligible to receive FWS in the Summer term
- Students cannot be hired as student employees until they begin classes at UM
  - Job X employment portal will not work for students who are not enrolled in classes for the semester they are being awarded FWS
- Yearly Limits
  - New Students = $3,000
  - Continuing Students = $4,000
  - Note: Summer funds must be requested via "Forms" at www.canescentral.miami.edu if the student received FWS funds during the prior Fall/Spring but is not enrolled in any summer credits
- Adjustments
  - If the student accepted FWS but would like to decline FWS, the student must submit a signed statement to us via their case and an Associate can escalate the case to the FA Specialist
  - If the student declined FWS but would like to accept FWS, the student must submit a signed statement to us via their case and an Associate can escalate the case to the FA Specialist
  - FWS only needs to be removed to make room for extra loan funds, usually PLUS or Private loans, if the student would rather have the loan funds in place of FWS and COA is an issue
- Institutional Work Study (IWS)
  - Institutional Work Study is a placeholder, **not** actual Federal Work Study. It is used as an estimate of how much a student may receive once fully packaged and FAFSA is on file
    - If student is fully packaged and their EFC or SAI is high, they will not qualify for Federal Work Study, so the IWS will be removed

First Year Fellows (FYFs)

- FYFs are given funding, which is factored into their aid packages and counts against the COA
    - Here is an **example** compensation package from the 2021-2022 academic year:
        - Regular FYFs = Receive $8,500 ($4,250 for Fall and $4,250 for Spring) in compensation as part of their aid that goes toward their housing costs
            - Those living in Mahoney are given a double room but charged for a single (i.e., $13,800)
            - Those living in Hecht/Stanford are given a small single and charged accordingly (i.e., $11,740)
            - The student will see the full housing cost on their bill, but they will also see the compensation listed as an aid award and subsequently a credit on their bill
        - Lead FYFs = Receive $11,740-$12,000 depending on the room rate ($5,870-$6,000 for Fall and $5,870-$6,000 for Spring) in compensation as part of their aid that goes toward their housing costs
            - Those living in Mahoney are given a double room but charged for a single (i.e., $13,800)
            - Those living in Hecht/Stanford are given a small single and charged accordingly (i.e., $11,7400)
            - The student will see the full housing cost on their bill, but they will also see the compensation listed as an aid award and subsequently a credit on their bill
    - Example of how it shows in PowerFAIDS:

Resident Assistant - Room	No	$4,250.00	Accepted	01/12/2021	

- The amount that will be awarded will be sent by the department to FA for posting
    - If there is room in the COA, the awards may just be added to their award packages
    - If there is no room in the COA, their aid packaged could be adjusted in the following order in order to include the FYF award in the COA:
        1) COA housing budget would be adjusted because the student is typically in a more expensive housing rate
        2) COA meal budget typically stays the same as FA allows for the standard 19-meal plan and it is the second most expensive allowance; however, if a student selects the unlimited meal plan, FA can adjust for that
        3) Since FYFs do not typically use FWS, FA will remove FWS if confirmed not using FWS
        4) If the FYFs declined their loans, FA will remove these
        5) Other awards could be adjusted to fit in the FYF award (e.g., Coral Grant or International Student Grant) with a dollar-for-dollar swap if a student is already at 100% of COA
    - FYFs would receive a revised award letter once these adjustments are made; this is when the FYFs will see specifically how things had to be adjusted in order to include the FYF awards
- If the FYFs need more specific information at this time as to how this new aid will impact their current aid, Associate will escalate to a FA Specialist
    - Specialists may not be able to tell the student anything else as they too are unable to provide exact numbers but, if needed, you can escalate and mention to the student the Specialist may not be able to provide any additional figures, but you will have the student meet with the Specialist just in case

FL Aid Website

- https://www.floridastudentfinancialaidsg.org/SAPHome/SAPHome?url=home
- List of awardees and budgeted amounts for all forms of State of FL aid will come from the State of FL each summer around the end of July/beginning of August

FL Bright Futures

- **The FAFSA is not required for state aid like EASE or Bright Futures**
- Two types: Florida Academic Scholars (FAS) and Florida Medallion Scholars (FMS)
  - Florida Medallion Scholars covers approximately $159 per credit of enrollment, Florida Academic Scholars covers approximately $212 per credit of enrollment.
- Once they deposit, students should login to their State of FL portal and inform the State of FL they are planning to attend UM to ensure they are included on the roster of awards that will come to UM from the State of FL
  - List of awardees and budgeted amount will come from the State of FL each summer around the end of July/beginning of August
- Initial Award / Disbursement
  - The initial awarded amount is projected based on 15 credit hours enrolled
  - State Aid typically does not disburse until on or around census date for a semester
  - Benacquisto could be delayed but the intention is to do with the rest (TBD)
  - Students enrolled less than full-time when disbursement runs prior to the 1st day of classes will not see their state aid disburse
  - This will not happen for them until after census as it will occur during the normal timeframe once FA has a chance to verify enrollment
    - Remember: BF will adjust up or down after census based on credits enrolled
      - It will disburse at 15 credits
      - If someone is enrolled less at census, they will owe $
      - If someone is enrolled in more at census, they will get $
  - Any other adds/drops after that time will then adjust the amount received
- If student sees the wrong award on "Anticipated Aid" (i.e., FAS vs. FMS), tell the student it will be updated to reflect the true award and true amount once the University receives the list of awardees
  - New Students
    - The award listed on the FA offer is based on the University's estimation of what the award will be based on their submitted standardized test scores
  - Continuing Students
    - All State aid (e.g., FL Bright Futures, EASE, and FSAG) for continuing students for 2022-2023 are projected until the official amounts are provided by the Governor's office sometime in July
      - This projection is based on amounts that students received in the prior academic year of 2021-2022
      - Once the official numbers are received, the amounts of the awards will be adjusted accordingly
  - Graduate/Law Students
    - If a student has not used up their full FL Bright Futures eligibility, they may be able to use it for their first semester of Graduate/Law School
    - If a Grad/Law student contacts 'CC and states they have remaining FL Bright Futures to be used in their first semester, they need to send a screenshot with proof from the State that they are eligible

- If Grad/Law student has been out of school for over 1 year prior to beginning their Grad/Law program, they will be required to complete the Restoration Application for FL Bright Futures before the award can be applied
  - This is completed with the State
- If student sends proof, escalate to Grad/Law Financial Aid to assist with adding the FL Bright Futures award

- Summer
  - Can apply both the FAS and FMS funds in summer effective Summer 2018 and Summer 2019, respectively
  - Should apply to the student account after the Last Day to Drop Without a "W" for the summer session in which the 6th credit is taken
- Can be increased or decreased at any time due to enrollment, even after census
- Can apply to 1 semester of GRAD study for up to 15 credits if graduate from UGRD in 7 semesters or less or 105 credits or less
  - MED would need to check eligibility with the State of FL
- Students are only eligible for funding for their degree-required credits, which means it's typically up to 120 credits except for Architecture and Neuroscience that require more credits
  - If the degree does not require extra majors, minors, cognates, etc., they may not be covered
  - If the student used all available eligibility, the student would see a decrease or removal of the Bright Futures award
    - Students are welcome to reach out to the State of FL about their eligibility if they have questions; do not recommend they speak with their advisor

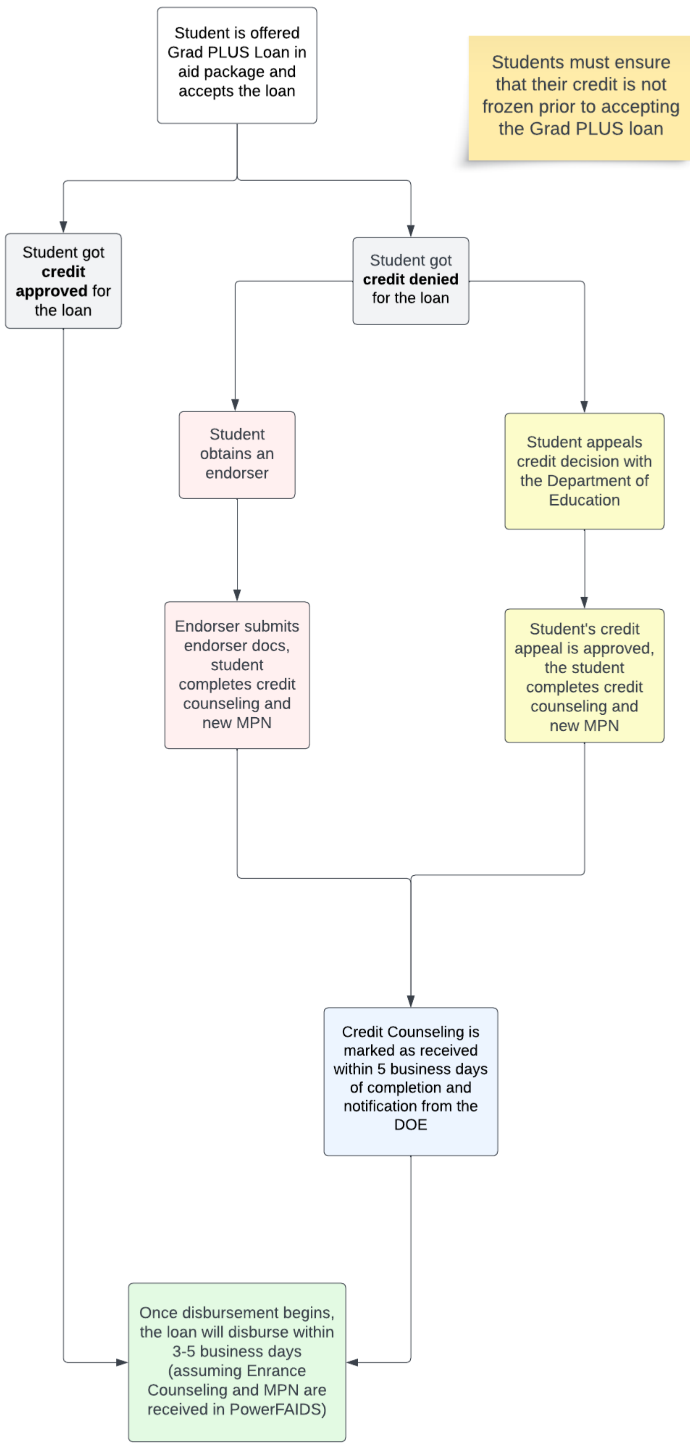
FL Residency

- **The FAFSA is not required for state aid like EASE or Bright Futures**
- FL Residency Documents will only start to be requested after student has made tuition deposit
- See "What documents can be submitted as proof of Florida residency for financial aid?" knowledge article
  - The address must match Address 1 or Address 2 in PowerFAIDS
  - Documents cannot be expired (e.g., license)
  - Documents are submitted through a Dynamic Form
    - Tell students to use the link in the Documents and Messages section of CaneLink → Student Center → View Financial Aid → 2021+ → [proper academic year]
    - Direct Dynamic Form Link (just in case)= https://nextgensso2.com/sp/startSSO.ping?PartnerIdpId=http://auth.miami.edu/adfs/services/trust&SpSessionAuthnAdapterId=miamiDF&TargetResource=https%3a%2f%2fdynamicforms.ngwebsolutions.com%2fSubmit%2fStart%2f7fab41b4-e0b3-488b-a72f-6033d797fd7b
  - Specialists can seek out the final, official, signed HS transcript from the Office of Admission if the student needs to use that document
    - **Associate =** Escalate to FA Specialist
- Graduate/Law Students who are eligible for one semester of FL Bright futures and did not previously attend UM as an undergraduate and therefore did not have their Florida Residency certified, must submit documents proving that the Grad/Law student is a Florida resident. The Grad/Law student is an independent student and therefore their parent's information should not be submitted.
- There is a deadline each year by which students who have not successfully submitted their FL Residency documents will no longer be eligible for FL aid
  - This would be communicated in advanced to students who are at risk

- There are times that a student's SSN may be correct in CaneLink and PowerFAIDS but it is not correct with the FL Department of Education
    - When this occurs, students should call (888) 827-1040 to correct this

Grad PLUS Loan

- See Federal Loan Types



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Housing Review

- Continuing students who enter "off campus" as their living arrangement (Housing Plan) on their FAFSA, but have a local address listed on Cane Link, may trigger a Housing Review task for the Financial Aid processing team
  - Local address can fall within Dade County, Broward County, and West Palm Beach
- When this task is assigned, a document requirement will be added for student to submit a lease agreement and proof of payment for their off campus living arrangements
  - Proof of mortgage payment is also acceptable
  - Either proof of payment for two months, or proof of deposit, will be accepted
  - An email to student will also be sent, visible in Comm Log on PowerFAIDS
  - This document requirement will block disbursement from occurring until resolved
- If student is unable to produce this documentation, their budget will be adjusted accordingly to reflect that they are living with parent, which can affect their financial aid awards
  - If it is early in the packaging process, the processing team may instruct student to update their FAFSA to the appropriate Housing Plan
  - If student is already packaged and awarded, processing team may make the adjustment to the FAFSA
- If a student self-reports this information and has the lease agreement, we can instruct them to upload it to the Document Submission Form
- If a student self-reports this information and does live with their parent(s), we can escalate to Financial Aid to make the appropriate adjustments/instruct student what to do
- If student states that they have previously submitted a lease agreement in a prior academic year, escalate to Financial Aid so it can be verified
  - Student shouldn't have to resubmit
- If an incoming or continuing student is going from on campus to off campus, they can upload lease agreement to Cost of Attendance Appeal Form

Identity Verification Form

- The Identity Verification Form has replaced the Statement of Educational Purpose
- This form may be submitted using one of the three options below:
  - **In-Person Verification: Undergraduate, Graduate, and Law** students may visit Canes Central in person with the required form and a valid, unexpired government-issued photo ID. An Associate will review the documentation and certify the student's identity. They will make a copy of the ID, stamp it, and upload it to Onbase.
    - See Document Submission/IDOC for the process to accept this form in person.
      - **NOTE**: If student brings in form that is already notarized, scan it as is and do not sign
      - Associate only signs if blank form is brought in along with original document
      - **NOTE**: We do not accept documents from anyone other than the student (example: proxy)
  - **Postal Mail (Notarized Form):** Students unable to appear in person may complete the form in the presence of a notary public and submit the following by mail:
    - The notarized Identity Verification form along with a clear photocopy of the unexpired government-issued ID that was presented to the notary
      - Mailing Address:
        - Office of Student Financial Assistance and Employment
          P.O. Box 248187

Coral Gables, FL 33124

- **Virtual Verification via Video Call:** Students may also complete the verification process remotely through a scheduled video call, if they are unable to come in person or mail the form.
  - During the virtual session:
    - The student will be asked to display their unexpired government-issued photo ID on camera
    - An Associate will capture a screenshot of the student and their ID for verification purposes
      - Please include the student face and their photo ID
    - After the call, the student should submit a clear copy of their unexpired government-issued photo ID to complete the process through a case with Canes Central
    - Associate will then escalate the case to Financial Aid for them to review and mark document as Received

Independent Student Criteria

- Criteria to be classified as an independent student include one of the following:
  - 24+ years of age
  - Veteran
  - Graduate or professional student
  - Married
- For more information on what makes a student Independent, visit this Student Aid webpage: https://studentaid.gov/apply-for-aid/fafsa/filling-out/dependency

Internal Documents Only

- The following documents will appear on PowerFAIDS under "Documents" but are not to be communicated to students as they are only for internal use:
  - Conflict Resolution Required
    - **Note:** This is different from the **"Conflict-Add'l Info May Be Required"** Document, which is not private. This document is a visible placeholder to students to simply let them know they may be required to submit additional documents so they should keep an eye on this and submit ASAP
  - NSLDS Close to Max
    - **Note:** This is different from the **"NSLDS Resolution"** Document. Look at Messages for the **"NSLDS Resolution"** Document for how to proceed.
      - If in the process of taking care of the "NSLDS Resolution" document the student needs FA to complete a form for the lender, have the student submit via the Document Submission Form with (a) their portion already complete and (b) specific instructions on where to send it
  - Outside Scholarship XXX Check
  - Mid-Year Transfer Monitor Review

International Students

- First Year International students who receive financial aid cannot have their aid reviewed the first Academic year
  - They are eligible to be reviewed prior to the following Academic year, typically the Summer prior to the Fall start

- International students who have stated in their admission application that they will not be seeking Financial Aid are not eligible for Financial Aid while at UM
  - To have been considered, they would have needed to submit the CSS Profile and Financial Certification Form prior to their admission decision as all international student aid decisions are made at the point of admission based on the information provided, and Admission seeks to meet 100% of demonstrated need at that time
  - If not eligible for Financial Aid, international students are not eligible to complete a Request for Review
- International Students who become eligible non-citizens or permanent residents and would like to be considered for need based aid should complete both the FAFSA and the CSS profile to be considered for Federal aid and Institutional aid
- You can confirm that a student is International for financial aid purposes on User String screen in PowerFAIDS
  -

Mnemonic	Value
ISIR-AFF-CODE	
ADMIT TERM*	Fall 2024
ENRL ACTION*	Cancelled- Appl. Withdraw
Random ident.	
FA INTEREST*	Yes
ADMIT GROUP*	Regular Decision
NEW TO THE U*	Yes
No Need	
ONLINE STUDENT*	No
DATA SOURCE*	Admission
SPEC PROGRAM*	
STD GRP- SoM*	
STD GRP - MED*	
STD GRP - ADM*	
PREMTRC STATUS*	No
STD GRP - GRAD*	
CLASS*	
INTERNATIONAL*	Yes

- <u>International Student Grant</u>
  - This is one of the last scholarships/grants into a student's aid package (along with Coral Grant), so it is one of the first scholarships/grants backed out if new awards are added
  - This grant does not cover a second degree. It only covers one degree.
  - Students do not need to re-apply or re-submit the CSS profile each year in order to qualify

Loan Certification

- FA will not certify private loans until they know the student plans to take their federal loans
  - Students should accept/decline their federal awards so their private loans can be certified
  - If students state they only want private loans and want to decline their federal loans, be sure to paint the picture of loan types, interest rates, etc. before they finalize their decision
  - If students do not yet have any federal loans and did not apply for FAFSA, paint the picture on aid types and encourage them to consider FAFSA and those options first if they become interested
- There must be room in the COA for any loans to be certified
  - If the requested amount would exceed the COA for the term/year, the certified amount will be lowered in order to fit within COA

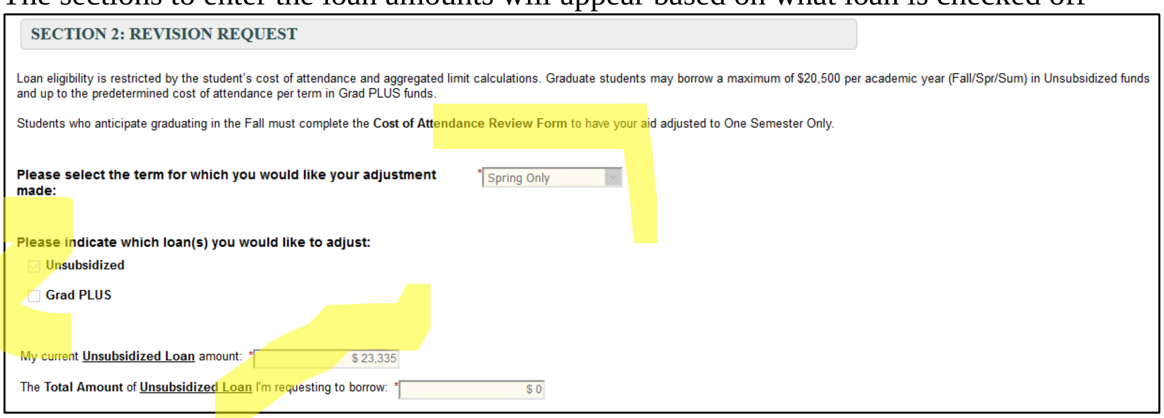
Loan Deferment Request

- We cannot provide loan deferment information
  - Students must speak with their lender to understand their deferment options
- We can only help facilitate paperwork needed for lenders for a student's deferral request
  - Click here for information

Loan Expected Graduation Date

- The expected graduation date sent by the University to loan servicers are communicated through FA to the National Student Clearinghouse
- These dates are a mechanical date placed automatically by CaneLink and it could be that the date is not reflecting the student's true graduation date as UM does not currently gather that specific information
- Per FA, here are some things you can mention to reassure students this is okay:
  - The expected graduation date is pushed back 1 year every new academic year automatically when a student enrolls for the next academic year at least ½ time
  - The file sent to the National Student Clearinghouse will include all students enrolled at least ½ time
  - Repayment will not begin until the student is no longer enrolled at least ½ time
- If you communicate all of the above and the loan servicer sends the person a specific notice that says otherwise about repayment, Associates should obtain the notice and speak with Leadership

Loan Revision

- Who must request a loan revision?
  - Revisions to loans must be requested by the borrower
  - For example, if a parent takes out a Parent PLUS loan, the request must come from the parent
  - For example, if a student borrows a private loan or accepts a sub or unsub loan, the student must make the request
- Semester Deadlines
  - Last day to Submit a Loan Revision Form for a semester = Last Day of Classes
    - If after the Last Day of Classes, no more forms can be submitted
- Loan Revision Form Basics
  - Used to adjust loan amounts for some forms of aid, not all aid (see sections below for details)
  - GRAD/LAW Form
    - Example of the section they complete is below
    - **Available Terms Include:** Full Year (Fall/Spring), Spring Only
      - **Note:** There is a Summer Only form too but it is separate
    - The sections to enter the loan amounts will appear based on what loan is checked off
    - 

      SECTION 2: REVISION REQUEST

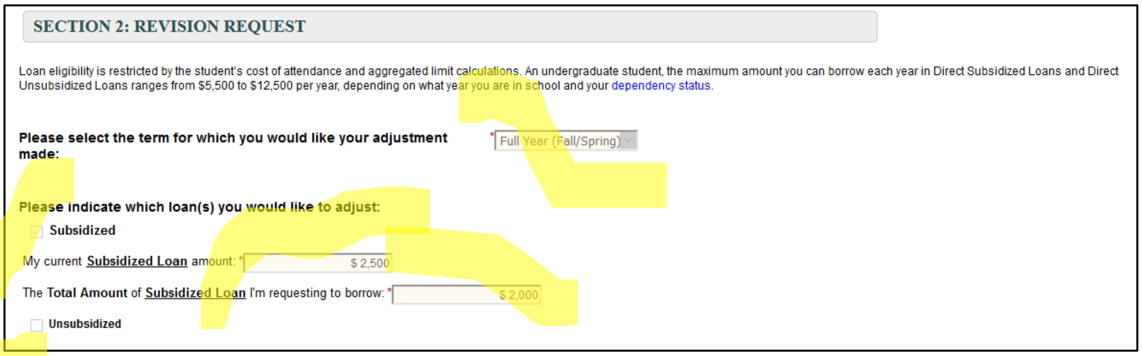
      Loan eligibility is restricted by the student's cost of attendance and aggregated limit calculations. Graduate students may borrow a maximum of $20,500 per academic year (Fall/Spr/Sum) in Unsubsidized funds and up to the predetermined cost of attendance per term in Grad PLUS funds.

      Students who anticipate graduating in the Fall must complete the **Cost of Attendance Review Form** to have your aid adjusted to One Semester Only.

      Please select the term for which you would like your adjustment made: * Spring Only

      Please indicate which loan(s) you would like to adjust:
      Unsubsidized
      Grad PLUS

      My current **Unsubsidized Loan** amount: * $ 23,335
      The **Total Amount** of **Unsubsidized Loan** I'm requesting to borrow: * $ 0
  - **Note:** If a GRAD/LAW student visits 'CC as a walk-in and requests a Loan Revision, escalate to a Specialist to assist. They do not have to wait the SLA for the Loan Revision form to be processed, GRAD FA will complete their request in person
  - UGRD Form
    - Example of the section they complete is below
    - **Available Terms Include:** Full Year (Fall/Spring), Spring Only, Summer Only
    - The sections to enter the loan amounts will appear based on what loan is checked off



SECTION 2: REVISION REQUEST

Loan eligibility is restricted by the student's cost of attendance and aggregated limit calculations. An undergraduate student, the maximum amount you can borrow each year in Direct Subsidized Loans and Direct Unsubsidized Loans ranges from $5,500 to $12,500 per year, depending on what year you are in school and your dependency status.

Please select the term for which you would like your adjustment made: * Full Year (Fall/Spring)

Please indicate which loan(s) you would like to adjust:

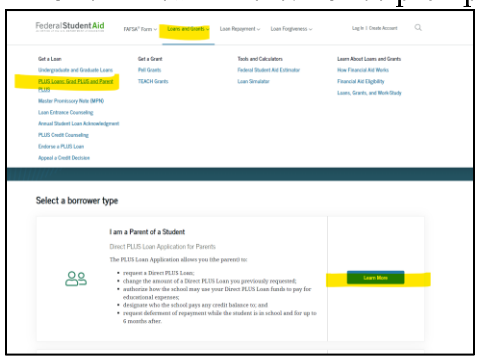
Subsidized

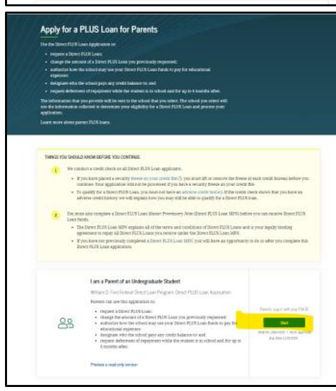
My current **Subsidized Loan** amount: * $ 2,500

The **Total Amount** of **Subsidized Loan** I'm requesting to borrow: * $ 2,000

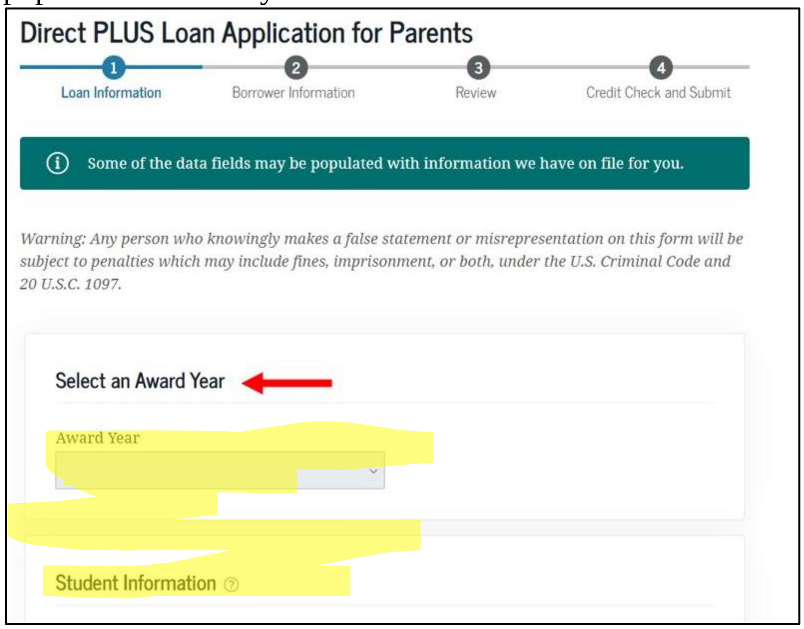
Unsubsidized

- <u>What happens if the student already got a Refund?</u>
  - The student should still follow the normal process to revise their loans, but they should be instructed not to spend that portion of their refund
  - Once FA revises the loan in the FA system, a new balance will be reflected on the student's account and the student will need to use the refund to pay the balance
  - Technically, loans must be revised and funds returned within a specified period of time but, in general, students who go through our loan revision process would not be responsible for origination fees or interest on the returned amount
    - If they go through their lender/servicer, they may be responsible for these costs
  - **Note:** Students cannot originate loans after the loan period, even if they accepted the loan by the last day to originate the loan; hence, a revision cannot happen after the deadline as it is a new origination
    - Remember that the academic year ends after summer so students enrolled in summer may be able to work out a Spring/Summer origination/revision if the summer deadline hasn't passed and they were enrolled both semesters
      - This shouldn't be communicated but know could be an option
- <u>Federal Loan Revision Calculator</u>
  - This is only for federal loans (i.e., Grad PLUS, Parent PLUS, Sub, and Unsub)
  - Always mention that calculations from this are "approximate" to not guarantee an exact figure
  - Never tell a person exactly the amount they "should" borrow; they need to decide that
  - Click here to view the calculator
  - See more below about the process to revise the loans once this is used for the amount
- <u>Fall Only</u>
  - This is not currently an option on the Loan Revision Form
  - All aid is adjusted to be Fall only for Fall graduates once they apply for graduation and then they are notified
  - Students who continue into the Spring but do not want Spring aid and only want Fall aid can accomplish this by accepting their Fall/Spring aid, waiting until they earned 100% of federal aid eligibility (i.e., when Spring bills released) and complete a Loan Revision Form at that time to remove Spring aid
    - Once disbursement occurs then aid can be adjusted to be uneven; loans only have to be split evenly for origination
  - See notes on Private Loans in this section below to learn how to alter the term of a private loan
- <u>Grad PLUS Loans</u>
  - Complete the Loan Revision Form to **increase**, **decrease**, or **cancel** the loan amount
  - See Prorate Aid for questions on proration
- <u>Parent PLUS Loans</u>
  - **Demo of Parent PLUS Application**

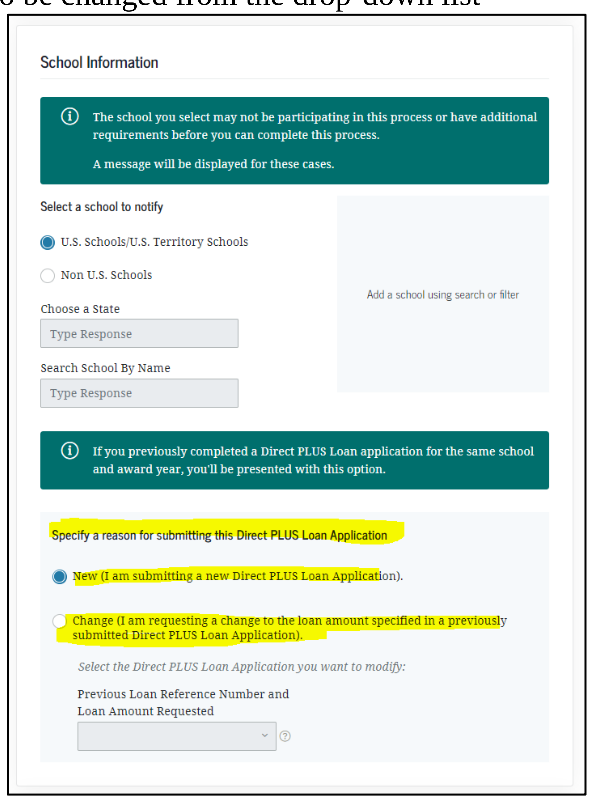
        - can be accessed at https://studentaid.gov/plus-app/parent/landing on the right under "Log In to Start" (it says "View Demo")
    - If the loan has **not disbursed and the parent wants to increase, decrease, or cancel** the loan amount, the parent needs to edit the amount they selected on the Parent PLUS loan on file (Note: This will feel to them like they are applying for a new loan)
        - <u>Process</u>
            - Parent visits www.studentaid.gov and logs in
            - Hover over "Loans and Grants" → Click "PLUS Loans: Grad PLUS and Parent PLUS" → Click "Learn More." Once prompted, click "Start."
                - 

                - 

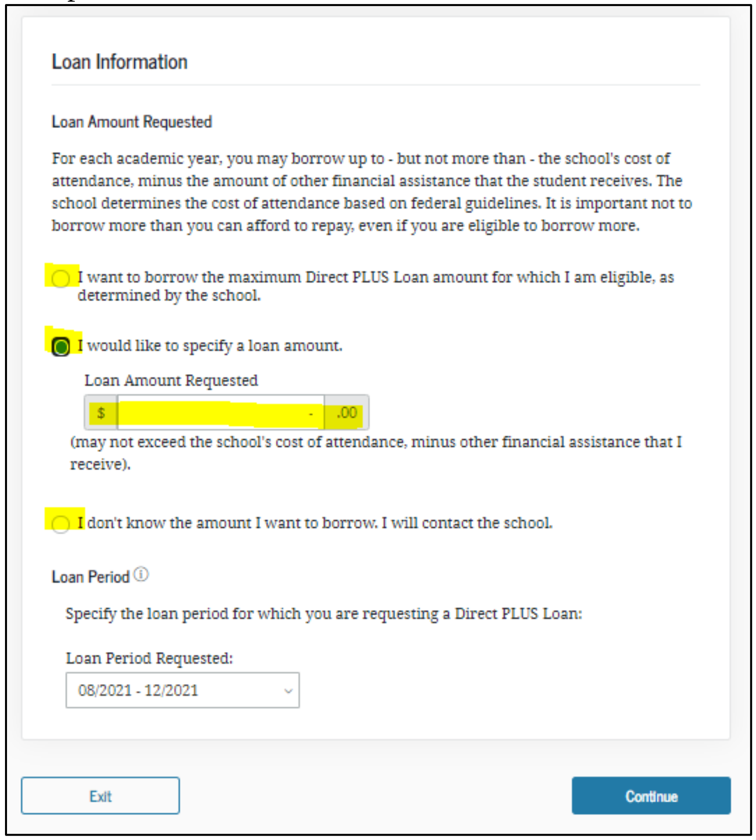
- Select the "Award Year"
  - By selecting the same Award Year as they already did in a prior application, the information edited in the new application would supersede that of the old application
  - Most of the information in the rest of the application may then be pre-populated once this year is selected



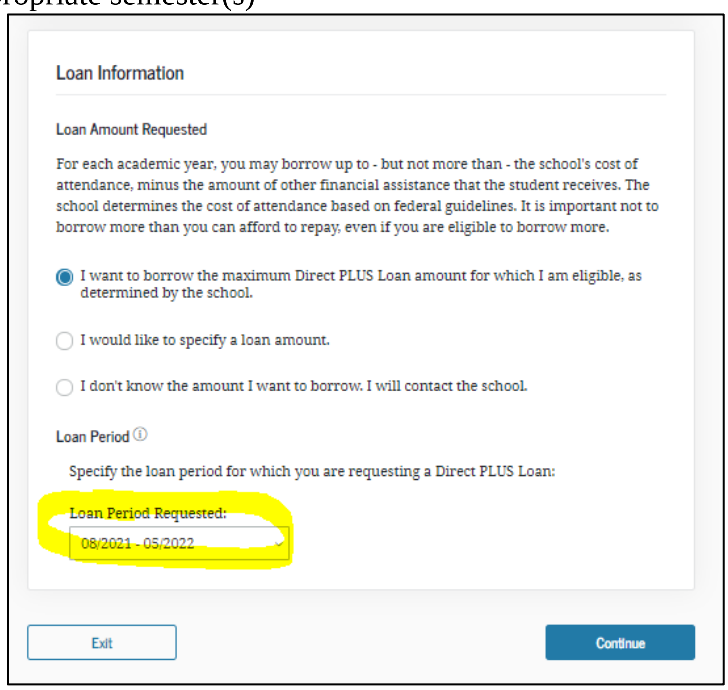
- Under "School Information," choose the option to "Change (I am requesting a change to the loan amount specified in a previously submitted Direct PLUS Loan Application)" option and select the appropriate loan amount for the loan that needs to be changed from the drop-down list



- If the loan amount needs to be edited, click on the appropriate loan amount option under "Loan Information" and, if additional boxes appear (see example selection below), complete that information



- If the loan period needs to be edited, change the "Loan Period Requested" drop down menu under "Loan Information" to the desired months that correspond to the appropriate semester(s)



- If the loan has **not disbursed and the parent wants to change the loan period**, the parent needs to edit their loan application they selected on the Parent PLUS loan on file (Note: This will feel to them like they are applying for a new loan)
  - Process
    - Go to www.studentaid.gov and log in
    - Hover over "Apply for Aid"
    - Click "Apply for a Parent PLUS Loan"
    - Click "Start"
    - Select "Award Year"
      - By selecting the same "Award Year" as the parent did on the prior Parent PLUS loan application, the loan information being entered in subsequent steps will supersede that of the old application
    - Under "School Information," choose the option to "New (I am submitting a new Direct PLUS Loan Application)" option
    - Click on the appropriate loan amount option under "Loan Information" and, if additional boxes appear, complete that information
    - Change the "Loan Period Requested" drop down menu under "Loan Information" to the desired months that correspond to the appropriate semester(s)
    - Submit the application
    - Email loans.ofas@miami.edu to (a) inform the loan processing team that a new application was submitted to change the loan period and (b) ask that the old application for the old loan period be cancelled
      - Note: It could take up to 15 business days from the date the new Parent PLUS loan application was approved for the change to appear in the student's CaneLink → "View Financial Aid" → "2021+" → "Awards"
- If the loan has **disbursed and the parent would like to request additional funds**, the parent needs to submit a new Parent PLUS loan application
  - Process
    - Go to www.studentaid.gov and log in
    - Hover over "Apply for Aid"
    - Click "Apply for a Parent PLUS Loan"
    - Click "Start"
    - Select "Award Year"
    - Under "School Information," choose the option to "New (I am submitting a new Direct PLUS Loan Application)" option
    - Click on the appropriate loan amount option under "Loan Information" and, if additional boxes appear, complete that information
    - Enter the appropriate "Loan Period" information under "Loan Information" for the months that correspond to the appropriate semester(s)
    - Submit the application
- If the loan has **disbursed and the parent would like to reduce or cancel** the loan amount, the parent needs do so through their www.studentaid.gov loan application log in
  - Process
    - Go to www.studentaid.gov and log in
    - Hover over "Apply for Aid"
    - Click "Apply for a Parent PLUS Loan"
    - Click "Start"

        - Select "Award Year"
            - By selecting the same "Award Year" as the parent did on the prior Parent PLUS loan application, the loan information being entered in subsequent steps will supersede that of the old application
        - Under "School Information," choose the option to "Change (I am requesting a change to the loan amount specified in a previously submitted Direct PLUS Loan Application)" option and select the appropriate loan amount for the loan that needs to be changed from the drop-down list
        - If the loan amount needs to be edited, click on the appropriate loan amount option under "Loan Information" and, if additional boxes appear, complete that information
        - Submit the application
      - If there are significant issues with this, you can ask the parent, not the student, to email their request with the specific amount to reduce to at loans.ofas@miami.edu (Note: You should not communicate this unless you absolutely need to)
  - If the loan has **disbursed and the parent would like to change the loan period:**
      - <u>Process to change the loan period from Fall Only to Fall/Spring of the Parent PLUS loan, the parent will need to do the following (Note: It will feel like applying for a new loan):</u>
        - Go to www.studentaid.gov and log in
        - Hover over "Apply for Aid"
        - Click "Apply for a Parent PLUS Loan"
        - Click "Start"
        - Select "Award Year"
        - Under "School Information," choose the option to "New (I am submitting a new Direct PLUS Loan Application)" option
        - Click on the appropriate loan amount option under "Loan Information" and, if additional boxes appear, complete that information
        - For the "Loan Period" information under "Loan Information," enter the months that correspond to the Spring semester (i.e., January-May) so a Spring-only portion of the Parent PLUS loan can be generated
        - Submit the application
      - <u>Process to change the loan period from Fall/Spring to either Fall Only or Spring Only of the Parent PLUS loan, the parent will need to do the following:</u>
        - Email loans.ofas@miami.edu to request the specific change to the previously submitted loan period, specifying the loan period that was applied for (i.e., August-May) and the new loan period the loan should be amended to cover (i.e., August-December or January-May)
            - Note: It could take up to 15 business days for this change to be processed and to appear in the student's CaneLink → "View Financial Aid" → "2021+" → "Awards"
- <u>Private Loans</u>
  - Applied for XXX amount and posted at UM for XXX amount but wants to **increase** the amount = Contact the lender to apply for supplemental amount
      - An increase cannot be applied to a certified (i.e., applied on PF as an Award)
      - We also cannot alter a loan amount and certify more than what was already requested and sent to us as approved by the lender

        - The student would need to initiate a new, supplemental loan application with the lender so another private loan can come through for the additional requested amount
    - Applied for XXX amount and posted at UM for XXX amount but wants to **decrease (regardless of if it is certified or not)** the amount = E-mail loans.ofas@miami.edu with the new amount they would like
        - A reduction to a posted loan cannot occur through the lender on the same, posted loan
    - Applied for XXX amount and **posted at UM for a lower amount because of room for COA** and loan **has already been certified (i.e., applied on PF as an Award),** but then completes a COA adjustment and borrowing power increases, and they now want to **increase** the amount back to XXX = Contact the lender to apply for supplemental amount
        - If the room in COA needs to be cleared because the student wants to decline FWS, Sub, Unsub, or Grad PLUS, do the following:
            - Have the student decline or accept awards in CaneLink
            - Confirm this was done
            - Before escalation, inform student you will escalate for amounts to be removed from COA and then, once they hear it is done, they must so a supplemental app with their lender as we cannot increase an amount for a certified loan
                - Provide new SLA for time it will take to appear on bill once approved for supplemental by the lender
            - Escalate case to FA Specialist so those declined amounts can be removed from COA
    - **Cancel** a loan already posted at UM = E-mail loans.ofas@miami.edu to request it be cancelled
    - **Change in Loan Period (e.g., Fall/Spring to Fall only)** = Can request a change by e-mailing loans.ofas@miami.edu but keep in mind it may alter the agreement the student has with the lender
    - **Summer loans** = Need separate request when summer is ready
    - **Notes:**
        - Once a loan is certified, the student signs the Terms of Loan Agreement with the lender, which is based on that specific certification
            - Each loan has its own agreement
            - Therefore, a supplemental app is required to increase
        - Credit is good for 180 days so a new application should not impact credit
- <u>Sub/Unsub Loans</u>
    - Students who already accepted their loans should use the Loan Revision Form to edit the amount or zero it out
    - Students who have not accepted their loans and wish to decline (i.e., 0 them out) their loans should (1) decline their award online, (2) then put the request in writing, specifically mention the loans they would like to decline, and (3) submit through the case
        - Associate will escalate this to a FA Specialist for processing
        - loans.ofas@miami.edu can be used to submit this statement too but not ideal if there is already a case; this will help avoid shuffle and e-mails
    - Additional unsubsidized loans after the denial of a Parent PLUS loan should be applied automatically the following Friday if that option was selected by the parent; the Loan Revision Form is not used for this
    - In cases where it is now the Spring, but a student had not been awarded Sub or Unsub loans for Fall/Spring and now would like to add them, and they have room in their budget, they need to request this through the Loan Revision Form
    - GRAD/LAW students are not assigned Unsub loans for Summer in the initial Summer awarding

- This is because there is a need to prevent over-awarding Unsub loans since most exhaust their Unsub yearly amount in the Fall/Spring terms
- If students did not exhaust their Unsub yearly eligibility in Fall/Spring or if you cannot see if they used their yearly eligibility—this could be because they were not enrolled in both terms so you cannot see all their awards as they may have enrolled at another school—then a student can complete a Loan Revision Form to request Unsub for Summer

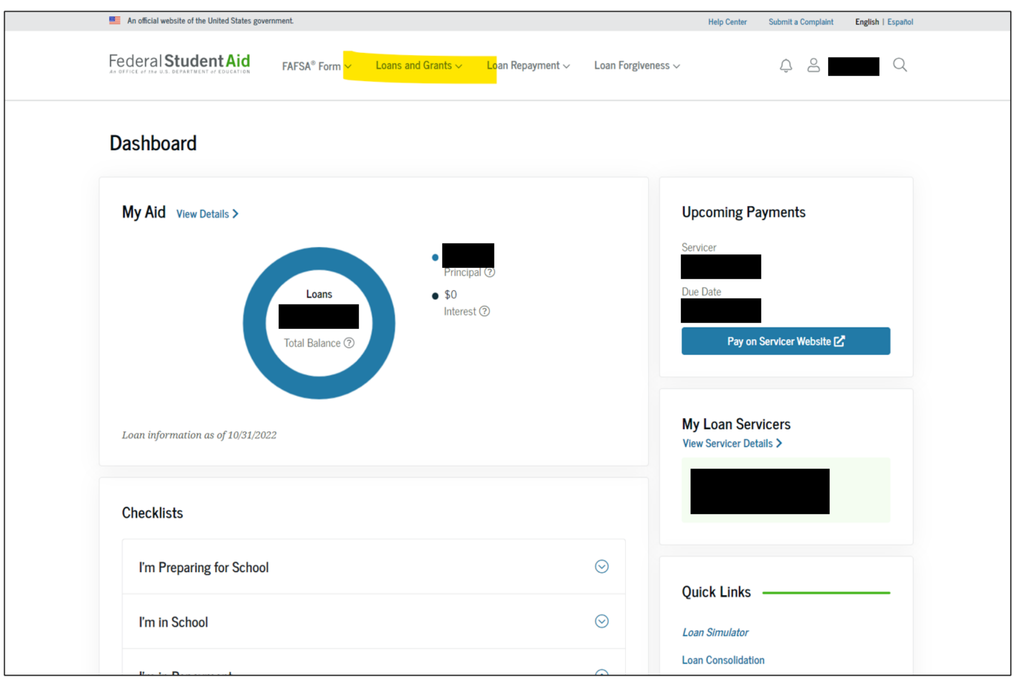
- See Prorate Aid for questions on proration

- Right to Cancel
  - Federal guidelines state students have 30 days from the date of disbursement OR the date UM sent the student the Right to Cancel to revise or cancel their federal loans
    - There could be small variations
    - If within the 30 days and would like to do this, follow the processes outlined above to revise or zero out the loan
      - Can escalate if needed

Loans for Prior Terms

- Cannot certify federal loans for prior terms (i.e., completed terms)
- Some private loan companies may issue private loans for prior terms, but students would need to speak with lenders directly

Master Promissory Note (MPN)

- Student can confirm at www.studentaid.gov if this is expired and/or completed for the proper loan
- If this is not expired, there is no need to redo as it will come over into the UM system and be marked as Received once the loan is originated
  - If the student has declined loans in prior academic years but want it this academic year and 12 months have passed, the student will need to submit a new Master Promissory Notice since no disbursements have occurred in 12 months
- **Sample Screenshots/Steps to Complete MPN**
  - 

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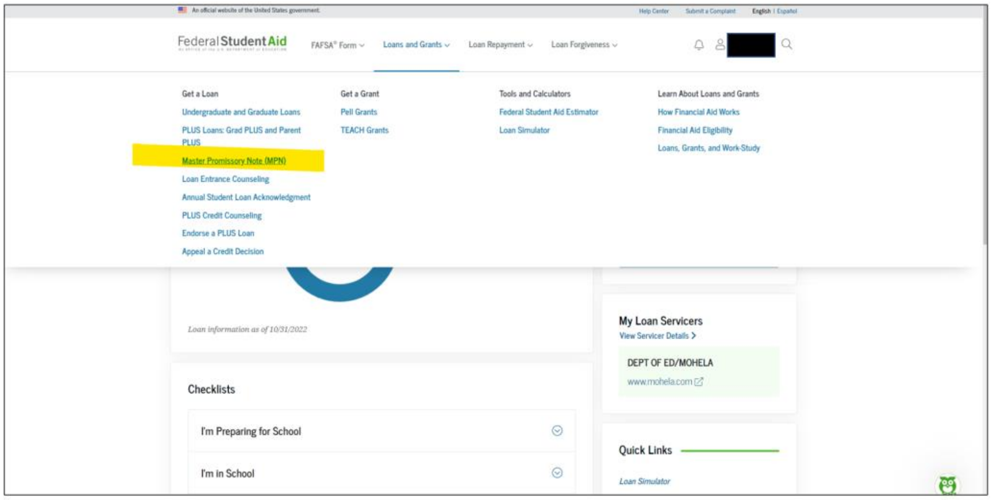
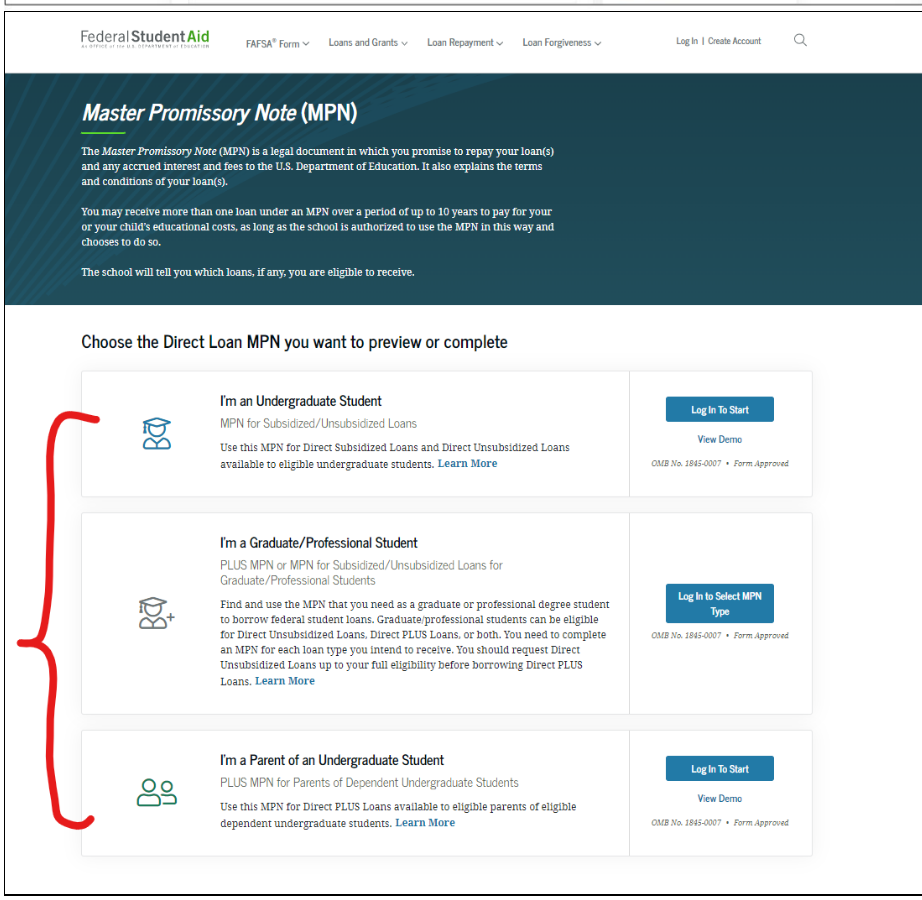
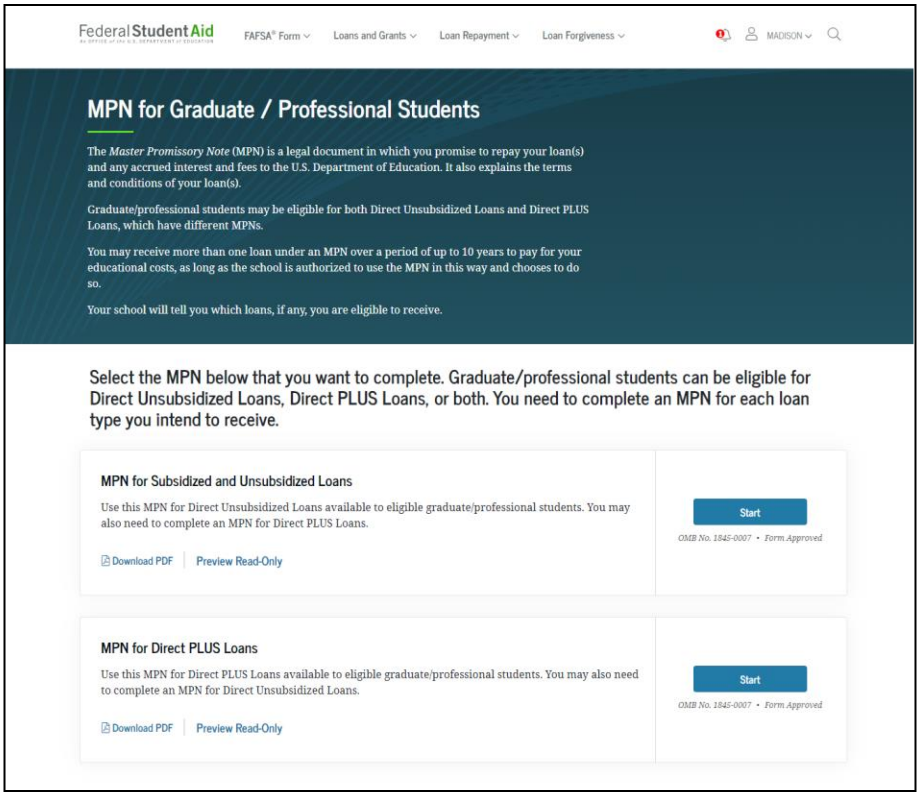
- 
An official website of the United States government
Help Center
Submit a Complaint
English | Español
Federal Student Aid
FAFSA® Form
Loans and Grants
Loan Repayment
Loan Forgiveness
[redacted]
Get a Loan
Undergraduate and Graduate Loans
PLUS Loans: Grad PLUS and Parent PLUS
Master Promissory Note (MPN)
Loan Entrance Counseling
Annual Student Loan Acknowledgment
PLUS Credit Counseling
Endorse a PLUS Loan
Appeal a Credit Decision
Get a Grant
Pell Grants
TEACH Grants
Tools and Calculators
Federal Student Aid Estimator
Loan Simulator
Learn About Loans and Grants
How Financial Aid Works
Financial Aid Eligibility
Loans, Grants, and Work-Study
Loan information as of 10/31/2022
Checklists
I'm Preparing for School
I'm in School
My Loan Servicers
View Servicer Details
DEPT OF ED/MOHELA
www.mohela.com
Quick Links
Loan Simulator
- 
Federal Student Aid
FAFSA® Form
Loans and Grants
Loan Repayment
Loan Forgiveness
Log In | Create Account
Master Promissory Note (MPN)
The Master Promissory Note (MPN) is a legal document in which you promise to repay your loan(s) and any accrued interest and fees to the U.S. Department of Education. It also explains the terms and conditions of your loan(s).
You may receive more than one loan under an MPN over a period of up to 10 years to pay for your or your child's educational costs, as long as the school is authorized to use the MPN in this way and chooses to do so.
The school will tell you which loans, if any, you are eligible to receive.
Choose the Direct Loan MPN you want to preview or complete
I'm an Undergraduate Student
MPN for Subsidized/Unsubsidized Loans
Use this MPN for Direct Subsidized Loans and Direct Unsubsidized Loans available to eligible undergraduate students. Learn More
Log In To Start
View Demo
OMB No. 1845-0007 • Form Approved
I'm a Graduate/Professional Student
PLUS MPN or MPN for Subsidized/Unsubsidized Loans for Graduate/Professional Students
Find and use the MPN that you need as a graduate or professional degree student to borrow federal student loans. Graduate/professional students can be eligible for Direct Unsubsidized Loans, Direct PLUS Loans, or both. You need to complete an MPN for each loan type you intend to receive. You should request Direct Unsubsidized Loans up to your full eligibility before borrowing Direct PLUS Loans. Learn More
Log In to Select MPN Type
OMB No. 1845-0007 • Form Approved
I'm a Parent of an Undergraduate Student
PLUS MPN for Parents of Dependent Undergraduate Students
Use this MPN for Direct PLUS Loans available to eligible parents of eligible dependent undergraduate students. Learn More
Log In To Start
View Demo
OMB No. 1845-0007 • Form Approved

- **Sub-menu for Graduate/Professional to show Unsub vs. PLUS**
    - 

Merit (UM) Scholarships

- There are different types offered (see the Admission website for more specifics on each):
    - President's Scholarship
    - Cane Achievement Award
    - Stamps Scholarship
    - Isaac Bashevis Singer Scholarship
    - Ronald A. Hammond Scholarship
    - Marta S. and L. Austin Weeks Endowed Scholarship
    - George W. Jenkins Scholarship
    - Hurricane Scholarship
        - This scholarship is given at admission to encourage students to attend UM Engineering programs.
        - Students must remain in the Engineering program, or the scholarship is removed.
- Newly Admitted UGRD Students
    - All admitted students are automatically considered for merit aid upon admission
    - Students who are not awarded a merit scholarship upon admission are not able to apply for one at a later time
        - They can explore other forms of aid
        - Here is the verbiage Admission communicates related to this:
            - *"Regrettably, the Admission Committee reviewed your credentials and determined that, within the context of this year's highly competitive candidate pool, you did not qualify … The Office of Undergraduate Admission awards merit scholarships as part of the first-year and transfer admission processes, not based on a current student's performance as an undergraduate at UM. My*

recommendation is that you make your enrollment decision based on the award package you have received."

- Merit aid appeals should be handshaken to the students UGRD Admission Officer for review (see https://admissions.miami.edu/undergraduate/about/meet-our-staff/index.html)
  - Nothing is guaranteed as it could remain exactly the same

- UM scholarship can be requested to be applied to a part-time semester if that part-time semester is the student's last semester for graduation and the student only needs a part-time schedule to gradate
  - See Prorate Aid for more information
  - Requires letter from advisor
  - Associate needs to then escalated to a Specialist for review

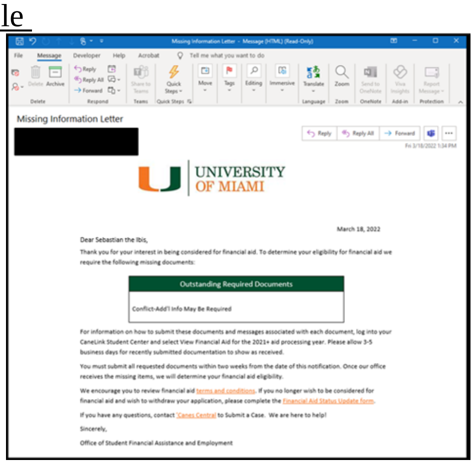
Mid-Year Transfer Monitor Review

- This will appear on the Documents page in PowerFaids. Financial aid will send a file to NSLDS to monitor the student's activity so we can be advised of any changes to their eligibility because the current award is based on what we know from Fall. This will remain on PowerFaids until the review is done. In most cases this will not modify eligibility.
- This is an internal document and **not to be discussed with the student**. Advise the student to "hang tight" and pay based on what you know.
- SLA is 7-10 business days once disbursement begins (i.e. 10 days before the semester begins)
  -

Student US Citizenship Documentation	Disbursement	Received	9/23/2021
Mid Year Transfer Monitor review	Disbursement	Not Received	12/2/2021
Florida Residency Document 1	Fund	Received	11/23/2021

Missing Information Letters

- GRAD/LAW
  - In general, should be sent weekly to anyone with outstanding documents in PowerFAIDS
  - There are some statuses for some document types when these are not sent but this is the general procedure
- UGRD
  - In general, should be sent weekly to anyone with outstanding documents in PowerFAIDS
  - There are some statuses for some document types when these are not sent but this is the general procedure
- Example
  -



Missing Information Letter

[redacted]

Fri 3/18/2022 1:34 PM

UNIVERSITY OF MIAMI

March 18, 2022

Dear Sebastian the Ibis,

Thank you for your interest in being considered for financial aid. To determine your eligibility for financial aid we require the following missing documents:

Outstanding Required Documents
Conflict-Add'l Info May Be Required

For information on how to submit these documents and messages associated with each document, log into your CaneLink Student Center and select View Financial Aid for the 2021+ aid processing year. Please allow 3-5 business days for recently submitted documentation to show as received.

You must submit all requested documents within two weeks from the date of this notification. Once our office receives the missing items, we will determine your financial aid eligibility.

We encourage you to review financial aid terms and conditions. If you no longer wish to be considered for financial aid and wish to withdraw your application, please complete the Financial Aid Status Update form.

If you have any questions, contact 'Canes Central to Submit a Case. We are here to help!

Sincerely,

Office of Student Financial Assistance and Employment

National Merit

- Process to Add and Disburse Awards
  - Students who receive National Merit must work with National Merit to inform them they plan to attend UM and to complete any other requirements they set forth for the student's information to be communicated to UM via their roster
  - UM will receive a roster from National Merit
    - As the FA processing team receives this roster, they will add the awards as place markers on the students' Awards and/or place Comments
    - These place markers should be added by the time the bill is released
  - These funds will not be disbursed until the checks from National Merit are received, which will happen sometime after FA Census Date
- No Awards Posted
  - First, check Awards and Comments in PowerFAIDS
    - If there is something about National Merit, follow that information
    - Hang tight until the bill is released
  - Second, if a student says they are to receive National Merit but they do not see it posted on their aid awards, the student should do the following:
    - Contact National Merit to notify them they will attend UM and clear up any potential action items they may have pending
    - Hang tight for the FA processing team to get their name in a roster and add the awards
  - Last, if the bill is released and the student checked with National Merit but you don't see the Awards or Comments, escalate

Need-based Aid

- Here are the current need-based aid types:
  - Coral Grant
  - Federal Work Study (FWS)
  - Florida Student Assistance Grant (FSAG)
  - Pell Grant
  - Subsidized Loan
  - Supplemental Educational Opportunity Grant (SEOG)
- There are some other types of aid that may impact the amount of need-based aid awarded:
  - FL Bright Futures, if increased, will reduce need-based aid dollar-for-dollar
  - FL Bright Futures, if decreased, will not impact need-based aid (up or down)

Non-Credit Programs

- Non-Credit Programs are treated as UGRD programs but they are not eligible for all normal UGRD aid
- Not Eligible
  - Federal aid
  - Institutional aid
- Eligible
  - Private Loans
  - Outside Scholarships (if they find ones available for non-credit programs, specifically)
- Cost of Attendance
  - They are only eligible for COA related to required tuition and fees (view their bill)
  - They cannot get COA increases for living, meals, transportation, etc.

Offer Letter

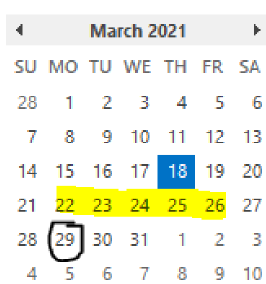
- For an example of an Undergraduate student offer letter, click here

Outside Scholarships

- Resources
  - Two good resources are scholarships.com and fastweb.com
- Notify UM
  - Students are required to notify UM of outside scholarships each academic year
    - **GRAD/LAW**
      - Simply have the agency send in the check
    - **UGRD**
      - The student needs to submit the Outside Scholarship award letter/notification
      - Students can submit this via the Outside Scholarship Submission Form, on the forms page of the 'Canes Central website
        - Award letter/notification must include the academic year that the award is for
          - Letters with previous academic years will not be accepted
        - Award letter/notification must also include the award amount
          - Letters without an award amount will not be accepted
      - Then the organization needs to send in the check
- Student Paperwork Needed
  - **UGRD** = If the paperwork is specifically for an outside scholarship and it is required by the outside scholarship organization, ask the student to submit the paperwork via a 'CC case to notify UM
    - **DO NOT PROVIDE FRANCE'S CONTACT INFORMATION**
      - Escalate case to UGRD Financial Aid for assistance
    - Forms that need to be completed must include a due date if applicable
      - Students should allow a 2-week window
    - If a form is submitted with little to no turnaround time, Financial Aid will try to get it back to the student by the deadline, but this cannot be guaranteed
      - Forms will still be completed even if the case is reviewed after the deadline for the form
  - **GRAD** = Create a case and escalate to GRAD Financial Aid for assistance
- Fund Application to Accounts
  - Split evenly by Fall and Spring unless organization specifies otherwise
    - Student would need a letter from the organization to change this
  - Once received by Student Accounts and sent to Financial Aid to be posted, Frances Arcay will upload check information to folder in Box.
    - CC Team → Outside Scholarship Checks
  - Once received by Financial Aid, there is an SLA of 10 business days from when check appears in the Box folder for it to appear on student bill
    - If 10 business day SLA passes and the outside scholarship is not on bill, escalate case to FA
      - Notate the date that check was uploaded to Box, but please **do not** include attachment of check information in the case as this violates GLBA

- Outside Agencies
    - *EFT Requests for Payment*
        - Agencies who want to pay via EFT instead of paper check must submit a case and the Associates will need to escalate to an FA Specialist so they can connect with the agency and provide the EFT information
            - This must come from the agency as it cannot be given to a student
    - *GRAD/LAW*
        - Agencies need to send physical checks to our address
        - Agencies who need documentation from or to speak directly with the scholarship administrator at UM should be directed to Submit a Case
            - Escalate to FA Specialist for assistance
    - *UGRD*
        - Agencies need to send physical checks to our address
        - Agencies who **need UM to complete a scholarship certification form, COA form, or other form**, must have the student submit the documentation required through the Outside Scholarship Submission form, on the Forms page of the 'Canes Central website
        - Agencies who need to speak directly with the scholarship administrator at UM should be given Frances Arcay's email (f.arcay@miami.edu) as she is their direct contact
            - **DO NOT PROVIDE THIS INFORMATION TO STUDENTS**
                - Escalate to FA Specialist by chatter to Frances directly to mention the caller already reached out to her and you are escalating the case to UGRD FA

Online MBA Program Financial Aid

- Term Dates = Follow UOnline academic calendar
- Packaging SLA = Once (a) packaging begins (Note: This begin date will be communicated by FA), (b) the student is registered, and (c) the student submitted the proper FAFSA, they should be packaged by the end of the next business week
    - Example =
        - If these criteria is met on March 18, 2021, the student should be packaged the following business week
        - If not, they can contact 'Canes Central as early as Monday, March 29, 2021 and we can escalate to FA as needed for packaging
        - 

    - Recommendation =
        - Have the students fully-register for both mini-terms contained within a larger semester from the onset as it will facilitate aid packaging, help avoid payment issues/concerns, and avoid retro-adds/drops
        - Also, register as soon as possible once MATR will help facilitate the packaging process
- Disbursement Dates and SLA = By Friday of 2nd week of classes

  - It takes 3-5 business days if awards are accepted, and documents are completed once disbursement begins
  - Note: This is different from other programs in that disbursements are not initiated until the end of the second week of classes
- Document Submission SLA = We communicate a standard 10 business day SLA for all other documents
- FAFSA and SLA =
  - Same code as GRAD = 001536
  - It takes approximately 3-5 business days for the FAFSA to show in PowerFAIDS once completed, but communicate the 10-business day SLA
  - Deadline = End of Session 1 Courses
    - If Session 2 begins, consult Madison to see if exceptions are possible
- Last Day to Originate Loans SLA = Stick with the timeframe we currently communicate for GRAD FA, which is the Last Day of Classes
  - This means all awards must be accepted and all MPN/EC documents completed, and assuming credit approved for PLUS (if needed)
  - Also, any loan revisions need to take place by this time
  - Students who file loan revisions and/or submit FAFSAs close to this deadline
- Communications to Students = 'Canes Central will see it listed in Comm Log and Comments in PowerFAIDS
- Missing Information Letters = Sent to all students pending documents automatically every Monday after 5:00 p.m.
- Forms = Links to the webpage with GRBUO forms can be found on the 'CC website
  - 'Canes Central is not able to view submitted Dynamic Forms for GRBUO or UOnline
- Walk-In Escalations = If a GRBUO student comes in person and case has to be escalated, please do not escalate in person. Escalation would happen through normal virtual channels so the GRBUO Financial Aid processing team can review
- Document Submission in Person = If a GRBUO student walks-in and is submitting Citizenship Documents or the Statement of Educational Purpose, 'CC Associate will scan all appropriate documentation, upload to the case, then escalate virtually to the GRBUO Queue
  - GRBUO will take the scanned documents and process them for student

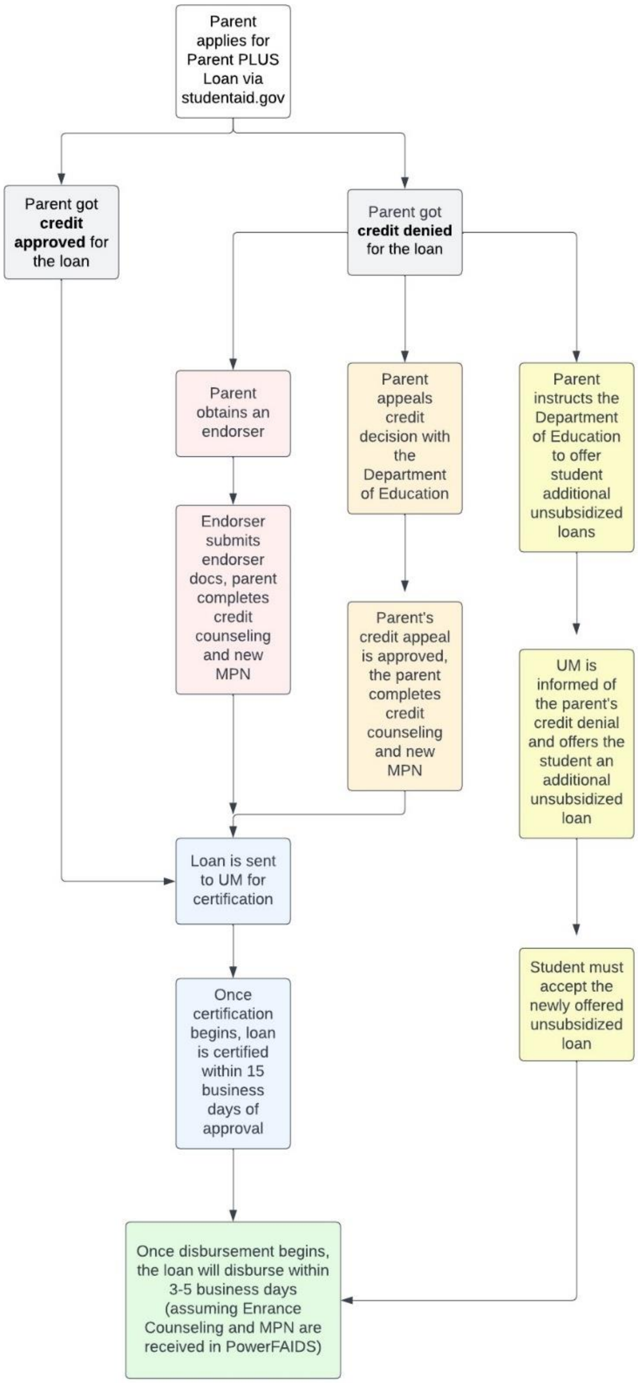
Overawards

- The FA processing team has an automated "Over award task" that notifies the processing team once an over award shows on a student's FA account
  - Overawards may appear for a period of time as the processing team manually adds scholarships, waits for waivers to roll over from Flywire, etc.
  - This "over award task" will only show, however, once the FA team "re-determines" the student's account
  - Thus, you may see an over award before the FA Specialists do as you are reviewing students' accounts live while they are only looking when notified by the task
- If you see an **over award in PowerFAIDS**, you should do the following:
  - 1st Time
    - Inform the student of what you see and that they could most likely expect an update to their financial aid once it is reviewed by the processing team
    - Inform the student this typically happens within 7 business days
    - Screenshot what you see
    - Add the screenshot in the case Feed

        - Notate that you see an over award and that you informed the student to expect a potential change in aid
    - 2nd+ Time
        - If you get another case from the student, review the old case Feed for the note above
        - Escalate the case if it has been more than **7 business days** after the initial Feed post about the over award and mention you are still seeing the same over award in PowerFAIDS
    - If you determine an FA **over award will occur because you see a new waiver posted in Flywire (CaneLink)** but it has not yet rolled into PowerFAIDS, you should do the following:
        - Note
            - It takes approximately 1-2 business days for waivers to roll from Flywire (CaneLink) into PowerFAIDS
            - Once a waiver rolls over, it creates an "over award task" if there is an over award as a result
        - 1st Time
            - Follow steps above for 1st time
        - 2nd+ Time
            - Follow steps above for 2nd time

Parent PLUS Loan

- See Federal Loan Types



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Perkins Loans

- Perkins Loan balances are being re-assigned to the Department of Education by our Perkins Loan servicer, Heartland ECSI, but this process is in flux and some have already migrated
- There are former students who were Perkins Loan borrowers and who still have existing balances with Heartland ECSI
  - Those with balances will not show as balances with UM as the balance had been with ECSI directly so do not be confused by $0 balance on their UM account (i.e., CaneLink/Flywire)
  - In some cases, these borrowers are delinquent in their loans and are asking about balances appearing on their credit reports

- If a former borrower contacts us and asks about a balance but you confirm there is no balance in CaneLink, it is almost certain the balance is with Heartland ECSI directly (especially if they mention their credit report or a Perkins Loan)

- Students can find more information regarding Perkins loans at https://osas.miami.edu/paying-your-bill/collections-department/index.html. If a case is submitted regarding a Perkins loan, handshake the student to the Collections department for assistance (collections@miami.edu)

Permission for UGRD Students to take GRAD Course / Students Taking Courses in Other "Stacks"

- Click here to view this information in Registration and Records

Private Loans

- We cannot ever recommend specific private lenders but we can provide students with the ELMSelect website (https://www.elmselect.com/v4/school/485/program-select) so they can see examples of what companies students have used in the past
- Majority of these loans are processed through ELMSelect
- Lenders who do not participate in ELMSelect can be given Marjorie Gamerl's contact information (mgamerl@miami.edu; 305-284-3216)

Prorate Aid

- Disability Accommodations
  - Students who receive accommodations through the Office of Disability Services (ODS) that allows them to enroll less than full-time will also receive prorated amounts for all institutional aid (merit- and need-based) as well as State of FL aid based on the number of credits enrolled at census
    - Bright Futures always adjusts based on number of credits actually enrolled
  - If the aid wasn't adjusted appropriately, have the student submit a case with the attached ODS letter and the Associate will escalate to the FA Specialist for proration
- Final Semester (usually in case of Fall graduates)
  - Aid can be prorated for a student's final semester if the student only needs to complete a load of credits that would put the student below full-time status
  - **CAUTION:** This is not always beneficial unless they only receive non-need-based federal loans because the student's full EFC is then allocated to the Fall only, meaning their need may go down and they could lose need-based aid
    - Do not advocate for those in this position to complete a proration because it could negatively impact their aid awards
    - Do not tell students they could get more of their grants, scholarships, etc.
    - Do not tell students can apply both their Fall/Spring UM aid awards to Fall only as this is not allowable
  - **WHEN:** This could be beneficial for Accelerated BSN, GRAD, and LAW students though since they don't receive much/any need-based aid …
  - **UGRD**
    - What could happen?
      - **Sub and Unsub Loans** may be prorated based on credits enrolled
        - Federal aid (except Pell) requires students to be enrolled at least half-time to receive it
        - Note that students enrolled less than full-time may see a reduction in their loan awards because they would no longer be eligible for a full half of the yearly, Fall/Spring loan

        - UGRD example: A student enrolled in 9 credits in the fall, is enrolled less than ½ of an academic year and therefore is eligible for less than ½ of an annual amount. A full year is equal to 24 credits. A student enrolled in 9 out of 24 annual credits (9 divided by 24) is eligible for .375 of the annual award. In this example, $5,500 x .375=$2,062. This assumes the student has not met the aggregate loan limit.
    - **Pell, SEOG, and Bright Futures** can be enrolled in any amount of credits for Fall/Spring
      - Pell is always adjusted based on actual enrollment at census date
      - Bright Futures always adjusts based on number of credits actually enrolled
      - See Summer Aid for summer details
    - **EASE** is not available for a student enrolled less than full-time unless that enrollment is because of ODS accommodations
    - **Benacquisto Scholarship** may or may not be approved to be prorated
      - This is the decision of the State, if a student has Benacquisto and asks if their scholarship may be prorated for their last semester, they should be advised to speak with the State directly
        - If student states they have approval from the State to have Benacquisto prorated, you can escalate to Financial Aid Specialist along with the advisor letter for proration
    - **Institutional aid (merit- and need-based)** may be prorated for a student's final semester if the student only needs to complete a load of credits that would put the student below full-time status
      - Institutional aid allocated for the Fall and Spring cannot be combined and used in the Fall only, even if the student is graduating a semester early (e.g., they cannot receive the full amount of Coral Grant for Fall/Spring in Fall only)
        - **IMPORTANT:** If a student is awarded for Fall and Spring but is graduating in the Fall, they cannot have the full amount of their Fall/Spring Coral Grant, Institutional aid, etc. applied to the Fall only
  - Process
    1) Student must obtain a letter from the Program Director/Advisor that states the student is expected to complete his/her academic requirements and graduate in Fall
      - Submit this via a case
      - Associate will escalate to a FA Specialist with attached letter confirmed to be submitted
- **GRAD/LAW**
  - What could happen?
    - Spring allocation of Unsub may be able to be added to Fall and replace Grad PLUS loan, which would be great as the interest rate is lower
    - Federal aid requires students to be enrolled at least half-time to receive it
    - Note that students enrolled less than full-time may see a reduction in their loan awards because they would no longer be eligible for a full half of the yearly, Fall/Spring loan

- <u>Process</u>
  1) Student must complete the COA Form and select the option for Fall Graduate
  2) If the student has not applied for Fall Graduation, they must obtain a letter from the Program Director/Advisor that states the student is expected to complete his/her academic requirements and graduate in Fall
     - Letter from the Program Director/Advisor can be uploaded to the COA form

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Request for Review (R4R)

- Used if experienced a decrease in income during the most recently completed calendar/tax year since normal aid is based on the prior-prior year
  - Medical bills are a reason why someone could submit a R4R
    - The bills must have already been paid; students cannot submit for unpaid bills
    - The bills must be paid in the tax year and exceed 11% of their AGI for that tax year
  - A parent passing away may be a reason why someone could submit an R4R
    - Associate can escalate to Financial Aid Specialist so a discussion can take place about options at that point regarding R4R
      - Before escalating a case to FA Specialist for a death in the family, Chatter Betsy Lopez so she can work with Student Affairs and ensure the student is reached out to
  - If a parent is recently out of work and it has been 3 consecutive months, current year income may be considered but we shouldn't advertise this
    - Associate can escalate to Financial Aid Specialist so a discussion can take place about options at that point regarding R4R
- Not used to simply adjust loan amounts
- Students must accept all self-help aid first (e.g., Subsidized Loan and Federal Work Study)
- <u>Disputing R4R Decision</u>
  - **Simply put: It is what it is**
    - The R4R is an appeal of aid for an academic year, and there are no appeals to appeals
  - **Communicate the following**—more tactfully than the simplification above—if someone disputes the results of their R4R appeal
    - Communicate the information left for us in Comments and Comm Log
    - Provide the person with other aid options (e.g., Private Loans, PLUS Loans, Outside Scholarships, etc.) and payment options (e.g., MPP, etc.)
    - Then, if needed, inform the person of the following:
      - UM uses the information they provided for the appeal to render a decision
      - UM applies the same appeals review process to all students
      - There are no appeals to an appeal
      - Unfortunately, the decision sticks
  - If none of this works and you try your hardest to communicate this, you can speak with 'CC Leadership to review to determine if (a) it is what it is or (b) if 'CC Leadership thinks it is appropriate for them to go to FA directly to inquire for more details and/or re-review

Resident Assistants (RAs)

- RAs are given a housing and meal plan waiver/scholarship, which is factored into their aid packages and counts against the COA
  - They also receive a stipend but that is not factored into COA as it is paid like a regular employee
  - Here is the compensation package for the 2021-2022 academic year:

	A	B	C	D	E
1	**2021-2022 First Year RA**			**2021-2022 First Year UV & LSV CA**	
2	Stipend (21 pay periods)	$ 2,080.00		Stipend (21 pay periods)	$ 2,500.00
3	RA Room Rate	$(12,620.00)		CA Room Rate	$(14,000.00)
4	RA Room Credit	$ 12,620.00		CA Room Credit	$ 14,000.00
5	RA Dining Credit (for meal plan)	$ 2,300.00		CA Dining Dollar Credit	$ 500.00
6	RA Dining Balance (projected)	$ (421.00)		Net Gain	$ 2,500.00
7	Net Gain	$ 1,659.00		**Total Dollar Compensation Value**	**$ 17,000.00**
8	**Total Dollar Compensation Value**	**$ 17,000.00**		** $200 increase for each year of experience	
9	** $200 increase for each year of experience				
10					
11	**Note:** 2020-2021 Rate pending the 2021-2022 costs				

  - Example of how it shows in PowerFAIDS:

Resident Assistant - Room	No	$4,250.00	Accepted	01/12/2021

- The amounts that will be awarded will be sent by the department to FA for posting
  - If there is room in the COA, the awards may just be added to their award packages
  - If there is no room in the COA, their aid packaged could be adjusted in the following order in order to include the RA award in the COA:
    1) COA housing budget would be adjusted because the student is typically in a more expensive housing rate
    2) COA meal budget typically stays the same as FA allows for the standard 19-meal plan and it is the second most expensive allowance; however, if a student selects the unlimited meal plan, FA can adjust for that
    3) Since RAs do not typically use FWS, FA will remove FWS if they confirm they are not using FWS
    4) If the RAs declined their loans, FA will remove these
    5) Other awards could be adjusted to fit in the RA award (e.g., Coral Grant or International Student Grant) with a dollar-for-dollar swap if a student is already at 100% of COA
  - RAs would receive a revised award letter once these adjustments are made; this is when the RAs will see specifically how things had to be adjusted in order to include the RA awards
- If the RAs need more specific information at this time as to how this new aid will impact their current aid, an Associate can escalate to a FA Specialist
  - Specialists may not be able to tell the student anything else as they too are unable to provide exact numbers but, if needed, you can escalate and mention to the student the Specialist may not be able to provide any additional figures but you will have the student meet with the Specialist just in case

Return to Title IV (R2T4)

- This process takes place once a student withdraws
- We cannot provide exact details on the impact of withdrawal but we can provide estimates of what could occur based on the withdrawal impact chart
- Note that students maintain their entire aid eligibility once they complete 60% of the semester (i.e., they "earned all of their aid")
  - The aid will remain on their account

- If less than 60% into the semester, the student may end up with a new balance after the R2T4 is complete
- This calculation happens within 30 days of withdrawal and then we have 15 days to return the funds to the government (45 days total)

- GRAD
  - Unsub is the 1st loan to be returned per federal guidelines, not Grad PLUS

Satisfactory Academic Progress (SAP)

- SAP information can be seen in the appropriate places within POE and User Medium String in PowerFAIDS
  - SAP information listed in the Summer/Fall cell was from the prior SAP run after Spring grades
    - For example, the SAP status after Spring 2021 grades are posted will appear in the Summer 2021 (if there is a Summer POE) and the Fall 2021 cells
    - **Remember to change years in PowerFAIDS to see this!**
  - SAP information listed in the Spring cell was from the prior SAP run after Fall grades
    - For example, the SAP status after Fall 2021 grades are posted will appear in the Spring 2022 cell
- SAP Chart = https://finaid.miami.edu/_assets/pdf/financial-assistance-at-a-glance2020.pdf

Financial Assistance
Satisfactory Academic Progress Policy

	UM Merit/Academic Scholarships	UM and Federal Need-Based Aid	Florida Bright Futures		Florida Resident Grants	Benacquisto Scholarship
	Hammond, Weeks, Jenkins, Stamps, President's, Canes Achievement, Singer	*Coral Grants, donor awards, Pell, SEOG, Work Study, International Student Grants, Direct Student Loans and PLUS Loans*	*Academic Scholars*	*Medallion*	*Effective Access to Student Education (EASE) & the Florida Student Assistance Grant (FSAG)*	
Requirements:						
Minimum **cumulative GPA** *(does not round-up)*	3.0	2.0; however, could be greater than 2.0 if your program requires a higher GPA	3.0 (for full renewal or 2.75 for partial renewal)	2.75	2.0	3.0
Credits Completed *(Fs, Ws or incompletes are not counted as credits completed)*	12 credits/semester and/or 24 credits/academic year	12 credits or more per semester is recommended but **must** successfully complete 67% of what is attempted. Credits must be required for your primary degree program.	Complete all credits attempted and required for primary degree program; min. 12 credits/semester or 24 credits/academic year		12 credits/semester and/or 24 credits/academic year. All credits must be required for your primary degree program.	Complete all credits attempted; min. 12 credits/semester or 24 credits/academic year. All credits must be required for your primary degree program.
Term Limits	8 consecutive terms or per scholarship agreement	150% of length of degree requirements* (eg: 120 cr/degree = 180 maximum credits attempted, including transfer credits)	120 credits for a 4 yr UG program; if in an approved 5 yr UG program, may apply for an extension with the state of Florida		9 terms; 10 terms in an approved 5 year UG program	120 credits for a 4 yr UG program; if in an approved 5 yr UG program, may apply for an extension
Frequently Asked Questions:						
If I fail SAP can I take credits at UM to meet the credit completion and GPA earned requirements?	Yes, summer after the academic year only	Contact Office of Student Financial Assistance and Employment	Yes, summer after the academic year only		Yes, summer preceding the academic year only	Contact Office of Student Financial Assistance and Employment
May I repeat a course?	N/A	Cannot be used to pay for more than two attempts of any single course.	See Term Limits above		See Term Limits above	Must complete all attempted credits.
Is financial assistance available during the summer?	No	Pell Grants and student loans may be available if taking at least 6 credits	Yes		No	No
When is Satisfactory Academic Progress (SAP) evaluated?	End of each spring	End of each term	End of each Spring		End of each Spring	End of each Spring by the State of Florida
If I don't meet SAP one semester, is there a warning period? *(student will still be awarded aid during the warning period)*	No	Yes - 1 semester	No		No	No
Once I am on "SAP warning" term what happens?	N/A	Must meet SAP each semester going forward or eligibility will be at risk	N/A		N/A	N/A
What happens if I lose my financial aid due to failing SAP?	File an appeal for consideration within 30 days of notification	File an appeal for consideration within 30 days of notification	File an appeal for consideration within 30 days of notification		File an appeal for consideration within 30 days of notification	File an appeal for consideration within 30 days of notification
If you fall behind, can credits be made up in the summer? In most cases; however, evaluation may be done prior to the completion of summer. The student should follow appeal instructions if notified of SAP failure.	Yes	Yes	Yes		Prior summer only	No
Can I take credits away from UM to meet SAP credit requirements?	Yes, but only for credit completion, not for the GPA requirement	Yes, but only for credit completion, not for the GPA requirement	Yes, but only for credit completion, not for the GPA requirement		Yes, but only for credit completion, not for the GPA requirement	No
Can my financial aid be earned back?	Yes - after 1 semester of meeting SAP	Yes - after 1 semester of meeting SAP	Yes - at the end of the following academic year, if meeting SAP		Yes - at the end of the following academic year, if meeting SAP	No
If I go on **Inactive Status** or enroll in a **non-UM program** (Fall or Spring), how does this effect my financial aid?	**For Inactive Status:** If you are meeting SAP prior to your semester away, your scholarship will be on hold until you return. **For Non-UM programs, e**ach term is counted as a semester "used" of your scholarship.	Loans MAY go into repayment. Can receive aid upon return if meeting SAP prior to semester away from UM.	Can receive aid upon return if meeting SAP prior to semester away from UM and eligibility is not exhausted elsewhere.		No impact. Can receive aid upon return if meeting SAP prior to semester away from UM	Must pro-actively notify the UM State Aid Program Coordinator for an eligibility review.

*Term limit restrictions are implemented when the University first determines a student will exceed their maximum attempted credits for their program.

- Limited Information = **Research!**
  - You may be limited in what you can see for SAP in PowerFAIDS but you need to use each of the following:
    - **POE** = Federal and Alternate (UM Merit) SAP
    - **User Medium String** = Bright Futures (SAP FL BF), EASE (SAP EASE), and FSAG (SAP FSAG)
    - **Messages** = General SAP letter verbiage sent to student
    - **Comm Log** = See when and what is sent to student
    - **Comments** = May have notes there on SAP
  - When a SAP notice goes out, you'll see the marker in Comm Log and the verbiage sent in Messages (hopefully … but maybe not)
    - If in Messages, it would look like this:

Id	Associated With	Message
DOC EASE App	FL RES	Our records indicate that you may qualify for financial aid through the State of Florida. Please complete the appropriate online application below so we may determine your eligibility. Dependent Student Florida Residency Application Independent Student Florida Residency Application Please note - it is important you choose and submit the correct form to avoid processing delays.
LTR SAP FED FAIL	N/A	* After a careful evaluation of your university transcript, we have determined that you did not meet the GPA and/or credit completion rate required for all federal and UM need-based financial aid eligibility. Appeals are limited to one appeal and the decision of the appeals committee is final.

- You will need to review that a Comm Log was sent, check the Comments (if there are any), check the Messages (if there are any), and review the proper cell in the POW or Medium String area to understand their SAP issue
  - You may then need to go to CaneLink to see their GPA and credits completed to deduce what the exact issue is
    - Compare this to the "SAP Criteria" (see below)
  - You can review some sample SAP letter templates (see below)
  - All of this information will help you pinpoint the issue and communicate to the student
- In User Medium String for UGRD students with a Federal SAP issue, you will see a custom data field will indicate the reason for the issue:
  - GPA
  - % complete
  - max time
  - multiple variables (if the student is failing more than one of the previous listed criteria)

- Options After SAP Notice
  - If on Warning = No option to appeal since nothing was failed
  - If Failed = Option to appeal by appeal deadline (see below)
- Letter Templates
  - Here are the SAP Letter templates:
    - SAP Failed
    - SAP Failed Max Time Frame
    - SAP Warning
    - SAP Warning Max Time Frame
  - **Note:** These templates may not be the most up-to-date templates but they should be helpful in understanding what may be communicated. There may be other templates that are not included here as well.
- Students are notified via email if they fail SAP
  - Students will see it in their messages as well
  - Students, even those who previously failed SAP, will be assessed for SAP each semester
- SAP Statuses for Federal SAP
  - **Good standing =** This means they are meeting SAP standards
  - **Warning =** This means they are no longer meeting the SAP standards; if they do what they need to in this WARNING term, they will go back to being in good standing; if not, they will fail SAP
  - **Probation =** For appeals that were approved, and it was decided to continue their aid eligibility for another semester; comments will outline what they must do in the probation semester to continue eligibility
  - **Continued probation =** For someone who met the academic plan in the prior probation term but who is not yet up to SAP standards; we continue their aid eligibility into this term
  - **Close to max time =** Still have aid eligibility in this term but they have exceeded a threshold and are within a couple of terms of exceeding the 150% rule for their program
  - **Exceeding 150% max =** They lost aid eligibility for this term and are not on track to complete their degree within 150% of the length of the program based on credits attempted, including transfer credits

  - **Not making sap =** Lost aid eligibility after being on a WARNING, PROBATION or CONTINUED probation term (if applicable)
- SAP Criteria
  - **UGRD =** Check the grid on the UGRD SAP website
  - **GRAD =** 3.0 GPA and earned 67% of all credits; evaluated each semester
  - **LAW =** Check the LAW SAP website
- SAP Criteria for Students Registered with Office of Disability Services (ODS)
  - In conversation, it could come up naturally that a student is registered with ODS, or you may see a Comment in PowerFAIDS
  - **Normal SAP =** When registered with ODS, they must meet the GPA criteria and earn every enrolled part-time credit if enrolled under the SAP standard credit requirement per semester
  - **SAP Appeal Granted (see Appeals Below) =** When registered with ODS, they must meet the GPA criteria for their probationary period and earn every enrolled part time credit (e.g., instead of 12 when 12 is required)
- Appeals
  - Students, even those who previously failed SAP, will be assessed for SAP each semester
    - Students **can only appeal when they receive a failure notice**, and they must appeal for consideration
    - Students must provide proof in appeal of extenuating circumstances with proof
    - If appeal is approved, student is placed on a Plan of Action they must follow
    - Any decision on a SAP appeal by a student who has been withdrawn would apply to the next semester the student is enrolled.
  - The student should fill out the SAP appeal form for the semester in which they have failed SAP, not the future semester they will enter
    - Example = If student failed SAP at end of Spring 2023, they would fill out a SAP Appeal for Spring 2023, not Fall 2023
  - **Deadlines**
    - UGRD students do not have a deadline for SAP Appeals, they should be encouraged to complete it as soon as possible after receiving SAP Notice, however
    - GRAD/LAW students have until one month prior to the end of the next semester in which they are enrolled to appeal
- 150% Rule for Federal Need-Based Aid Only
  - For students who fail the 150% SAP rule for federal need-based aid and the reason of it is because of a bunch of transfer credits, they **need to appeal** this failure via the normal appeals process
  - Transfer credits in this situation refers to all transfer, test, dual enrollment, AP, IB, AICE, and Cambridge credits as all impact this rule
  - If a student in this situation submits a case to us before submitting a SAP Appeal, you can navigate them to the SAP Appeal form and tell them to submit the following information from their advisor
    - Email or letter from student’s academic advisor that says (a) how many credits the student has left to complete the UGRD degree, (b) how many credits the student is currently enrolled in for the current term, (c) how many transfer credits the student has on the student’s record, and (d) how many transfer credits **will not** count toward **any** of the student’s requirements
- Study Abroad Students
  - Click here for more information

Scholarships/Waivers

- Tuition Waivers = Click here to learn more
- Internship Stipends = Click here to learn more
- College/School Scholarships
  - Do not refer students to advisors to discuss financial aid or billing and payment issues, including scholarships unless the student is 100% sure the scholarship they received was offered and awarded by the college/school
  - If the student is 100% sure, the student can check directly with the college/school about the status of posting those scholarships—they can speak with their advisor, their admission representative, and/or the person who sent them the scholarship award letter—if they do not see them on their student account
    - Note: Scholarships awarded by colleges/schools take up to 15 business days to post on students' accounts from the time the scholarships are submitted by the colleges/schools to Financial Aid
    - We may be able to check Dynamic Forms to see if it was submitted (if you have access)
    - If the student comes back and says they spoke with someone and it still isn't showing but the person said it was submitted, find out who the student spoke with and connect with you, the student, and that person via email, and ask that person to follow up on their end to the status as waiver would be posted by OSAS within the SLA once submitted
      - That person will need to follow up with their budget manger to see what's happening
  - If not 100% sure, then just talk about the general FA packaging process, what they may be eligible for, etc., and provide the outside scholarships links
    - **No matter what, you should always have discussions about this so we are holistic!**
  - If students see a college/school scholarship posted on their account but they don't know why and (a) never received communication form FA in Comm Log or (b) never received communication from their college/school, escalate to FA if the student would like more information on the award
  - Here are some exceptions by college/school:
    - **School of Communication =** They have a couple school-controlled scholarships on their website. Information about these are sent in their Weekly Wire when available. If the application link isn't on their website, this isn't active. Don't refer people to them.

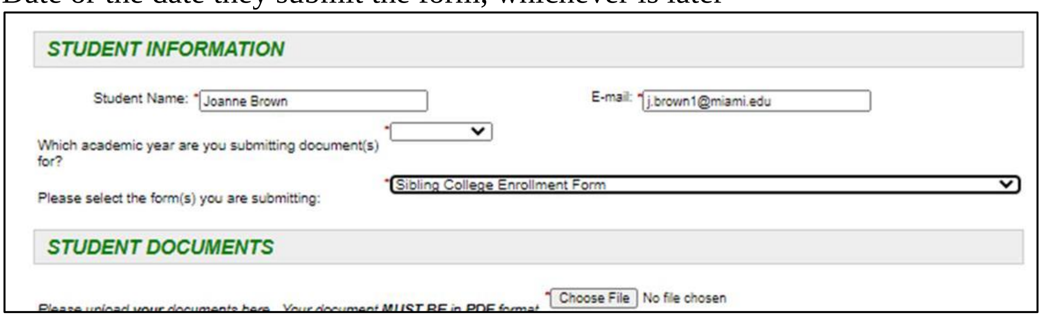
Selective Service

- FA may require proof of Selective Service
- See https://www.sss.gov/ for details
- Students can call (847) 688-6888 to obtain their Selective Service documents
- If the student is a non-citizen entering the United States and is not eligible, the student would need to either provide (a) a letter from Selective Service that states this or (b) an copy of the student's passport that shows the student's 1st entry into the United States submitted through the Document Submission Form, along with an explanation of the circumstances in the comment box of the form
  - This process should also be used if the person exceeds the age limit to register for Selective Service but attach license or passport (something with the DOB) to the Document Submission Form with the explanation

Sequestration/Loan Acceptance Deadlines

- This is the time all loans convert to the new origination fee rates (i.e., October 1st)
- There is no deadline per se for students to accept loans, but it is recommended that loans are accepted ASAP since the loans may be cancelled during sequestration
    - Cancellation may not happen in PowerFAIDS though since can recalculate the origination fees automatically in the system
    - If a loan is cancelled but the student would like it back, an Associate can escalate to a Specialist
- Sequestration is when a loan must be cancelled because it has not been disbursed by a specified date
    - If a loan is cancelled during sequestration but the student would like the loan back, the student can complete the Loan Revision Form to request the loan funds to be re-added as long as the semester is not complete

Sibling FA Verification Form

- UM is asked to complete these for siblings of current UM students so the sibling can turn them into their school for their own FA verification
- Students can submit these forms at any time, but they can only be completed on or after census
    - This must be completed by an FA Specialist
- Students must submit these forms via the Document Submission Form
    - They need to select the “Sibling College Enrollment Form” option
    - Tell the student that it will take some time to process this form from the point of submission if they are submitting it before Census
    - Follow the FA Document Submission SLA, **BUT only start** the 15 business days from Census Date or the date they submit the form, whichever is later
    - 

STUDENT INFORMATION

Student Name: * Joanne Brown

E-mail: * j.brown1@miami.edu

Which academic year are you submitting document(s) for? *

Please select the form(s) you are submitting: * Sibling College Enrollment Form

STUDENT DOCUMENTS

Please upload your documents here. Your document MUST BE in PDF format * Choose File No file chosen

- **IN PERSON?**
    - You can escalate in person to the Specialist, and they can complete it then and there if it is after census

Special Programs

- 5 Year UGRD Architecture Program
    - Institutional funds (e.g., Coral Grant, International Student Grant, UM Merit Scholarships, etc.) will be applicable for the normal, required 5 years for this program and this program only
- 2nd + Bachelor’s Degree (e.g., ABSN)
    - Not eligible for Pell or many forms of State of FL aid
    - ABSN students are not considered for UM merit aid
    - Sub and Unsub may be available as long as the student has not exhausted eligibility
    - Parent PLUS loans are available if the student is still a dependent student
    - Private loans are always an option
- UGRD/LAW 3+3 Program
    - 1st year of Law School applies to 4th year of undergraduate degree required credits

- Students are issued their undergraduate diploma after they complete their 1st year of Law School
- Because the students enroll in only LAW courses during the 4th year, they pay LAW tuition and fees and they are packaged as LAW students; therefore, their UGRD awards do not apply
- These students must edit their FAFSA for their 4th year so it reflects they are a LAW student so they can be packaged appropriately

- <u>UGRD/GRAD 4+1 Engineering Program</u>
    - Students complete their undergraduate degree and MATR directly into a Master's program for their 5th year
    - Because the students enroll in only GRAD courses during the 5th year, they pay GRAD tuition and fees and they are packaged as GRAD students; therefore, their UGRD awards do not apply
    - These students must edit their FAFSA for their 5th year so it reflects they are a GRAD student so they can be packaged appropriately
    - Note: if the student MATRs into the Master's program a semester earlier in the Spring, the student should wait to edit their FAFSA to reflect GRAD status sometime after November 1st so they mitigate any unnecessary impact to their Fall UGRD awards
- <u>GRAD and/or LAW Dual Degree Programs</u>
    - In these cases, students should use the FAFSA School Code for their primary degree (e.g., LAW for the LAW/MPS dual degree program)
    - These students will receive an FA package that will account for both programs once the FA team packages the students
- <u>Current UM UGRD Students Changing to UM GRAD/LAW Students + FAFSA</u>
    - There are certain things current UGRD students need to indicate on the FAFSA in order to be packaged properly for GRAD aid (e.g., indicate they have a Bachelor's)
        - This is especially impactful for mid-year changes, but year-to-year changes can prove challenging as well
    - Associates should escalate cases in which they are notified a current UM UGRD will be changing to GRAD/LAW status mid-year or year-to-year so the FA GRAD Specialists can work with the student to make sure everything is okay on their FAFSA, and so they can "lock down" the system not to disrupt their current aid
    - Before you escalate, talk through the following with the student so the student knows exactly what to do moving forward:
        - How the student will need to change their information on their FAFSA after classes are completed for their UGRD degree and before they begin for their GRAD/LAW degree
        - The types of GRAD/LAW financial aid and eligibility requirements, thresholds, etc.

Stipends

- Normally, awards (e.g., stipends, fellowships, etc.) posted through Financial Aid show the various disbursement dates of each payment in the "Disbursements" screen on PowerFAIDS
    - You can communicate those disbursement dates of the various stipend line items if you see multiple for 1 award in 1 semester
    - Note: Students are generally aware of these dates
    - Example of stipend with different disbursement dates in PowerFAIDS

PIBS Monthly Fellowship								
Grad Fall	06/24/2022	$0.00	$0.00				A	
Grad Spring	08/25/2023	$0.00	$0.00				A	
Grad Spring	07/25/2023	$0.00	$0.00				A	
Grad Spring	06/24/2023	$0.00	$0.00				A	
Grad Spring	05/23/2023	$3,083.00	$3,083.00				A	
Grad Spring	04/26/2023	$3,083.00	$3,083.00				A	
Grad Spring	04/24/2023	$0.00	$0.00				A	
Grad Spring	03/27/2023	$0.00	$0.00				A	
Grad Spring	03/25/2023	$3,083.00	$3,083.00				A	
Grad Spring	02/27/2023	$0.00	$0.00				A	
Grad Spring	02/22/2023	$3,083.00	$3,083.00				A	
Grad Spring	01/30/2023	$0.00	$0.00				A	
Grad Spring	01/25/2023	$3,083.00	$3,083.00				A	
Grad Spring	01/10/2023	$0.00	$0.00				A	
Grad Spring	01/02/2023	$0.00	$0.00				A	
Grad Fall	12/17/2022	$3,083.00	$3,083.00				A	
Grad Fall	11/28/2022	$0.00	$0.00				A	
Grad Fall	11/20/2022	$3,083.00	$3,083.00				A	
Grad Fall	10/31/2022	$0.00	$0.00				A	
Grad Fall	10/26/2022	$3,083.00	$3,083.00				A	
Grad Fall	09/26/2022	$0.00	$0.00				A	
Grad Fall	09/24/2022	$3,083.00	$3,083.00				A	
Grad Fall	08/29/2022	$0.00	$0.00				A	
Grad Fall	08/25/2022	$0.00	$0.00				A	
Grad Fall	08/15/2022	$0.00	$0.00				A	
Grad Fall	08/13/2022	$0.00	$0.00				A	
Grad Fall	07/26/2022	$0.00	$0.00				A	
Grad Fall				09/26/2022	$3,083.00	9760	A	9/26/2022

- If there is only 1 disbursement dated line item but you see that not all of the funds were disbursed like in the sample below, it would need to be escalated to FA to determine when the other disbursements would roll out (unless you see Comments otherwise)
- P2S = Pay to Student
    - If a line item on a term statement in Flywire shows "P2S", this amount will not pay any charges. It will override any charges and be sent directly to the student as a refund

Study Abroad

- Learn more about FA and Study Abroad by clicking here

Subsidized Loan

- See Federal Loan Types

Summer Aid

- Students must be enrolled at least half-time/part-time to be eligible for most types of aid
- Types of Summer Aid
    - Bright Futures can apply and will be added to the student account after the Last Day to Drop Without a "W" for the summer session in which the 6th credit is taken
    - Pell will apply with a minimum of 6 credits and will be added to the student account after the Last Day to Drop Without a "W" for the summer session in which the 6th credit is taken
    - Federal Work Study (FWS) must be requested via the appropriate form
        - Does not need to be full-time, just active
        - May be enrolled in the following Fall and not the Summer, and may still be eligible to receive FWS for Summer
    - Private loans can be requested for Summer only
    - Federal loans will be posted if not at max eligibility
        - Grad PLUS will be added automatically for GRAD/LAW
        - Unsub loans will not be automatically assigned to GRAD/LAW; a loan revision form can be used to request unsub if not at max eligibility

        - UGRD students may receive Sub/Unsub loans if they have remaining eligibility
        - See Federal Loan Types for more information
    - Parents of UGRD students can apply for Parent PLUS loans
- Learn more in the "How do I receive financial aid for the Summer semester?" knowledge article
- Students cannot transfer their institutional (e.g., President's Scholarship), State of FL (e.g., Bright Futures), or federal aid (e.g., PLUS loans) to another institution over the summer
    - Private loans may be taken out for courses taken at another school in the Summer, but students need to work with the private loan lender and the school they are attending
- The Cost of Attendance is calculated for approximately 3 months of living expenses. The academic year (Fall/Spring) is calculated at approximately 9 months (i.e. 4.5 months for Fall and 4.5 months for Spring).

Tax Documents

- All tax documents must be submitted via www.miami.edu/mytaxes/, Dynamic Forms, or IDOC, whichever is specified in Messages
    - No one should ever submit these through email or cases as it is not secure
- Tax documents that are not correct must be amended by the submitted and the IRS directly
    - Once the amended tax return is submitted to the IRS, the original and the amended versions would need to be signed and submitted to the University or review
- Order replacement W2s, 1099 forms, and other tax forms if lost using the information at https://www.irs.gov/individuals/transcript-types-and-ways-to-order-them
- W2
    - Tax line 6 = Schedule 1
    - Tax line 12 = Schedule 3
    - Tax line 17 = Schedule 5
- Signatures
    - All submitted tax documents must have at least one of the following:
        - Wet signature
        - Employer Identification Number (EIN) **AND** Preparer Tax Identification Number (PTIN) for electronic filings
            - If both are not visible, the documents need a wet signature
- Thresholds to File Taxes or Not
    - People must make a certain income threshold to be required to file taxes
    - See the sample below but refer students to their accountant for specifics
        - They can also use the IRS tool at https://www.irs.gov/help/ita/do-i-need-to-file-a-tax-return

- ## Chart A – For Most People Who Must File

  Note: If you may be claimed as a dependent by another taxpayer, you must file as a dependent whether you are being claimed or not. See Chart B.

If your filing status is...	AND at the end of 2020 you were...*	THEN file a return if your gross income was at least...**
Single	under 65	$12,400
	65 or older	$14,050
Married filing jointly***	under 65 (both spouses)	$24,800
	65 or older (one spouse)	$26,100
	65 or older (both spouses)	$27,400
Married filing separately (see the Instructions for Form 1040)	any age	$5
Head of household (see the Instructions for Form 1040)	under 65	$18,650
	65 or older	$20,300
Qualifying widow(er) (see the Instructions for Form 1040)	under 65	$24,800
	65 or older	$26,100

* If you were born on January 1, 1956 you are considered to be age 65 at the end of 2020. (If your spouse died in 2020 or if you are preparing a return for someone who died in 2020, see Publication 501)

** **Gross income** means all income you received in the form of money, goods, property, and services that isn't exempt from tax, including any income from sources outside the United States or from the sale of your main home (even if you can exclude part or all of it).

- Do not include any social security benefits unless
  (a) you are married filing a separate return and you lived with your spouse at any time in 2020 or
  (b) one-half of your social security benefits plus your other gross income and any tax-exempt interest is more than $25,000 ($32,000 if married filing jointly).
  If (a) or (b) applies, see the Form 1040 Instructions to figure the taxable part of social security benefits you must include in gross income.
- Gross income includes gains, but not losses, reported on Form 8949 or Schedule D.
- Gross income from a business means, for example, the amount on Schedule C, line 7, or Schedule F, line 9. But, in figuring gross income, don't reduce your income by any losses, including any loss on Schedule C, line 7, or Schedule F, line 9.

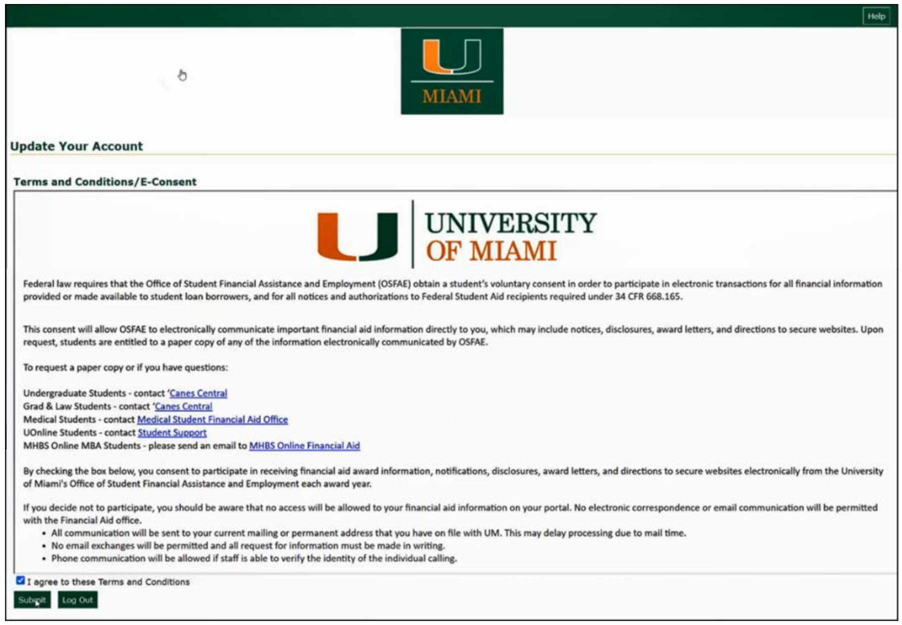
*** If you didn't live with your spouse at the end of 2020 (or on the date your spouse died) and your gross income was at least $5, you must file a return regardless of your age.

Individuals who do not have a filing requirement based on this chart should also check Chart C, Other Situations When You Must File, and Chart D, Who Should File. Individuals with earned income but who do not have a filing requirement may be eligible for the Earned Income Credit.

- Non-filers
  - If a student or parent did not file taxes and is eligible for a non-filer, they may be able to submit the non-filer in lieu of a tax return when requested
    - This would be reviewed by the FA team once received and the student or parent would then be notified if they need anything else and/or if the non-filer did not suffice
  - **Directions to Obtain Non-filer**
    - Available at www.irs.gov/individuals/get-transcript
      - Note: This is typically not available if you have never filed taxes before in prior years. If this is the case, please use the paper request process detailed below.
    - Click "Get Transcript Online" (If at any point, you cannot validate your identity – for example, you cannot provide financial verification information or you lack access to a mobile phone – you may use Get Transcript by Mail, see below)
    - Follow instructions for creating an account or log in. To create an account, you will need your Social Security Number or Individual Tax Identification Number, email address, birthdate, mailing address from latest tax return, tax filing status, account number for loan or credit card associated with your name, and mobile phone associated with your name
    - Select "Verification of Non-filing Letter" and in the Tax Year field, select "2019"
    - If successfully validated, you will be able to view your IRS Verification of Non-filing Letter

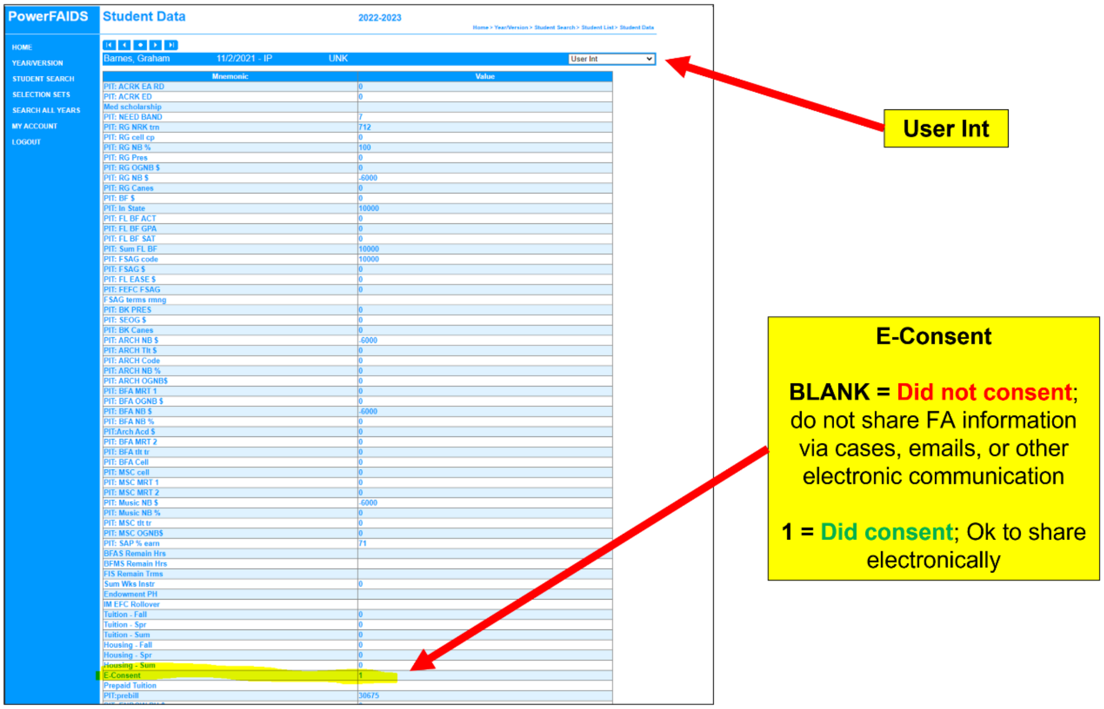
Terms and Conditions/E-Consent

- Electronic Consent Overview
  - Federal law requires the University of Miami to obtain voluntary consent from any student who wishes to receive electronic communication about their financial aid awards, documents, etc.
  - Because the financial aid processing team uses CaneLink and email to notify students of pending documents, award packages, disbursements, etc., they will now require students to consent to view this information as they are both considered official forms of electronic communication
  - Beginning May 19, 2022, students will need to provide consent to receive electronic communications related to financial aid
- How will students access the "Terms and Conditions/E-Consent" screen?
  - Students will be presented with a "Terms and Conditions/E-Consent" screen each academic year when they try to access their financial aid information via CaneLink --> View Financial Aid --> 2021+.
    - There, they will be able to click the button that says "I agree to these Terms and Conditions" or log out
      - If they agree, they will have completed the consent process and they will be automatically re-directed to their normal financial aid screens so that they may access their awards, documents, messages, etc. This would also make them eligible to receive other forms of electronic communication about their financial aid
      - See below for a sample conditions page:



  - Once student agrees, they will be automatically re-directed into their normal aid view
  - **We should simply encourage as many students to complete this as possible each time it is live**
- <u>Associate Instructions/Tips for "Terms and Conditions/E-Consent" process</u>
  - Before we share any information with students or proxies about FA via cases, emails, or other electronic means (this does not include phones), **we must check to see if the student provided their E-Consent** by accepting the "Terms and Conditions/E-Consent" above
  - This is viewable in PowerFAIDS under "User Int"
    - Look for the "E-Consent" line item
    - If it is blank or shows "0" = They have not consented; do not share any information electronically
    - If it shows "1" = They have consented; you are welcome to share information electronically
    - **Important Notes**
      - Even though students are automatically re-directed into their normal aid view once they agree to these terms, it takes approximately 30 minutes for this to show on our PowerFAIDS view. More specifically, every hour on the ½ hour our system will refresh this information so we can see it (e.g., at 12:00, 12:30, 1:00, 1:30, etc.)
      - If you don't see the 1 listed in this area, you must wait for the system to refresh to confirm you see a 1 so you know you are cleared to share information electronically

- Here is a screenshot of what we see:



Title IV

- Students must authorize the University to apply any excess federal funds to outstanding University charges via CaneLink Student Center → Finances → View Student Permission
- If the student does not see an option to Grant Permissions, they probably already did so (Note: The student should read the top line)

Tuition Remission

- See Tuition Remission under Billing and Payment

Undergraduate FA Packaging Formula

- 2 "Constants"
  - IM EFC from 1st year of enrollment
  - Coral Grant (or International Student Grant) amount awarded in 1st year of enrollment
- What Does it Mean to Meet 100% of Need?
  - A student's need is met at 100% if IM Unmet Financial Need is ≤ $1,000 in the 1st year of enrollment
    - UM does not guarantee that 100% of need will be met in any year beyond the 1st year
  - Coral Grant (and International Student Grant) amounts are rounded down to the nears 100
  - Declining a portion of awarded need-based aid (e.g., FWS, Sub Loan, etc.) does not mean students can receive more Coral Grant or International Student Grant
    - They are limited to the amount awarded initially in the 1st year
  - All students should be prepared for a 2-4% increase in costs each year due to changes in tuition, fees, etc.
  - **Do not use the terminology of "unmet need" when talking to students**
    - Instead, use terminology like, "it looks like you could be eligible to regain some of the Coral Grant that was removed in your 2nd year but we're going to have a Specialist review" … or something like that

- Notes on COA/Budgets/EFC
    - **IM EFC =** Does Not Change Each Year, with Limited Exception
        - Always assume a minimum student contribution of $2,500 for IM EFC (Note: This is already part of the listed IM EFC you see in PowerFAIDS)
        - The IM EFC calculated in the 1st year is the same IM EFC used for the student until graduation
            - You will not see this roll over from the 1st year on, so you must always look back to the 1st year to get this figure
        - If you see IM EFC change over the years, it is for one of these reasons:
            1) **$2,500 =** Since this is the minimum amount always assumed as part of IM EFC, you may often see future years default to this figure; go back and use the IM EFC from the 1st year
            2) **R4R or COVID-19 Appeal Submitted** = This will then be used as the new, permanent IM EFC in packaging for the future; you should see a Comment that there was an R4R or COVID-19 appeal so you know when this happens and can use the IM EFC from that year moving forward
            3) **Other Amount** = This will happen when a student decides to submit a new CSS Profile on their own without going through a R4R or COVID-19 appeal. It the new CSS Profile comes with an EFC that is lower, the CSS Profile will be ignored so we would go back and use the IM EFC from the 1st year. If the new CSS Profile comes with an EFC that is greater, it could restrict need-based aid, even without an R4R or COVID-19 Appeal, which is why students should not be advised to complete this again unless they are submitting an appeal.
        - For students who entered prior to Fall 2020, this figure will be in CaneLink → Financial Aid → View Financial Aid Status → (Academic Year for 1st Year) → Need Summary
    - **FM EFC** = Changes Each Year
    - **COA** = Changes Each Year
        - This will most likely increase every year due to changes in tuition and fees
- Outside Scholarships Affect Need-based Aid
    - These are considered a “resource” used to pay for education so do go into the need-based aid category if the student has need
    - If there FM EFC < IM EFC (so FM Need > IM Need), these funds can "fill that gap" in need before removing other need-based aid
        - For example, if FM EFC is $3,000 and FM Need is $3,000 but IM EFC is $4,000 and IM Need is $2,000, there is a $1,000 difference in FM vs. IM Need … Outside Scholarships can fill this $1,000 gap without impacting other need-based aid
        - Check out the example below as the student could receive up to $9,276 in outside scholarships before any adjustment is made to her aid package:

	FM	EFM	IM
Total Budget:	75,176	75,176	75,176
Family Contribution:	23,200	400	32,464
Original Need:	51,976	74,776	42,712
Unmet Financial Need:	9,276	32,076	12
Need-Based Aid:	42,700		42,700

    - Students can decline FWS and/or Sub Loan to create room for these scholarships

- If both bullets above are not possible, Coral Grant (or International Student Grant) will be reduced
- FA Year and 1 Semester of Awards
  - Sometimes students who are awarded for 1 semester in a FA year have their funds rolled over the new year at the same rate, not accounting for the "doubling" of awards or IM EFC
  - If this happens in the 1st year when the IM EFC and the Coral Grant (or International Student Grant) maximums are set, these figures may be doubled to yield the IM EFC and the Coral Grant (or International Student Grant) maximum amount for Fall/Spring
    - It is not guaranteed that the need-based grant double but that is an estimate; escalate to a FA Specialist for official review
- How Changes in FM EFC Affect Students from 2nd Year and On
  - Common changes in FM EFC each year results from several issues, including:
    - Change in income
    - Change in number of persons living in the household
    - Change in number of household members in college
  - **FM EFC ≤ IM EFC →** Use IM EFC to calculate Need and student can only get up to maximum Coral Grant (or International Student Grant)
  - **FM EFC > IM EFC →** Use FM EFC to calculate Need and student may not be eligible to receive the entire maximum Coral Grant (or International Student Grant)
  - Students who successfully completed an R4R or COVID-19 Appeal may be awarded the Enhancement Grant, UM Citizens Board COVID19 grant, or 2020AppealGrant (i.e., COVID19 grant)
    - After the year in the successful appeal, those funds should have lumped together with Coral Grant to just show the full amount as Coral Grant in the future
    - Note: The UM Citizens Board COVID19 grant was available in 2020-2021 for appeals only
- Other Aid Options Once Fully-Packaged
  - **COA Adjustment**
    - Examples:
      - Moving from on- to off-campus
      - Living in Lakeside Village (if not considered in Budget already)
      - Include Health Insurance
    - Note: These will not result in an increase in institutional aid but students may request more federal or private loans to cover an increase in educational expenses
  - **Unsub Loans**
  - **Decline FWS and replace with Sub Loans**
  - **Parent PLUS Loans**
  - **Private Loans**
  - **Outside Scholarships**
  - **R4R**
    - Can submit if (a) at max award limits, (b) accepted self-help aid, and (c) experienced a significant loss of income between the prior-prior year to the prior year
    - Should never be submitted just because someone "wants more money"
    - At very least, student must accept their Sub Loans (if not the FWS too) to be considered for an R4R
      - Can move forward to a needs analysis without seeing this Accepted but you must make it clear the expectation during the review will be they need to accept this aid
  - **Others?**

- <u>Funds are Packaged in the Following Order</u>
  - Note: There may be other funds out there that are not accounted for below

Types of Aid		Award	Notes
Non-need-based Aid		Unsub Loan	Added automatically up to the limit after all need-based aid is applied in EFC > 0
Need-based Aid	Included as need-based aid only if received	Enhancement Grant	Added only after successful R4R; essentially like Coral Grant and lumped into it for the next year
		UM Citizens Board COVID-19	Added only after successful COVID-19 Appeal; essentially like Coral Grant and lumped into it for the next year
		Outside Scholarships	May reduce other forms of need-based aid
		Canes Distinction Award	This is awarded by the 'Cane Success Center to student leaders as a retention effort and used to fill the need gap in later years as tuition, fees, etc. go up; will roll once awarded
		Coral Grant (or International Student Grant)	Added up to maximum amount from 1st year or new FM need, whichever is first
		Endowed (Donor) Scholarships	Combined amount of any Endowed (Donor) Scholarship and Coral/International Grant will meet maximum amount from 1st year or new FM need, whichever is first
	Self-help Aid	Sub Loan	Must accept these awards (at least Sub Loan) before will be considered for R4R
		Federal Work Study	
		FSAG	
		SEOG	
Entitlement Aid		Benacquisto	
		National Merit	
		Bright Futures	
		EASE	Tuition and fees only
		UM Merit Scholarships (President's Scholarship, Canes Achievement Award, Stamps, Singer, Hammond, Weeks, Jenkins, etc.)	Tuition only
		Tuition Remission	
		Pell Grant	

- <u>Packaging Formula (CC Perspective)</u>
  - Use the information above and follow the steps below to walk students through why their aid package looks like it does, and to see what "Other Aid Options Once Fully-Packaged" (see above) they have available to them:
    1) What was the student's 1st year at UM?
    2) What was the student's IM EFC in that 1st year?
       - This is now the constant IM EFC unless there is an R4R or COVID-19 Appeal
    3) What was the student's total amount of Coral Grant (or Institutional Student Grant) awarded in that 1st year?
       - This is now the constant maximum amount of Coral Grant (or International Student Grant) unless there is an R4R or COVID-19 Appeal
       - If a student is awarded an Endowed (Donor) Scholarship, the combination of the Endowed Scholarship and Coral Grant (or International Student Grant) will equal the maximum amount from 1st year or the new FM need, whichever is first

4) Was there an R4R or COVID-19 Appeal? If so, what was the resulting IM EFC and Coral Grant (or International Student Grant) amount?
    - These figures will be the new constants instead of the 1st year
    - Remember: Coral Grant, Enhancement Grant, and UM Citizens Board COVID19 grant will be combined for a new, combined total maximum "Coral Grant" eligibility for future semesters
5) What is the student's new FM EFC?
6) What calculation do you use for the year for Need (i.e., FM or IM)?
    - **FM EFC ≤ IM EFC** → Use IM EFC to calculate Need
    - **FM EFC > IM EFC** → Use FM EFC to calculate Need
7) Using the identified Need, show the student how the package was built using the graphic above, explain each fund type and why the amount was added, and talk through "Other Aid Options Once Fully-Packaged" (see above)

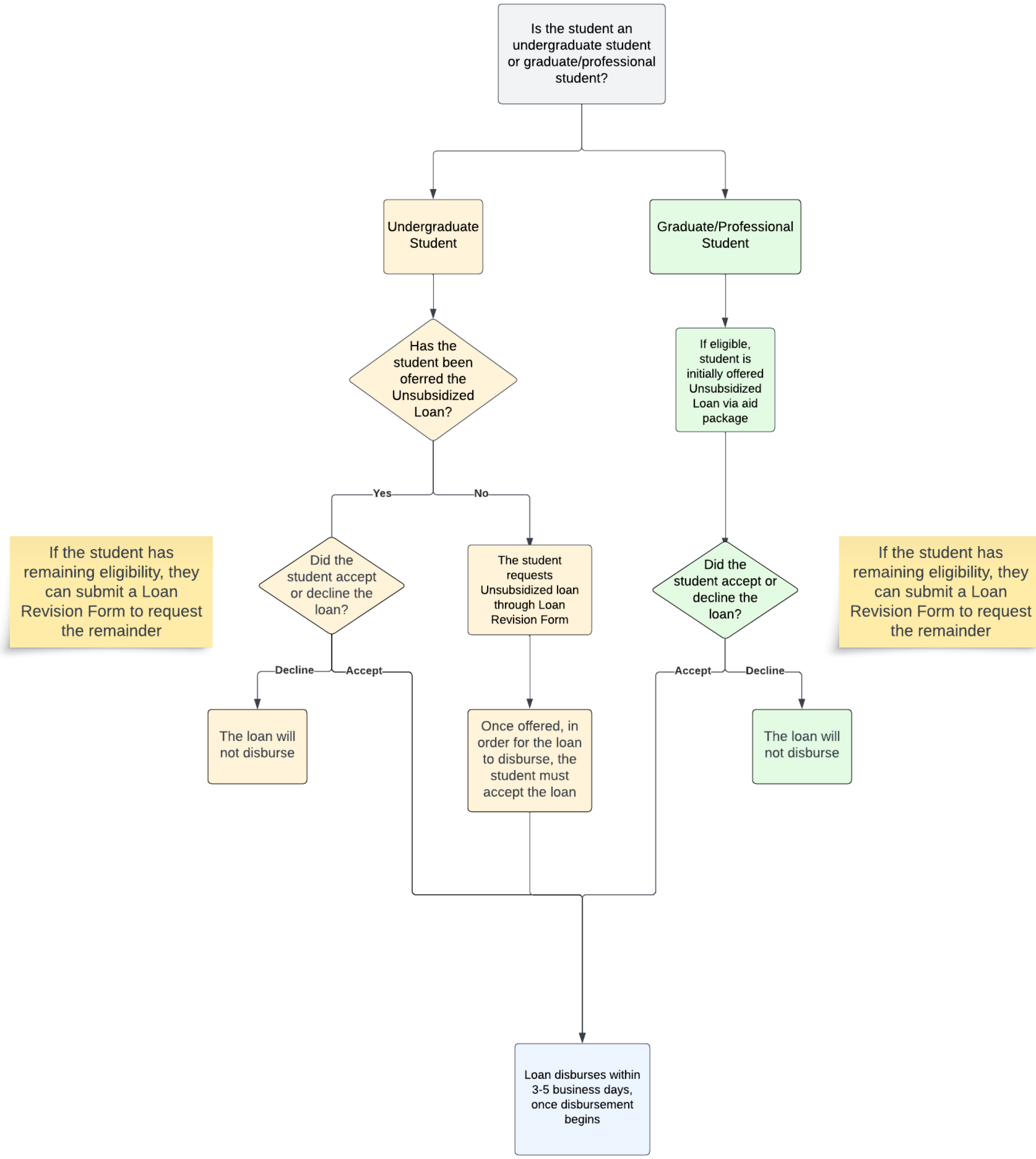
- **Important =** When you do this, explain each thing you look at, write it out, share screens, etc. so they know what you are doing to thoroughly-review their information and provide them with accurate, tailored, and correct information

Undergraduate-to-Graduate/Law Aid Changes

- See Special Programs

Unsubsidized Loan

- See Federal Loan Types



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Registration and Records

Academic Bankruptcy

- Students entering college sometimes perform at an unacceptable academic level. They either drop out or are dismissed. Some individuals this experience re-evaluate their educational goals and desire to return to college
- Undergraduate students in this category who want the opportunity for a fresh start at the University may apply for admission or readmission with the request that their prior academic record be disregarded
    - Student must have been enrolled at UM and then out for at least 6 months
- If granted, only UM courses will be bankrupted; all non-UM courses would remain as is
- Students who take courses during the 6 months or more they are out of the University can be considered to have those courses count at UM if bankruptcy is granted
- Transfer students would qualify as being admissible after high school
- Academic Bankruptcy information can be found in each years Academic Bulletin
    - General University Information → Undergraduate Policies and Procedures → Student Status → Academic Bankruptcy
- Process
    - Escalation to Reg to apply for it … SHOULD BE EXTREMELY RARE!
    - Once approved, Registrar will send them to CC if they have questions about their aid eligibility
- Aid Eligibility if Granted
    - These questions should be handled by Associates
    - Most students apply for this because they did not do well in prior courses, meaning most will have some sort of SAP issue; other issues could include aggregate federal loan limits, the 150% percent rule, etc.
    - Here is how to approach these discussions:
        1. If the student had an SAP issue, recommend the student submit a SAP appeal for bankruptcy and mention the reasons why they sought this designation
        2. Mention how they will be subject to aggregate loan limits, the 150% rule, and other federal guidelines when they are reviewed for packaging
        3. Talk about worst case scenario other options for funding (e.g., outside scholarships, private loans, MPP, Parent PLUS, etc.)
        4. Mention the Packaging SLA timeframe and when they should expect their new package, and encourage them to submit documents and act if requested
        5. There may not be much more specifics at that point
            - If they have deeper questions about if they reached their aggregate limit, etc., Associates can escalate to an FA Specialist for review
            - Try to resolve with general discussion above first

Academic Bulletin Acknowledgement

- Starting in Fall 2025, students will need to accept an Academic Bulletin Acknowledgment on CaneLink
    - Once completed, agreement will be visible on Boomi, under Registrar forms and labeled "Academic Bulletin Acknowledgement"
    - An example of the agreement can be found here: https://miami.app.box.com/file/1842960200847

Academic Change Form

- These forms are used by UGRD students to change colleges/schools, majors, minors, and cognates
- The forms need to be processed by different areas as follows:
  - **College/School Changes =** Submitted to 'Canes Central for processing; escalate to Specialist
  - **Major Changes (within College/School) =** Processed through the student's college/school
  - **Major Additions of 2nd+ Majors (no change to 1st Major) =** Processed through the student's 1st Major college/school
  - **Minor Changes =** Processed through the student's college/school
  - **Cognate Changes =** Processed through the student's college/school
- Sometimes representatives from colleges/schools may not know how to process these changes
  - They should be able to do so in CaneLink through Student Program Plan
  - If they don't have access or know how to do this, you can escalate the case to the Specialist but ask the Specialist specifically to show the administrator how to process in the future

Admission Record Request

- If a student contacts 'CC requesting to review their original admissions records, do not send them to the Office of Undergraduate Admission
  - Instruct the student to email Allen Augustin at aaugustin@miami.edu to request an appointment for the admissions records review
  - An appointment needs to be made to request this review
  - **Note:** According to the University of Miami's Policy, copies of high school transcripts or any other documents in the admissions file are **not able** to be distributed to student, however they are permitted to view the record/documents during an appointment with Allen
  - **Note: Do not refer students to Allen if they are requesting any financial records (scholarship letter, financial aid offer letter, or term statement).**

Advising Hold

- We can no longer override holds (e.g., Advising Holds) when adding, dropping, or registering students
- All holds that impact registration must be lifted by the appropriate entity in order to add, drop, or register a student

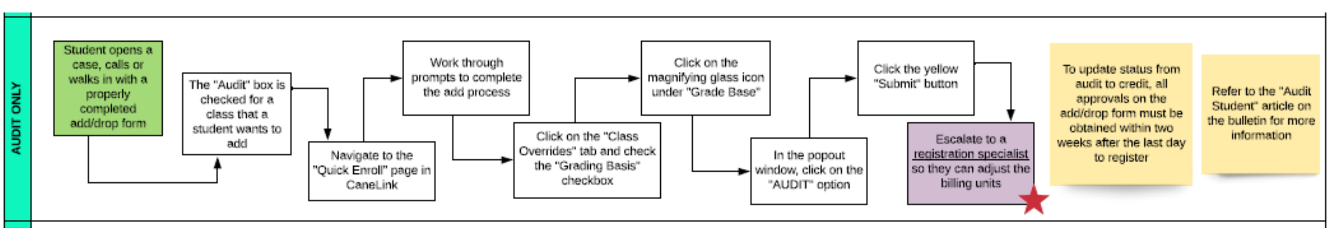
Application for Graduation

- Certificate Students
  - These students cannot apply for graduation; only regular degree students can
    - This is because these students cannot walk in Commencement
    - Example: Post-Master's Certificate for Psychiatric Mental Health Nurse Practitioner cannot apply
    - **Do not escalate these situations**
  - Their college/school will complete their requirements manually once grades are released so it shows as completed in CaneLink
- Applied for Wrong Semester / Need to Remove / No Longer Want to Walk in Commencement
  - If the student applied for graduation for the wrong semester and it either (a) needs to be changed (e.g., from Spring to Summer) or (b) needs to be removed, get the confirmation from the advisor and escalate to the Registrar Specialist for processing
- Change to Mark as Will Attend Commencement Ceremony
  - If the student successfully applied for graduation but marked, they will not attend the Commencement ceremony and would now like to attend the ceremony, escalate to the Registrar Specialist for processing

- **Do not send this to Commencement**
- Commencement pulls data on who will attend the ceremony from CaneLink, and this must be entered through

- Late Applications
  - If the deadline passes but someone still needs to apply for graduation, e-mail the student and cc the advisor, ask the advisor to confirm the student will be eligible to graduate, ask the advisor/student to provide you with the information contained within the knowledge article on "How do I submit a late application for graduation?," and, once received, escalate to the case to a Registrar Specialist to process
    - **Note** = This information must be confirmed by the advisor
    - Inform the student you cannot guarantee the student's information will be able to be included in the commencement booklet if it is past the application deadline
- Unable to Apply
  - If a student is unable to apply online because the student was not marked as eligible in the initial batch communicated to by the Registrar/Commencement, e-mail the student and cc the advisor, ask the advisor to confirm the student will be eligible to graduate, ask the advisor/student to provide you with the information contained within the knowledge article on "What do I do if I am unable to apply for graduation online but I am slated to graduate this semester?," and, once received, escalate to the case to a Registrar Specialist to process
    - **Note** = This information must be confirmed by the advisor
    - Inform the student you cannot guarantee the student's information will be able to be included in the commencement booklet if it is past the application deadline
- Handshake Emails to Commencement Office
  - If you need to handshake a student to the Commencement Office, please handshake them to commencement@miami.edu and include specifics on the student explicitly in the email (e.g., name, C#, grad term, and issue)
- [Click here to learn how aid is impacted]()

[Audit]()

- 

- If a student is only enrolled in 1 course and it is being taken as an audit course, the student will be charged the equivalent of 1 credit hour
- Students can audit a maximum of 1 course per semester and no more than 3 courses total
- There are no refunds for Audited courses
- For more information about Audited courses and policies, visit https://credit.dcie.miami.edu/non-degree-seeking/resources/auditing/index.html

[Authorized Signature Form]()

- All approved signatures are posted on Box under the "Registrar & Canes Central Shared Folder" --> "Updated authorized signatures" subfolder
- If you notice a Dean needs to update or add signature permissions, follow these steps:
  1. Email the Dean the "Registrar Authorized Signature Form" and ask the Dean to fill it out and email it back

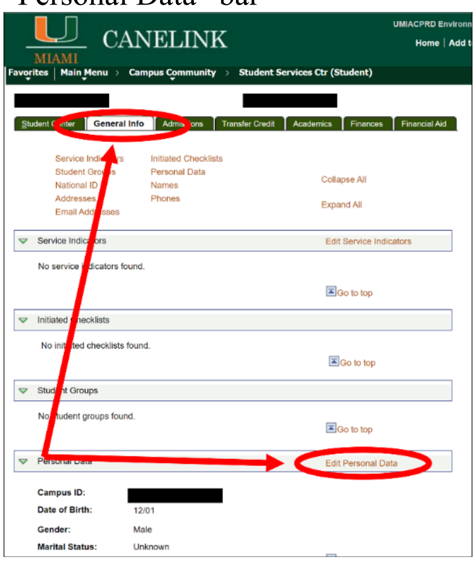
        - This is available in CC Team --> Forms
    2. Once you have this document, escalate it to the Registrar and ask them to add to the authorized signature folder
        - Tag Ceidy on the chatter post so she is aware
    3. If the reason why this update came to light was because you needed to retro-add, retro-drop, etc., hold onto a parent case to perform this action once the Registrar adds the newly authorized signature to their records (via a child case)
        - This way you can manage the experience and communicate completion as normal through our retro, etc. processes
    - See Drop/Add section to learn when a Dean's signature is required on a Drop/Add Form

Bio-Demo Changes

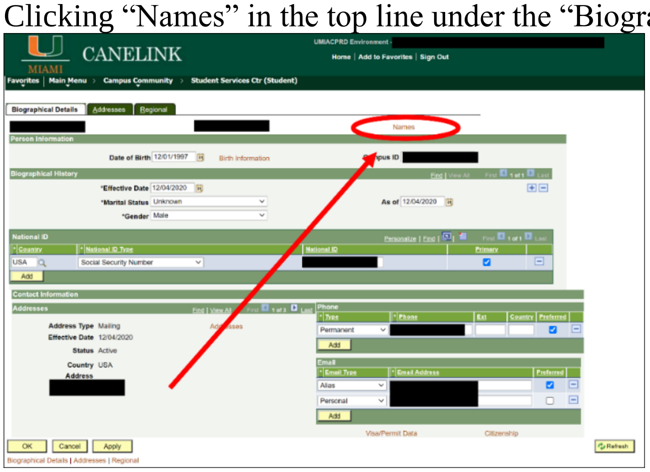
- Students complete Boomi form on Registrar forms page with appropriate documentation, Registrar Specialist team will process
- Name Changes
    - Law Students
        - Name changes for law students go through the Law School Registrar
    - Diploma Name
        - No legal documentation is needed to make the diploma-approved changes
        - Diploma-approved changes include:
            - Addition/edit of diacritical marks
            - Truncating of legal middle name listed on record (Note: you cannot add a middle name or initial, only truncate what is there legally)
            - Removing a middle name
            - Addition/edit of capitalization within the name
        - Diploma name modifications will NOT change the name on the student's official record. The official (legal) name on record will appear on all academic documents including transcripts. The name on a student's transcript MUST be the official name on their record. Thus, if they modify their diploma name, the name on their transcripts will not match the name on their diploma

        - Recommended Deadline
            - We recommend for students to complete Diploma name changes by the time grades are released because degree conferral will happen soon after
            - Any changes after this date cannot be guaranteed to appear on the Diploma
    - Legal Name
        - Legal name can be edited with a birth certificate, but only to add the middle name or correct an error in spelling
            - This cannot be used to go back to a maiden name, etc.
            - Driver's license or State-issued ID cannot be used to correct names
    - Graduated Students/Alumni
        - If a former student needs a name change but no longer has access to CaneLink, they will not be able to access the Boomi form
            - Please use the PDF version of the Bio-Demo Form (https://miami.app.box.com/file/1691204792987) to make the change on CaneLink
            - Student will submit completed form and appropriate documentation; Associate will process and upload documentation to Salesforce case and OnBase

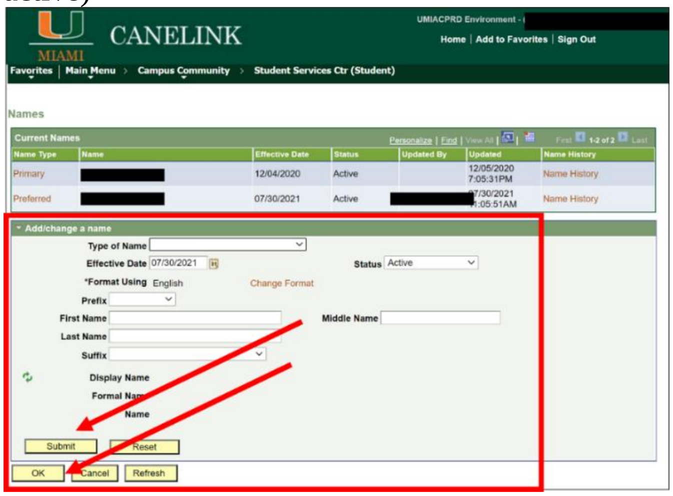
- <u>Preferred Name</u>
  - Preferred name can be edited by the student via CaneLink
    - Undergraduate students can enter this when they apply via Slate, and it is rolling into CaneLink
    - **Only first and middle name can be edited for Preferred Name, not last name**
  - After updating a Legal or Married name, Associate must update preferred name to match
    - Student can then alter their preferred name if they choose to
    - Associate may have to wait 1 day after updating a legal name to update the preferred name in CaneLink
  - Students can update their Preferred Name in CaneLink → My Profile → Biographical Information → Preferred Name
    - They click on the edit icon next to Preferred Name and edit accordingly
  - Learn more on the Preferred Name website or knowledge article about when/where the Preferred Name vs. the Legal name will appear (e.g., 'Cane Card) or will not appear (e.g., transcript)
  - If students do not see the Preferred Name option, we can make it visible by doing the following:
    - Logging into the student's CaneLink Student Center
    - Clicking the "General Info" tab and clicking "Edit Personal Data" on the "Personal Data" bar



    - Clicking "Names" in the top line under the "Biographical Details" tab



- Following the steps to add the Preferred Name (Note: Only add the legal name as the preferred name as well, and then let the student edit online once you make this active)



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  - Student will see Preferred Name appear instead of Legal Name for certain areas. For more information, please see https://registrar.miami.edu/general-information/policies/preferred-name/index.html

Cancellation and Reinstatement

- UGRD students will be cancelled if they do not pay by the posted deadline
- GRAD/LAW students are not cancelled at this time
- Must pay in full and pay a $150 fee to be reinstated
- Click here to learn more

CaneLink Schedule Confirmation

- We can view the date and time student's confirmed their schedule in CaneLink via the following path:
  - 

- If you do not see a term listed, it's because either (a) the student was not enrolled or (b) the student did not confirm the schedule

Change of Grade Process

- See "What is the process for a faculty member to submit a Change of Grade Form?" knowledge article

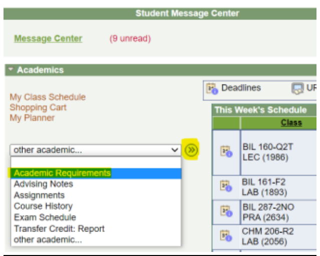
Class/Year in School

- **Note:** This only applies to UGRD students
- A student's "class" is determined based on the number of credits the student has completed
  - This does not include classes that are still in progress
- Class may be different from the student's "year in school" as it could be the student's 2nd year but the student is a junior by credits

- <u>Class Breakdown</u>

Academic Year	**Credit Threshold** (Remember: This is credits completed, which does not include credits in progress)
Freshman	0-29
Sophomore	30-59
Junior	60-89
Senior	90+

- <u>Missing Credits</u>
  - There are times when AP credits do not appear in a student's total credit count.
  - This can be important when it comes to establishing priority for housing.
  - We should look at a student's Degree Progress Report (DPR) which can be found in CaneLink.
  - Start at the Student Services Center Page and find the Academic Requirements tab and click the arrows to the right.



  - The PDF version will provide a course history summary towards the bottom of the page where you can check on whether all credits have been applied.

<u>Course History</u>

Term	Subject	Catalog Nbr	Title	Grade	Units	Type
SP 2021	UMX	100	UM EXPERIENCE	A	0.00	EN
SP 2021	CHM	113	CHM LABORATORY I	A	1.00	EN
SP 2021	CHM	121	PRIN. OF CHEM.	A-	4.00	EN
SP 2021	ENG	105	ENG COMPOSITION I	A+	3.00	EN
SP 2021	FYD	101	FIRST YEAR DIRECTIONS	A+	1.00	EN
SP 2021	MTH	161	CALCULUS I	A	4.00	EN
SP 2021	PSY	110	INTR TO PSYCHOLO	A	3.00	EN
FA 2021	BIL	150	GENERAL BIOLOGY	A	4.00	EN
FA 2021	BIL	151	GEN BIOLOGY LAB	A	1.00	EN
FA 2021	BIL	286	CLINICAL MEDICINE I	S	3.00	EN
FA 2021	CHM	205	CHM DYNAMICS LAB	A	1.00	EN
FA 2021	CHM	221	INTRO STRUCT DYNAMICS	A	4.00	EN
FA 2021	MTH	162	CALCULUS II	I	4.00	IP
SP 2022	BIL	160	EVOL & BIODIVRSITY		4.00	IP
SP 2022	BIL	161	EVOL BIODIVR LAB		1.00	IP
SP 2022	BIL	287	CLINICAL MEDICINE II		3.00	IP
SP 2022	CHM	206	ORGO RXN SYNTH LAB		2.00	IP
SP 2022	CHM	222	ORGO RXN SYNTH		4.00	IP
SP 2022	PSY	190	FORUM		1.00	IP
SP 2022	PSY	230	CHILD & ADOLESCENT DEVEL		3.00	IP

  - If there are credits that appear on the DPR but do not appear to be included in the total number of credits in CaneLink, contact EM Ops using the alpha designation in the QRG

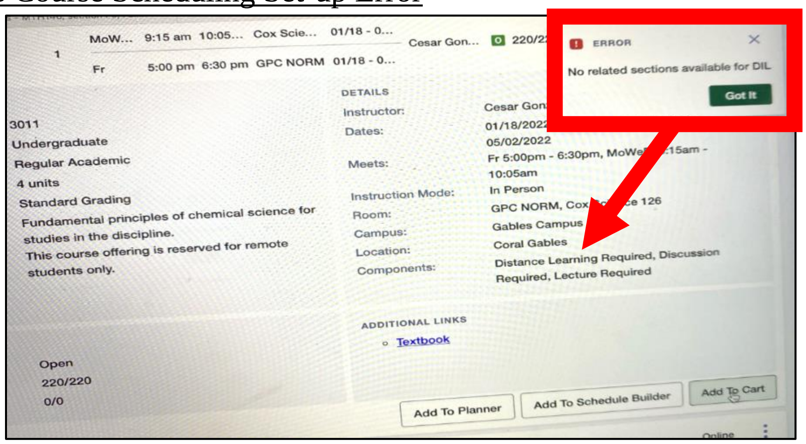
Consortium Agreements

- These are very limited
- Click here for information

Consumer Information for Students (Higher Education Opportunity Act of 2008)

- Organized into eight (8) areas: General Institution Information; Availability of Institutional and Financial Aid Information; Privacy of Student Records—Family Educational Rights and Privacy Act (FERPA); Student Activities and Services; Career and Job Placement Services; Campus Security Policies, Crime Statistics and Crime Log; Intercollegiate Athletic Program; and the Net Price calculator
- Available at www.ua.miami.edu

Course and Curriculum/Scheduling Issues

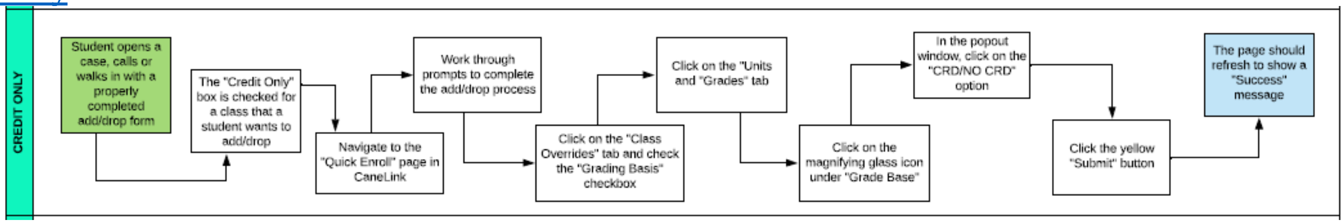
- Students may encounter issues when adding courses and/or adding courses to their Shopping Carts
- Not all issues are true issues as they could be a result of (a) browser/cache issues, (b) user error because clicking Add instead of Add to Cart, etc.
- If the student is clicking the correct buttons and has experienced the same error on multiple browsers, ask the student to do the following:
    1) Make sure they have the specified prerequisites to enroll in the course
        - If not, that's the issue! No need to do anything else except consult their advisor.
    2) Have the student submit a case for further exploration and ask the student to attach a screenshot of the error
        - **Associate =**
            - Check out the error
            - Consult with Leadership if needed
            - If it is an issue with the course scheduling set-up, email the screenshot to scheduling.rg@miami.edu and ask them to take a look to see if they can help resolve
            - Circle back to student and seek to close out the case once resolved
- Sample Course Scheduling Set-up Error
    - 

Course Descriptions

- Every course currently offered by the University is listed in the Academic Bulletin organized by Class, which is typically 3 letters and 3 numbers (ex. BIL 101)
- If a student or alumni contacts us requesting a course description for a course taken at UM, direct them to the Academic Bulletin. If they are looking for a course from a prior year, on that page (on the bottom left) they can find Previous Bulletin Archives.
- The Registrar's office can provide Course descriptions. The Course Description Request form can be found here https://registrar.miami.edu/forms-and-services/forms/index.html. Please note there may be fees involved for this service.
    - There is no fee for a request of less than 12 credits or 4 courses
    - A full semester (or more than 4 courses) is $25
    - Notarization of Course Descriptions is also available for a fee of $25
- If the course description supplied in the Academic Bulletin is not sufficient, a specific course syllabus can be requested by contacting the professor for that course. If that option is not available, the college or school may have retained prior syllabi and you should encourage the student or alumni to check with the appropriate department of that college or school.
    - See Syllabi

Knowledge Transfer Summary (KTS)

Credit Only



- Must earn a C or higher to get CR (i.e., credit)
- <u>Eligibility</u>
  - Students can take a maximum of 1 course per semester as credit only, and no more than 9 credits total of credit only courses
  - The courses must be electives and cannot count toward other requirements
  - Must be a sophomore or above and completed at least 1 semester of residency at UM
  - Must have a 3.0 GPA
  - See other criteria in the Academic Bulletin → General University Information → University Policies → Course Information → Eligibility

Degree Conferral

- UGRD = takes approximately 3 weeks from the date grades are released
- GRAD = takes approximately 6 weeks from the date grades are released
- LAW = takes approximately 6 weeks from the date grades are released
- If degree not conferred, student should be connected with Academic Advisor (UGRD) or Program Director (GRAD/LAW); ask on the student's behalf
- The University has three degree conferral dates
  - Spring graduates (May)
  - Summer graduates (August)
  - Fall graduates (December)
- While the actual day varies from year to year, the three conferral dates are the only ones used and are not custom
- The date seen on CaneLink in Program area on Academics tab of Student Center is the date that the steps in CaneLink were taken to clear a student for graduation and the date that the Registrar awarded the degree in CaneLink
  - This is a procedural date, not a confer date
- The date that shows on a student's transcript will be the confer date, not the procedural date

Degree Verification

- Students must complete the Enrollment Certification Boomi form to request this
  - They should list any specifics they need (e.g., degree conferral date, etc.) in the notes
  - **Do not refer students to the National Student Clearinghouse**
- Employers, credit evaluators, etc. must use the National Student Clearinghouse
  - See the CC Website → Registration and Records → Degree Verification for details
  - If the employer is unable to obtain verification through the Clearinghouse, the employer will need to create a case with us and provide the Transaction ID they received from the Clearinghouse (Note: If the Transaction ID is not included, the Registrar will not verify)
    - An Associate will escalate to a Specialist

- Include any important information from the employer (e.g., when they contacted NSC, what they got from them, Transaction ID #s, the student they are contacting us about, etc.)
- The Transaction ID must be included
- If the employer is not a Contact in Salesforce, create the contact record

Diplomas

- Takes approximately 3-4 weeks from the date the degree is conferred
- Basics
  - Anyone can look up on the diploma website the degree conferral and order status
    - Diploma website: https://www.michaelsutter.com/miami
    - Diploma website for LAW Students: https://www.michaelsutter.com/miamilaw
  - When the diploma is being processed, it won't turn up in the search until it is officially ordered in the next week's diploma order (Note: these are ordered once per week, on Tuesdays)
  - When a student's degree is conferred, their diploma will be ordered automatically
  - Students will receive an e-mail when their diploma is issued, and they will be given the option to order an eDiploma at that time
  - Diploma name change process can be found in the Bio-Demo Changes section
- Mailing Address
  - The Diploma Address is the one where the diploma will be mailed and can be changed in CaneLink or by the CC Team
  - If no Diploma Address is in the system, it will default to the Permanent Address
  - Diplomas are ordered every Tuesday so this should be done ASAP when they apply for graduation
  - They can check the diploma website to see the status of their diploma and see if they can still change the address if it is not in process
- Dual Degrees vs. Double Major
  - Students who are pursuing double majors will receive 1 diploma
  - Students who are pursuing dual degrees will receive 2 diplomas
- Majors, Minors, and Cognates
  - Only the degree shows on the diploma
  - Majors, minors, cognates, etc. do not show
- Latin Honors
  - This will show on the bottom center of the diploma, under the University seal
- Departmental Honors
  - As of Spring 2022, this will no longer show on the diploma
    - Prior graduates are not able to ask for an updated diploma format
  - Previously, this would show on the bottom right of the diploma, under the Dean's signature

- Graduate Diploma Sample

    - 

- Undergraduate Diploma Sample
    - 

- 1st (FREE) Diploma
    - If the initial diploma arrives damaged, an Associate can escalate a case up to the Registrar Specialist to have this replaced
- eDiploma
    - Students can order their eDiploma after the hard-copy Diploma order is placed and showing on the Michael Sutter site
    - Students will receive an e-mail when their diploma is issued, and they will be given the option to order an eDiploma at that time
- Replacement Diploma / eDiploma Orders
    - Students can order additional diplomas or electronic diplomas via our website under Diplomas
        - This is the only way they can do this
        - **Do not give out Michael Sutter's phone number**
        - This process is important because those orders filter 1st through the Registrar home office for review, approval, and release, and only then does Michael Sutter proceed with the printing and mailing

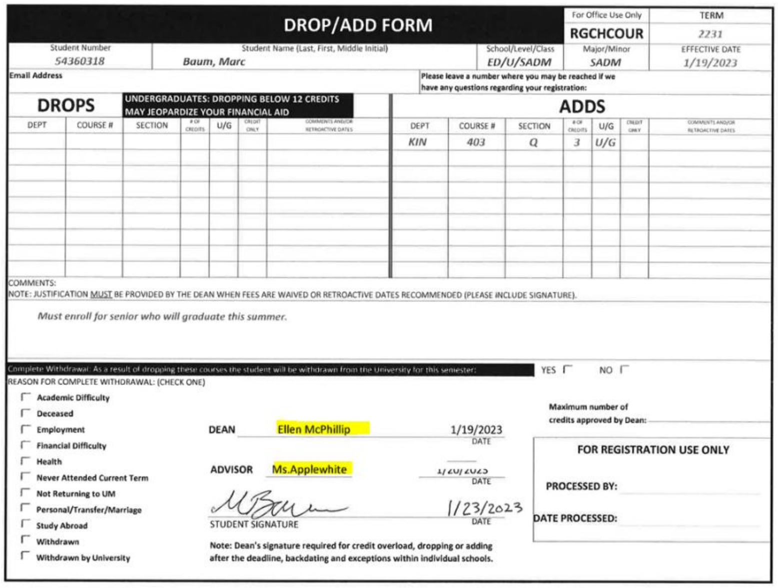
    - If someone refuses to order online, a case will need to be escalated to the Registrar
        - Note: This should be very rare

Dismissals

- These do not go through a Success Advocate at the Center for Academic Navigation and Success
- Schools or colleges work directly with the Registrar's office but if it somehow makes it way to us through a case we can escalate to the Registrar
- We do not need signatures on Drop/Add Forms from students who are dismissed (just advisor signature)

Drop/Add

- Students should be encouraged to add/drop online if they are able, and to consult with their advisor if they have any questions about course selection
- We need a student's and advisor's signature on a Drop/Add Form to process any drop/adds. E-mails will no longer be accepted as of the Spring 2022 semester, specifically January 3, 2022
    - A Dean's signature trumps all signatures
    - The most we can do without a Drop/Add Form is explain their options, talk about why they may have experienced a registration issue (e.g., prerequisite, corequisite, permission required, hold on account, etc.) but then we would need to handshake to advisors if they need advising assistance
- **All required overrides must be checked off on the form for us to process the Drop/Add (e.g. class permission, time conflict, prerequisite, corequisite)**
- Dean's Signature
    - For certain types of adds/drops and/or overrides, we must verify the Dean's signature using the signature forms located in the Box → Registrar & Canes Central Shared Folder. See Authorized Signature Form section for more information. We need Dean's signature for the following
        - Retro-adds/drops
        - Credit overloads (and increasing max credits)
            - See Max Enrollment Credits (Max Total Units)
- Honor On-time Requests After Deadline?
    - We can honor some requests to drop/add after the deadline without the need for a retro-add/drop
        - **Honor =** There is a case submitted to us by 11:59 p.m. on the deadline **AND** there is a signed Drop/Add Form by the student and the advisor (or proper advisor approval email in the case)
        - **Do Not Honor =** There is a case submitted to us by 11:59 p.m. on the deadline **BUT THE STUDENT HAS A HOLD THAT PREVENTS REGISTRATION**
        - **Do Not Honor =** There is a case submitted to us by 11:59 p.m. on the deadline **BUT THERE IS NO** signed Drop/Add Form by the student and the advisor (or proper advisor approval email in the case)
            - This would need to be treated like a Retro-Drop/Add
        - **Do Not Honor =** There is an email to the advisor by 11:59 p.m. on the deadline **BUT THERE IS NO** request made to us by that same deadline
            - This would need to be treated like a Retro-Drop/Add
        - **Do Not Honor =** All other retro-add/drop requests (see the Retro-Drop/Add section for details)
            - This would need to be treated like a Retro-Drop/Add
        - **Honor =** Under some very rare circumstances if there is evidence of system malfunction when a student attempts to drop/add by 11:59 p.m. on the deadline

        - The Associate would need proof and, if proof is obtained, would need to be escalated to a Specialist
- <u>Legit Signatures on Drop/add Forms</u>
    - This is not a legit digital signature and should not be processed or escalated:
        - 

DROP/ADD FORM

For Office Use Only	TERM
RGCHCOUR	2231

Student Number	Student Name (Last, First, Middle Initial)	School/Level/Class	Major/Minor	EFFECTIVE DATE
54360318	Baum, Marc	ED/U/SADM	SADM	1/19/2023

Email Address

Please leave a number where you may be reached if we have any questions regarding your registration:

DROPS — UNDERGRADUATES: DROPPING BELOW 12 CREDITS MAY JEOPARDIZE YOUR FINANCIAL AID

DEPT	COURSE #	SECTION	# OF CREDITS	U/G	CREDIT ONLY	COMMENTS AND/OR RETROACTIVE DATES

ADDS

DEPT	COURSE #	SECTION	# OF CREDITS	U/G	CREDIT ONLY	COMMENTS AND/OR RETROACTIVE DATES
KIN	403	Q	3	U/G		

COMMENTS:
NOTE: JUSTIFICATION MUST BE PROVIDED BY THE DEAN WHEN FEES ARE WAIVED OR RETROACTIVE DATES RECOMMENDED (PLEASE INCLUDE SIGNATURE).

Must enroll for senior who will graduate this summer.

Complete Withdrawal: As a result of dropping these courses the student will be withdrawn from the University for this semester: YES ☐ NO ☐

REASON FOR COMPLETE WITHDRAWAL: (CHECK ONE)

☐ Academic Difficulty
☐ Deceased
☐ Employment
☐ Financial Difficulty
☐ Health
☐ Never Attended Current Term
☐ Not Returning to UM
☐ Personal/Transfer/Marriage
☐ Study Abroad
☐ Withdrawn
☐ Withdrawn by University

DEAN Ellen McPhillip 1/19/2023 DATE

ADVISOR Ms.Applewhite 1/20/2023 DATE

MBaum 1/23/2023
STUDENT SIGNATURE DATE

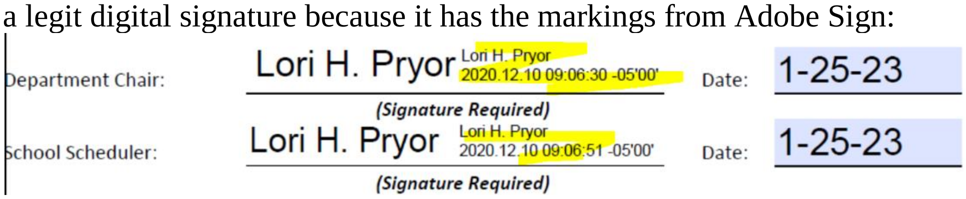
Note: Dean's signature required for credit overload, dropping or adding after the deadline, backdating and exceptions within individual schools.

Maximum number of credits approved by Dean:

FOR REGISTRATION USE ONLY

PROCESSED BY:

DATE PROCESSED:

    - This is a legit digital signature because it has the markings from Adobe Sign:
        - 

    - This is required for any forms needing to be processed by the Registrar (Inactive status, repeatable course, etc.)
- <u>New UGRD Registration Dead Period</u>
    - There is a dead period during new UGRD registration for their 1st semester so you can override the No Valid Appointment Error with a Drop/Add Form
- <u>Max Enrollment Credits</u>
    - **Always do this in 2 situations:**
        1) In cases when a student enrolls in an intersession course where you increase the max by the number of credits of the intersession course
        2) In cases when you receive a Drop/Add Form or Course Request Form and the advisor clearly puts a max credit load on the form that would increase this max number (see the bottom right of the form)
    - See "How do I view and make changes to a students Max Enrollment Credits (Unit Load)?" knowledge article for details
- <u>College of Arts and Sciences (CAS) Late Start Program</u>
    - This is a program where students who would normally drop a course, but it would put them below full-time status, are able to pick up another course halfway through the term
    - These courses are shorter in length
    - Normally, these drop/add requests go from Emily Long to Marilin Cabassi in the Registrar
    - If we see this, confirm with the advisor/Dean the course is for the CAS Late Start Program and, if so, escalate to the Registrar and chatter to Marilin so she knows to pick it up
- <u>Career Stacks (e.g., MED stack)</u>

- When students take courses in another "stack" or career (e.g., UGRD taking GRAD course, GRAD taking LAW course, etc.), then we have to register the student for the course in their active stack
  - The Registrar processing team will run the inter-career process at the end of each term to place the course into the proper stack
  - This is done without affecting tuition, etc. at that time; any impact should have already been felt at the beginning
- <u>MED Stack</u>
  - **Never add or drop MDR courses** as those are MD courses
    - Students must speak with the MD Registrar contacts for these issues (see QRG)
  - We received permission to access the MED stack so we can register MD students enrolled in dual degree programs (e.g., MD/MPH) into their GRAD courses only
  - If you get a Drop/Add Form for a dual program MD student who needs to register for the GRAD courses, add the GRAD courses to the MED Stack (not the GRAD stack) if they are enrolled in MDR courses too
    - This is important for a billing/registration side for MD students
- See Permission for UGRD Students to take GRAD Course / Students Taking Courses in Other "Stacks" for more information on that process

- <u>Closed Class</u>
  - Always communicate that, in general, students cannot get into a closed class
    - Instead, they should work with their advisor to explore other options and/or set up swap or waitlist for the class
  - Associates should never enroll a student into a closed class because of fire code capacity issues
  - **Only if asked by an advisor**, Associates should recommend the following (in this order):
    1) **Create a Seat =** Ask the advisor/college/school to create another seat in the course and enroll the student this way; if there is a waitlist, they can move the student to waitlist position #1 when they create a seat so the student is added into the course when the waitlist runs at midnight that night (assuming there are no issues with requisites, duplicate enrollment, max credits, etc.)
    2) **Permission/Pin Number w/ Waitlist Position #1 AND 1 Space in Course =** Ask the advisor/college/school to provide this pin number if option 1 doesn't work. They must also have the student moved to waitlist position 1 and there must be a seat open in the course. If you receive the permission number, the student is waitlist position 1, and there is a spot open in the course, you can process the Drop/Add in the moment by overriding the Closed Class. This is essentially to ensure the student gets the spot without relying on the waitlist process at night.
- <u>Error for Drop Date Before Add Date</u>
  - When you get the error that the drop date is before the add date, we need to escalate as the Registrar is the only unit who has the access to correct this and remove the course
  - **Before you escalate, follow these steps:**
    - Ensure all fields, signatures, overrides, etc. are completed correctly on the Drop/Add Form
    - Contact the Submitter/Advisor to let them know you are receiving an error that the drop date is before the add date, let them know when the drop date is, and ask them if (a) they would like to amend the effective date to be after the add date or (b) if the add date needs to remain "as is" because of Ws, refunds, etc.
      - If (a), ask them to change the effective date on the form, initial next to it, and send back to you so you can process

- If (b), escalate the case to the Registrar Specialist and explain you need help removing the course because of this error, and that you received confirmation they would like the effective date to be "as is"
- Note: The Submitter/Advisor should not need to submit a new Boomi Form

- Permission Pins
  - If a student doesn't know where to go to seek a permission pin number for registration, we can handshake them to the appropriate contact listed on the QRG
    - **Advising Point Persons and Permission Pin Number Contacts**
      - Provide the student with the appropriate point of contact from the chart below or e-mail the contact directly and CC the student to create a virtual "handshake"

College/School	UGRD Point of Contact	GRAD Point of Contact	Permission Pin Number Contact

- Drop/Add Deadlines and Special Sessions
  - There are special sessions that do not follow the regular academic calendar (e.g., Intersession, Working Professional Session 1, etc.)
  - You may see an error when trying to process or notice a W if you are only looking at the regular academic calendar
  - Check the session listed for the course in CaneLink by clicking on the actual course
  - To view the actual drop without a penalty (i.e., without a "W"), drop with a penalty (i.e., with a "W"), etc. deadlines for these special sessions, access the following CaneLink resources (Note: They both have slightly different information so you may need to view both to find the information you need):
    - Main Menu → Set Up SACR → Foundation Tables → Term Setup → **Academic Calendar**

    - Main Menu → Set Up SACR → Foundation Tables → Term Setup → **Term/Session Table**

- Advising Holds
  - Click here for more information
- Retro-Drop/Add
  - Click here for more information
- Past Due Holds and Drop/Add
  - Click here for more information

English Evaluation/Translation or Certification of Records or Transcripts

- There are 3 common types of evaluations, translations, and/or certifications we may be asked for so it's important to understand the student's request to direct them appropriately:
  1) **Evaluate/Translate Foreign Degree/Transcripts for UM Review**
     - This is often requested when applying for UM admission
       - **Example:** Admission requires students with foreign degrees/transcripts to have them evaluated and translated in line with the policies at https://admissions.miami.edu/undergraduate/application-process/admission-requirements/international-evaluation-requirement/index.html
     - Evaluating credits, equivalating degrees, and/or translating documents must be completed by an outside translation company like Josef Silny & Associates Inc., Educational Credential Evaluators (ECE), etc.
  2) **Evaluate/Translate UM Degree/Transcripts for Foreign Institution Review**
     - This is often requested when applying for admission to a school in another country
     - Evaluating credits, equivalating degrees, and/or translating documents must be completed by an outside translation company like Josef Silny & Associates Inc., Educational Credential Evaluators (ECE), etc.
  3) **Certify UM Education was Taught in English**
     - This is often a supplemental request of a school in another country and/or an employer in another country
     - This is something that can be confirmed by UM
     - Students must submit the Enrollment Certification Form
       - Please ask them to specifically state in the notes that they need a specific statement on the certification letter that their course instruction was in English

Enrollment Certification

- Enrollment information is communicated by the Registrar to the National Student Clearinghouse at the beginning of each term and then monthly after that
  - If the student is unable to access their current enrollment letter via CaneLink and/or if an outside entity is unable to verify enrollment through the National Student Clearinghouse, then either (a) the information had not yet been communicated to the National Student Clearinghouse or (b) the student was not enrolled at the time the information was communicated and the update has not yet been sent. In these cases, the student should complete the Enrollment Certification Form via Boomi
- Process
  - All students should first try to use the enrollment letter available to them on CaneLink → Current Enrollment Certification (before the Student Center)
    - This is a general letter generated by the National Student Clearinghouse that simply shows that the student is enrolled
  - If this letter either (a) isn't available or (b) doesn't include the information they need, they can use the Enrollment Certification Form at www.canescentral.miami.edu/forms
    - They can ask for specifics in this letter and include attachments
    - If a student requests a Certificate of Enrollment prior to the last day to drop without a W, the certificate will show the enrollment as "course selected". See asterisk in the example below for more information

January 18, 2022

To	Whom it may concern
Record of **Student No**	Jingyi Liu 54287165
Term Dates **Enrollment Status**	Spring 2022 (01/18/2022-05/11/2022) 3/4 Time * Course Selected
Career **Academic School** **Anticipated Degree** **Major** **Anticipated Graduation Date**	Undergraduate School of Communication Bachelor of Science in Communication General Advertising May 2022

*University of Miami considers a student course selected until all financial obligations have been completed, they are then considered registered.

DOE – 001536 The University of Miami is accredited by the Commission on Colleges of the Southern Association of Colleges and Schools to award the baccalaureate, master and doctoral degrees. Contact the Commission on Colleges at 1866 Southern Lane, Decatur, Georgia 30033-4097 or call 404-679-4500 for questions about the accreditation of the University of Miami.

- If this letter needs specific information about their degree requirements, whether they can take courses over the summer, or anything else that really needs more granular academic information, they need to do one of the following:
  - See "Graduation Letter" if they need letters post-graduation
  - See "Good Standing Letter/Form" if they need information included on academic and/or disciplinary standing
- If a student has a form that needs to be filled out that requires enrollment information in addition to other information (financial aid information, billing information, etc.), they can upload their form directly to the Enrollment Certification form on Boomi
  - Registrar processing team will work with other units to obtain the requested information, then fill out the enrollment information and complete the form

- Law Students
  - If a Law student who has a form that requires both enrollment and financial information submits a case to 'CC, or Law Reg submits case to 'CC with appropriate forms that need financial information (Note: Student should be enrolled, and charges applied, so we can accurately paint this picture):
    1. 'CC Associate will complete all needed financial information
    2. 'CC Associate will email back the forms via the case to the case submitter
    3. LAW will complete the enrollment elements, apply the stamp/seal as needed, and return to student or send out as directed
  - If such a form only requires enrollment information (e.g., car insurance), it should go directly through the Law Registrar
- Graduated Students
  - If a student has graduated and no longer has access to Cane Link, they will be unable to submit the Enrollment Certification Boomi form
  - A graduated student would need to pursue the options listed under "Graduation Letter" if they need letters/information post-graduation

- Transient Letter
    - UM doesn't have a "transient letter" per se, so students have 2 options:
        1) **Enrollment Certification Form =** This can be used to say that (a) someone is enrolled and (b) if the student requests it, they can include that the student is in good academic standing
        2) **Need More Information than Option 1** = If the student needs more information about if they are eligible to take summer courses, what summer courses are approved, etc., they need to work with their college/school advisor to obtain a letter from them
- Employers
    - Employers should be referred to go directly through the National Student Clearinghouse (see Degree Verification portion of CC → Registration and Records website)
    - If they tried doing this and were unsuccessful, Associates can escalate the case to the Registrar Specialist
        - **Associates =** If the employer did their due diligence and 100% tried to do this through the National Student Clearinghouse but were unsuccessful, create a case for the employer and send it to the Virtual Services Queue
            - Include any pertinent information from the employer (e.g., when they contacted NSC, what they got from them, transaction ID #s, the student they are contacting us about, etc.)
            - The Transaction ID must be included (Note: If the Transaction ID is not included, the Registrar will not verify)
            - If the employer is not a Contact in Salesforce, create the contact record

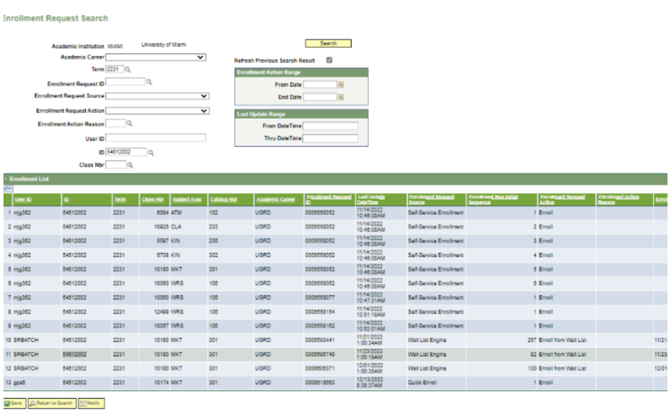
- Non-Degree Students
    - Students enrolled in non-degree programs should be able to access this form; however, their information is not communicated to the National Student Clearinghouse
- Non-Enrolled Student Letter
    - If a student who never attended UM needs a letter that says they never attended—this is typically because they put UM on an admission application by mistake—do the following:
        - See if they can amend their application with the school they are applying to
        - If not, escalate the case to a Registrar Specialist and ask for them to create a letter

Enrollment Limits

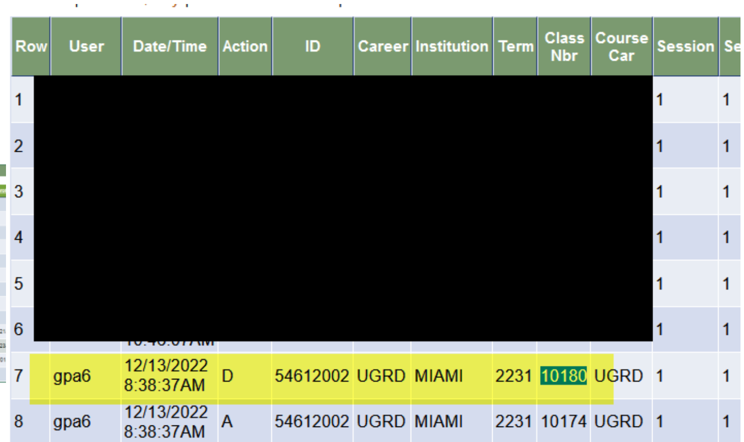
Student Group	Full-time (FT)	Half-time (HT)/ Part-time (PT)	Less-than-half-time (LTHT)
UGRD (Fall/Spring/Summer)	12+	6-11	1-5
GRAD (Fall/Spring)	9+ or at least 1 800 level course	5-8	1-4
GRAD (Summer)	6+ or at least 1 800 level course	3-5	1-2
UOnline (Fall/Spring/Summer)	6+	3-5	1-2
LAW (Fall/Spring)	11+	6-10	1-5
LAW (Summer)	6+	3-5	1-2

Enrollment Request Search

- This CaneLink feature can be used to view enrollment history for a given term
  - "Main Menu" → "Registration and Records" →"Enroll Students"→ "Enrollment Request Search"
  - Note that we cannot see waitlist history prior to the start of term. This can only be seen through an audit ran by the Registrar Processing Team
    - Example: Spring 2023 enrollment history for the waitlist is not visible to us until the start of the Spring 2023 semester



Our View



Row	User	Date/Time	Action	ID	Career	Institution	Term	Class Nbr	Course Car	Session	Se
1	[redacted]									1	1
2										1	1
3										1	1
4										1	1
5										1	1
6										1	1
7	gpa6	12/13/2022 8:38:37AM	D	54612002	UGRD	MIAMI	2231	10180	UGRD	1	1
8	gpa6	12/13/2022 8:38:37AM	A	54612002	UGRD	MIAMI	2231	10174	UGRD	1	1

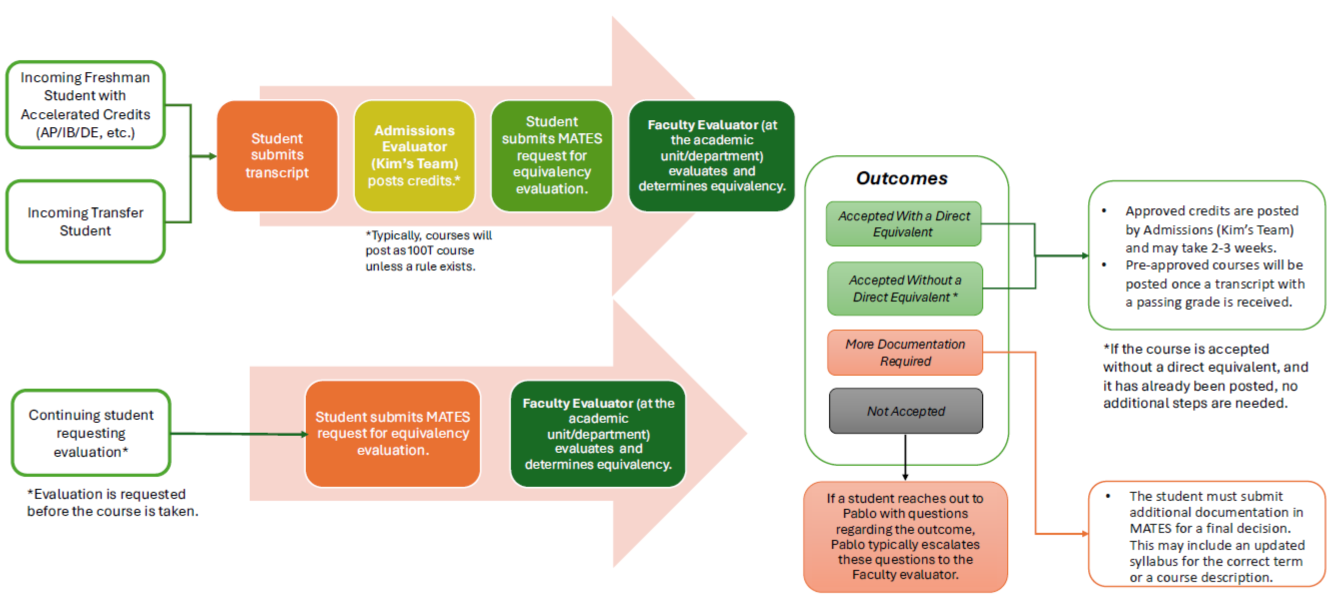
Registrar Audit View

- See "Waitlist" for more information on how the waitlist process work

External Credit (e.g., transfer, Non-UM study abroad, AP, IB, dual enrollment, and Cambridge)

- Viewable in the CaneLink Student Center under the Transfer Credit tab
- Edits, updates, additions, etc. all processed through the Office of Admission
- Once the courses are entered by the Office of Admission, students should work with their advisors to obtain and process any needed course equivalencies
- Transfer Credit Equivalencies
  - First-year and transfer applicants, as well as continuing students, may earn college credit and transfer approved credits to the University of Miami
  - Credit evaluations will only take place after student has been admitted at the University
  - Only credit bearing courses from Regionally Accredited institutions will be awarded transfer credits
  - All transfer credits must be earned in academic terms that are **at least 6 weeks in length**
  - Transfer credit will not be granted for coursework taken at another institution during the same term the student is enrolled at UM
    - Fall, Spring, and Summer terms included
      - Summer intersessions and sessions A, B, and C constitute a single term
    - More information about transfer credits can be found in the Academic Bulletin (https://bulletin.miami.edu/general-university-information/university-policies/course-information/#text)
- MATES (Miami Academic Transfer Equivalency System
  - Transfer Credit Equivalency requests are completed through the Miami Academic Transfer Evaluation System (MATES)
    - MATES Website: https://mates.miami.edu/
  - Questions regarding status update on a submitted request are to be sent to the specific department for the course in question
  - Questions regarding how to appeal a denied request, direct students to univregistrar@miami.edu with all the details and supporting documentation for review by the University Registrar

MATES Process Overview



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- In general, the University doesn't award decimals for credits (e.g., 13.5)
    - **UM Coursework**
        - Credits will be whole numbers
        - If a retro is submitted with a request to go to a partial credit (e.g., 13.5), Registrar will most likely put a note for us to clarify with the submitter and adjust to a whole number; usually that means rounding down
    - **Study Abroad via UM**
        - When students go through UM Study Abroad, they are placed in a placeholder of SAP credits (e.g., 12) until their transcripts come in
        - The transcripts are then received, evaluated, and entered by EM Ops
        - Usually, EM Ops will round down if anything would result in partial credit since UM does not award partial credit for UM courses
    - **Transfer/Summer Work**
        - Sometimes credits will come in as partial credits and be entered as such as we honor what the credit conversion is from the other institution
        - This is common with quarter system courses (e.g., California State schools)

FERPA Guidelines and Verification

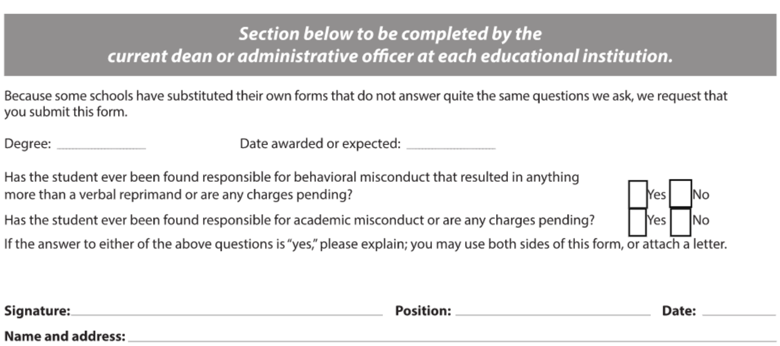
- As a general rule, we do not provide any specific information about a students account without first following the identity verification steps listed below
- If we are not able to verify the identity of student or proxy after following verification steps, we can only provide information "in general", but no specific details about information on a students account
- Student Verification
    - In-person Requests**:** Students must present themselves with their name and C#, EMPLID (5#), or University of Miami e-mail address. Their identity must be confirmed with a photo identification (ID). The ID may be a Cane Card or any other government-issued ID.
    - E-mail Requests: Students must send e-mail requests to University employees from their University of Miami e-mail account. If an e-mail is sent from a personal e-mail account and the personal e-mail account can be verified in Salesforce or CaneLink as belonging to the student, you may respond to the request. If not, the student must be directed to resend the request from the University of Miami e-mail system.
    - Phone Requests: Students must always provide the following information so that we can verify their identities:
        - Name
        - C#, EMPLID (5#), or University of Miami e-mail address
        - The correct answer to 1 of the following questions *(Note: Ask these questions in the order listed below. If the student cannot answer the first question, move to the second. If they cannot answer the second question, move to the third, and so on.)*:
            - What is your date of birth?
            - What is the course number of one of the courses you are currently enrolled in? *
            - What is one of the courses you were enrolled in last semester? *
            - What semester did you first enroll at the University of Miami?
            - What are the last four digits of your Social Security Number?
            - What is your current mailing address?

    ** Students may not be able to provide you with this information if they are not currently enrolled or if they are currently enrolled but through a Study Abroad or Non-UM Program; move to the next one*
- Proxy Verification

  - In-person Requests**:** Proxies must present themselves with their name, the e-mail account associated with their proxy access, their student's name, and their student's C#, EMPLID (5#), or University of Miami e-mail address. Their identity must be confirmed with a government-issued photo identification.
  - E-mail Requests**:** Proxies must send e-mail requests to University employees from the e-mail account associated with their proxy account.
  - Phone Requests: Proxies must always provide the following information so that we can verify their identities:
    - Student's name
    - Student' C#, EMPLID (5#), or University of Miami e-mail address
    - Their name
    - Their e-mail address that is associated with their proxy access

Good Standing Letter/Form

- **Remember:** The student must fill out their portion before anything below
- Academic Good Standing
  - Students who need this information in a letter or on a form (e.g., Common Application) should submit the Enrollment Certification Request Form via Boomi and specify they need mention of good academic standing
  - If there is a form they need completed, they should attach the form to the Enrollment Certification Request Form
  - A graduated student would need to pursue the options listed under "Graduation Letter" if they need letters/information post-graduation
- Disciplinary Standing
  - Students who **only need this information** in a letter or on a form and **do not need enrollment information** should submit their request to the Dean of Students Office (DOSO) and specify the need mention of good disciplinary standing
    - **If students also need enrollment certification and/or good academic standing**, they should submit their requests/forms via the Enrollment Certification Form in Boomi first and not go directly to the DOSO
  - The contact in the DOSO for this is Terry Ortega (t.ortega@miami.edu; 305-284-5353)
  - Associates should handshake students to Terry if they inquire via a case
  - An example of questions on a form that DOSO would need to assist in answering is below



Section below to be completed by the current dean or administrative officer at each educational institution.

Because some schools have substituted their own forms that do not answer quite the same questions we ask, we request that you submit this form.

Degree: ____________ Date awarded or expected: ____________

Has the student ever been found responsible for behavioral misconduct that resulted in anything more than a verbal reprimand or are any charges pending? ☐ Yes ☐ No

Has the student ever been found responsible for academic misconduct or are any charges pending? ☐ Yes ☐ No

If the answer to either of the above questions is "yes," please explain; you may use both sides of this form, or attach a letter.

Signature: ____________ **Position:** ____________ **Date:** ____________

Name and address: ____________

(Please print or type)

  -

Grade Entry

- Faculty instructions are available in the "How do faculty enter and approve grades in CaneLink?" knowledge article
- Change of Grade instructions are available in the "What is the process for a faculty member to submit a Change of Grade Form?" knowledge article

Graduation Letter

- Students have 4 options:
  1) Order a Transcript
  2) Submit a request through an Enrollment Certification Form and specifically request to include the anticipated graduation date
     - This option is only if they have not yet graduated
       - A letter of graduation will not be provided by the Registrar once the student graduates so they would need to go with option 1 or 3 above
     - **This is only for Anticipated Graduation date, not actual degree conferral confirmation or dates**
       - For this, students either need to go with Option 1 if the degree is conferred or Option 3 if the degree is not conferred
  3) Work with the college/school to obtain a letter
     - Note: This option must be used if the letter must be detailed and speak to specifics about degree requirements as that cannot be included
  4) Work with the college/school to have a form for licensure/credentialing completed
     - Graduated student may have a form they need filled out which includes specific information about their program of study (e.g., Nursing, Education)
     - We can handshake students, and the forms, back to their program of study for assistance

Wisconsin Department of Public Instruction
INSTITUTIONAL ENDORSEMENT AND ASSURANCES—TEACHER
PI 1612 I (Rev. 06 17)
Forms are available at: http://dpi.wi.gov/tepd/elo/supplementary-forms

INSTRUCTIONS TO INSTITUTION: Complete Section II and return to applicant
Website: http://dpi.wi.gov/tepd
Educator Licensing Telephone
(608) 266 1027 or (800) 266 1027

I. APPLICANT INFORMATION Completed by Applicant

Legal Name First	Middle Init	Last	SSN *Last 4 Digits Only*
Home Address *Street, Box, City, State, Zip*	Email Address		Telephone *Area Code/No*
Name and Location of Institution	Degree Earned		Date of Graduation *Mo/Year*
Teacher License(s) Requested			

II. INSTITUTIONAL ENDORSEMENT AND ASSURANCES Completed by Educator Preparation Program and **Returned to Applicant**

1. Did the applicant complete your institution's state approved program leading to a teacher license? Complete both Section 1a and 1b
   a. ☐ YES, Identify below educator license(s) for which applicant qualifies in your state

License Area	Subject	Grade/Development Level	Program Completion Date *(MM/DD/YR)*
Teacher			
Teacher			
Teacher			

☐ NO, *Explain:* ______

b. **Type of Program:** ☐ Traditional IHE ☐ IHE Based Alternative Route ☐ Other Alternative Route

2. **The license(s)** recommended in question 1 (above) is based on completion of a:
   ☐ Major in: ______
   ☐ Minor in: ______ Conferred Date: ______
3. **Supervised Field Experiences** (complete a and b):
   a. Applicant completed a pre-student teaching practicum(s) in: ______ (Subjects/Grades)
   b. Applicant completed student teaching in: ______ ______ (Subjects/Grades)
   for ____ weeks in an ☐ Elementary School ☐ Middle School ☐ High School ☐ Other Setting

—Continued on Page 2—

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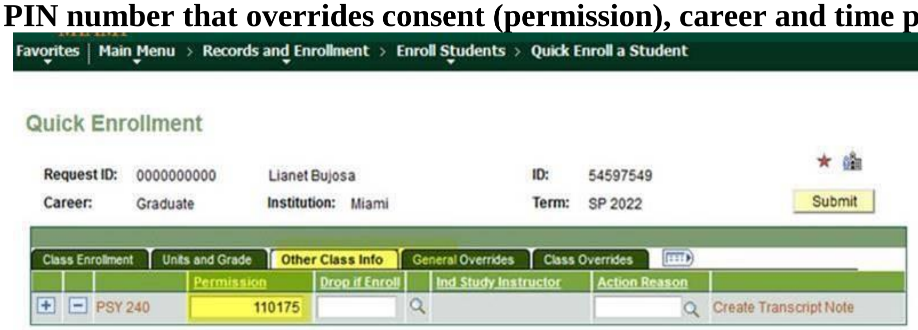
  5) If none of the above-mentioned options are acceptable for a graduated or former student, they can reach out to UMIT to request access to their former student credentials so a request via Boomi can be submitted
     - Do **not** escalate to Registrar Specialist queue

- Employers, credit grantors, insurance companies, background screening agencies, etc. go through www.studentclearinghouse.com

Graduate Student Registering for Undergraduate Courses

- Grad students in the Music Therapy program are required to take UGRD courses. They will receive a "No Valid appointment error" when enrolling. Additionally, many of these courses are now closed because they are full. Although we generally cannot add a student to a waitlist, we will be allowed to do so in these cases and with a permission number.
- Instructions below:
  - The advisor/student needs to obtain a permission number from the college/school/department for the course
  - We would need the Drop/Add or Course Request Form and the permission number, and then we would enroll them by inputting the permission number and selecting the appointment override option (see steps below)
- **Enter PIN number that overrides consent (permission), career and time period:**



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- **Click to override appt time:**

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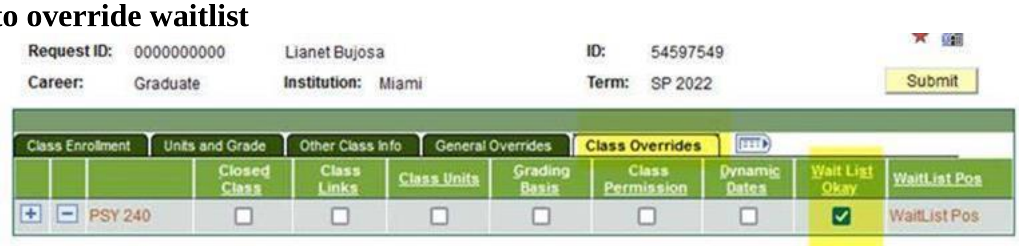
- **Select to override waitlist**



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Honors

- Honor Roll
  - There are 3 honor rolls for UGRD students:
    - Dean's List = Semester GPA $\geq$ 3.5
    - Provost's Honor Roll = Semester GPA $\geq$ 3.75
    - President's Honor Roll = Semester GPA = 4.0

- Students must complete all courses with a grade for that term, and they have to have completed a full-time schedule of classes
    - If a Change of Grade is processed after semester grades are released and, as a result, the student should make the honor roll, but it doesn't automatically update on their unofficial transcript, Associates will escalate to a Registrar Specialist
- Honor Roll Certificates
    - As of 1/23/2025, the Registrar will **no longer** accept or print Honor Roll Certificate requests
        - Inform students that they can view their Honor Roll status on their unofficial or official transcripts
- Latin Honors
    - There are three levels of University Graduation Honors (Latin Honors) for Undergraduate students, determined by a minimum GPA unique to the school or college from which the student is graduating
        - Cum Laude = Top 5% of graduating class
        - Magna Cum Laude = Top 10% of graduating class
        - Summa Cum Laude = Next top 10% of graduating class
    - The GPA required will change each academic year (beginning with the fall semester) and will be based on the cumulative GPAs of the previous year's graduating class.
        - The GPAs are calculated every summer and the year specific criteria can be found here
    - For the determination of University Graduation Honors, cumulative GPA is never rounded off and is the lower of:
        - the average of all grades earned at the University of Miami (UM cumulative graduation GPA), OR
        - the combined average of all graded work taken at the University of Miami or elsewhere (whether or not the transfer work is accepted toward a degree at the University of Miami)
    - Students must meet the required GPAs by the completion of the final semester within his/her school or college to be eligible to graduate with the honor
        - For commencement purposes, all Latin honors at commencement are based on the previous semesters GPA
        - After degree has been conferred, the appropriate Latin honor will automatically be placed on the student's final transcript and diploma, under the University seal
- Departmental Honors
    - This will show on the bottom right of the diploma, under the Dean's signature

Inactive Status

- Cannot be requested for 1st semester of attendance
- Students must request this 1 semester at a time
    - If they would like this for 2 semesters in a row, they will need to submit a 2nd form later on and before the deadline for the next term
    - To qualify for inactive status all financial obligations must be satisfied.
- When an Associate receives this form, escalate to a Registrar Specialist
    - Students only need to complete their portion of the form before submitting it to 'CC
        - Always mention that we will send to processing team but the decision on approval is tentative until it is reviewed by the college/school … the Registrar will notify the student of approval
        - Make sure we emphasize it is tentative until they receive confirmation

        - Also always recommend someone speak with their college school so they know it is coming and to talk about how it will impact their academic progress (not financials)
    - Registrar Specialist will work to obtain the college/school approval and complete the form
- To undo, contact Registrar Specialist for the student and request this to be undone and for the student to be re-activated for registration
    - Must be done prior to the deadline for registration
- Students who are officially on Inactive Status should be automatically term activated and assigned a registration appointment time for the next semester (i.e., the semester they are slated to return)
    - Students who do not return as scheduled and do not go on a 2nd semester of Inactive Status will be discontinued and required to file for readmission should they decide to return in the future
- If fees still show on a student's account after the student was successfully placed on inactive status, a case should be submitted, and an Associate will escalate to an OSAS Specialist to ask if the fees can/should be removed
- Re-do Request for UGRD Out 1 Year
    - UGRD students who were out for approximately 1 year may be asked to re-complete the CSS Profile and other documents to receive aid (in addition to the FAFSA)
- Return from Inactive Status
    - Students returning from Inactive Status may be calling about their Financial Aid. If it is not yet appearing on their account, look at the "Edit Program Data" tab under the "Academics" tab in CaneLink. To the right of "Program Action" you should see "Return from Inactive Status." If not, create a child case to Registrar and ask them to update the student's status. Once this is completed, it should take 24 hours for PowerFaids to update and Financial Aid should be able to package the student.
        - Escalate case to Financial Aid if not updated
- See **Leave of Absence** for Graduate Students.

Independent Learning Initiative (ILI)

- IND 100 – Independent Learning Initiative
- Charged 1 credit worth to be in program
- Run through Camner Center, find information here
- Charge added to bill after course is registered (usually within 5 days if the bill is released)
- Students enrolled in the program do not receive a grade or credit for participating
    - If a request to add the IND 100 course is received after the last day to add this course can be retro added/dropped without going through Boomi or without Karen's approval
        - We just need a Drop/Add Form with all the proper information
- Students/Advisors need to adhere to normal Drop/Add Form policies when adding ILI course
    - Student signature, advisor signature, appropriate permissions

Intersession

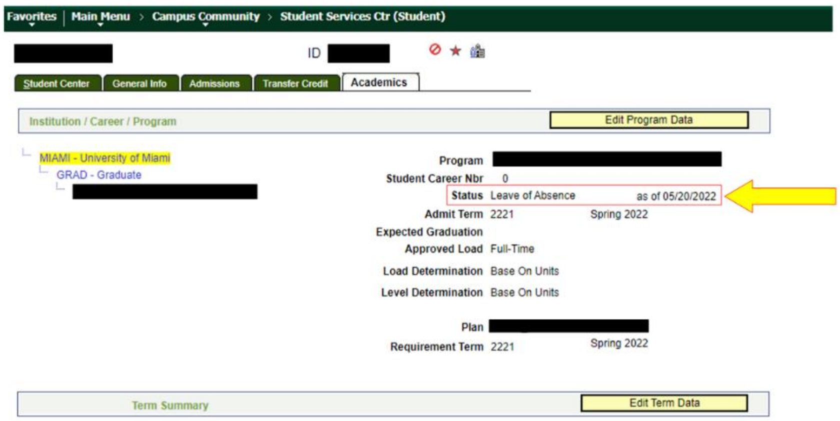
- Refer to the DCIE website for more details on intersession (see https://credit.dcie.miami.edu/)
    - The Law school does not have Intersession courses.
- Sessions
    - Winter Intersession A = Usually mid-December to mid-January
    - Winter Intersession B = Usually early-January to mid-January
    - Spring Intersession = Usually early-March to mid-March
    - 1st Summer Intersession = Usually mid-May to late-May
    - 2nd Summer Intersession = Usually late-May to late-June

  - 3rd Summer Intersession = Usually early-July to late-July
- Enrollment and Max Credits
  - Students must obtain consent from DCIE to enroll by completing the "Intersession Course Pin Request" via their website above (at the bottom)
    - Refer students to their advisor to discuss
  - Registration for intersessions is lumped into the regular Spring or Summer term but the costs are above and beyond normal tuition flat rates (i.e., separate from normal tuition rates)
    - The price is the per credit rate
    - There are no fees
  - When you enroll someone for intersession, always increase their term enrollment limit in CaneLink by the same number of credits of the intersession course(s) so it doesn't negatively impact their ability to add/drop later on
- Last Day to Add
  - Must be added before 5:00 p.m. on the 1st day of class (some may be earlier deadlines)
- Last Day to Drop
  - This is the 2nd day of the class
  - Students who drop by this date also receive a 100% refund for the course
- Class Sections
  - U80 = UGRD
  - B80 = BGS students only
  - G80 = GRAD
- Common Registration Errors
  - Students may be excited to register for Spring or Fall and accidentally log in to do so when intersession registration opens—this is usually available to all students on the 1st day of registration even if a student's registration appointment for Spring or Fall is later—and they may add Intersession classes without fully-understanding they are intersession courses and/or they may report issues registering for regular Spring or Fall courses
    - Remind students of the registration dates
    - If they accidentally register for intersession, have them work with their advisor to complete a Drop/Add Form and remove the class if need be
- Financial Aid
  - Students can be considered for Financial Aid but this is not automatic
  - Students must complete the COA Appeal Form
    - **UGRD =** Fill out the "XXX Cost of Attendance Appeal Form"
      - Click Additional Educational Expenses and mention intersession in Section 3
    - **GRAD/LAW =** Fill out the "XXX Grad/Law Tuition COA Request Form"
  - Students must be enrolled in full-time credits during the regular term (i.e., not intersession) to receive full-time aid, even if they take courses in the intersession
  - Most likely, COA will go up by tuition cost and it will increase ability to take more loans

Leave of Absence

- Graduate students can request a Leave of Absence which serves the same purpose as Inactive status for Undergraduate Students. The Petition for Leave of Absence is a dynamic form that can be found at https://www.grad.miami.edu/policies-and-forms/forms/index.html
- The dynamic form will need to be approved and electronically signed by a graduate student's Advisor, Graduate Program Director, and Associate Dean of Graduate Education. Once the request is approved, the form will be automatically submitted to the Graduate School for final review

- If a graduate student states they were granted an LOA but they are not dropped from their courses, escalate to a Registrar Specialist to remove the courses if these 2 conditions are met:
    - Review Dynamic Form to ensure it was approved (or obtain approval confirmation document from student)
    - The student states he/she shouldn't have been enrolled in that term
- The Registrar will then work with the Graduate School and the student's college/school at that point to address the issue
- Students who are on a Graduate School approved leave of absence will have their "status" updated in CaneLink to show **Leave of Absence**



    -
        - This status allows students on a Graduate School approved leave of absence to retain their University of Miami Information Technology (IT) access
- If students on a Graduate School approved leave of absence do not return by the expected return date inputted on their Petition for Leave of Absence form, they must submit a new Petition for Leave of Absence form to update their expected return date and extend the leave
    - **If a new Petition for Leave of Absence is not submitted to extend the leave, that student's UM IT access (e.g., CaneLink, email, cloud storage, library access, etc.) may be lost**
        - Any student who is not continuously enrolled and who is not on an approved leave of absence may lose UM IT access
- Students returning from an approved leave of absence must submit an Application for Readmission by the readmission deadline as listed in the Academic Calendar for the semester they intend to return for graduate study. If they do not, they risk having their UM IT access impacted

Loan Deferment Request

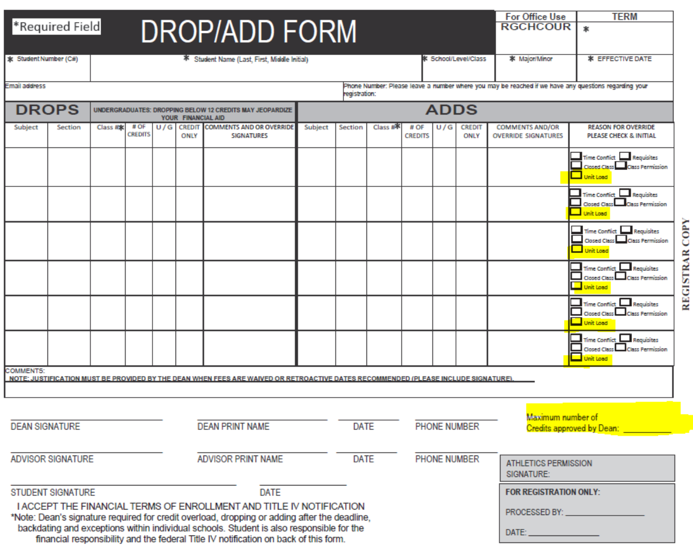
- Students' enrollment information is communicated to the National Student Clearinghouse (click here to learn more), which is then used to update students' enrollment status with their loan lenders
- We should tell lenders to go through the Clearinghouse
- If the lender insists that another deferral form be completed by the University, have the student submit it through the online Loan Deferment Request Boomi Form through our website
    - The Registrar team can send it to the lender directly
    - Student must indicate delivery method, address, etc.
    - **These requests are only completed after the Last Day to Drop Without a W**
        - Communicate this timeframe to submitters
        - The Registrar general **SLA begins** the day after the Last Day to Drop Without a W or the day they submit the form, whichever is later

MATR (Matriculation)

- Matriculation (MATR) happens when a newly admitted and deposited student is "thrown over the fence" from the admission side of CaneLink into the student records side of CaneLink
- To determine if a student is MATR, you can see that they are term activated for the upcoming semester under the "Academics" tab on Cane Link
- Approximate MATR Dates
  - Summer = March 15th
  - Fall = March 15th
  - Spring = October 15th
- Actual MATR dates will be set by the Registrar and communicated out each term

Max Enrollment Credits (Max Total Units)

- The Max Total Units refers to the maximum number of credits a student can enroll in each semester
- You should increase the Max Total Units for a student so the student can more seamlessly add, drop, waitlist, and swap courses in any of the following circumstances:
  - In cases when a student enrolls in an intersession course where you increase the max by the number of credits of the intersession course
  - In cases when you receive a Drop/Add Form or Course Request Form, and the advisor clearly puts a max credit load on the form that would increase this max number (see the bottom right of the form)



*Required Field DROP/ADD FORM

For Office Use RGCHCOUR | TERM *

* Student Number (C#) | * Student Name (Last, First, Middle Initial) | * School/Level/Class | * Major/Minor | * EFFECTIVE DATE

Email address | Phone Number: Please leave a number where you may be reached if we have any questions regarding your registration:

DROPS	UNDERGRADUATES: DROPPING BELOW 12 CREDITS MAY JEOPARDIZE YOUR FINANCIAL AID						ADDS							
Subject	Section	Class #*	# OF CREDITS	U / G	CREDIT ONLY	COMMENTS AND OR OVERRIDE SIGNATURES	Subject	Section	Class #*	# OF CREDITS	U / G	CREDIT ONLY	COMMENTS AND/OR OVERRIDE SIGNATURES	REASON FOR OVERRIDE PLEASE CHECK & INITIAL
														Time Conflict Requisites Closed Class Class Permission Unit Load
														Time Conflict Requisites Closed Class Class Permission Unit Load
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REGISTRAR COPY

COMMENTS:
NOTE: JUSTIFICATION MUST BE PROVIDED BY THE DEAN WHEN FEES ARE WAIVED OR RETROACTIVE DATES RECOMMENDED (PLEASE INCLUDE SIGNATURE).

DEAN SIGNATURE | DEAN PRINT NAME | DATE | PHONE NUMBER

Maximum number of Credits approved by Dean: ___________

ADVISOR SIGNATURE | ADVISOR PRINT NAME | DATE | PHONE NUMBER

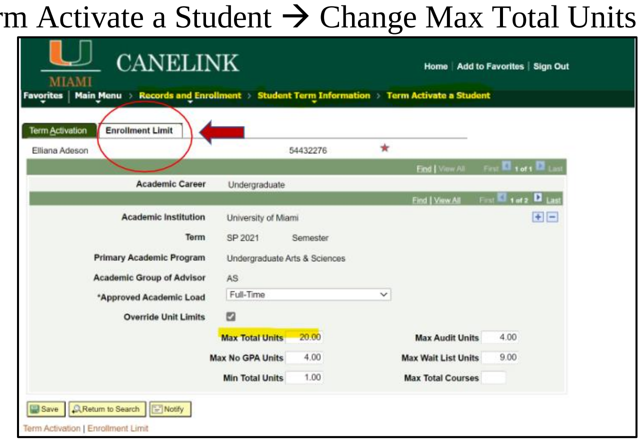
ATHLETICS PERMISSION SIGNATURE:

STUDENT SIGNATURE | DATE

I ACCEPT THE FINANCIAL TERMS OF ENROLLMENT AND TITLE IV NOTIFICATION
*Note: Dean's signature required for credit overload, dropping or adding after the deadline, backdating and exceptions within individual schools. Student is also responsible for the financial responsibility and the federal Title IV notification on back of this form.

FOR REGISTRATION ONLY:
PROCESSED BY: ______________
DATE: ______________

- To change this, go to CaneLink → Main Menu → Records and Enrollment → Student Term Information → Term Activate a Student → Change Max Total Units under the Enrollment Limit tab → Click Save



- The Max Total Units listed below for each student population refers to the maximum number of credits student can enroll in each Fall and Spring semester without increasing this or requiring a Unit Load override

Acad Program Code	Description	FT Max Units
GRAR	Graduate Architecture	15.00
GRAS	Graduate Arts & Sciences	9.00
GRBU	Graduate Business	20.00
GRCO	Graduate Communication	12.00
GRCS	Graduate Continuing Studies	12.00
GRED	Graduate Education	15.00
GREN	Graduate Engineering	15.00
GRGR	Graduate School	12.00
GRMD	Graduate Medical	22.00
GRMS	Graduate Marine & Atm Science	15.00
GRMU	Graduate Music	10.00
GRND	Non-Degree Graduate	6.00
GRNU	Graduate Nursing	24.00
GRSP	Graduate Special Programs	17.00
LAW	School of Law	16.00
LAWM	Law Masters	16.00
MED	Miller School of Medicine	36.00
NGRAD	Non-Degree Graduate General	6.00
NGRAR	NDG Graduate Architecture	6.00
NGRAS	NDG Graduate Arts & Sciences	6.00
NGRBU	NDG Graduate Business	6.00
NGRCO	NDG Graduate Communication	6.00
NGRCS	NDG Graduate Continuing Studie	6.00
NGRED	NDG Graduate Education	6.00
NGREN	NDG Graduate Engineering	6.00
NGRGR	NDG Graduate School	6.00
NGRMD	NDG Graduate Medical	6.00
NGRMS	NDG Graduate Marine & Atm Scie	6.00
NGRMU	NDG Graduate Music	6.00
NGRNU	NDG Graduate Nursing	6.00
NGRSP	NDG Graduate Special Programs	9.00
NLAW	NDG School of Law	16.00
NLAWM	NDG Law Masters	16.00
NMED	NDG Miller School of Medicine	6.00
NUGAR	NDG Undergraduate Architecture	12.00
NUGAS	NDG Undergrad Arts & Sciences	12.00
NUGBU	NDG Undergraduate Business	12.00
NUGCO	NDG Undergraduate Communicatio	12.00
NUGCS	NDG Undergrad Cont Studies	15.00
NUGED	NDG Undergraduate Education	12.00
NUGEN	NDG Undergraduate Engineering	12.00
NUGMS	NDG Undergrad Marine & Atm Sci	12.00
NUGMU	NDG Undergraduate Music	12.00
NUGNU	NDG Undergraduate Nursing	12.00
NUGRD	Non-Degree Undergraduate Gen	6.00
NUGSP	NDG Undergrad Special Programs	20.00
OGRAS	Graduate Arts & Sciences	20.00
OGRBU	Graduate Business	20.00
OGRCO	Graduate Communication	12.00
OGRED	Graduate Education	15.00
OGRMU	Graduate Music	10.00
OGRNU	Graduate Nursing	21.00
OUGCS	Continuing Studies	9.00
UGAR	Undergraduate Architecture	18.00
UGAS	Undergraduate Arts & Sciences	18.00
UGBU	Undergraduate Business	20.00
UGCO	Undergraduate Communication	18.00
UGCS	Undergrad Continuing Studies	9.00
UGED	Undergraduate Education	18.00
UGEN	Undergraduate Engineering	18.00
UGMS	Undergraduate Marine & Atm Sci	18.00
UGMU	Undergraduate Music	18.00
UGND	Non-Degree Undergraduate	15.00
UGNU	Undergraduate Nursing	18.00
UGSP	Undergraduate Special Programs	17.00

National Student Clearinghouse

- Timing of Reports to the Clearinghouse
  - Enrollment information is reported monthly to the Clearinghouse, beginning on the first day of the semester
  - Degree reporting information is automatically reported every Saturday
  - This report is then sent to studentaid.gov to update the student's information
    - The process can take several weeks as the National Student Clearinghouse must process the submission and then transmit to NSLDS for changes
- Non-Degree Students
  - Their information is not communicated to the Clearinghouse so these students cannot obtain their own current enrollment letter through CaneLink
  - Instead, they need to complete the online Enrollment Certification form through Boomi to request this
- Employer Enrollment/Graduation Certifications
  - Employers need to go through the Clearinghouse
    - **Contact Information** = see Degree Verification portion of CC → Registration and Records website
  - The University does not confirm any information over the phone or email
  - The University does not provide transcripts; students have to order them online and send to employer directly

- If the employer is unable to obtain verification through the Clearinghouse, the employer will need to create a case with us and provide the Transaction ID they received from the Clearinghouse (Note: If the Transaction ID is not included, the Registrar will not verify)
  - An Associate will escalate to a Specialist
    - Include any important information from the employer (e.g., when they contacted NSC, what they got from them, Transaction ID #s, the student they are contacting us about, etc.)
    - The Transaction ID must be included
    - If the employer is not a Contact in Salesforce, create the contact record
- Most cases are successfully verified through the Clearinghouse
- Release of information forms are not acceptable via email, only in person
  - This is acceptable if an investigator walks into the Registrar and shows a badge (e.g., FBI)
  - The Registrar then keeps the release and provides an unofficial transcript

Non-UM Program

- This form needs to be completed in its entirety
- $1,000 fee
- Completed application must be submitted to 'CC (see bottom of application page below)
  - We MUST CHECK ALL PAGES for completion
    - Only when all pages are complete, they submit to us either via case or in person
    - We escalate to Registrar for processing

~~11.~~ The University of Miami cannot provide proof of enrollment during the semester that you are participating in the Non-UM program. Students will be reported by the University to the National Student Clearinghouse as "withdrawn" but students will remain in "Active Status" in the University of Miami's CaneLink system so they will be eligible to enroll for the following term. Please note that reporting to the National Student Clearinghouse may prompt loan lenders to reach out accordingly. Should that occur, students will need to work directly with their loan lender in order to discuss their options.

~~12.~~ 11.

NOTE: If requesting this status late in the semester before departing or during the semester in which you are studying away, it is the student's responsibility to notify all departments of the new status. Students are responsible for any charges incurred as a result of not notifying departments, of their intent to study elsewhere and following appropriate check-out procedures. This may include housing, parking or other fees. Students are ultimately responsible for understanding the various ways in which participating in a non-UM program can impact them during their time away from UM as well as the semester of their return to the university; this includes - but is not limited to –

- housing preference & seniority
- financial aid & payment of fees
- credit transfer & degree progress

Note about Non-UM Program in locations where U Programs exist:
The University of Miami invests considerable time, effort, and resources in the creation of U programs consistent with the needs of its students, with University standards, and educational objectives. Therefore, students intending to study for a semester in a city where UM offers a U program will be expected to enroll in the U program unless they have a compelling academic reason to attend a different program and their petition is approved. Students can see a list of U programs by clicking www.studyabroad.miami.edu . Students approved to study on a non-UM program are not eligible for UM institutional funding or financial aid while participating in this program. ***International students:*** Obtain approval signature from the International Student & Scholar Services office *(Fall and Spring ONLY, not required for summer sessions)*

Please submit all completed forms from this package to 'Canes Central by creating a case at www.canescentral.miami.edu or visiting:
Address:
1307 Stanford Drive
Harold Long Jr. and H.T. Smith Student Services Building
1st Floor

- Summer
  - The Registrar does not require or process Non-UM forms for Summer
  - Students do not normally use this form for Summer work at another school but, if they do, Study Abroad must confirm that their program dates are a minimum of 6 weeks in order for them to be eligible for transfer credit
  - If they do not use the Non-UM form for Summer, we should still highly recommend students complete Transfer Equivalencies with their advisors to ensure their courses will transfer back to UM
- Re-do Request for UGRD Out 1 Year

    - UGRD students who were out for approximately 1 year may be asked to re-complete the CSS Profile and other documents to receive aid (in addition to the FAFSA)
- Students who are in a Non-UM Program are treated like Inactive Status students in the sense they remain "active" in CaneLink, are term activated for the next term, and can register on their assigned registration appointment time
- UM reports students in Non-UM status as "withdrawn" to the National Clearinghouse because they are not enrolled at UM
    - The Clearinghouse is not reliant on our own, internal designations like "Non-UM"; we simply report enrollment status
    - This can trigger loan lenders to communicate with borrowers about repayment
    - If a borrower is concerned about being contacted by a lender as a result, you can do the following:
        - Tell the borrower he/she can contact the school he/she is enrolled at to see if they report enrollment to the Clearinghouse and/or
        - Tell the borrower to contact his/her lender to request a deferral or forbearance for the reasons the borrower is simply enrolled in another program this semester
    - Students must be removed from their courses before the Non-UM program form can be processed
        - If they are enrolled, they must submit a Drop/Add Form to remove all courses along with their Non-UM Program Form
            - Even though they are essentially withdrawing, they do not go through 'Cane Success for this specific scenario

Online Courses

- Some courses are listed as Online courses and they are managed through DCIE (not UOnline)
- Sections
    - Y = UGRD students all colleges/schools
    - Y1 = BGS students only
- Tuition and Aid
    - There are no additional fees as these are part of the normal tuition and fee billing rates
    - Financial aid is also part of normal term financial aid
- Registration Information
    - In general, students enrolled in traditional, on-campus, in-person programs may not take more than 25% of their degree required courses as online courses
        - The Registrar and University Accreditation are working on a formal policy now that will include specific thresholds of credits and courses that students cannot pass
    - Per UM accreditation requirements, students should not be enrolling and may not be able to enroll in only online courses
    - Students must request permission to enroll via the "Online Course Pin Request" form via the https://credit.dcie.miami.edu/ website (see the bottom)
    - Refer students to their advisors for assistance
    -

Online MBA Program Registration and Records

- Academic Calendar = Follows the UOnline calendar
- Diplomas/Transcripts = Normal processes through 'Canes Central
- Registration = Recommend having the students fully-register for both mini-terms contained within a larger semester from the onset as it will facilitate aid packaging, help avoid payment issues/concerns,

and avoid retro-adds/drops. Also, registering as soon as possible once MATR will help facilitate the packaging process.

- Withdrawal and Leave of Absence Processes = From 'Canes Central's standpoint, we would handshake back to mhbsonline@miami.edu

Overrides

- Click here to access the tip sheet and learn more about processing Overrides
- You can use the "Quick Enroll" feature in CaneLink to enroll students in classes and to override certain restrictions that may stop students from being able to enroll in the class
    - Only override if approved to do so
- In "Quick Enroll" there are two tabs that contain various override options:
    1) **Class Overrides**
        - Closed Class: Use this override to enroll students in a class that has met its enrollment limit and is closed.
        - Class Links: Use this override to bypass any required additional class sections for this class.
        - Class Units: Use this checkbox to override the "Units Taken" field value for both fixed and variable unit classes.
        - Grading Basis: Use this override if you wish to change the grading basis used to grade students for the class.
            - You will need to use the "Grade Base" field in the "Unit and Grade" tab to select the new basis after you select this checkbox.

    2) **General Overrides**
        - Appointment: Use this override if you wish to enroll students outside their enrollment appointment.
        - Unit Load: Use this override if you want to allow students to enroll in more units than is typically permitted.
        - Time Conflict: Use this override if you wish to enroll students in two classes that take place at the same time.
        - Action Date: Use this override and date field to back or future date the enrollment action.
        - Requirement Designation: Use this to override the requirement designation for this enrollment row.
        - Career: Use this override to allow students to enroll in a class outside of their Academic Career.
        - Service Indicator: Use this override to enroll students in a class even if they have a hold on their record prohibiting enrollment.
        - Requisites: Use this override to bypass a prerequisite on the course.

Permission for UGRD Students to take GRAD Course / Students Taking Courses in Other "Stacks"

- All outside signatures, including the signature from the Graduate School must be on this form before colleges/schools submit to CC with a Drop/Add Form to process this for a student
    - **The Graduate School Representative must be from *Alexander Mas*, *Marissa Rodriguez*, or Redmond Willis, no one else**
    - Redirect the college/school/student to get any pending signatures and resubmit as outlined above once all signatures are obtained
- Prior to processing a Drop/Add Form, make sure you have a conversation with the student about the financial implications and they agree they understand

    - If so, sign as the 'Canes Central representative after a discussion with the student about implications and then add the course(s) for the student. When adding these courses you must click on the Class permissions override.
    - Unless part of a special program, not all courses in other "stacks" may be covered by FA
- Inter-Career Process
    - When students take courses in another "stack" or career (e.g., UGRD taking GRAD course, GRAD taking LAW course, etc.), then we have to register the student for the course in their active stack
    - The Registrar processing team will run the inter-career process at the end of each term to place the course into the proper stack
    - This is done without affecting tuition, etc. at that time; any impact should have already been felt at the beginning
- Tuition:
    - The tuition for these additional Graduate courses is the same as an Undergraduate course. If they remain within 12-20 credits they can take advantage of the flat rate. If they go over 20 credits they will be charged the per credit rate.

Proxy/Delegate Access

- General Information
    - Proxies must be "Access Granted" to be able to receive information from a UM team member
        - Verbal or written permission can also be given by the student in the moment if need be; however, that permission must be specific to the fact that the student is okay with the team member speaking about the specific aspect(s) of their record, and you must inform the student/proxy they must finalize the proxy status in the future
            - This situation may come up if a student is locked out of Cane Link and is unable to assign proxy status (e.g., Cancellation hold)
            - Written permission from the student must include the following
                - Handwritten statement
                - States that student gives permission for parent to speak with us
                - The exact phrase for the options student would normally select on CaneLink
                    - Financial Aid information, Billing and Payments information, Grade and Transcript information
                - Dated, signed with a wet signature, and emailed to the case
                - Parents full name and email must also be listed
            - If we receive written permission, we can continue to work with the parent without needing the students permission each time
        - If verbal or written permission is obtained instead, specifically document that in the call and/or case notes so we have record
- Who is Eligible?
    - The proxy option becomes available for newly admitted students only when they are MATR and the students are "thrown over the fence" to the registration side of CaneLink
    - Students must be currently active to be able to assign proxy access
        - Students who are not active can only grant access via written or verbal confirmation (see section above)

- Here is the e-mail template proxies receive to finalize their access:

Dear Tyrion Lannister,

Cersei Lannister granted you access to their education records within the University of Miami's student information system, **CaneLink** (canelink.miami.edu). A University of Miami ID and password are required to access this system.

ACTION REQUIRED - Please Follow These Steps to Activate Your Access Now:

- **STEP 1: Set your CaneID password*.** Visit caneid.miami.edu and click the "Forgot Password" button. Enter your **CaneID** (**txl838**) and then click "Continue" to complete the password setup process.
  - ***Important**: If you do **not** set your CaneID password within **30 days**, your CaneID will be deactivated.
- **STEP 2: Sign in to CaneLink with your Login ID.** Visit canelink.it.miami.edu/proxy-next-steps and click the "Log in to CaneLink to Accept Terms and Conditions" button. You will be instructed to sign in using your **Login ID*** (txl838@test.cgcent.miami.edu) and password.
  - ***Note**: Your Login ID includes @miami.edu appended to the end of your CaneID. The @miami.edu at the end of the Login ID indicates that you are associated to the University of Miami organization and enables you to sign in accordingly.
- **STEP 3: Accept or decline the terms and conditions*** for accessing your student's education records. Enter the following information:
  - The **Security Key**: KBJjmxA
  - Your **email address** (where this notification was received)
  - ***Note**: This step is **required** to comply with Family Educational Rights and Privacy Act (FERPA) guidelines.

Need Help?

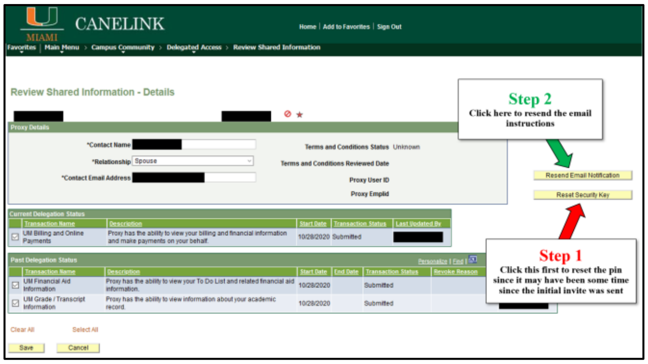
- For additional questions or support regarding your proxy/delegate access, please contact the 'Canes Central team via any of the methods listed at canescentral.miami.edu/contact.
- For University of Miami ID related support, please call the IT Service Desk at **305-284-6565**.

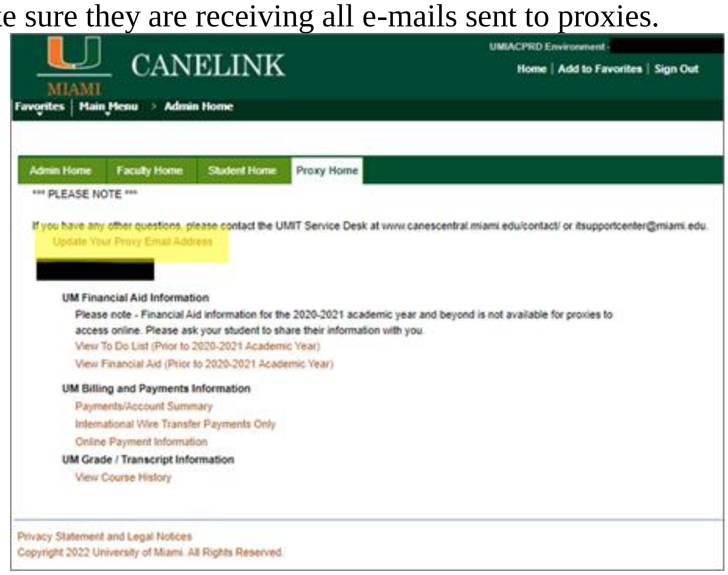
Thank you.

- Once granted proxy access, the new proxy will gain access to the Billing and Payment link in CaneLink (i.e., the bill) the next business day
- **Note:** There are 3 types of access that can be provided to a proxy
  - UM Financial Aid Information
  - UM Grade/Transcript Information
  - UM Billing and Online Payments
- A student has the choice to delegate access to any or all of these areas. It is important to note what access a proxy has, because we can only speak to them about the areas they have access to
- Example: If a proxy has only been granted access to Billing and Online Payments, information about Financial Aid may not be discussed
- Example of full proxy access:

Shared Transactions		
Shared Access	Start Date	Transaction Status
UM Financial Aid Information	07/18/2023	Access Granted
UM Grade/Transcript Information	07/18/2023	Access Granted
UM Billing and Online Payments	07/18/2023	Access Granted

- Troubleshooting Initial Access
  - **If initial student request is < 1 month old**
    - Resend Email Notification (by Student)
      - Students can resend the proxy email to someone by visiting CaneLink → Student Center → Delegate Access → Edit (next to the person's name) → Resend Email Notification
      - Note: Both the proxy email address and security key are case sensitive
    - Resend Email Notification (by CC team member)

- When resending the proxy/delegate email to someone, you must (1) reset the security code and then (2) resend the email notification to ensure the information contained within the e-mail is still functional
  - 

    - **If initial student request is ≥ 1 month old**
      - After 30 days, the CaneID created for the proxy will become **inactive**
        - The proxy needs to contact UMIT to have them **reactivate** their CaneID and have the new proxy email resent
          - **Note:** Proxy only has **48 hours** to finalize proxy access once the email is resent
    - **If the proxy has a CaneID but cannot remember the password**
      - Have the proxy reset the password at https://caneidhelp.miami.edu/caneid/
    - **If the proxy cannot remember their CaneID**
      - Have the proxy find it at https://caneidhelp.miami.edu/caneid/
- E-mail address update
  - Proxies whose e-mail address has changed and have a different e-mail address in the case than what is listed in CaneLink must update their e-mail address in their account. They should do so to make sure they are receiving all e-mails sent to proxies.
    - 

- Proxy Access Removed
  - If a student removes a delegated proxy from their account, the former proxy will receive an email letting them know they no longer have access (see example below)

Access to Sebastian Ibis's school data has been revoked.

CaneLink <canelink@miami.edu>
To Rodas, Madison
Reply | Reply All | Forward
Fri 9/17/2021 1:38 PM
Follow up. Start by Wednesday, May 4, 2022. Due by Wednesday, May 4, 2022.

Dear Madison,

Please be advised that your access to Sebastian Ibis's education records has been removed. You will no longer be able to view and/or take action on the following records within CaneLink on Sebastian Ibis's behalf:
UM Financial Aid Information, UM Grade/Transcript Information, and UM Billing and Online Payments

If you feel you should have access to these records, please contact Sebastian Ibis.
For questions regarding proxy access, please contact the Registrar's office at registrar@miami.edu.
For technical support, contact UMIT Service Desk at help@miami.edu.

Thank you.
This is an automated notification. Please do not respond to this message.

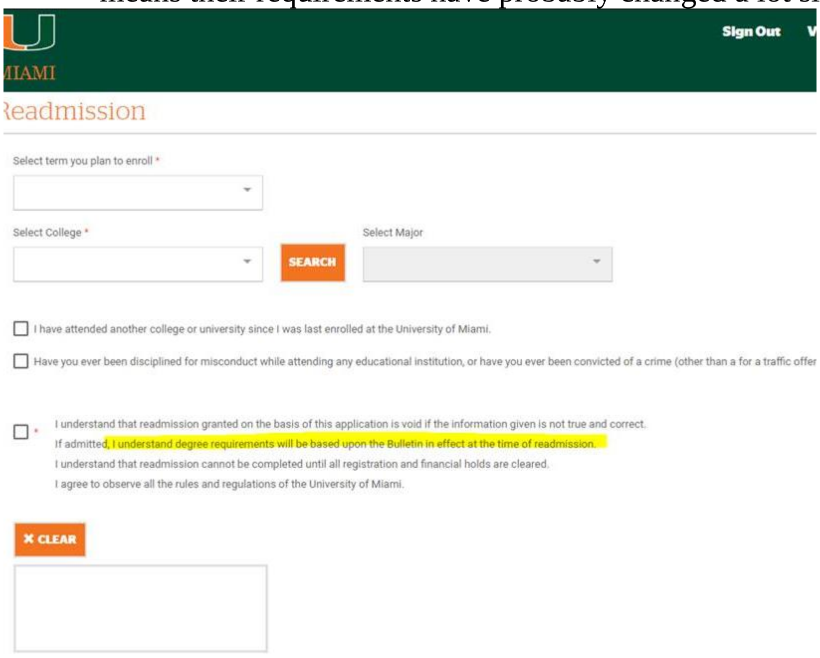
- Family Weekend
  - Parents, proxies, etc. Register for Family Weekend via their Proxy Home
  - They must complete their proxy access to see this registration link when it becomes available (usually early August)
  - As of July 2025, there is a new level of Proxy Access for "Campus Event Access"
    - ☑ Campus Event Access — Proxy is able to register for University-hosted events, such as our annual Family Weekend. Please note: This is the minimum REQUIRED access and does NOT provide visibility to your educational information.
    - This provides access for proxies to be able to register for university-hosted events
      - **No** access to educational information
  - Questions or concerns after proxy access is complete should be directed to the Orientation office
- When Is Proxy Access Required/Take Effect?
  - Depending on the area of Shared Access, there are different time frames for when they take effect and when we will require full proxy access in order to discuss specific information about a student's account
    - Grade and Transcript Information (Registrar)
      - Under FERPA, we can speak about a student's academic record to a non-proxy up until the **first day** a student sits in classes. This is typically the **first day** of the first semester for a student
      - After that time, proxy access for Grade and Transcript Information **must** be fully granted and verified prior to discussing a student's academic record
    - Financial Aid Information (Financial Aid)
      - Under FERPA, we can speak about a student's financial aid information to a non-proxy up until the **first day** a student sits in classes. This is typically the **first day** of the first semester for a student
      - After that time, proxy access for Financial Information **must** be fully granted and verified prior to discussing a student's financial aid information
    - Billing and Payment Information
      - Under GLBA, we can speak about a student's bill to a non-proxy up until the release date of the **first semester** billing notification
      - After that time, proxy access for Billing and Payment Information **must** be fully granted and verified prior to discussing a student's billing information

Readmission

- Recommendation
  - Always recommend students speak with the college/school they want to readmit to before they apply so they can confirm this process will go through successfully
- UGRD Students
  - **New Students (i.e., 1st Semester)**
    - Students must follow Readmission (readmit) vs. Re-application (reapply/reapplicant) based on the criteria outlined in the chart below
    -

	INCOMING FIRST-YEAR OR TRANSFER STUDENTS WHO WITHDRAW AFTER FINANCIAL AID IS DISBURSED AND BEFORE RECEIVING W'S	INCOMING FIRST-YEAR OR TRANSFER STUDENTS WHO WITHDRAW AFTER RECEIVING W'S OR GRADES ARE POSTED FOR THE TERM
WISH TO RETURN THE SAME ACADEMIC YEAR	Readmission application through 'Canes Central	Readmission application through 'Canes Central
WISH TO RETURN IN A NEW ACADEMIC YEAR	New application through the Office of Undergraduate Admission	Readmission application through 'Canes Central

  - **Continuing Students (i.e., already completed the 1st Semester)**
    - A student must submit a Readmission Form if the student was not enrolled and did not receive grades in a major semester (i.e., Fall or Spring)
    - If a student received all Ws in a major term (i.e., Fall or Spring), even if they were discontinued, they do not need to complete the Readmission Form if they are returning the next major term
      - This is considered a "Soft Readmit"
      - Have the student submit a case and an Associate will escalate to the Registrar Specialist to reactivate the student and assign a registration time
  - **"Soft" Readmit**
    - All Ws for Continuing Students
      - See above
    - Re-enroll for Graduating Students
      - This is when a current UM student who is graduating in the current term wants to readmit for the next term to continue taking UGRD courses after the degree is conferred
      - These students readmit for the next major semester (i.e., Fall or Spring) and do not miss a major semester
        - If they do, they are not considered a "soft" readmit
      - These students **do not pay the $100 readmission fee**
        - They need to complete everything they can on Boomi but submit without paying
        - Associates then escalate these for processing to Registrar
  - **Readmission Form**
    - Readmission Form needs to be completed online via Boomi by the deadline in the Academic calendar
      - The deadline is the deadline. There are no extensions
      - After the deadline the current term will be removed from the Boomi form
      - If the student misses the deadline, discuss the deadline to apply for the following semester
      - They can talk to their advisor too to plan their curriculum accordingly

- The form states that students would be held to the academic requirements of the bulletin at the time they readmit
  - If they have concerns about this, they should meet with their advisor to talk through what the requirements would look like
  - Colleges/schools can always petition with the Registrar to not change the bulletin requirements, but they need to discuss with their advisor
  - This rule is primarily for students who have been gone for a long time, which means their requirements have probably changed a lot since they were here
- 

- If a student does not have access to UM systems any longer (i.e., Discontinued) and is unable to log in, provide the student with the following information:
  1) Student must contact UMIT at help@miami.edu and request that the student's credentials be reactivated since they had been discontinued
     - This will provide the student with the ability to log into Boomi
- Tell the student that when the student's credentials are reactivated he/she will need to go to Boomi to complete the Readmission Form. The form can be found at the 'Canes Central website > Forms > Registration and Records
- Readmission Fee
  - $300
  - This is paid via Boomi when the form is submitted
  - To re-run the payment: UGRD = Registrar Specialist

- **Non-Degree Readmits**
  - Students who were only enrolled as Non-Degree students in DCIE in the past **cannot** file for Readmission into a degree-seeking program (e.g., from Non-Degree to Business)
  - These students must go through the full admission process through the Office of Admission
- **Bachelor of General Studies (BGS) Readmits**

            - Students who were only enrolled as BGS students in DCIE in the past **can** file for Readmission into a different degree-seeking program in another college/school
            - No need to go through another admission process
            - **Note:** BGS students should only really readmit to the BGS program
                - Any students wanting to do differently should be recommended to speak with DCIE prior to filing for readmission
        - **Re-do Request for UGRD Out 1 Year**
            - UGRD students who were out for approximately 1 year may be asked to re-complete the CSS Profile and other documents to receive aid (in addition to the FAFSA)
- <u>GRAD Students</u>
    - Complete the online Dynamic Form through the CC website (or Graduate School website)
- <u>LAW Students</u>
    - Contact the Law Registrar

Repeatable Course Form

- Associate auto-escalate to Specialist once approved by college/school
    - If the student needs to enroll in the course, you must have a Drop/Add Form too before you escalate
        - It's not that the Registrar can simply enable something on the backside that would then allow the student to add himself/herself online; instead, they must have the Drop/Add Form so once the repeatable element is complete, they can add the student directly
            - The actual process is course and curriculum open the course for the enrollment team to add it; these need to be done simultaneously so no one else enrolls

Repeat Rules

- <u>Undergraduate Repeat Rule</u>
    - Students have 1 year to repeat the course (see bulletin.miami.edu for details)
    - If a student misses the 1-year mark and they want to appeal the timeframe for an extension, they must speak with their college/school about their options
    - If the student speaks with their college/school and is referred back to us, connect with the advisor and tell them if they have questions they should connect with Karen Beckett (do not inform the student about this)
    - Financial Aid: Review SAP Chart to determine if specific awards will pay for a repeated course
- <u>General Repeat Rule Adjustment</u>
    - ABSN (Accelerated Nursing Program) students use this repeat rule when completing the Repeated Course Adjustment Form on Boomi
    - A grade of C- or lower is considered failing for ABSN, so they must retake course in the following semester
    - The second attempt of the course may show as an "Illegal Repeat" on student's transcript
        - If so, they should be instructed to complete the Repeated Course Adjustment Form on Boomi

Retro-Drop/Add

- 'Canes Central is unable to process retroactive drop/add requests unless they come in through the approved Boomi process flow
    - Do not refer people to the Deans or advisors about this
    - The deadlines are the deadlines
    - They can speak with their advisor about "other options"
- See **Census Date** for the effects of a Retro-Drop/Add after Census

- 3 Exceptions:
  - **IEP courses are not subject to this rule**
    - You can process retro-drop/adds for IEP courses without Karen's approval
  - **JUS (Judaic Studies) courses do not have to go through the Boomi process flow**
    - You can process retro-drop/adds for JUS courses through a Salesforce case submission
      - Karen's approval still needed; we can accept over email through the case
  - **IND 100, Independent Learning Initiative**
    - This is through the Camner Center
    - This course can be retro added/dropped without going through Boomi or without Karen's approval
      - We just need a Drop/Add Form with all the proper information
- See Drop/Add for when we can "*Honor On-time Requests After Deadline?*"
- Process – Retro Request Boomi flow was launched on 2/1/2022
  - Associate Deans or their designee will be allowed to submit the Boomi form
  - A drop/add form must be attached. The drop/add must be completely filled out for all requests, including all required signatures, including the student signature.
    - Dean's signature is required for all retro adds/drops
    - We must verify the Dean's signature using the signature forms located in the Box → Registrar & 'Canes Central Shared Folder
  - Financial Aid will review to ensure there are no FA issues
  - Registrar will review the form next.
  - If the form is approved by both the Registrar and Financial Aid, the request will go to 'Canes Central for processing.
  - A retro may be approved but it cannot be processed until the student ensures all other holds, including OSAS holds, are cleared
  - **All required overrides must be checked off on the form for us to process the Drop/Add (e.g. class permission, time conflict, prerequisite, corequisite)**
  - When a retro-drop is approved but Karen says it should be with a "W," do the following (Note: This is the only time you can adjust effective dates on your own):
    - Use today's date as the effective date if it is currently within the window to drop a class with a "W"
    - Use the Last Day to Drop—when students can last get a "W"—if it is past the window to drop a class with a "W"
    - Write the date in the effective date area on the Drop/Add Form, write a note it was changed per Karen's note in Boomi to drop with a "W," and sign your name where you write this
    - Scan the form, attach to case, upload to Boomi, and follow normal processes with OnBase
  - Whenever you complete a retro-add/drop, remember to be holistic and talk to students about how it will affect their bill (if it will) and talk through payment options

- LAW Retro Requests
  - If we receive a request for a retro for a LAW student but there is an OSAS hold on the student's account, we do the following in this order:
    - Try to get the student to do what the student needs to do to remove the hold
    - If the student is asking for a temp hold lift, follow the normal protocol to request it

        - If the hold is lifted, handshake the student to the LAW Registrar, mention the hold was lifted (express the urgency of a temp lift), mention the student contacted us about a retro-add/drop, ask if the LAW Registrar can help the student discuss options
- <u>UOnline Retro Requests</u>
    - If we receive a request for a retro for a UOnline student, we will create a case and reach out to the student and advisor to let them know we are sending the retro over to our processing team for assistance
        - Send email through the case to univregistrar@miami.edu for processing
- <u>Winter Intersession Retro Requests</u>
    - Per the Registrar, we are okay to process winter intersession retro requests *before* the spring semester officially begins
        - Once the semester begins, the Registrar will no longer approve retros for winter intersession and 'Canes Central will no longer process them

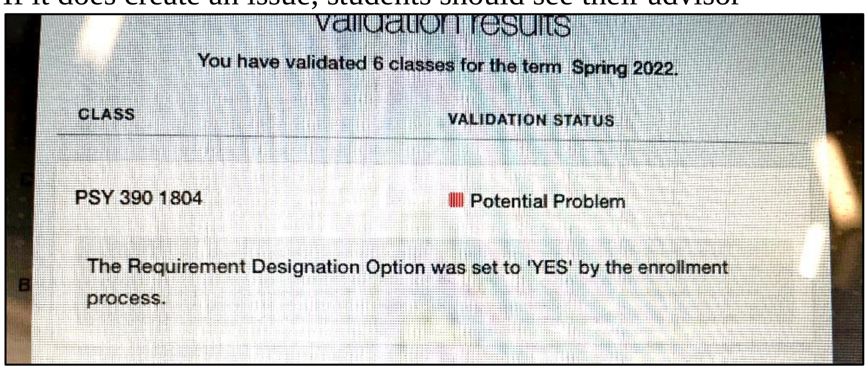
Schedule Confirmation Process in CaneLink

- Displays starting on the Last Day to Add for a semester
    - There will be a communication sent to students that day
    - Student can bypass by selecting skip until after last day to drop without "W"
    - After this, students will be blocked from using CaneLink until they confirm it

Seal/Stamp on Letters/Forms

- If a student has a form that requires a University seal or stamp, this would need to come from our Registrar Specialists
- If it seems to deal with an Enrollment Certification or Loan Deferment, then it needs to be submitted by the student through the appropriate electronic form via our website at www.canescentral.miami.edu/forms/
    - The student should specify they need the seal or stamp
- See Good Standing Letter/Form for information on how to submit forms that request academic and/or disciplinary standing

Shopping Carts

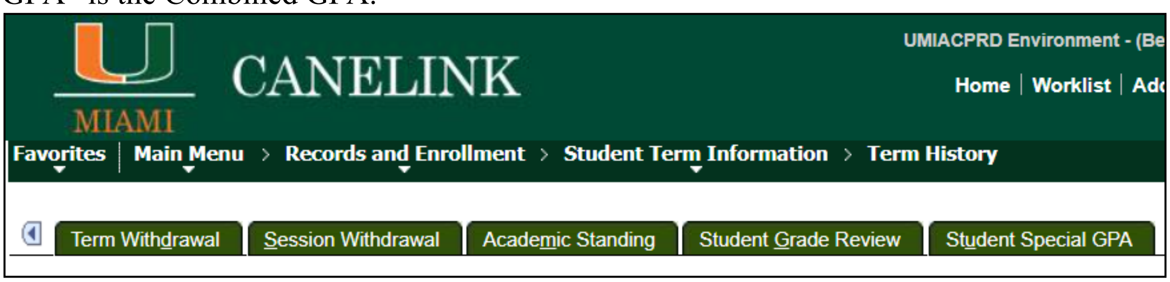
- Validation "Problems"/Notes
    - *Requirement Designation set to "YES"*
        - This isn't an issue as it's (typically) just a flag that the course could be Civic course, Writing course, etc.; check the course search and click on class to see those details
        - It probably won't create an issue at registration
        - If it does create an issue, students should see their advisor
        - 

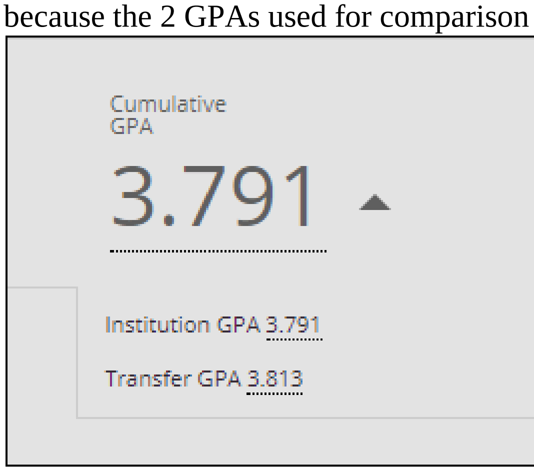
Social Security Number (SSN)

- Changes to the SSN must be requested through the online Boomi form
    - A student will need to be able to upload a pdf of the front and back of the Social Security card through the Boomi form
- SSN Hold
    - All students, domestic and international, will have an **SSN Indicator** placed on their CaneLink if they do not have a valid SSN on file
    - The **SSN Indicator** is not a hold and does not have any impacts on registration
        - A SSN is important information on a student's record because it is required for financial reporting and for federal taxation purposes
        - The process used is based on 1098-T regulations, so the indicator is not placed until there is a tuition charge
            - Incoming students will not have the SSN hold until tuition calculation is done

            - Continuing students without an SSN on file will have the SSN indicator placed on once tuition charges are added to the bill
        - In order for students to receive a 1098-T form, they must have a valid SSN on file
            - See 1098-T section for more information
        - International students who are not able to obtain a social security number may use an Individual Tax Identification Number (ITIN) in order to get paid
            - Students must also submit the original ITIN card via the Boomi form
    - Domestic students will need to have an SSN on file for FAFSA to link from Department of Education to PowerFAIDS

Special GPA (Combined GPA)

- The Special GPA, or Combined GPA, factors in both UM and transfer work into one GPA
- This is used primarily for the determination for Latin Honors for undergraduate students
- This GPA will not appear on a transcript
- Students cannot see this GPA online, but they can hand-calculate their Combined GPA using the formula specified on our website
- There are 2 ways this can be viewed by advisors and others who have access to do so:
    1) **Via CaneLink (see breadcrumbs below)**
        - Once there, the Student Special GPA is the final tab from on the right. The "Special GPA" is the Combined GPA.
        - 

    2) **Via EAB/Navigate**
        - Advisors and Associates can see this on the students' records under the GPA block. The Combined GPA is referred in EAB/Navigate as the "Transfer GPA." This is convenient because the 2 GPAs used for comparison are in the same location.
        - 

Summer Courses

- Students from other Universities can apply to take summer courses at UM by reaching out to DCIE and applying as a non-degree student (see https://credit.dcie.miami.edu/non-degree-seeking/index.html)
- UM students enroll in UM summer courses through normal enrollment means

- Withdrawals from Summer at UM
  - See “Withdrawal” section below
- UM students can enroll in courses through other institutions in line with the Residency Rule and in consultation with their academic advisor

Syllabi

- Former students and alumni looking for a syllabus for a course taken at UM have the following options:
  - Contact the professor who taught the course.
  - Contact the college/school in which that course was taught as they may have retained older syllabi.
- Discuss the availability of Course Descriptions and the methods of researching and obtaining them. See Course Descriptions.

Term Activation

- Term activation is the process that allows matriculated students to enroll in courses
- Students must (1) be term activated and (2) be assigned a Registration Appointment Time to be able to register
  - New Students: This is set up automatically as they are thrown “over the fence" (i.e., move from the admission system into the records system)
  - Cancelled and Reinstated Students: Students who were cancelled for non-payment and then are reinstated should already be term activated and have a registration appointment since they were once registered for the term
  - Continuing Students: This will happen automatically each semester until they apply for graduation or withdraw from the institution
- A 'Canes Central team member can verify if a student is term activated and/or has a registration appointment time in CaneLink, and then escalate to a Registrar Specialist if needed using these steps:
  - Review the student's account and look for service indicators
    - If the student has a hold blocking registration, inform the student of what they need to do and ensure they will be able to register once the hold is removed
  - Determine if the student is active
    - Click on the “Academics” tab to see if the current term is listed under “Term Summary”
    - Click “Edit Program Data”
    - Confirm students’ status is “Active in Program"
    - Students must be active in an academic program and plan to be term activated
    - Student status should NOT be “Applied for Graduation,” “Withdrawn,” or “Inactive”
  - Check to see if an enrollment appointment time is listed for the student through their main Student Center screen

Transcripts

- Transcript Orders
  - Students should be encouraged to order online through our website
  - We can check *Parchment* to view the status of orders, but we need the student to provide us with the DID number: https://exchange.parchment.com/d/tracking/didtracker.htm
    - If students don’t receive their tracking information for FedEx, USPS, etc., escalate to Specialist
  - Electronic orders are sent to the recipients with 1 email:
    - This email has the link to access the document

    - If there are any issues with an order and we are unable to resolve, a case should be created and, if needed, and Associate can escalate to a Registrar Specialist
    - The system allows anyone to place an order, including those who have never attended UM or those who have received a Certificate through DCIE. These orders go into what is called the “Pending queue” where the Registrar’s office tries to sort those orders and match the student to the information in CaneLink or cancel them if needed.
- <u>In-Progress Courses</u>
    - Courses that are In Progress (IP) will appear on the transcript after the last day to drop without a “W”
- <u>Unofficial Transcripts</u>
    - We cannot provide this to a student
    - If they cannot download from CaneLink because they no longer have access to CaneLink, they need to order an official
- <u>Old Transcripts</u>
    - Anyone whose full academic record is not on CaneLink—these are typically students who graduated prior to Fall 2013—will not be able to order a .pdf version of their transcript
    - These all get verified manually by the Registrar prior to being sent
- <u>Notarized</u>
    - Transcripts do not need to be notarized unless the student absolutely know the requesting body is requiring it of them
        - This can be confusing for students so let them know and perhaps they will save time and money by not selecting this option when not needed
    - The Registrar is now notarizing transcripts
    - Cost is reflected on the order website
    - Note: Sometimes students received the transcript complete email but it takes another week for the transcript to truly be complete with notarization
- <u>Apostille</u>
    - When a student selects this option, the Registrar home office representative who works on the transcript will explain the next steps to the student
    - See the transcripts website for the most up-to-date information
    - Cost is reflected on the order website
- <u>LAW Questions</u>
    - Refer LAW student to the LAW Registrar if they have questions about their transcripts as we do not have access to view their transcript orders
- <u>Hold Lifted that Prevented Transcript Send</u>
    - Associates should escalate this to Registrar Specialist for processing if confirmed all holds are removed and there is an active order in Parchment
- <u>In Person Pick Up Option for Official Transcripts</u>
    - Students must order transcripts online
    - If they placed an order online and elected for the in person pick up option, they will be notified by the Registrar when their order is ready and where it should be picked up
- <u>Transcript Errors</u>
    - UGRD Transcript Errors (not ABSN)
        - **Non-UM Transcript Sent to UM but Not Showing Under “Transfer Credit”**
            - It could be a timing issue (e.g., still shipping, processing time, etc.)
            - Handshake to Admission (EM Ops) to see if they received the transcript as all transcripts are sent there
        - **Non-UM Credits Show Under “Transfer Credit” but Missing Elsewhere (e.g., DPR)**

            - This tends to happen if 1 of the 2 steps needed to post credits is not completed
            - Handshake to Admission (EM Ops) to fix the coding so the credit appears in all locations
        - **Non-UM Schools Listed on UM Transcript**
            - Admission will not admit a student who does not provide all transcripts for all institutions listed on their application
                - If students incorrectly lists a school on their application that they never attended, they may be asked by Admission to provide a letter from that institution on their letterhead that states the student never attended
            - If this occurs, do the following:
                - Confirm with the student they never attended the school, even if they withdrew
                - Reach out to our colleagues in UGRD Admission—find the person for the last name alpha from the QRG—and ask if the student listed that institution on their application
                    - *Do not refer the student to admission*
                    - Take this chance to reach out and find out the information so you can eliminate any unnecessary shuffle
                - If the student had listed the school on the application, Admission may need to speak with them, or they may relay to you what to inform the student
                    - Take your next step based on the email response and handshake to Admission personnel as needed
                - If the student had not listed the school on the application, there is some other issue
                    - Example: UGRD graduating this term but applying for ABSN and perhaps the ABSN program accidentally added that school instead of another
                    - Since we are unable to pinpoint the issue, escalate to Registrar Specialist for assistance
    - <u>ABSN, GRAD, and LAW Transcript Errors</u>
        - These students tend not to experience issues with transfer credits posting on an ABSN, GRAD, or LAW transcript
            - Each of these programs handle their own admission
                - If the issue is the student has an incorrect Non-UM school on their UM transcript, handshake the student to the admission personnel for their academic program to review and assist
                    - ABSN = https://www.sonhs.miami.edu/admissions-and-student-services/office-of-student-services/contact-oss/index.html
                    - GRAD = https://www.grad.miami.edu/apply/admissions-representatives/index.html
                    - LAW = Law Registrar (i.e., Terrell West at twest@law.miami.edu and CC LawReg@law.miami.edu)
                - **Caution:** Be careful that you only refer students who experience this issue as a result of entering one of these programs; if it's a UGRD issue, follow the steps above

Veterans Affairs (VA)

- veterans@miami.edu
- The veteran or dependent must initiate VA benefits
- VA Education Hotline = (888) 442-4551
  - Helps the veteran understand what benefits they are entitled to receive
- **Associates =** Always loop in Gregory Bellamy in any VA Case—CC in the emails—so he is aware of every case and can chime in if need be
- Chapter 33 benefits are not counted towards the total COA. Additionally, this benefit pays full tuition. Other tuition restricted aid can affect the amount applied to the student's account.
- **RG6** = Student VA Benefit-Do Not Call
  - This is a positive service indicator and does not impact any services
  - Do not contact students with this hold for proactive billing and aid outreach; it is ok to discuss these things with them if they reach out to us directly
- We don't want to "over-refer" students to the VA team if they do not need to go there
  - In general, if someone calls to speak about their balance and we see their specific VA types listed as posted payments (e.g., Chapter 33 and Yellow Ribbon, etc.), then we should assume all funds are in accurately, if we confirm with the student they were only expecting those funds to be posted
    - Then take the time to determine why there is still a balance and explain the bill
    - For example, a student paid $1,000 in their 1st semester but now owes $1,500 in the 2nd semester, but you can see if it is due to the $500 deposit that was accounted for in the 1st semester
  - If the student still believes the numbers are incorrect, you can refer the student to speak with the VA reps

Waitlist vs. Swap (and Enrollment Philosophy)

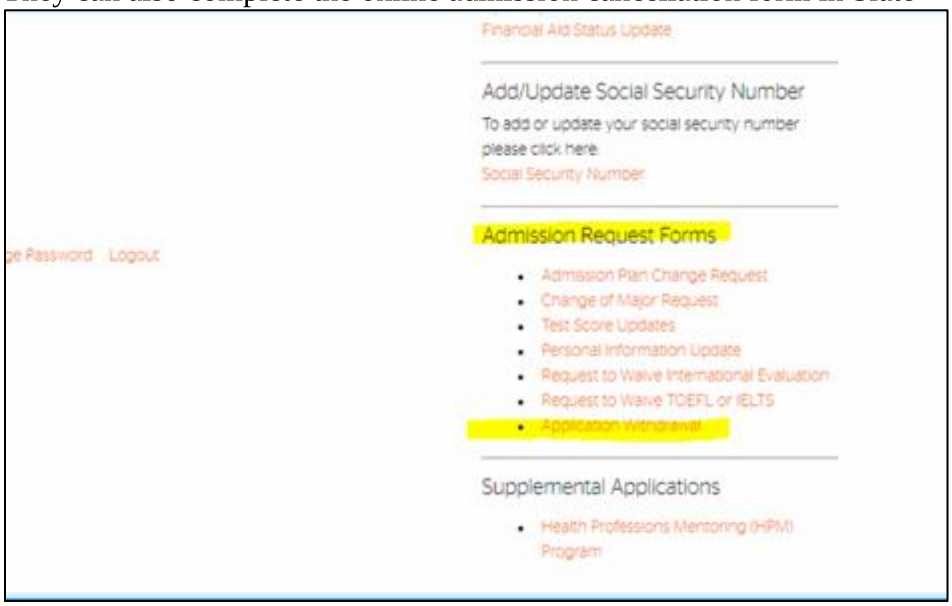
- Our enrollment philosophy is always that students should enroll into a full schedule of classes so that they know they have a full schedule to work with in case they are unable to make changes, and then to use waitlists and swaps to increase their chances of getting into more preferred courses
- Swap is preferred over waitlist because it helps students avoid (a) class conflicts, (b) duplicate course enrollments, (c) issues with enrollment caps, etc.
  - Essentially, swap allows students to set up CaneLink to automatically remove them from a course and add them into a new one they prefer should it become available
- We cannot set up swap for students; they must do it on their own
  - It seems tempting to do this for a student in CaneLink but, if you do, it will not work as CaneLink will not recognize the swap when it goes to run
- We cannot set up students on waitlists for courses that we have to select overrides for them to access
  - It seems tempting to do this for a student in CaneLink but, if you do, it will not work as CaneLink will not recognize the overrides when it goes to run.
  - The only exception is for a Graduate student who is taking an Undergraduate course, for example in the Music Therapy program. See **Graduate student registering for Undergraduate Courses**
- Students who would like to set up swap or waitlist should be recommended to speak with their advisors to see if they can obtain permission codes as needed to avoid the issues mention above
- Waitlisted courses will appear on students' schedules beyond the Last Day to Add and up to the point when the Registrar performs an official snapshot of those remaining on the waitlist.
  - In general, this happens just before benchmark

  - Only after this time are waitlisted courses removed from students' schedules.
- The waitlist runs for the last time the night before the last day to add a course.
- The waitlist position is visible on the schedule in CaneLink
- Waitlist Issues
  - Students can waitlist for multiple sections of the same course
  - If the college/school does not code the course sections correctly on the backside, students who are on multiple waitlists and go to drop one may be dropped from both
    - Caution students, tell them to screenshot their waitlist position before dropping, and tell them to work with their advisor through any concerns
    - Issues would need to be directed to advisors and faculty of the course
    - There is no current way for us to see their old waitlist to assist
- Note that we cannot see waitlist history via Enrollment Request Search in CaneLink prior to the start of the upcoming term.
  - See "Enrollment Request Search" for more information

Withdrawal

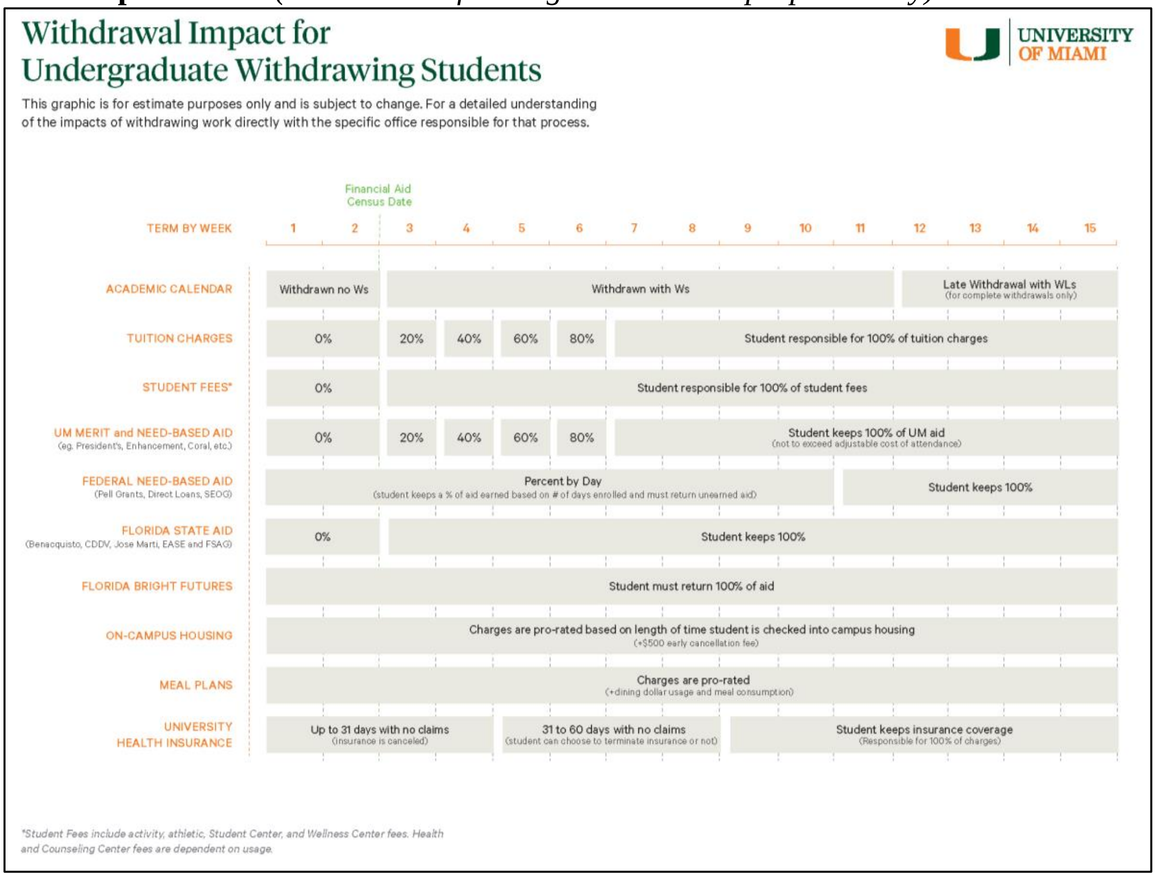
- Effect on Aid
  - UGRD students who were out for approximately 1 year —this includes withdrawal and inactive—may be asked to re-complete the CSS Profile and other documents to receive aid (in addition to the FAFSA)
  - UGRD students who returns within one calendar year, and he/she continues to meet the requirements (e.g., SAP) of their UM merit scholarship, then their UM merit scholarship may be re-awarded to them upon their return
    - Exceptions:
      - The expiration timeframe (e.g., 8 consecutive semesters) will not be extended if this is offered; however, they may be able to appeal at the end of the original scholarship agreement terms
      - Music scholarships may require a new audition to be considered
      - Theater scholarships may require a new audition to be considered
  - Some federal aid may need to be returned; review the R2T4 section to learn more
- Fees After Withdrawal
  - If fees still show on a student's account after the student was successfully placed on inactive status, a case should be submitted and an Associate will work with the designated contacts to ask if the fees can/should be removed
    - For list of contacts, please see Optional Fees/Waivers section
- Undo Withdrawal
    - To undo a withdrawal submission, the student must notify a Success Advocate at the Center for Academic Navigation and Success in writing of their request to retract their withdrawal
    - Success Advocate will then notify the Registrar team to update the student's record accordingly
    - Must be done prior to the deadline for registration
- GRAD Process
  - All students need to go through their advisor/Program Director who then send a Drop/Add Form and notice to Registrar team
  - The Program Director can guide the student through the Graduate Withdrawal Date Appeals Committee through the Graduate School if need be
    - This committee only reviews full withdrawal appeals, not individual courses

        - They can only appeal after they have completed the official withdrawal process
        - The appeal form is available through the Graduate School's forms website
    - An Associate can escalate this to a Specialist if it is submitted to 'Canes Central
- LAW Process
    - All students need to go through the Law Registrar
- DCIE Non-Credit Programs and Summer Scholars Program Process
    - All students need to go through DCIE to complete the "DCIE Withdrawal Form"
- UGRD Process
    - **Fall and Spring**
        - New/incoming students whose first semester will be that Fall or Spring and it has not yet begun need to go through Admission so they can discuss their options (e.g., withdraw admission, defer, etc.)
            - Note: This does not include Accelerated BSN (NUAP_BSN) students as they must go through the School of Nursing and Health Studies
            - They can also complete the online admission cancellation form in Slate



            - This still applies whether they registered or not, as long as the first semester has not yet begun
        - Continuing students whose first semester already began need to work with a Success Advocate at the Center for Academic Navigation and Success
            - Associate can create a CMI case with 'Canes Success Advocate ('Canes Success Center) for student through Salesforce
                - This is the preferred method for contact as it will create a case and establish a time for the student to see them
                - Students may also be provided with this link to find contact methods for the Success Advocate team
    - **Summer**
        - New/incoming students whose first semester will be that Summer and it has not yet begun need to go through Admission via the information under the section above so they can discuss their options (e.g., withdraw admission, defer, etc.)
            - Note: This does not include Accelerated BSN (NUAP_BSN) students as they must go through the School of Nursing and Health Studies
            - They can also complete the online admission cancellation form in Slate

-
    - Continuing students who plan to continue in the Fall but need to drop their Summer courses at UM can simply obtain a signed Drop/Add Form and submit to us for processing
        - Associates must escalate this to a Registrar Specialist
        - Do not refer to Success Advocates at the Center for Academic Navigation and Success because this is not considered a withdrawal from the University
    - Continuing students who do not plan to continue in the Fall but need to drop their Summer courses at UM need to work with to work with a Success Advocate at the Center for Academic Navigation and Success because this is considered a full withdrawal from the University
- **Intersession**
    - If students want to drop intersession courses but keep their **Spring or Summer** courses, they simply need to work with their advisor (see Intersession)
    - If students want to drop intersession courses but they will no longer be enrolled in **Spring** courses, they must work with a Success Advocate at the Center for Academic Navigation and Success
    - If students want to drop intersession courses but they (a) will not be enrolled in any other **Summer** courses and (b) do not intend to return to UM, they must work with a Success Advocate at the Center for Academic Navigation and Success
- **Withdraw Date Appeals**
    - How is it initiated?
        - Students can do this on their own online via the information at https://success.miami.edu/success-advocates/student-withdrawal/appeal-form/index.html
    - If students have questions about this process, put the student in touch with a Success Advocate at the Center for Academic Navigation and Success
    - How do they check on the status of their appeal?
        - We should email handshake them to Enid Miguez (exm722@miami.edu)
    - How are they notified of the appeal decision?
        - Via the email address by which they submitted the appeal form
    - What if they have a question about the appeal decision?
        - We should email handshake them to Enid Miguez (exm722@miami.edu)
    - Is there a deadline to submit the appeal?
        - Either 30 days after the date of withdrawal or 30 days after the end of the semester in question

        - Are they eligible for refunds?
            - An approved appeal does not necessarily result in a tuition refund or changes to the students' academic record
            - If it does, that information is specified in the email decision they receive
        - Can I appeal my appeal decision?
            - No, there is no next step; all appeals decisions are final
    - **Withdrawal Impact Chart** *(Note: This is for rough educational purposes only)*
        - 

WL Courses

- The WL designation is not given for single class drops; it's only used in full-withdrawal situations
    - A WL grade is essentially a late withdrawal
    - This is only used in cases of full withdrawal
    - The effective date can be after the Last Day to Drop overall, and it will be since it's late
        - The effective date must be the actual date of the request to be removed from the course as it is a federal compliance issue
    - Since all complete withdrawals ultimately go through the Registrar processing team—this is either through us or the 'Cane Success Center in line with the withdrawal processes—the WL is not something we will apply to students' accounts
        - This designation will show as the grade automatically in CaneLink once the withdrawal is processed by the Registrar
- If someone requests a drop after the last day to drop, it is considered a retro-drop
    - See Retro-Drop/Add for details

[Online MBA Program]

Program Code in CaneLink is GRBUO

Referral Process

- MHBSO → 'Canes Central, FA, Student Accounts, Registrar, and 'Cane Card
  - All these referrals will go straight to 'Canes Central since we are the customer service face of these 4 offices
  - Communicate to students they can reach 'Canes Central via any of our *5 Ways to Connect* listed at www.canescentral.miami.edu/contact/
  - MHBSO team members can also submit cases on behalf of students to 'Canes Central through EAB/Navigate
- 'Canes Central → FA, Student Accounts, Registrar, and 'Cane Card
  - Escalate to the home offices through our normal channels but only if needed
    - Please ensure that you are classifying the cases as the "UOnline" career *before* escalating
    - Katrenna and Nyota will receive access to 'Canes Central's Salesforce instance as a FA Specialist so they can draw all UOnline classified cases from the escalated queue
  - Do not communicate to "see 'Canes Central to speak with someone from [fill in the office]" as students should simply be recommended to meet with a team member from 'Canes Central
  - 'Canes Central will make the professional judgment through their interaction if something needs to be handled through the home office
- 'Canes Central → MHBSO
  - Handshake to program advisors through mhbsonline@miami.edu
  - Eliminate the use of the inquiry form

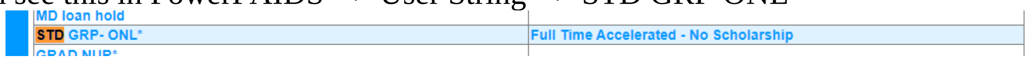
Financial Aid

- Term Dates = Follow UOnline academic calendar
- Packaging SLA = Once (a) packaging begins (Note: This begin date will be communicated by FA), (b) the student is registered, and (c) the student submitted the proper FAFSA, they should be packaged by the end of the next business week
  - Example =
    - If these criteria is met on March 18, 2021, the student should be packaged the following business week
    - If not, they can contact 'Canes Central as early as Monday, March 29, 2021 and we can escalate to FA as needed for packaging

March 2021

SU	MO	TU	WE	TH	FR	SA
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

  - Recommendation =
    - Have the students fully-register for both mini-terms contained within a larger semester from the onset as it will facilitate aid packaging, help avoid payment issues/concerns, and avoid retro-adds/drops
    - Also, register as soon as possible once MATR will help facilitate the packaging process
  - Packaging for this population is different from other GRAD students as they are packaged for the full academic year based on when they enter

        - Fall Entry = Fall/Spring/Summer package
        - Spring Entry = Spring/Summer package
        - Summer Entry = Summer package
        - CONT Students = Fall/Spring/Summer package
    - For them to pull into the FA team's processing list, the MHBS must add the students into a Student Group
        - We can see this in PowerFAIDS --> User String --> STD GRP-ONL*
            - 

        - If the field is blank = There is a problem, and they will not be packaged
            - Ping the MHBS GRBUO advisor to add the student group so the student can be packaged
            - Once the student group is added, they fall under the Packaging SLA
            - If the Packaging SLA is in effect and the student has been waiting a long time for the FA package but it was due to the student group being blank, get the student group fixed and then escalate the case for packaging
                - Try to always stick with the Packaging SLA
                - This is really if you dub it necessary based on the situation/tone
            - If the field has words in it = GRBUO Student
            - If the field has a % = UOnline Student
- <u>Disbursement Dates and SLA</u> = By Friday of 2nd week of classes
    - It takes 3-5 business days if awards are accepted and documents are completed once disbursement begins
    - Note: This is different from other programs in that disbursements are not initiated until the end of the second week of classes
- <u>Document Submission SLA</u> = We communicate a standard 10 business day SLA for all other documents
- <u>FAFSA and SLA</u> =
    - Same code as GRAD = 001536
    - It takes approximately 3-5 business days for the FAFSA to show in PowerFAIDS once completed, but communicate the 10 business day SLA
    - Deadline = End of Session 1 Courses
        - If Session 2 begins, consult Madison to see if exceptions are possible
- <u>Last Day to Originate Loans SLA</u> = Stick with the timeframe we currently communicate for GRAD FA, which is the Last Day of Classes
    - This means all awards must be accepted and all MPN/EC documents completed, and assuming credit approved for PLUS (if needed)
    - Also, any loan revisions need to take place by this time
- <u>Communications to Students</u> = 'Canes Central will see it listed in Comm Log and Comments in PowerFAIDS
- <u>Missing Information Letters</u> = Sent to all students pending documents automatically every Monday after 5:00 p.m.
- <u>Forms</u> = Links to the webpage with GRBUO forms can be found on the 'CC website
    - 'Canes Central is not able to view submitted Dynamic Forms for GRBUO or UOnline
- Walk-In Escalations = If a GRBUO student comes in person and case has to be escalated, please do not escalate in person. Escalation would happen through normal virtual channels so the GRBUO Financial Aid processing team can review

- Document Submission in Person = If a GRBUO student walks-in and is submitting Citizenship Documents or the Statement of Educational Purpose, 'CC Associate will scan all appropriate documentation, upload to the case, then escalate virtually to the GRBUO Queue
    - GRBUO will take the scanned documents and process them for student

Registration and Records

- Academic Calendar = Follows the UOnline calendar
- Diplomas/Transcripts = Normal processes through 'Canes Central
- Registration = Recommend having the students fully-register for both mini-terms contained within a larger semester from the onset as it will facilitate aid packaging, help avoid payment issues/concerns, and avoid retro-adds/drops. Also, registering as soon as possible once MATR will help facilitate the packaging process.
- Withdrawal and Leave of Absence Processes = From 'Canes Central's standpoint, we would handshake back to mhbsonline@miami.edu

Billing and Payment

- Bills = Will be on same bill release and billing notification schedule
- Past Due Holds = Treated the same as all other students

'Cane Cards

- These students will follow the new process set up for online students to receive a 'Cane Card
- This will not be communicated to them, but it is an option should someone inquire
- See https://engagecanes.force.com/CC/s/article/How-do-students-enrolled-in-online-programs-obtain-a-Cane-Card for information

Communications

- These students will be included in all 'Canes Central communications moving forward with slight modifications to remove non-applicable items
    - Communications will include regular newsletters, calling and texting campaigns (e.g., holds that impact registration), etc.
- Messaging will also be sent by FA, Student Accounts, and Registrar through their normal communication sequences to notify students of missing documents, bills, etc.

’Cane Card

See the **’Cane Card How-to Guide** Knowledge Article for details on how to create ’Cane Cards

Access

- ’CC has an encoding machine for Onity
  - We can encode Cane Cards to provide dorm room access for students who live in any dorm that uses Onity system
- Students living in Lakeside or UV should not need to have their Cane Cards encoded as these buildings are 100% CBORD integrated
- When printing a card for an undergraduate student, ’CC should ask if the student lives on campus
  - If yes, and not living at Lakeside or UV, look the student up on Onity and encode them for their dorm room access
  - If yes, and living at Lakeside or UV, ’CC just needs to tap and swipe the card on our reader and ensure they get a green light
    - If student returns and states they do not have access to these buildings or rooms, ’CC can contact Access Control or HRL as this could be an issue related to access groups or direct assignments to apartment doors
- Cane Cards should allow students to access the doors to classrooms of classes they are **currently enrolled in**

Boomi Form

- General Philosophy
  - Students and Associates must fully-complete the Boomi form in person to receive a new/replacement ’Cane Card
  - Do not provide a ’Cane Card if the form is not completed in entirety
- Technical Issues (Including Duo Mobile Issues)
  - Students may experience technical issues logging into the Boomi form, signing, etc. because they list their phones, etc.
  - Every effort should be made to help the student resolve their technical issues and properly complete the online Boomi Form
    - The form should be sent to them via text and email
    - Common solutions could include:
      - Observing the student and walking them through the Boomi Form step-by-step
      - If the student does not have a phone to access their text/email, (a) have the student use our kiosk to log into their email, (b) have the student call UMIT at 305-284-6565 using our mobile phones to ask for a Duo Mobile key so the student can access email and Boomi, and (c) once complete, recommend the student go to the Student Technology Help Desk in the Richter Library to obtain a Duo Mobile fob as a temporary solution to their Duo Mobile issues
  - Only as an absolute last resort should we do the following to manually charge a student:
    - Fill out a paper “Cane Card Charge Form”
      - Electronic copies can be printed from CC Team → Forms
      - Printed forms are available in the shelves under the transcripts
    - Escalate the ’Cane Card case to the OSAS Specialist and attached the scanned, completed form
      - Specifically mention Boomi was down so we were unable to complete the electronic process

- Specifically ask them to manually charge the $25 fee to the student's account
- Mention the completed form is attached for their reference
- 

  Cane Card

  Student ID: ______
  Name: ______
  Phone Number: ______
  Email: ______

  Please complete the following information:

  Select payment option: Charge to Student Account

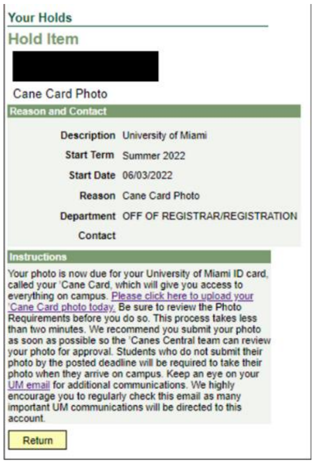
  Comments

  ______ Associate's Signature ______ Date
  ______ Student's Signature ______ Date

- <u>Incorrect Information on Form</u>
  - If you accidentally select the wrong information on a Boomi form and it has not yet been completed, you can now cancel the request by clicking "Cancel," adding a note as to why, and clicking "Cancel Request"
    - If you are cancelling a request, you must submit a new form with the correct information and ensure its completion
    - If there is no longer a need for a form, you must notate why in the case itself

<u>'Cane Card Photo Hold</u>

- If incoming student has not submitted their 'Cane Card photo through the new online submission process, a hold labeled "CCP CARD Cane Card Photo" will be placed on their CaneLink
  - Hold has no impact
  - If you review the "Services Impacted" by this hold through your administrative access at CaneLink → Main Menu → Campus Community → Services Indicators (Student) → Manage Service Indicators, you will see there is **no impact** on the students. Thus, it **will not** prevent registration, transcripts, etc. Still, this is to be a reminder to students to submit their photo ASAP
- Students who are pending photos will see this hold on their CaneLink account until their photo submission is approved
  - Once approved, they will receive an email of approval to their UM email address and the hold will be automatically removed within 48-72 hours
- A Message Center message will also be assigned to all students pending an approved photo after a certain timeframe
  - Unlike the hold, this message is general in nature and will not be removed, even after they submit a photo. It is just a reminder to take action

- 
  Your Holds
  Hold Item
  [redacted]
  Cane Card Photo
  Reason and Contact
  Description University of Miami
  Start Term Summer 2022
  Start Date 06/03/2022
  Reason Cane Card Photo
  Department OFF OF REGISTRAR/REGISTRATION
  Contact
  Instructions
  Your photo is now due for your University of Miami ID card, called your 'Cane Card, which will give you access to everything on campus. Please click here to upload your 'Cane Card photo today. Be sure to review the Photo Requirements before you do so. This process takes less than two minutes. We recommend you submit your photo as soon as possible so the 'Canes Central team can review your photo for approval. Students who do not submit their photo by the posted deadline will be required to take their photo when they arrive on campus. Keep an eye on your UM email for additional communications. We highly encourage you to regularly check this email as many important UM communications will be directed to this account.
  Return

Import Process for Student Information into 'Cane Card System

- CS Gold Process
  - CS Gold runs every day at 7:15 a.m., 10:00 a.m., 12:00 p.m., 2:00 p.m., and 4:00 p.m., which means, after students register for their 1st semester, they must wait until the next run time to obtain a Cane Card once they register
  - This runs on weekends too
- Caveat
  - The UMIT team only "turns on" the loading of new students into the CS Gold system at a specific date, which is usually 1 month before the students' first semester begins, and only for those who are enrolled
  - These dates will be communicated to you once they are established for each new semester
- New 'Cane Card photos
  - New 'Cane Cards are only updated in CaneLink and Navigate one time each semester, usually in the 3rd-ish week of the term
    - If a student takes a new photo, they will not see it updated in these systems until the beginning of the next semester, assuming they are enrolled
    - If a student doesn't see the updated photo in the next semester, ask them to wait about 4-5 weeks into the semester in case the upload is delayed
    - If after 4-5 weeks the photo isn't updated, we'll need to work with UMIT to ensure the upload is successful

New 'Cane Card Process

- There is a new process to collect 'Cane Card photos electronically for incoming students **before** they arrive on campus. This change will help streamline the production and distribution processes of 'Cane Cards and will reduce wait times for our students at pick up
- See the **New 'Cane Card Process FAQs** in Box for this information
- What student population will get imported to CloudCard?
  - All incoming Undergraduate, Graduate and Law students will be automatically invited via email to upload their 'Cane Card photo when they are:
    - Matriculated
    - Assigned a University of Miami email
  - They will **not** be invited to upload their 'Cane card photo if:
    - They already have a 'Cane Card photo on file (photo on CBord)

        - This can be common in students that participated in the Summer Scholar Program and already took a photo at that time
        - Mini Canes Camp
    - The students will need to make sure that they are checking their UM Email for this notification, they will be able to access their email once matriculated
        - It can take 24 - 48 hours, or up to a week for their email to be populated
    - Refer to Knowledge Article, "When will new students be able to access their UM email?", for further information
- <u>Important Dates</u>
    - **Summer Term**
        - Deadline of **July 20th**
        - Students that are enrolled in Summer Session A, B, and C can pick up their Cane Card in person starting the Monday before classes begin
    - **Fall Term**
        - Students will start receiving invitations to submit a photo beginning mid-March with a deadline of **July 20th**
        - There will be a period where we will not be printing out any cards for incoming students which is from July 20th until we start handing out those cards
    - **Spring Term**
        - Students will start receiving invitations beginning mid-October with a deadline of **December 1st**
    - **Note:** Students who do not submit photos by the specified deadline will be required to take a photo in person when they arrive on campus
- <u>What communications do students get?</u>
    - Students will receive the welcome email **every 2 weeks up to 6 times** reminding them to submit their photo
    - All Email Templates can be found in CC Teams > 'Cane Cards > Cloud Card Email Template
    - Welcome Email:
        - This is the email that will be sent automatically when the student is imported from CaneLink if the student is (a) Matriculated, (b) assigned a UM email, and (c) does not already have a picture in CBord

MIAMI

WELCOME

You will be issued a University of Miami ID card, called your 'Cane Card, and your 'Cane Card will be used for access to everything on campus. Keep an eye out for additional information in your inbox from 'Canes Central.

Please click the button below to upload your 'Cane Card photo. This process takes less than two minutes.

The deadline to submit your photo is July 20, 2022, but we recommend you submit your photo as soon as possible so the 'Canes Central team can review your photo for approval. Students who do not submit their photo by this deadline will take their photo when they arrive on campus.

Photo Requirements:

- Should be taken against a plain, light background
- Should be cropped several inches above head to middle of chest
- Must be a color photo
- Must be positioned directly facing the camera
- Eyes should be open and looking at the camera
- Must not include sunglasses, hats, pets, or props
- Prescription eyeglasses are permitted if worn frequently
- Medically prescribed tinted lenses are permitted with supporting documentation issued through the Office of Disability Services (ODS)
- Head coverings worn for religious reasons are permitted if the full face is showing; veils are not permitted

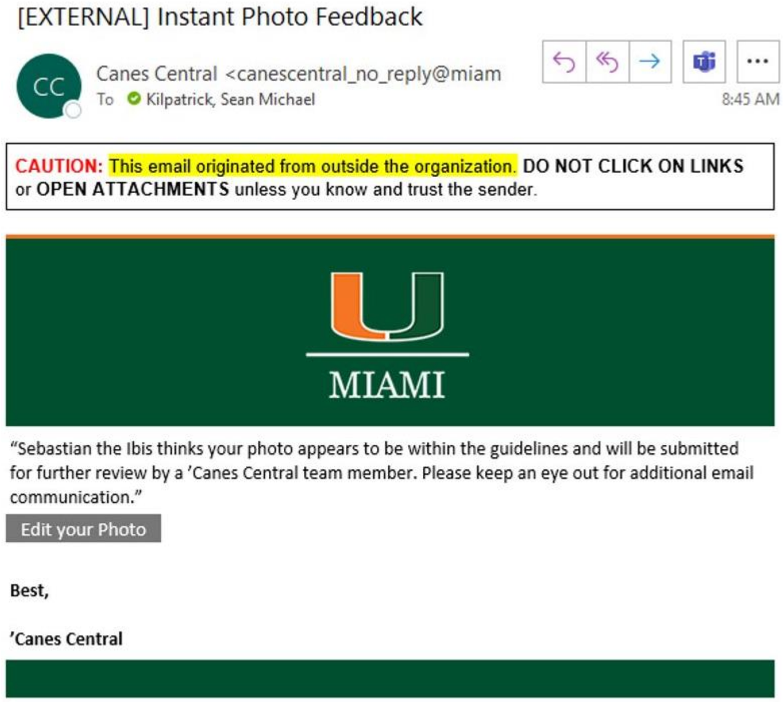
Submit Your Photo

Best,

'Canes Central

- Student will receive **a Bot Instant Feedback Email** automatically after submitting the photo letting them know that the photo is within the guidelines and is currently being reviewed
  - This email will be identical for both good photos and maybe photos, but the system will automatically identify if the photo submission does not meet the Photo Guidelines and will ask the student to resubmit.

- **Example of Good/Maybe Bot Instant Feedback Email**:



[EXTERNAL] Instant Photo Feedback

Canes Central <canescentral_no_reply@miam
To Kilpatrick, Sean Michael
8:45 AM

CAUTION: This email originated from outside the organization. DO NOT CLICK ON LINKS or OPEN ATTACHMENTS unless you know and trust the sender.

MIAMI

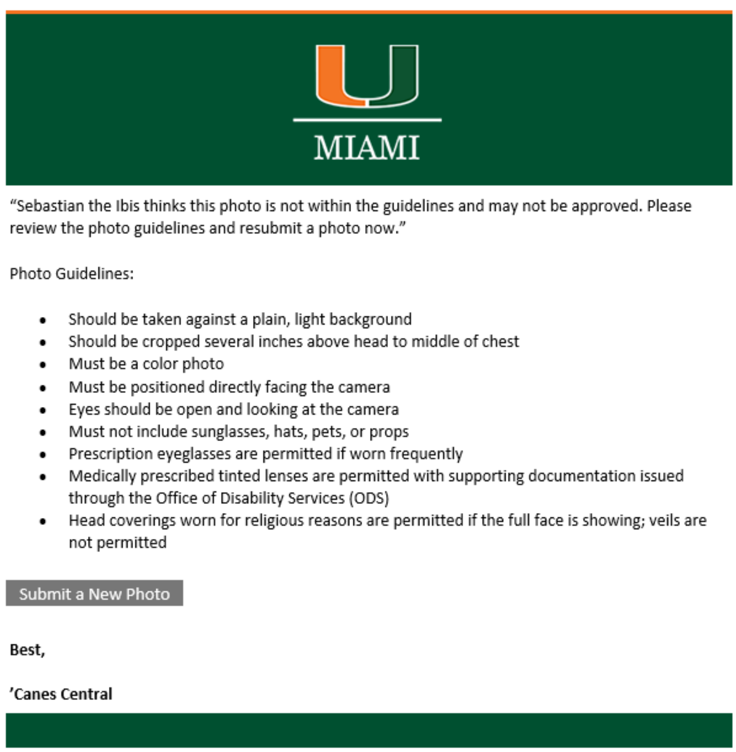
"Sebastian the Ibis thinks your photo appears to be within the guidelines and will be submitted for further review by a 'Canes Central team member. Please keep an eye out for additional email communication."

Edit your Photo

Best,

'Canes Central

- **Example of Bad Bot Instant Feedback Email**:



MIAMI

"Sebastian the Ibis thinks this photo is not within the guidelines and may not be approved. Please review the photo guidelines and resubmit a photo now."

Photo Guidelines:

- Should be taken against a plain, light background
- Should be cropped several inches above head to middle of chest
- Must be a color photo
- Must be positioned directly facing the camera
- Eyes should be open and looking at the camera
- Must not include sunglasses, hats, pets, or props
- Prescription eyeglasses are permitted if worn frequently
- Medically prescribed tinted lenses are permitted with supporting documentation issued through the Office of Disability Services (ODS)
- Head coverings worn for religious reasons are permitted if the full face is showing; veils are not permitted

Submit a New Photo

Best,

'Canes Central

- Student will receive a **Picture Approved Email**, sent automatically when 'Canes Central approves the photo.
  - Example of **Picture Approved email**:

MIAMI

YOUR 'CANE CARD PHOTO HAS BEEN APPROVED

Summer Scholars students will pick their 'Cane Card at Summer Scholar check in/Orientation.

Undergraduate students must pick up their 'Cane Card at central Orientation check-in. Undergraduates who miss Orientation check-in will be able to pick up their 'Cane Card at the 'Canes Central office beginning on the first day of classes.

Graduate and **Law** students can obtain their 'Cane Card by visiting the 'Canes Central office beginning the Monday prior to the first day of classes unless otherwise specified by their college/school. Here are some known exceptions:

- **GRAD Medical, except Physical Therapy (e.g., Public Health, etc.)** students will pick up cards on the Medical Campus during Orientation
- **GRAD Physical Therapy** students will pick up cards at the Plummer Building during Orientation
- **GRAD RSMAS** students will receive communication from the RSMAS Graduate Studies Office regarding distribution
- **LAW** students will pick up cards at the Law School during Orientation

Remember: You will need to bring your driver's license, state ID card, or passport to confirm your identity.

Best,

'Canes Central

- Student will receive a **Picture Denied Email**, sent automatically when 'Canes Central declines the photo
  - A personalized message can be inputted stating why the photo was declined
  - The email will also remind the student of the Cane Cards requirements and the deadline to submit the photo
  - Example of **Picture Denied Email**:

MIAMI

YOUR 'CANE CARD PHOTO HAS BEEN DENIED

Your photo was denied for the following reason(s):

- Must be positioned directly facing the camera

This is being denied since you were not facing the camera. Please retake and resubmit. Review the photo guidelines for details.

Submit a New Photo

Please review the following guidelines and resubmit your 'Cane Card photo by the July 20, 2022 deadline:

- Should be taken against a plain, light background
- Should be cropped slightly above head to middle of chest
- Must be a color photo
- Must not include sunglasses, hats, pets, or props
- Must be positioned directly facing the camera
- Eyes should be open and looking at the camera

Best,

'Canes Central

- What is the process to approve/deny photos and batch printing?
  - ’Cane Card Specialist will execute all the approval/denials of newly submitted ’Cane Card photos via CloudCard. Please refer to the Tip Sheet for Cloud Card found in CC Teams > ’Cane Cards > Cloud Card UMIT Tip Sheet
- How will students pick up their ’Cane Cards?
  - Students will need to bring a government-issued ID (e.g., driver’s license, state ID card, or passport) to confirm identity at pick up
  - **Undergraduate Students:**
    - Must pick up their ’Cane Card at central Orientation check-in; Undergraduates who miss Orientation check-in will be able to pick up their ’Cane Card at the ’Canes Central office upon the conclusion of Orientation check-in
    - During Orientation, any ’Cane Cards that were leftover will be brought back to ’Canes Central by Betsy or the Associate onsite and will be stored in a locked cabinet behind the Greeter where the transcripts are located
    - The same process above applies for commuter students
  - **Graduate and Law Students:**
    - Students can obtain their ’Cane Card by visiting the ’Canes Central office beginning the Monday prior to the first day of classes, unless otherwise specified by their college/school
    - **GRAD RSMAS, GRAD MED** will have their students pick up their ’Cane Cards directly from them
      - We are still responsible for collecting the photos, but we will not print these student populations ’Cane Cards
  - **DCIE (Summer Scholars Program):**
    - After the Summer semester photo submission deadline, they can come visit ’Canes Central in person and we will take a photo for them
    - Students can start coming in to ’Canes Central beginning the Monday before classes start to pick up their ’Cane Card, as the cards will be ready for pickup
  - For more information about what student populations do or do not get a ’Cane Card, refer to the Who can we Assist section of ’Cane Card
- How will we store the printed ’Cane Cards?
  - All ’Cane Cards will be stored in a card filing box next to our transcripts behind the front desk where the Greeters are, in alphabetical order
  - Information about prefixes to assist with alphabetical order:
    - a. Consider a prefix as part of the name, not as a separate unit. Ignore variations in spacing, punctuation, and capitalization in names that contain prefixes (for example, *d', D', Da, de, De, Del, De la, Des, Di, Du, El, Fitz, L', La, Las, Le, Les, Lo, Los, M', Mac, Mc, Saint, San, Santa, Santo, St., Ste., Ten, Ter, Van, Van de, Van der, Von,* and *Von Der*).

Name	Unit 1	Unit 2	Unit 3
A. Serafino Delacruz	DELACRUZ	A	SERAFINO
Anna C. deLaCruz	DELACRUZ	ANNA	C
Michael B. DeLacruz	DELACRUZ	MICHAEL	B
Victor P. De La Cruz	DELACRUZ	VICTOR	P
LaVerne F. Delano	DELANO	LAVERNE	F
Angela G. D'Elia	DELIA	ANGELA	G
Pierre Des Trempes	DESTREMPES	PIERRE	
Brian K. De Voto	DEVOTO	BRIAN	K
P. Henri Leclair	LECLAIR	P	HENRI
Paulette G. Le Clair	LECLAIR	PAULETTE	G
Perry T. LeClair	LECLAIR	PERRY	T
Doris B. VanNess	VANNESS	DORIS	B
Jan P. Van Ness	VANNESS	JAN	P
Marian L. Vanness	VANNESS	MARIAN	L

- When a student visits 'Canes Central to pick up their 'Cane Card, we must do the following
  - Check in the student under "Request a 'Cane Card" where a case will automatically be populated
  - Ask the student if (a) this is their first card, (b) if they uploaded it online, and (c) if they received notification that the photo submitted was approved
    - We should always be doing our due diligence to make sure that we are not printing duplicate 'Cane Cards as that hinders our new process
  - Verify the student's government-issued ID (e.g., driver's license, state ID card, or passport) to confirm identity at pick up
  - Ask the student if they live on campus, if they do, we need to encode the card with Onity access
  - Once the case is populated, make sure that in the case description it highlights that the student is here to pick up their pre-printed card
  - Students who do not submit photos by the specified deadline will be required to take a photo in person when they arrive on campus
  - **Students Starting in Summer Session A, B, and C that have an approved photo**
    - Can come to Canes Central starting the Monday before classes begin to pick up their photo
    - We will need to encode the card if needed and follow the usual process
  - **Students Starting in Summer Session A, B, and C that do not have an approved photo**
    - We will take the photo for them in person and encode it if needed.
    - These students will continue to receive emails prompting them to submit a photo - make sure you communicate not to submit their photo online if they already got a card as their access will be **deactivated**
    - We can archive these students for the summer only
      - Chatter 'Cane Card Specialist on the case and indicate that this student took a photo in person so that they can be removed from Cloud Card
      - This will stop the emails from being sent
- What are the Photo Guidelines?
  - Should be taken against a plain, light background
  - Should be cropped slightly above head to middle of chest
  - Must be a color photo
  - Must not include sunglasses, hats, pets, or props
  - Must be positioned directly facing the camera
  - Eyes should be open and looking at the camera
- How will we discard the 'Cane Cards that were never picked up?
  - We must shred all 'Cane Cards that are not picked up by the student
  - Before shredding, we must ensure that we have proactively reached out to the student to let them know that their 'Cane Card is waiting for them at 'Canes Central
    - Outreach Timeline:
      - Start the outreach efforts right after the last day to drop without a W
      - Make at least 3 attempts (call/text) between then and the end of the semester, making sure you are logging your attempts on Salesforce
      - Make one last attempt before end of the semester (call) and then discard

- General Questions
  - **What do we do if a student calls us about their declined photo?**
    - If students call us to ask why their 'Cane Card photo was declined, remind the student that an automatic email was sent to them letting them know specifically of the reason and to follow the photo guidelines and resubmit by the deadline
  - **What if a student is stating that they never received an invitation email to upload a photo?**
    - All incoming Undergraduate, Graduate and Law students will be automatically invited via email to upload their 'Cane Card photo when they are (1) matriculated and (2) assigned a UM email
      - If the student never received an email, it means that they already have a 'Cane Card photo on file (photo on CBord)
      - Remind them that the email *comes from:* ***canescentral_no_reply@miami.edu***
  - **What do I do if the student is having technical difficulties?**
    - We should not refer any technical errors to UMIT, we can help student at 'Canes Central by recommending they clear their cache and try using a different browser

Preferred Name

- This will show on the 'Cane Card
- CaneLink is programmed to pull over the Preferred Name if one is entered and, if not, to pull over the Legal Name
- If it doesn't show on the 'Cane Card but you verify it was entered in CaneLink at least 1 day prior, reach out to Jose Abreu (jaabreu@miami.edu) or Nelson Kerbel (nelson@miami.edu) in UMIT for assistance in getting it added

Replacement Card

- Preferred Name
  - Students who complete the Preferred Name process in CaneLink and come in and specifically ask for a new 'Cane Card that shows the Preferred Name can do so
    - If returning a 'Cane Card (even if working), do not charge
    - If not returning a 'Cane Card, charge $25 fee
  - Be sure to look and confirm Preferred Name is in Cbord before you print a new card
- Legal Name Change
  - Students who complete the Legal Name process in CaneLink and come in and specifically ask for a new 'Cane Card that shows the new Legal Name can do so
    - If returning a 'Cane Card (even if working), do not charge
    - If not returning a 'Cane Card, charge $25 fee
  - Be sure to look and confirm new Legal Name is in Cbord before you print a new card
- Transgender Students
  - Students who come to CC, identify they are transgender, and request a replacement 'Cane Card may do so in line with the following:
    - Preferred Name = See guidelines above
    - Legal Name = See guidelines above
    - "Look"/"Presentation" = If the student mentions he/she/they are going through transition and is transitioning his/her/their look, you can take a new photo and replace the 'Cane Card at no charge if the student is returning a 'Cane Card; if not, charge $25 fee

- Reactivate Cards
    - If a student finds their lost ’Cane Card, there are two possible scenarios
        1. If any old ’Cane Cards are found after being issued a new one, the old cards should be discarded as they are immediately invalidated once new ’Cane Cards are activated
        2. If a ‘Cane Card is reported as lost and the student never got issued a new card, once students find their ’Cane Card again, they should inform ’Canes Central of this by visiting us in person
            - We can reactivate the card that was reported lost

Temporary Cards

- These are issued by Housing only for Housing
- Dining is not loaded on the temporary cards
    - Students can give their C# to be let in to eat as the dining halls are under strict order not to turn someone in this situation away

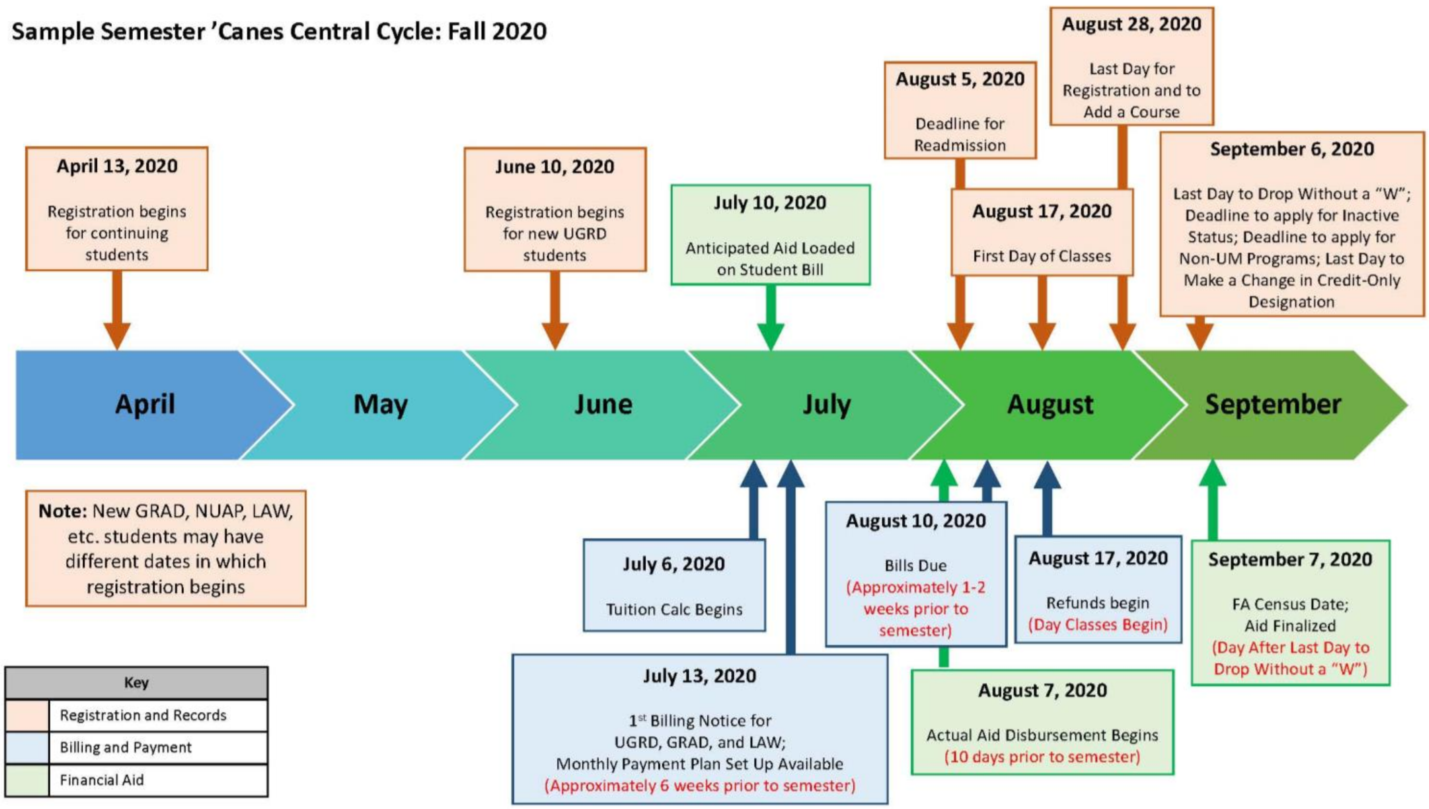
Who can we Assist?

- Students
    - We handle all student cards
    - Refer to New ’Cane Card process for information on when each student population should be picking up their card
    - **Do not get Cane Cards**
        - DCIE Non-Credit Programs (no cane cards issued)
    - **Do get Cane Cards**
        - DCIE Summer Scholars Programs
        - DCIE BGS (Bachelor of General Studies)
        - DCIE Non-Degree (UCT_NDG, UCX_NDG, UND_NDG, and ALU_NDGDCIE
        - Intensive English program (IEP)
    - **Online students** will now be loaded into CBord
        - They will not be loaded into Cloud Card
        - Online MBA Program and Law Masters Online students will follow the same process for all online students
        - See https://engagecanes.force.com/CC/s/article/How-do-students-enrolled-in-online-programs-obtain-a-Cane-Card for information
    - We can now print a ’Cane Card for online students **but only if it is requested**
        - **This should not be advertised**
- Faculty/Staff
    - Faculty and Staff should go to the Parking and Transportation Office in the McKnight Building, 1st Floor, for either New or Replacement card
    - Replacement cards that need to be printed without exchanging the old, damaged cards need to be done at Parking & Transportation in the McKnight Building, 1st Floor
        - These carry a charge, and our team doesn’t have access to that system to do this since we were equipped for student cards

Alumni Cards

- Alumni must first contact the Alumni Office at alumni@miami.edu or 305-284-2872 to make a request to activate their card. Within 24 hours after the alumni makes the request, Access Control will then add the patron to the system. Only then can the Alumni card be printed.

Putting it all Together



Related Services

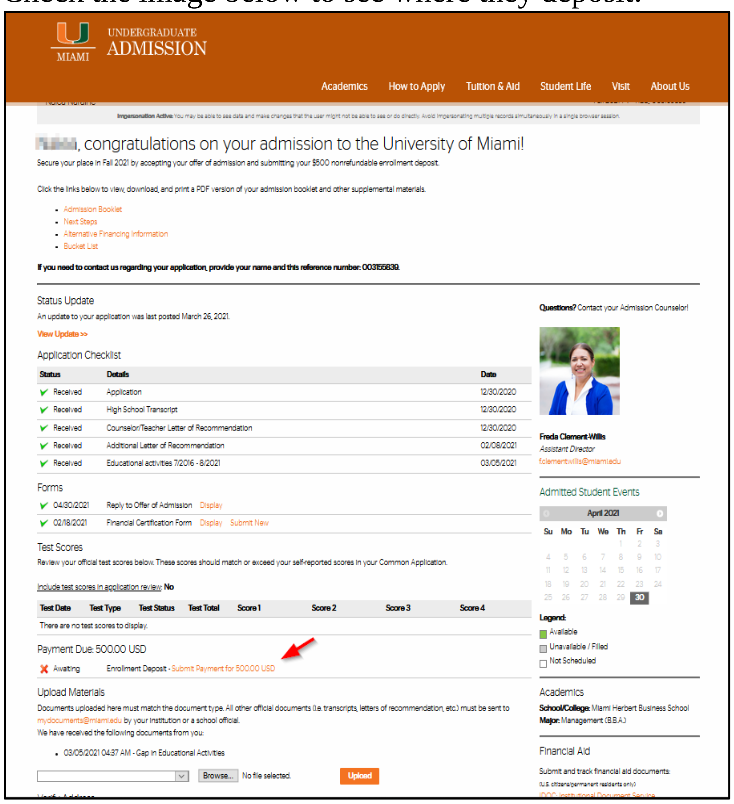
Admission

- Information students submit to the University (e.g., GRE scores, transcripts, etc.) cannot be returned or released back to the student
- Undergraduate Admission Application Received Acknowledgement Letter
  - This is sent to applicants when their application is received

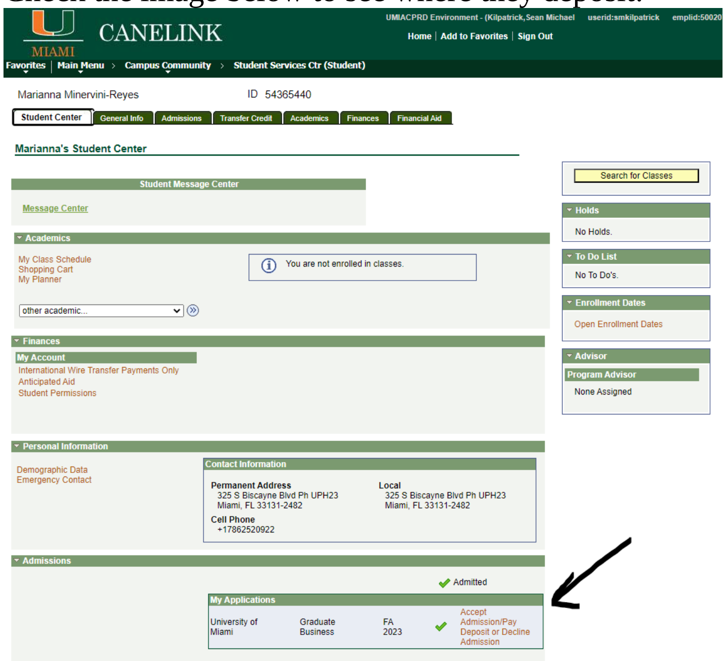
> Dear Test,
>
> Thank you for applying to the University of Miami for Fall 2021. The Office of Undergraduate Admission looks forward to learning more about you as we review your application and supporting documents.
>
> Your CaneID and password will grant you access to the applicant portal. First-time users must go to the CaneID Change Password page to change their temporary password and add security questions.
>
> **Cane ID**: txa305
> **Temporary Password:** The two digits of your birth month, followed by the two digits of your birth date, a dash, the first two characters of your last name (uppercase and lowercase), and an exclamation point. (Example: 0102-Sm! = January 2 birthday with the last name Smith.)
>
> You can track your application once your account has been created through our online applicant portal at apply.miami.edu/access.
>
> Please contact the Office of Undergraduate Admission at 305-284-6000
> or admission@miami.edu with any questions.
>
> If you already have a CaneID and know your password, you can log in with those credentials. If you're having trouble logging in, please visit the CaneID Self-Service. For any additional questions related to your CaneID or login issues, please contact our help desk at 305-284-6565 or help@miami.edu.
>
> Thanks, again, for your interest in becoming a 'Cane.
>
> Sincerely,
>
> 
>
> Nate Crozier
> Assistant Vice President
> Undergraduate Admission and Marketing

- Undergraduate Admission Update Personal/High School Email for Application
  - Students must do this through Admission since it deals with CommonApp and Slate
  - We can check and help update their emails in CaneLink once matriculated
- Admission Deposits
  - Admission deposits are non-refundable
  - Employees have concerns about paying a deposit because they are an employee can consult their respective admission department to inquire if there are any alternatives (i.e., Admission for UGRD and college/school for all others, including ABSN)

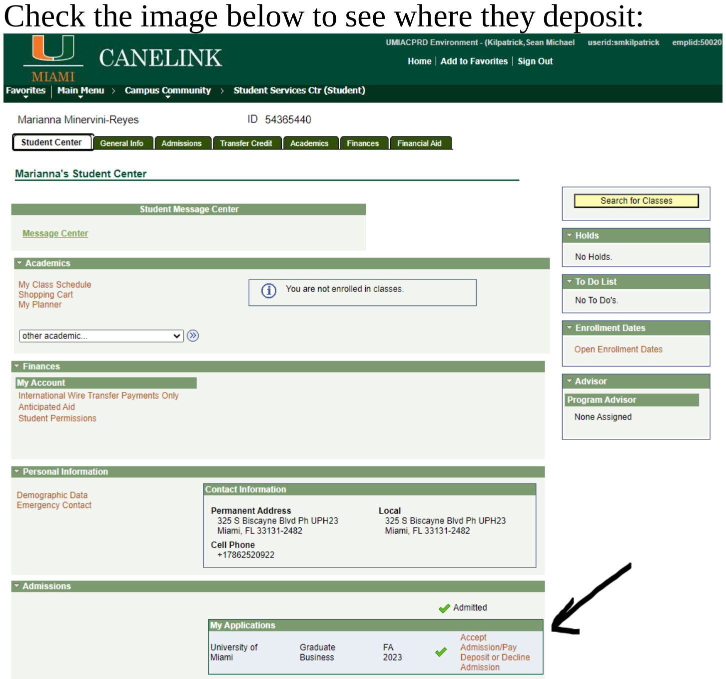
- Employees who pay a deposit can be reassured that the deposit will help pay down any of their required fees, so it is not going to waste
- If the student pushes after you communicate this …
    - GRAD/LAW = You can handshake to the college/school, reiterate the deposit is non-refundable, and mention you're connecting the student with the college/school to discuss any lingering questions they have about this since it is admission-related
    - UGRD = You can handshake to Admission to discuss

- If a new admit requests to appeal their Merit award and they have not begun their first semester at UM, we can follow steps for a UM Merit Scholarship Appeal
    - Undergraduate Student (non-ABSN) Admission "Applicant Portal" and Deposit
        - Deposits can only be paid with credit card or e-check and need to be paid through the applicant portal
        - UGRD students (non-ABSN) know the place where they find their admission information as their "applicant portal," which is essentially the Slate admission software
            - This is located at https://apply.miami.edu/
        - This is where these students go for their admission application and deposit information
        - Students can also access their Financial Aid page through this portal. The link to Financial Aid is towards the bottom of the portal page
        - Check the image below to see where they deposit:
        - 

- <u>ABSN Student Admission Deposit</u>
  - Deposits can only be paid with credit card or e-check and need to be paid through CaneLink
  - Check the image below to see where they deposit:



  - If a student has questions, they need to speak with the admission personnel in the college/school of their program
- <u>Graduate Student/Law Student Admission Deposit</u>
  - Deposits can only be paid with credit card or e-check and need to be paid through CaneLink
  - Check the image below to see where they deposit:



        - If a student has questions, they need to speak with the admission personnel in the college/school of their program
- Taking UM Courses Prior to 1st Semester After Admission
    - Spring admits cannot take UM courses at UM until they begin as an official UM UGRD student
        - If they want to take college courses in the Fall, they would need to take non-degree coursework at another regionally-accredited institution
        - Here is some information: https://admissions.miami.edu/undergraduate/application-process/credit-information/suggested-coursework-to-prepare-for-transfer/index.html
- UGRD (excluding Accelerated BSN) Admission Talking Points
    - **Never share admission status**
        - Only speak to anything about newly admitted students if the student specifically tells you the student was admitted and/or shows you they were admitted
        - You can see things they cannot and admission decisions often change before they are made official, so it is crucial you never share this information
    - **Premier Scholarship Weekend**
        - Students are notified of their invitation to attend and be considered for these scholarships upon admission
    - **Health Professions Mentoring (HPM) Program**
        - Students are notified of their invitation to attend and be considered for these scholarships upon admission
        - Some students who applied may be waitlisted or denied
        - The waitlisted students would be notified by June 15th if they are accepted into the HPM program
    - **Admitted Student Visits and Events**
        - Admitted student events can be found at www.admitted.miami.edu
        - Students can schedule a 1:1 virtual appointment with an Admission Officer, Financial Aid Specialist, or College/School Advisor
        - Students can also do a self-guided walking tour
    - **Demonstrated Interest**
        - Students who are deferred, waitlisted, etc. should let their admission officer know that UM is their top choice if that is the case as they will track their demonstrated interest and log it to their application for future consideration
    - **CaneLink Access**
        - See the CaneLink section for details
    - **Housing**
        - Spring admits should be able to access the on-campus housing portal in November the semester prior to their arrival so they can try to sign up for housing
        - First-Year Fall Admits
            - Fall housing priority deadline = of May 15th
                - All non-local first-year students are required to live in University housing for two academic semesters, as long as space is available
                    - This policy does not apply to first-year students living with parents or legal guardians in Miami-Dade or Broward counties
                - Historically, the University has been able to accommodate all those incoming first-year Fall students who apply by the Fall housing priority deadline
                    - Incoming first-year Fall students who apply after the Fall housing priority deadline will be added to a housing waitlist
                - Housing beyond the first year is not guaranteed

- First-Year Spring Admits
  - Housing application opens = November 1st
  - Deadline to apply for housing = December 1st
  - On-campus housing is neither required nor guaranteed
  - When students apply for housing, their name is automatically added to the housing waitlist
  - If first-year Spring students secure on-campus housing, housing beyond the first semester is not guaranteed
  - Students can explore off-campus housing and consider purchasing a commuter meal plan should they live off-campus
- Transfer Admits
  - On-campus housing is neither required nor guaranteed
  - When students apply for housing, their name is automatically added to the housing waitlist
  - Students can explore off-campus housing and consider purchasing a commuter meal plan should they live off-campus

- **Financial Aid**
  - Newly admitted students would receive an emailed financial aid award package in mid-April if they applied for need-based aid
  - They would have received notice in their admission letter if they were awarded a merit scholarship
  - Getting admitted from the waitlist is competitive
  - We do not release any numbers re: the number of students who are active on the waitlist
  - We do not rank our waitlist
- **Denied Candidate Talking Points**
  - The door to UM doesn't have to stay closed. UG Admission encourages denied candidates to take full-time coursework at an accredited postsecondary institution for one full academic year (fall/spring). Then, reapply for entry term as a transfer applicant
  - UG Admission is happy to answer questions about transferring to UM. Please encourage denied candidates to stay in touch; and, UG Admission has a dedicated transfer admission staff and can support their transfer admission process
- **Sample Admission Letter**

UNIVERSITY
OF MIAMI

Office of Undergraduate Admission
P.O. Box 248025
Coral Gables, FL 33146-6929

Phone: 305-284-6000
admissions.miami.edu

February 23, 2022

Dear ,

Congratulations! We are delighted to offer you admission to the University of Miami for the semester to study Undeclared Business (B.S.B.A.) in the Miami Herbert Business School. This year, the Admission Committee evaluated a particularly competitive applicant pool, with more than 49,000 students applying for 2,100 places in the first-year class. Your academic and extracurricular achievements have distinguished you, and you should be proud.

With nine undergraduate schools and colleges at the University of Miami, you can truly customize your education. You will engage with professors who are experts in their field and study with students from all over the world. Our students graduate with the skills to make a meaningful impact and succeed wherever their career takes them. There is no better time to be in Miami, a young and vibrant city full of opportunities for personal and professional growth.

You have been admitted under the Early Decision II plan, which constitutes a binding agreement that you will attend the University of Miami. **Please complete the Reply to Offer of Admission form and submit your $500 nonrefundable enrollment deposit by As per the binding nature of the Early Decision II plan, upon submitting your enrollment deposit, you are required to promptly withdraw admission applications to other colleges and universities.**

For next steps on how to join the 'Cane family and for answers to frequently asked questions, visit admitted.miami.edu.

Your admission is pending our receipt and review of your official final high school transcript and test scores, if applicable. The University reserves the right to withdraw an offer of admission should the final high school transcript show a significant decline in academic achievement. In addition, the University reserves the right to withdraw an offer of admission if a student engages or has engaged in behavior that violates the standards of conduct to which all University students are held. If there is any update to your academic achievement or personal conduct, you must notify the Office of Undergraduate Admission immediately by uploading the documentation to your Applicant Portal in the Materials Upload section or by emailing the update to conductupdate@miami.edu. All other updates can be sent to mydocuments@miami.edu.

On behalf of the Admission Committee and the entire University of Miami community, congratulations again! We very much look forward to welcoming you to campus in the fall.

Sincerely,

Nate Crozier
Assistant Vice President
Undergraduate Admission and Marketing

Advising

- How do I refer someone to their advisor?
    1) Check CaneLink for listed advisor and then provide the student with the advisor's contact information
        - Contact information can be looked up at https://people.miami.edu/
    2) If no advisor is listed, direct the student to our website → Related Services → the Graduate Advising, Law Advising, or Undergraduate Advising links to find advising contacts
        - Students can also contact their general college/school but the links on our website are more detailed and may provide a better direct contact
        - **Note:** NEW UGRD students could also use the "Schools & Colleges Registration Process" listed under "Registration Timeline" at https://admitted.miami.edu/ → Road to UM
- **Associates =** We also have the escalated advising Points of Contact in the QRG so use those as needed

Alumni Email Access

- As of November 18, 2023, the University changed the Alumni email access policy
    - New graduates' @miami.eduemails are now being forwarded to their personal email address
        - Alumni that retained their UM mailboxes (e.g., those that graduated before the Fall 2023 semester) were transitioned to a forwarding-only account to align with the University's alumni email policy on November 18, 2024
- More information and instructions can be found here for Alumni: https://www.alumni.miami.edu/benefits/email-for-life/index.html

Animal Policy

- There are 2 types of animals included in UM policy:
    1) Service Animals (SA)
    2) Emotional Support Animals (ESA)
    - Note: General pets are not covered by this policy
- In general, **animals are not allowed in classrooms or offices**
    - If the person says it is a SA, ask "Is the animal trained to provide specific service to you?"
        - If they say yes, then you need to welcome them in …
            - You can't push it any further unless the animal misbehaves (as service animals shouldn't do that at all)
        - ESAs are not included, only SAs
            - You can service them outside or they can come back later
    - Students may be able to live on campus with these animals, but there are restrictions about whether or not they are allowed in classrooms, buildings, etc.
        - ESAs are really only allowed in housing if approved
    - Understand the definitions of these animals and/or learn more about the policies by clicking here
- How to Request
    - Students need to go through the **Camner Center** to apply for Service Animals and ESAs
- Compliance Concerns/Issues
    - **Dean of Students Office (DOSO)** handles all issues with compliance and all reports of animals outside of approved areas
        - Refer concerns to DOSO as needed
    - They also work in collaboration with the Camner Center and Housing to implement this policy

Dean of Students Office

- Dean of Students Office (DOSO) has mandatory online modules for incoming and returning students
    - The modules focus on important topics of alcohol and other drugs and sexual assault prevention
- After the due date, if the modules are incomplete, a hold will automatically be placed on the student's account
    - Non-completion of these modules ends up creating a hold that prevents course enrollment
        - For hold to be removed, student must complete required module

Dining

- Meal plan contract is for 1 year (i.e., Fall/Spring)
    - Students receive a confirmation email when they sign up for their meal plan
- Deadline to Downgrade Meal Plan = End 1st week of classes
- Meal Plan Types

2023 – 2024 Meal Plan Eligibility

FY2024 Meal Plans	Dining Dollars	First Year Residential	Upper-Class Residential	Lakeside Village	University Village	Off-Campus Commuter
7 Day All Access	250	✓	✓	✓	✓	✓
5 Day All Access (Monday-Friday)	250	×	✓	✓	✓	✓
125 Block Meal Plan	250	×	✓	✓	✓	✓
50 Block Meal Plan	500	×	×	✓	✓	✓
15 Block Meal Plan	500	×	×	✓	✓	✓
Dining Dollar Only 250	250	×	×	✓	✓	✓
Dining Dollar Only 500	500	×	×	✓	✓	✓
Dining Dollar Only 750	750	×	×	✓	✓	✓
Dining Dollar Only 1000	1000	×	×	✓	✓	✓

- *First- year students, students with less than 24 credits or one semester on campus, residing in any of the residential colleges (including Lakeside Village) will be enrolled in the 7 Day All-Access Meal Plan.*
- *Upper-class students residing in any of the residential colleges – Stanford, Mahoney, Pearson or Eaton, are required to participate in the 7 Day All-Access, 5 Day All-Access or 125 Block Meal Plan.*

    - As of Fall 2022, meal plans that have dining dollars included will appear as two line items on the term statement, separating the dining dollars from the meal plan

07/15/2022	07/15/2022	Unlimited Meal Plan	$3,780.00
07/15/2022	07/15/2022	Meal Plan-Dining $ Component	$250.00

    - The total of the meal plan and dining $ component charges should add up to the total cost of the selected meal plan
        - For information and costs of each level of meal plan, you can view the Resident and Commuter meal plan website at https://dineoncampus.com/miami/resident--commuter-meal-plans
- Dining Dollars
    - Dining Dollar balances roll over from Fall to Spring semester but are forfeited at the end of the Spring semester
        - Once the Spring semester begins, student would have two Dining Dollar balances on Cane Card, one for Fall and one for Spring semester
    - This differs from Cane Express funds remaining at the end of a semester, which continue to roll over and do not expire. For more information, see the Cane Express section
    - Students can view their balance via the GET App
    - Students can also request their balance via CaneLink and it will be emailed to them by Dining
- Prorated amounts will be billed for meal plans when students add them late or switch between them

- This is why the amounts on the bill may not reflect exactly what is online
- Changes to meal plans show on the bill the next business day
- Students can still access their meal plans even if balance is not paid in full

Family Weekend

- Parents, proxies, etc. Register for Family Weekend via their Proxy Home
- They must complete their proxy access to see this registration link when it becomes available (usually early August)
- Questions or concerns after proxy access is complete should be directed to the Orientation office
    - Orientation office website is https://orientation.studentaffairs.miami.edu/index.html

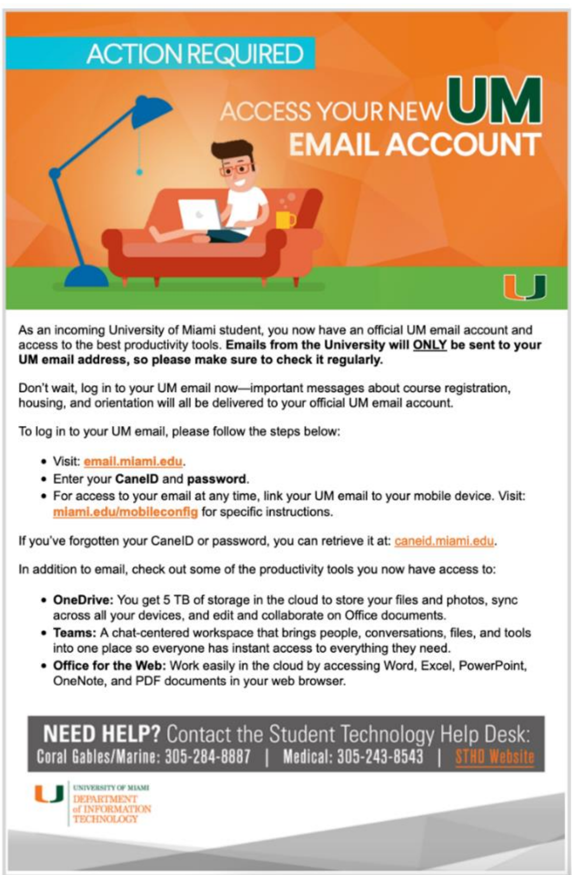
Health Insurance

- Domestic undergraduate students enrolled in six or more credit hours per semester and full-time domestic graduate students are required to obtain adequate health insurance
    - They are charged the UM Health Insurance unless they waive it due to having private coverage
- All international students are **required** to enroll in the University-sponsored health insurance program regardless of credit load. For more information, they can visit this website: https://studenthealth.studentaffairs.miami.edu/insurance-information/international-students/index.html There are two exceptions:
    - International students who are residing outside of the United States are not eligible for the Student Health Insurance Plan
    - International students sponsored by their embassy must waive the Student Health Insurance Plan because coverage is provided by the sponsoring embassy
- Cost of the UM health insurance can be added into the COA
- Health insurance does not become active until the balance is paid for the semester
    - Student can request this to be pushed to be active without full payment if need be, by calling (305) 284-5921
    - This number should also be used to check the status of a health insurance waiver
- Insurance billing can be reached at (305) 284-9100 or (305) 243-2900
    - Ask for Lynn
- <u>Fall Graduates</u>
    - Students who are graduating in the Fall may have the option to complete an insurance exemption form to be charged the Fall-only portion of the student health insurance
    - There is a deadline for this
    - You can direct students to Student Health Services to ask about this form, or this website: https://studenthealth.studentaffairs.miami.edu/insurance-information/graduating-seniors/index.html
- <u>Health Insurance Waivers</u>
    - Must be waived through the Student Health Center
        - Health Insurance Waiver website is aetnastudenthealth.com
            - Student must login themselves and complete the waiver form
            - If they experience any issues with the waiver, student can contact the insurance provider (Aetna) directly at (866) 439-1420
                - If they are still having issues after contacting Aetna, student may contact Student Health Services for assistance
    - Employees must waive the Student Health Insurance each year, even if they use the University's insurance for employees

- Continuing students must re-submit their health insurance waiver every year by July 15th
- New students must submit their health insurance waiver by the following date, depending on their semester of admission/matriculation:
    - Fall = July 15th
    - Spring = January 10th
    - Summer = May 25th
- Students will receive a waiver approval or denial based on their insurance coverage from studenthelp@aetna.com within 5 business days of their submission
- Once approved, it can take up to 5 business days to show on student account
    - If student says they completed the waiver but it doesn't appear yet on their bill, communicate this approximate timeframe and mention they can always speak with Student Health to confirm they are all set if they have any concerns

Gmail Student E-mail

- **Deposit --> Matriculation --> UM Email Address**
    - New students receive a University of Miami (UM) email address shortly after they are matriculated, which is the process that occurs to set up deposited students for registration
    - Matriculation starts happening for all deposited students beginning in mid-March for Summer/Fall incoming students and beginning in mid-October for Spring incoming students. Some program matriculation dates may vary (e.g., LAW is early-July).
- **Initial Email/Set Up**
    - New students receive an email with the subject line "Action Required: Log in to Your University of Miami Email" from the UM Information Technology (IT) department. Please refer to a sample of the email below for reference:


ACTION REQUIRED

ACCESS YOUR NEW UM EMAIL ACCOUNT

As an incoming University of Miami student, you now have an official UM email account and access to the best productivity tools. **Emails from the University will ONLY be sent to your UM email address, so please make sure to check it regularly.**

Don't wait, log in to your UM email now—important messages about course registration, housing, and orientation will all be delivered to your official UM email account.

To log in to your UM email, please follow the steps below:

- Visit: email.miami.edu.
- Enter your **CaneID** and **password**.
- For access to your email at any time, link your UM email to your mobile device. Visit: miami.edu/mobileconfig for specific instructions.

If you've forgotten your CaneID or password, you can retrieve it at: caneid.miami.edu.

In addition to email, check out some of the productivity tools you now have access to:

- **OneDrive:** You get 5 TB of storage in the cloud to store your files and photos, sync across all your devices, and edit and collaborate on Office documents.
- **Teams:** A chat-centered workspace that brings people, conversations, files, and tools into one place so everyone has instant access to everything they need.
- **Office for the Web:** Work easily in the cloud by accessing Word, Excel, PowerPoint, OneNote, and PDF documents in your web browser.

NEED HELP? Contact the Student Technology Help Desk:
Coral Gables/Marine: 305-284-8887 | Medical: 305-243-8543 | STHD Website

UNIVERSITY OF MIAMI
DEPARTMENT of INFORMATION TECHNOLOGY

- **UM Email Access and Recommendations**
  - Students can log in to their UM email by visiting **email.miami.edu** and entering their **CaneID** and **password**. For access to their email at any time, students can use the instructions at **miami.edu/mobileconfig** to link their UM email to their mobile device.
- **CaneID or Password Help**
  - If students forget their CaneID or password, they can retrieve it at caneid.miami.edu
- **Additional Assistance**
  - Students can contact the Student Technology Help Desk for further assistance

Housing

- Normal Charge Changes
  - Housing enters this information into their system, called Star Res, and the information flows directly into CaneLink and Flywire to update a student's account
  - This integration is built to run each morning
  - If a charge change is not reflecting in a student's record the next business day morning, it most likely has not been changed by Housing in Star Res
  - If beyond the next business day morning automatic process:
    - **Associates =** Create CMI case for Housing on the student's behalf to see when they anticipate this change to reflect
- Housing Deposits and Refunds
  - In the case where a student has already made a housing deposit but will not be living on campus for that semester, OSAS will change the housing deposit to a housing prepayment
    - This means that the funds can be applied to all charges on the account for the posted term
  - Housing prepayments do not pay any terms prior to the posted semester
    - If a housing deposit was made for Fall and turned into a housing prepayment, those funds would not be applied back to a prior semester (e.g., Summer)
      - If Housing wishes to make an exception, they can refund the student the prepayment for the posted semester, then the student can use that refund to pay for a prior term
  - If approved by Housing, Housing will communicate this to OSAS directly (i.e., not through the student)
  - If a student approaches a CC Team member and states the student's housing deposit was approved to be refunded, an Associate should reach out to Housing for confirmation via CMI case and then, if confirmed, escalate to the OSAS Specialist for processing
- Cancellation and Room Penalty Cost
  - Per the housing agreement terms and conditions, if a student cancels their housing after May 31st they remain responsible for the full housing charge UNLESS another new applicant is identified to be assigned in that space or the student is no longer attending the University
  - The full room/apt penalty is equal to the fall housing charge so they can be very large in the case of singles, UV or LSV apartment (see example below of how it shows on the bill)
  -

07/07/2021	07/07/2021	Health Insurance Waiver Online	($3,930.00)
07/08/2021	07/08/2021	Room Penalty - ERC	$4,590.00
07/09/2021	07/09/2021	Unlimited Meal Plan	$3,693.00

- Moving On-Campus to Off-Campus and COA Adjustments
  - Tell all students in these situations to contact Housing to officially cancel their housing assignment
  - Refer to the information in the Cost of Attendance section for COA-related information
- Summer Housing

   - Students do not need to be enrolled in summer classes to apply to live on campus in the summer

Enrollment Status

   - In general, students would not be allowed to live on campus unless they are enrolled
      - The housing team will use compassion when approaching eviction type of situations and try to work with students within reason if they are working toward reinstatement, etc.
   - If you notice someone has on-campus charges but is not enrolled, refer them to housing to discuss and be sure to mention that financial aid typically cannot cover charges for terms in which they are not enrolled
      - Thus, it's important they act to remove charges if they don't plan to attend
      - Otherwise, they need to pay out of pocket
      - Refer students to housing if they have questions or concerns
   - If a student informs us that they are currently enrolled in a full-time course load but want to drop courses that will put them at a part-time course load, they will need to contact Housing
      - **Associates =** Create a CMI case for Housing to inform them of the student's intent to drop from full-time to part-time course load status
      - Housing has a Full-Time Credit Waiver Form that a student can fill out to see if they are able to stay in on-campus housing if they drop to part-time course load status

- Payment
   - Students must acknowledge the following payment requirements when signing up for housing on campus:

     2. **Prepayment.** Completed agreements for housing must be accompanied by a securing $500.00 prepayment. Agreements which are not accompanied by the prepayment will not be accepted and neither the student nor the University will have any obligations under this Agreement. Prepayments will be credited toward the initial housing charge.

     3. **Payment.** Full payment must be completed by the date indicated on your student account statement. Payments are due as specified unless the Office of Student Account Services has approved in writing deferred payment arrangements setting forth minimum periodic payment amounts and due dates. As long as money is owed to the University, release of transcripts or diplomas may be prohibited.

   -

Outdoor Adventures

- There is a charge that may go onto students' accounts for lost, stolen, or damaged equipment rentals, ranging from approximately $400-1,200
   - The charge will be labeled as "OA Equipment Damage/Loss"
   - Students will pay per the normal process through Flywire
- Students are informed about this possibility when they sign the rental agreement at the beginning of their rental, reminding them about potential fees or charges if the items are lost, stolen, or damaged
- Normal Charge Changes
   - This is done by Outdoor Adventures via an input document to OSAS
   - This will only be reflected once the process is complete, meaning Outdoor Adventures submitted the appropriate input document and OSAS processed it
      - Students will see it reflected on their bill once this is done
- Communication to Students and Questions
   - This is a last resort as Outdoor Adventures will first try to resolve with the student and the Dean of Students Office
   - If a charge is needed, Outdoor Adventures will notify the student that the charge will be added to the student's account
   - Refer the student to Trey Knight, Assistant Director of Outdoor Adventures, at treyknight@miami.edu if they have any questions or concerns

Parent Listservs

- Alumni Relations/Development Parent Listserv
  - Alumni Relations/Development manage the main parent listserv
  - Requests to be added or removed to this listserv can be made to the Alumni Relations Service Desk at (305) 284-5600 or but submitting an incident through the DAR IT Self-Service Portal
  - Parents will receive emails as long as there is no "Do Not Contact" flag on the account
- Enrollment Management Admitted Undergraduate Parent Listserv
  - Admitted freshmen may also receive emails from Enrollment Management
  - This parent information is provided by the student upon submission of the Common App
  - The opt-in form (https://umiami.qualtrics.com/jfe/form/SV_8qrBU8Hp8RuvaNU) can also be used to be added to the listserv
    - The friendly URL is miami.edu/signup
- Hurricane Family Connection Listserv
  - This is managed through the Orientation office in the Division of Student Affairs
  - Parents of active UM students who are on the Alumni Relations/Development listserv are included in this mailing list as long as they are not flagged as "Do Not Contact"
  - Parents on this listserv receive approximately 1 newsletter per month in Fall/Spring
- ’Canes Central Proxy Listserv
  - This is managed through ’Canes Central
  - It includes all proxies who are coded as "Access Granted," not "Submitted," and who have a student who is currently enrolled
  - Proxies on this listserv receive all the same communications sent to students as part of ’Canes Central's communication efforts (link to this site: https://canescentral.miami.edu/communications/index.html)

Parking

- Normal Charge Changes
  - Parking enters this information into their system, called Star Res/T2, and the information flows directly into CaneLink and Flywire to update a student's account
  - This integration is built to run each morning
  - If a charge change is not reflecting in a student's record the next business day morning, it most likely has not been changed by Parking in Star Res
  - If beyond the next business day morning automatic process:
    - **Associates =** Create a CMI case to Parking on the student's behalf to see when they anticipate this change to reflect
- Parking Fines
  - Students have 15 days to appeal tickets
  - Parking fines roll from the Parking systems into CaneLink/Flywire 15 days after the citation if the person had not successfully appealed their fine
  - Once this rolls, the Parking system looks like there is nothing outstanding on their end but that doesn't mean the person doesn't owe anything
    - At that point, the charges are posted on the student's account and need to be paid through our normal processes
    - The charges of fines on students' accounts are correct in that they remain as they were not appealed successfully within the 15-day timeframe
  - Questions or disputes need to be directed to Parking if we cannot resolve them
- Commuter Student Parking Policy
  - Car restriction is only applicable if the first-year student lives on campus

- First year commuter students do not have this restriction
- Any student who lives off campus, regardless of class status, is allowed to purchase a commuter parking permit from Parking & Transportation

Study Abroad

- Study Abroad will refer all students to speak with us before they apply to go abroad so they understand the impact on their aid
  - Read the information below and be sure to talk about credits, credit conversions, SAP, COA, aid eligibility, etc.
- UM Study Abroad Programs
  - These are programs that are offered through the UM Study Abroad office
  - **Financial Aid**
    - Students technically enroll through UM for these programs so they can use all normal aid they receive at UM
      - Caveat – The EASE grant will not apply to the Study Abroad Fees.
    - *Enrollment*
      - Students need to be enrolled in the proper number of credits to meet the Aid Enrollment Thresholds to qualify for their various forms of aid
      - Students register for credits with their Study Abroad advisors
    - *Credit Conversions and Impact on Aid*
      - They typically enroll in a 12-credit general Study Abroad placeholder to begin—this is simply to trigger full-time enrollment—and then this is replaced with their actual coursework once they receive their final grades/transcripts
      - The actual credits from the abroad institution will be converted to UM credits when this is received
      - This conversion can increase or decrease the actual "enrolled" credits for the term, which can impact (positively or negatively) the amount of aid
        - For example, since aid is estimated at 15 credits, if the credit conversion reduces the final "enrolled" credits to 13.5, the student's Bright Futures would be reduced to only cover 13.5 credits, creating a new balance on the account
      - Students should proactively speak with their Study Abroad advisors about credit conversions, so they know how many credits to take abroad to yield their expected final credits at UM
        - Note: This can impact SAP, Bright Futures, etc. since those are impacted by enrolled credits

    - Example

Classes

✓ Enrolled ⊗ Dropped ⚠ Wait Listed

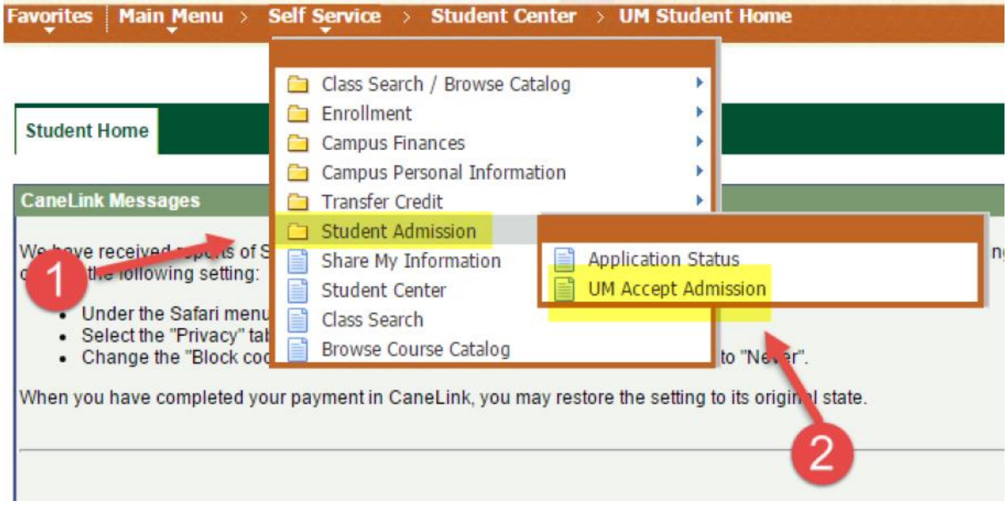
Class	Description	Units	Grading	Grade	Status
SAP AB0-LOC (5161)	STUDY ABROAD (Lecture)	3.75	Standard Grading	A	✓
SAP AB1-LOC (5162)	STUDY ABROAD (Lecture)	3.75	Standard Grading	A	✓
SAP AB2-LOC (5163)	STUDY ABROAD (Lecture)	3.75	Standard Grading	A	✓
SAP AB3-LOC (5164)	STUDY ABROAD (Lecture)	3.75	Standard Grading	A-	✓

-

- *Credit Only Courses*
  - Students are normally allowed to take up to only 1 course credit only abroad
  - They may come to us to discuss the impact so we should discuss SAP, etc.
- *COA*
  - COAs are based on an estimated 15 credits
    - Study Abroad does send a form to students who appear enrolled in less than 15 credits to see if they are actually enrolled in more credits so that can be figured into COA appropriately
    - Study abroad can add credits onto the general 12 credit placeholder to meet this as needed
  - COAs will be roughly the same as when the student is at UM but there can be/will be adjustments made to include study abroad-specific costs like:
    - Differences in housing costs
    - Differences in meals costs
      - Please note that there are some programs that charge a program fee that accounts for Housing and Meal accommodations. In cases like this, the Housing component of the COA and the Meal component of the COA will be reduced to account for this.
      - This is predetermined by the study abroad office and the program that the student is studying in
        - Example: U in Rome Program
    - Airfare costs
  - When COA goes up for these increases, students only gain additional room to take out additional loan dollars
    - Other forms of aid will not be increased to meet the new COA (e.g., Coral Grant, President's Scholarship, etc.)
    - Students can also apply for more outside scholarships (e.g., Gilman)
      - Check out Study Abroad's scholarship site
- *Deposits*
  - While Study Abroad deposits are not typically refundable and will apply to charges on the bill, there may be some scenarios where a Study Abroad program is cancelled and the deposit is approved to be refunded to student
    - See Tuition Deposits section for more information on this back end process
- *Disbursement*
  - This occurs at the same time as normal disbursements
  - There is no advanced disbursement, even if it's being used for study abroad expenses
- *SAP*
  - Students may be flagged as SAP failures until their grades are received from their institutions abroad (most likely not for University merit aid)
    - UM will not run UM Merit SAP until study abroad grades are received
      - This means that as long as the student was passing SAP before they went abroad, the student will keep UM Merit aid at that time
      - Once grades arrive, their UM Merit SAP will run and it will be adjusted if needed (and the student notified)
      - They will all receive an email to inform them of this
    - State/Federal SAP must still run without grades per guidelines

            - This may mean some students are marked as State/Federal SAP failures because their grades and credit completion are not yet received
            - Once students' grades are received by UM, their State/Federal SAP will be re-run and reinstated if they in fact meet SAP
            - If a student's grades are received, you see the grades are there, and you see they in fact meet the SAP criteria for State/Federal aid but SAP has not been re-run, the student should submit a case
                - This is not the norm but it's an exception for this population
                - **Study abroad students in these situations do not have to appeal**
                - **Do not escalate until you confirm** the information above and that the SAP failure is purely due to study abroad grades not being entered
    - **Courses on UM Transcript**
        - Students often think that because they obtained a course equivalency (a signatory approving a class abroad as equivalent to a course taught at UM) that the UM course prefix and title will appear on their transcript
        - This is not the case; course titles will be listed exactly as they appear on the partner university's transcript and course prefixes will be SAP AB0,1,2,3, etc.
        - Sometimes, students are concerned about this due to med/grad/law school pre-requisites; in those case, we advise students to include their course equivalency form, DPR or original transcript from the host institution with their transcript or application
    - **Student Accounts**
        - **Fees**
            - On campus fees are waived for those students in a UM Study Abroad Program. Student Accounts receives a list of those students attending from the UM Study Abroad team.
            - Students may see an IEEP fee or other fees associated with their program posted to their account.
        - **New Bills After Program Completion**
            - Sometimes students contact us well after their study abroad period and say they all of a sudden have a new UM bill from their term abroad
            - In these cases, it is almost always the case that the partner university transcript has come in to UM, the grade report was sent to the Registrar for posting, and the study abroad placeholder course was mistakenly left on the student's record when the actual study abroad courses were posted to the record
            - This can make it look like the student took more than 20 credits, triggering an additional tuition bill
            - These should be escalated to the Registrar to remove the placeholder
- Non-UM Study Abroad Programs
    - These are programs that are not offered through UM (e.g., Semester at Sea)
    - **Financial Aid**
        - Students cannot roll any of their aid to a non-UM program
        - Students must apply for non-UM programs
            - See "Non-UM Program" section of KTS for more information

[Summer Scholars Program]

- To accept their admission, they are instructed to click on "Self Service" at the top of their main CaneLink page → "Student Admission" → "UM Accept Admission" → follow instructions
- 

[UMX 100]

- The contact is no longer the Camner Center; it is Dr. Beth Bair (bethbair@miami.edu)