Financial Aid Calculation for International Students in Masters / Doctoral Programs

Introduction

The procedures on the following pages represent the best practice for identifying financial need for international students. These procedures were developed by the Financial Aid Office in collaboration with academic units, and are approved by Vice Provost Gail Burd.

Funds from Financial Aid Set Aside accounts are generally distributed based on financial need as determined by the Free Application for Federal Student Aid (FAFSA) filed by or on behalf of the students. Since the FAFSA can only be filed by citizens or eligible non-citizens, an alternative must be identified for international students who have need.

These procedures may only be used for identifying need for international students in graduate level programs that are subject to program fees.

Background

International students enrolled in masters and doctoral programs may have financial need. However, they are not eligible to complete the FAFSA because this document is for US Citizens and eligible non-citizens.

This process outlines an alternative methodology for determination of financial need for international students that are not eligible to complete the FAFSA. For information and to determine the citizenship requirement in order to be eligible to complete the FAFSA, review detailed requirements on the Department of Education financial aid website: http://www.ifap.ed.gov/ifap.

The proposed process is based on the methodology used by the US Department of Education, as published in ‘The EFC Formula Guide.’ Publications are updated for each award year. For the current publication, access the Department of Education financial aid website reference above and click on the “Publications” link.

Key points from this guide as of this writing are as follows:

- All students enrolled in masters or doctoral degree programs qualify as “independent students.”
- The worksheets for independent students are much shorter than those for dependent students.
- Worksheet B is used for independent students without dependents other than a spouse
- Worksheet C is used for independent students with dependents other than a spouse.
  - Independent students with dependents other than a spouse are eligible for ‘Automatic Zero EFC’ under specified conditions.
Financial Aid Calculation for International Students in Masters / Doctoral Programs

Process for Identifying Financial Need for International Students in Masters / Doctoral Programs

- The Office of Financial Aid will establish separate items types for awards to be made to international students and will load unlimited budget to these item types. Departments are responsible for managing the availability of funds in set-aside accounts.

- The academic program manager for a masters / doctoral program informs international students that they have the opportunity to apply for need-based financial aid from the University of Arizona, and provides a deadline for applications to be submitted.

- International students interested in aid should submit to the academic program manager a completed calculation of a paper copy of Worksheet B or C noted above, or a comparable online calculator.

- The academic program manager reviews all completed forms to determine which students are eligible. Students are eligible for need-based financial aid if the calculated EFC is lower than the cost of attendance. Cost of attendance for the University can be found:
  https://financialaid.arizona.edu/money/estimated-cost

- If a particular program has higher costs due to program fees or other expenses, the academic program manager identifies the additional costs of attendance.

- The academic program manager completes a worksheet (sample attached) identifying the cost of education, the estimated family contribution (EFC), and the need calculation for each eligible student.

- The academic program manager determines the amount of aid to award to eligible students and completes the external awards online. Financial aid may be awarded up to the amount of unmet need.

- Documentation of financial aid eligibility must be maintained on file by the college for a minimum of five years, or three years after the last date of attendance, whichever is longer. This documentation includes the eligibility worksheet completed by the student, and the financial need calculation completed by the academic program manager.

Approved:

Gail D. Burd, Vice Provost for Academic Affairs

Date: 1/7/11
Financial Aid Calculation for International Students
in Masters / Doctoral Programs
University of Arizona
Financial Need Calculation for International Students

<table>
<thead>
<tr>
<th>Student Name:</th>
<th>EmplID:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone Number:</td>
<td>Dept. Contact:</td>
</tr>
<tr>
<td>Student E-mail</td>
<td>Dept. E-mail</td>
</tr>
<tr>
<td>Notes / comments:</td>
<td></td>
</tr>
</tbody>
</table>

A. Estimated Cost of Attendance
   (https://financialaid.arizona.edu/money/estimated-cost) | $

B. Less: Estimated Family Contribution (EFC):
   (http://www.finaid.org/calculators/quickefc.phtml)
   *Screen shot showing calculator input values and result must be attached!
   ($ )

C. Less: Estimated Aid from Other Sources:
   *Excluding fellowships and cash awards
   ($ )

D. Unmet Financial Need (A – B – C) | $

<table>
<thead>
<tr>
<th>Student Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graduate Coordinator Signature</td>
<td>Date</td>
</tr>
<tr>
<td>Printed Name of Graduate Coordinator</td>
<td></td>
</tr>
</tbody>
</table>

* Documentation of financial aid eligibility must be maintained on file by the college. This documentation includes the eligibility worksheet completed by the student, and the financial need calculation completed by the academic program manager and signed by the student. Form and screen shots should be forwarded to the Office of Scholarships and Financial Aid (OSFA) for processing and disbursement (OSFA-DeptAskAid@email.arizona.edu) once the award has been entered for the student.
Financial Aid Calculation for International Students
in Masters / Doctoral Programs

Estimated Expected Family Contribution (EFC) Calculator instructions

Calculator instructions:

Dependency status
- If you are single, select “Independent Student”
- If you have dependents, select “Independent Student with Dependents” (this applies to married students or students with children)

Age of older parent
- Leave blank

Number of Family members in household
- If you are single, enter “1”, otherwise enter appropriate number in your household, including yourself and/or your spouse and/or your children.

Number of children in college
- Enter “1”, otherwise enter appropriate number in your household, including yourself and/or your spouse and/or your children.

Student’s Income
- This is U.S. taxable income for last calendar year. If you did not earn income in the U.S. in the last calendar year, enter “Zero”.

Student Assets
- The current value of a business and/or farm (excluding farms that are considered working farms or place of residence)
- Enter value amount, if none enter “Zero”

Student Assets - other
- Value of all cash (checking and savings accounts), real estate and investments (excluding the value of your primary residence)
- Enter value amount; it is expected that each family have some assets to contribute.

Parent Information
- Leave blank

Form Submission Instructions:
Take a screen shot of the calculator and values and the results and paste it into a word document. Email/submit the word document file with the screen shot and the Financial Need Calculation for International Students form to your academic advisor for their signature. If you are selected to receive an award, your academic advisor will forward the forms to the Office of Scholarship and Financial Aid for processing (OSFA-DeptAskAid@email.arizona.edu).