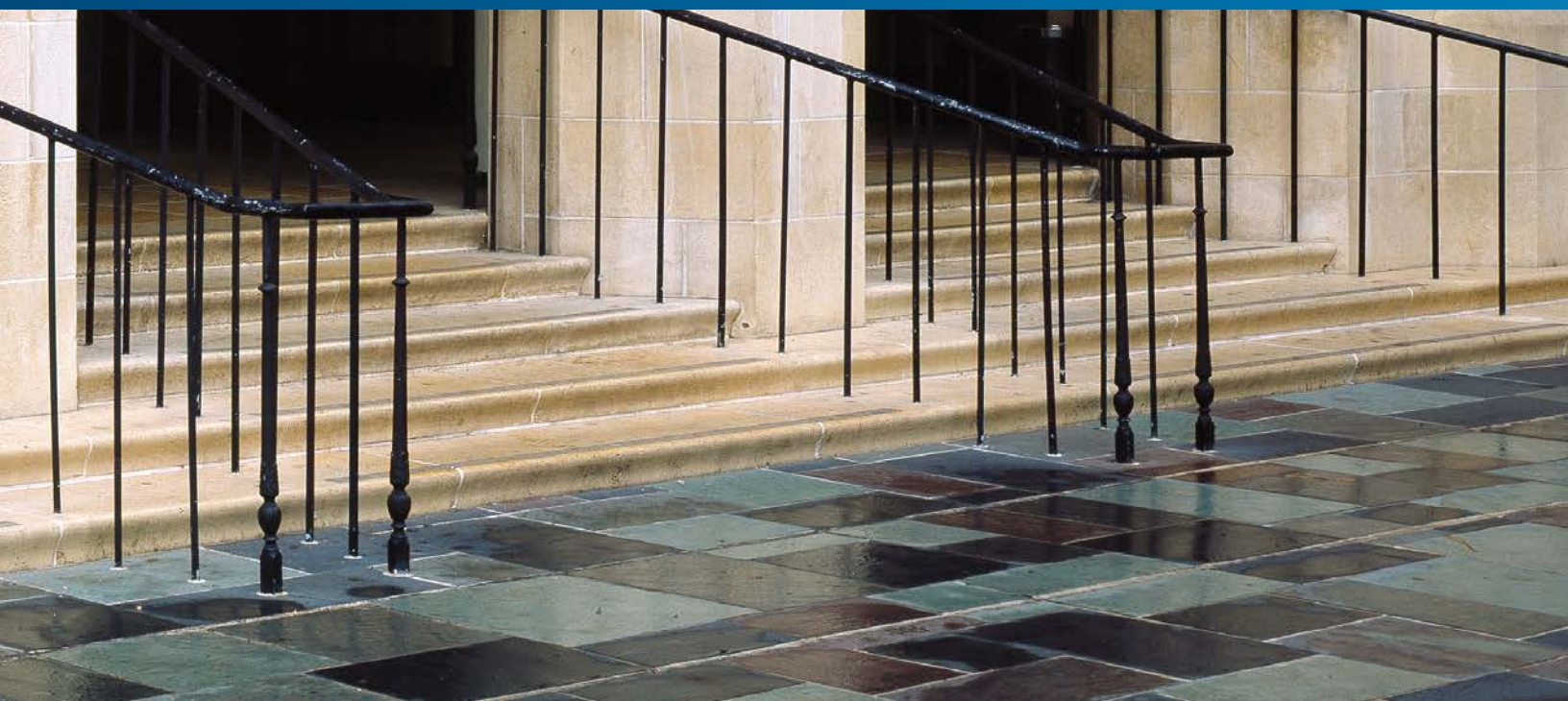




# Federal Financial Aid Guide & Application Packet

2020-2021

**UCLA** Extension



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*This guide has been designed to assist you in applying for federal financial aid. The guide outlines financial aid opportunities, the criteria and process for application, and the standards for remaining eligible. We welcome your interest in studying at UCLA Extension and wish you success in achieving your educational goals. This Federal Financial Aid Guide is subject to change based on updates to Federal Guidelines.*

# Qualifying Programs

Federal financial aid is offered for the completion of one of the following UCLA Extension programs ONLY.

NUMBER/FEE	PROGRAM	MAX. QTRS OF FINANCIAL AID ELIGIBILITY
<p>Satisfactory academic progress toward certificate completion requires full-time enrollment (12 units/quarter).</p> <p><i>All coursework, including elective courses, must be completed within the maximum time length designated for your certificate. Federal financial aid is not offered for students who have completed the program.</i></p>		
<b>THE ARTS</b>		
CE0594 / \$300	<b>Landscape Architecture</b> Prerequisite: bachelor's degree	<b>20</b>
<b>BUSINESS, MANAGEMENT &amp; LEGAL</b>		
CE0471	<b>Paralegal Training Program (graduate)</b> Daytime (Winter, Summer) Evening (Spring, Fall) Restricted enrollment, call (310) 825-0741 Prerequisite: bachelor's degree	<b>2</b> <b>4</b>
<b>BUSINESS, MANAGEMENT &amp; LEGAL</b>		
CE 0549	<b>Paralegal Training Program (undergraduate)</b> Daytime (Winter, Summer) Evening (Spring, Fall) Restricted enrollment call (310) 825-0741	<b>2</b> <b>4</b>
<b>HUMANITIES &amp; SCIENCES</b>		
CE0321 / \$95	<b>Post-Baccalaureate in Classics</b> Prerequisite: bachelor's degree	<b>6</b>
CE0075 / \$95	<b>Pre-Medical and General Science</b>	<b>8</b>

**Please note:** Students who intend on paying program costs through federal financial aid for enrollment in the Paralegal Legal Training Program and/or Post-Baccalaureate in Classics Programs listed above must submit a completed financial aid application packet by the deadline on page 7 to allow adequate time for processing (requires six weeks). Students who do not meet the published deadline will be responsible for paying their course fees in full until their financial aid application is processed.

# Satisfactory Academic Minimum Progress Guidelines

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## Qualitative and Quantitative Standards

Federal regulations require UCLA Extension to establish, publish, and apply standards of satisfactory academic progress for financial aid eligibility. If you fail to meet minimum progress standards, you will become ineligible to receive financial aid until you are in compliance with the standards. If, during any quarter, you expect you cannot meet the satisfactory academic progress requirements listed, you should contact the UCLA Extension Financial Aid Office immediately.

The qualitative standard for programs at Extension is a 2.0 grade point average with all courses in your program taken for credit (letter grade), and receipt of at least a "C" grade in each class.

The quantitative standard requires you to be enrolled in at least six units in your undergraduate program each quarter or four units in your graduate program in order to obtain funds. You must also successfully complete at least 18 undergraduate units or 12 graduate units in each year of your program. Additionally, each program has a quarter cap, i.e., the maximum number of quarters to complete a program. After the quarter cap established for one program has been reached, no further need-based financial aid will be granted. See page 3 for quarter limits.

To ensure that you meet these federally mandated minimums, plan to enroll in courses with start dates at the beginning of the quarter. If those courses cancel, you may then have options for enrolling in other courses, thereby meeting your minimum unit requirement. If you enroll in courses with start dates later in the quarter and those courses cancel, you will have few or no options for fulfilling the minimum unit requirements and therefore will be held financially responsible.

## Withdrawal and Cancellation

Withdrawal from a quarter in which you receive financial aid may apply as a quarter attended and may work to your disadvantage in reaching the quarter cap of your program. Cancellation of registration (prior to the first day of classes), however, does not apply as a quarter attended. Refund and payback of aid received is based on the date you officially withdraw or cancel.

## Disqualification and Reinstatement

The Financial Aid Office monitors satisfactory progress annually. Progress is measured according to the number of quarters you have attended and the number of units you have successfully completed. If you have not met the requirements, you will be disqualified from receiving funds and your financial aid will be discontinued until the deficiencies are satisfied.

Financial aid eligibility is reinstated for the quarter following the quarter in which you reestablish compliance with the units-per-quarter agreement. For example, if you successfully complete all deficit units in Fall Quarter and therefore make up the deficiency, you become eligible for financial aid in Winter Quarter.

## Appeals Process

If you fail to meet the satisfactory academic progress standards and are disqualified, you may appeal your disqualification.

To appeal, submit a letter and supporting documentation to the UCLA Extension Financial Aid Appeals Committee. In your letter, be sure to explain the circumstances that led to your disqualification and how they affected your ability to meet the requirements. On written receipt of your appeals packet, the Financial Aid Appeals Committee will review your request and inform you in writing of its decision.

## Return of Title IV Funds:

Federal student aid is awarded to a student with the understanding that the student will enroll in a certificate program that qualifies for federal financial aid for the entire quarter for which they received aid. When a student completely withdraws and/or drops below half-time enrollment, the student may no longer be eligible for the full amount of federal aid that the student was originally scheduled to receive.

Based on the date of your withdrawal, the UCLA Campus Financial Aid Office will calculate how much of your financial aid you "earned" from the beginning of the quarter until the date you dropped classes; including administrative cancellations, if applicable. If you received more financial aid funds than what you were entitled to, you will be required to repay federal financial aid funds received for the quarter of withdraw to UCLA. Withdrawing may affect your eligibility to receive financial aid in subsequent quarters/terms.

# Application Process

## Federal Direct Lending Loan Program

UCLA Extension will be participating exclusively in the William D. Ford Federal Direct Loan program for the 2020-2021 academic year. The lender is the U.S. Department of Education rather than a bank or other financial institution. In the past, the University participated in the Federal Family Education Loan Program (FFELP) in which students and parents borrowed from private banks and lenders.

## Direct Loan Program

*The Direct Loan Program* consists of low-interest subsidized and unsubsidized loans funded by the federal government. Loans are available to students enrolled in an approved certificate. Loan repayment begins six months after graduation or upon dropping below half-time enrollment status.

*Direct Subsidized Loans* are awarded to students in an eligible approved certificate (refer to page 3) with demonstrated need. The eligibility for financial need is determined by using a federal formula. Interest is paid by the government until six months after you leave school or upon dropping below half-time enrollment status. The interest rate for undergraduate students is fixed at 4.45% for loans with a first disbursement date between July 1, 2020 and June 30, 2021. For students enrolled in a graduate certificate, the interest rate is fixed at 6%.

*Direct Unsubsidized Loans* are available to all students in an eligible approved certificate regardless of income. Interest accrues from the date of disbursement, but the extra costs of accrual can be avoided by making regular interest payments while in school. The interest rate is fixed at 4.45%.

Subsidized and Unsubsidized Loans can be combined as long as the maximum annual and aggregate limits for the Direct Loan Program have not been exceeded (refer to loan chart, page 14).

Students use one PIN for many of their financial aid needs, including completing a FAFSA application, signing a Federal Direct Loan e-Master Promissory Note, and viewing their loan borrowing history at the National Student Loan Data System.

## With Direct Loans, you:

- Borrow directly from the federal government and have a single contact — the Direct Loan Servicing Center — for everything related to the repayment of your loans, even if you receive Direct Loans at different schools.
- Have online access to your Direct Loan account information 24-hours a day, 7 days a week, at Direct Loans on the web at [www.dl.ed.gov](http://www.dl.ed.gov) or **(800) 848-0979**.

**To apply for Federal Financial Aid at UCLA Extension, you must submit a Free Application for Federal Student Aid (FAFSA) 2020-2021 regardless of whether or not you are a new or continuing financial aid student. Some continuing students will receive a renewal FAFSA by mail. If you are a continuing student and do not receive the renewal, you must complete the FAFSA online at [www.fafsa.ed.gov](http://www.fafsa.ed.gov).**

**A financial aid award cannot be transferred from one institution to another, nor can it be rolled over to a different award year. Federal Financial Aid funds are limited to the certificates listed on page 3 in this guide.**

# Frequently Asked Questions About Direct Loans

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## Direct Lending

### **What are the primary differences between the Federal Direct Loan and Federal Family Education Loan (FFELP) program?**

The primary difference is the source of the loan funding. Federal Direct Loans come straight from the U.S. Department of Education using funds obtained from the U.S. Treasury. In the FFELP program, funding is provided by private lenders.

### **Why did the University choose to move into the Federal Direct Loan Program?**

The Federal Direct Loan program offers a stable source of funding. Volatility in the credit markets and reductions in lender subsidies have caused many lenders to pull out of the federal loan programs while many others have stopped offering borrower benefits.

### **How does this impact me?**

If you plan to obtain a federal student loan for the 2020-2021 academic year, you will be borrowing through the Federal Direct Loan Program.

### **What happens if I am in default and/or pre-claim status on a prior Stafford Loan?**

If your prior loan is in default or is in pre-claim status, contact your lender or guarantee agency before you complete any new loan application. All direct loan applications will be denied until repayment terms have been satisfied.

### **Will I need to do anything?**

You will need to complete a Federal Direct Loan Master Promissory Note. You may complete a Federal Direct Loan Master Promissory Note electronically (see Step 3 on page 9).

### **How do I apply for a Federal Direct Loan?**

You will need to complete a new Master Promissory Note with the Department of Education. Instructions are listed in Step 3 on page 9.

### **Will this affect my alternative loans?**

No, this applies only to federal student loans, not private or alternative loans.

### **Will I still be able to continue borrowing through the same lender as last year?**

No. If you obtained a 2019-2020 Federal Stafford or Federal PLUS Loan and need a student loan for 2020-2021, you will be required to borrow through the Federal Direct Loan program.

### **If I obtained a Loan through a private lender last year, and obtain a Federal Direct Loan in the future, will I have to repay two different lenders?**

Yes. Your Federal Direct Loan will be serviced by the Department of Education and you will receive correspondence and payment information from the Department of Education. You will also be contacted by other lenders from whom you have obtained Federal Stafford Loans. However, you have the option of consolidating all of your federal loans with the Federal Direct Loan program or any other lender that offers federal loan consolidation loans after you graduate. When it is time to repay your loans, if you consolidate, your previous federal loans would be paid in full and all your payments would be made to the Federal Direct Loan Consolidation program.

### **What happens to the Stafford Loans I have already obtained via my bank or lender? Will the payments still be deferred now that UCLA Extension is changing its loan processing?**

As long as you are enrolled in school on at least a half-time basis, your prior year Federal Stafford Loans will continue to be deferred.

### **Is there information available on Federal Direct Lending?**

You may find the U.S. Department of Education Direct Loan website helpful: [www.direct.ed.gov/student.html](http://www.direct.ed.gov/student.html).

Federal loans must be repaid with interest. When it comes time for repayment, you will need to give your lender clear and precise direction. While most student loans default due to an in-school deferment, definitions of "in school" can be interpreted to include electronic reports of course end dates, expected program completion dates, end of term dates, etc. To avoid confusion and ensure that your repayment begins exactly when you want it to begin, we encourage you to notify your lender in writing of the following points: you are declining the automatic in-school deferment; you want the lender to disregard any enrollment status data (courses scheduled completion dates, etc.) received from UCLA Extension; and you want your repayment to begin on "x" date, specified by you in writing, even if that date is prior to the end dates indicated in electronic information from UCLA Extension. This will ensure that your repayment begins when you want it to and that interpretations of electronic data do not interfere with your desired repayment arrangements.

## Federal Pell Grant

Eligibility for this need-based grant is determined by the federal government according to a formula developed by the U.S. Department of Education and approved annually by Congress. It does not have to be repaid. It is awarded to students who are enrolled in a qualified program and have not earned a bachelor's degree. When you file a Free Application for Federal Student Aid (FAFSA), you are automatically considered for a Pell Grant. Awards range from \$400 to \$6,195 per year. The Pell Grant award is adjusted according to your enrollment status.

Federal Pell Grants are very restricted. They are based on income and assets. Less than 20% of UCLA Extension students are awarded Federal Pell Grants. **These grants apply only to the Pathway Certificate.**

## Short-Term Programs and Federal Grants

Short-term programs qualify for the Federal Direct (subsidized and unsubsidized) Loan programs only.

The U.S. Department of Education (DoE) defines certificate programs at UCLA Extension as "short-term."

The Pathway Certificate program is eligible for Federal Pell Grants, as it is a Comprehensive Transition and Postsecondary Program (CTP).

ENROLLMENT STATUS REQUIREMENTS FOR FEDERAL AID		
Status	Undergraduate Units	Graduate Units
Full-Time	12	8
3/4-Time	9-11	6-7
Half-Time	6-8	4-5

## Priority Filing Deadlines

These dates represent the last day to turn in a completed federal financial aid packet. A completed packet includes papers already reviewed by the federal processor (a 4-5-week process). To meet these deadlines, submit your Free Application for Federal Student Aid (FAFSA) to the federal processor about two months prior to your anticipated quarter start date. You may submit your FAFSA online at [www.fafsa.ed.gov](http://www.fafsa.ed.gov).

PRIORITY FILING DEADLINES	
Quarter	Deadline
SUMMER 2020	May 12, 2020
FALL 2020	August 4, 2020
WINTER 2021	November 3, 2020
SPRING 2021	February 2, 2021
PARALEGAL TRAINING PROGRAM	
Quarter	Deadline
SUMMER 2020	May 27, 2020
FALL 2020	August 25, 2020
WINTER 2021	December 14, 2020
SPRING 2021	March 2, 2021

## Guidelines

The application process is exacting; the documentation required is fairly extensive. Despite these demands, we have found that you can complete the process with a minimum of concern if you pay strict attention to the following three guidelines:

1. Read carefully and follow scrupulously all of the directions and steps in this Guide and Application Packet. The steps must be completed in the order outlined.
2. Make sure all of your documents are complete and accurate. Both UCLA and the federal processor will reject any application packet that has missing documents or information.
3. Turn in your completed packet by the priority filing deadline. If you are eligible, funds should be available to you at the start of your program.

## Eligibility

You are eligible to apply if you:

- Have earned a high school diploma or GED.\*
- Are a U.S. citizen or eligible non-citizen (must be documented).
- Are enrolled in one of the approved Extension Certificates (see page 3).
- Are enrolled in at least six units of an undergraduate or four units of a graduate certificate per quarter.
- Have not defaulted on any educational loan or do not owe a refund on any state or federal student aid grant.
- Have registered with the Selective Service, if required.

*\*If you have not completed this requirement, call your local high school for information regarding GED completion and testing schedules.*

# 5 Steps to the Financial Aid Process

## STEP 1: FAFSA — 2020-2021 Free Application for Federal Student Aid

TO APPLY FOR Federal Financial Aid at UCLA Extension, you must submit a Free Application for Federal Student Aid (FAFSA). You can file the 2020-2021 FAFSA at [www.fafsa.ed.gov](http://www.fafsa.ed.gov).

Before attempting to complete the FAFSA, go to [www.fafsa.ed.gov](http://www.fafsa.ed.gov) to obtain your federal FSA ID. The federal FSA ID will allow you to sign your application electronically, and if you are a continuing applicant, access your FAFSA Renewal on the web.

**Please note: See Appendix for instructions on how to transfer IRS Tax Information directly into your FAFSA.**

Please refer to the chart below for specific questions on completing the FAFSA application for enrollment in an approved UCLA Extension Certificate.

When completing the FAFSA, the following questions must be completed as specified below:

Certificate	Certificate Level	2020-2021 FAFSA Instruction
<ul style="list-style-type: none"> <li>Pre-Medical and General Science</li> </ul>	Undergraduate	<p><b>Question 29:</b> Check/mark box: 1<sup>st</sup> year attended college before</p> <p><b>Question 30:</b> Check/mark box: Certificate of at least 2 years</p> <p><b>Question 47:</b> Check/mark the "No" box</p>
<ul style="list-style-type: none"> <li>Paralegal Training (undergraduate)</li> </ul>	Undergraduate	<p><b>Question 29:</b> Check/mark box: 3<sup>rd</sup> year undergraduate</p> <p><b>Question 30:</b> Check/mark box: Certificate of at least 2 years</p> <p><b>Question 47:</b> Check/mark the "No" box</p>
<ul style="list-style-type: none"> <li>Landscape Architecture*</li> <li>Paralegal Training (graduate)</li> <li>Post-Baccalaureate in Classics*</li> </ul>	Graduate	<p><b>Question 29:</b> Check/mark box: Graduate or continuing graduate</p> <p><b>Question 30:</b> Check/mark box: Graduate or professional degree</p> <p><b>Question 47:</b> Check/mark the "Yes" box</p>

\*Applicants must meet certificate prerequisite (i.e., bachelor's degree)

Federal School Code OR Name of College and City	College Street Address	State
001315 UCLA Los Angeles	405 Hilgard Avenue	CA



## STEP 2: SAR — Student Aid Report

The result of your FAFSA processing is the generation of a document called your Student Aid Report (SAR). The SAR is emailed directly to you from the federal processor 5-7 days after you submit the FAFSA.

When you receive your SAR, read it carefully. If additional information is requested or if there is an error, follow the directions given. If your SAR is accurate and complete, print and submit with your completed financial aid packet

## STEP 3: Federal Direct Loan Master Promissory Note (MPN).

To apply for a Federal Direct Loan, you must complete the direct lending MPN. You may access the MPN at [www.studentloans.gov](http://www.studentloans.gov). When applying for the Federal Direct Loan, select UCLA as school name.

Complete the Federal Direct Loan MPN at [www.studentloans.gov](http://www.studentloans.gov).

- A. Click on "Sign In."
- B. Enter your social security number, first two letters of your last name, birth date, and FAFSA pin.
- C. Click on "Complete MPN" under the heading Master Promissory Note.
- D. Click on Subsidized/Unsubsidized to complete the MPN. Make sure you view and print the MPN as a pdf. Otherwise, your MPN will not be saved.
- E. Print MPN and submit with your completed financial aid packet (**eight pages printed and processed in PDF format**).

Note: Be sure to download and print the MPN and submit it with your completed financial aid packet. For questions concerning the Federal Direct Loan program, please refer to pages 5-6.

If you received federal financial aid at UCLA Extension during the 2020-2021 school year and received a Federal Direct Loan, please visit [www.studentloans.gov](http://www.studentloans.gov) and print a duplicate copy of your Federal Direct Loan Master Promissory Note (MPN) and submit it to the Extension Financial Aid Office with your completed financial aid application packet.

## STEP 4: Supplemental Forms & Additional Documents

1. 2020-2021 Master Promissory Note Loan Supplemental Certification Form 589, page 16.
2. 2019 California State Tax-Withholding Statement Form 590, pages 17-18.
3. 2020-2021 UCLA Extension Financial Aid Supplement Form 591, page 19.
4. 2020 Financial Aid Applicant Income Certification Form 592, page 20.
5. 2018 IRS tax return transcript. If no tax return was filed, you are required to submit a 2018 IRS verification of non-filing letter. (see page 21)
6. Copy of Certificate Fee Receipt (see page 3 for fee amount—paralegal and continuing students are not required to submit a receipt).

## Award Confirmation

Approximately four weeks after the UCLA Extension Financial Aid Office receives your completed packet, you will receive an informal confirmation of your anticipated award.

Approximately two weeks after receiving the informal confirmation, you will receive official confirmation of your award from UCLA. This is your Financial Aid Notification (FAN) letter. You will receive two copies. The FAN will list your award amount by quarters. As soon as you receive your FAN, circle "A" accept or "D" decline and sign the reverse side of the form. Mail one copy to the UCLA Extension Financial Aid Office. Keep the other copy for your records.

It is the student's responsibility to review the contents of the FAN letter and to notify the Financial Aid office immediately of any award inquiries or adjustments, no later than 30 days prior to the end of the quarter. Requests submitted during the adjustment period will be reviewed with careful consideration within Federal rules and regulations. However any submissions after the adjustment period will not be reviewed or considered, the award listed on your FAN letter will remain as final. Award inquiries or adjustments must be submitted in writing through a formal statement to the general financial aid email, [finaid@uclaextension.edu](mailto:finaid@uclaextension.edu).

## STEP 5: Debt Management Session (Direct Loan Recipients Only)

If you are receiving a Direct Loan for the first time at UCLA, you must complete a mandatory online Debt Management Session. Your check will not be released to you until you have completed this session. You may access these sessions online at [www.loans.ucla.edu](http://www.loans.ucla.edu).

## Timeline: Steps 1-5

Weeks before the quarter begins	STEPS
16	<b>Step 1</b>
15	Complete FAFSA online at <a href="http://www.fafsa.ed.gov">www.fafsa.ed.gov</a> .
14	
13	
12	
12	<b>Step 2</b>
	Access SAR from federal processor via email.
11	
10	<b>Step 3</b>
	Submit Financial Aid Packet to UCLA Extension.
9	
8	
7	
6	
5	
4	<b>Step 4</b>
	Receive your informal award confirmation notice from UCLA Extension.
3	Receive your formal Financial Aid Notification (FAN) letter from UCLA.
2	<b>Step 5</b>
	Complete a mandatory online Debt Management Session — <a href="http://www.loans.ucla.edu">www.loans.ucla.edu</a> , if you are a first-time loan recipient at UCLA Extension.
1	Financial aid check disbursement. Begin classes.

### HELPFUL TIPS:

- Be sure that UCLA Extension Title IV Federal School Code, "001315," and address information are listed on the FAFSA exactly as indicated on page 8. Do not mail your FAFSA to UCLA Extension.
- UCLA Extension does not receive SARs electronically. If you file a FAFSA by Internet, you can make corrections to the SAR electronically.
- Keep a copy of all documents you submit. If UCLA Extension requests additional documentation, comply immediately.

**NOTE:** Any outstanding UCLA Extension obligations you may have incurred will prevent you from enrolling in UCLA Extension courses.

**NOTE:** If you previously enrolled at UCLA and have academic and financial holds on your student BAR account, you will not be eligible to receive financial aid through UCLA Extension.

**NOTE:** Students are responsible for monitoring their enrollment to ensure compliance with Satisfactory Academic Progress guidelines. Students will also be responsible for any late fees that are assessed as a result of failure to comply with UCLA Extension refund/drop policies.

# Disbursement

Direct Loans (subsidized and/or unsubsidized) are quarterly disbursements. Information on the fees attached to taking out Federal Direct Loans and how they affect your loan check may be found in the Master Promissory Note and loan disclosure statement. Checks will not be released prior to the dates listed below. **Note: You must be officially enrolled before your Financial Aid check will be disbursed to you (refer to page 13, question 19).**

Quarter	Checks Available
SUMMER 2020	June 22, 2020
FALL 2020	September 28, 2020
WINTER 2021	January 4, 2021
SPRING 2021	March 29, 2021

## DISBURSEMENT DATES FOR PARALEGAL TRAINING PROGRAM

### Special note to students enrolling in the Paralegal Training Program:

In compliance with federal regulations governing student loan programs, checks are disbursed in two equal increments throughout the enrollment period, **not in one initial payment**. You will receive one disbursement at the beginning of the enrollment period (i.e., after the add/drop enrollment period) and the final disbursement at the mid-point of the enrollment period. **Upon disbursement of your Federal Unsubsidized loan check(s), a refund for the difference of the student loan check and the tuition/fees will be issued once fees are paid in full.** *Please note:* The Financial Aid Office is unable to make any adjustments to the check disbursement dates. In addition, unlike the traditional degree-granting two year and four year programs, UCLA Extension is a non-degree institution. Therefore, financial aid will NOT cover 100% of your living expenses.

#### 5-month program

Quarter	Checks Available	
	1st Disbursement	2nd Disbursement
SUMMER 2020	July 6, 2020	September 14, 2020
FALL 2020	October 12, 2020	January 11, 2021
WINTER 2021	February 8, 2021	April 19, 2021
SPRING 2021	N/A	N/A

#### 11-month program

Quarter	Checks Available	
	1st Disbursement	2nd Disbursement
SUMMER 2020	July 6, 2020	December 15, 2020
FALL 2020	October 7, 2020	March 30, 2021
WINTER 2021	February 8, 2021	July 12, 2021
SPRING 2021	May 3, 2021	September 28, 2021

# BruinDirect

All financial aid disbursements (Direct Loans checks) will be refunded through the UCLA Billing and Receiving (BAR) system called BruinDirect.

## FREQUENTLY ASKED QUESTIONS

### What is BruinDirect?

It is the electronic deposit of funds directly into personal bank accounts which will allow you to access your money faster and more conveniently. BruinDirect may be used for checking accounts at any bank or credit union in the United States.

### How do I utilize BruinDirect?

Detailed instructions will be listed on the Financial Aid Notification letter.

### What if I do not wish to utilize BruinDirect?

Your Direct student loan check may be mailed. Checks will be mailed within 7-10 days of receipt of processing, but no earlier

than the quarterly disbursement dates. **NOTE: Be sure your correct mailing address is on file with the UCLA Extension Financial Aid and Student Records Offices.**

### When is my financial aid disbursed to BAR?

Your financial aid is disbursed to BAR approximately 5-7 days prior to the beginning of the term. You must be enrolled at least half-time (6 units undergraduate or 4 units graduate certificate) in order for financial aid to be released. Loans will not disburse until you have completed promissory note paperwork (refer to page 9, step 3 in this guide). In addition, first-time loan borrowers must complete a mandatory online Debt Management Session at [www.loans.ucla.edu](http://www.loans.ucla.edu).

### Note: You must complete all required sections of the Debt Management Session.

If you have questions, please contact the UCLA Extension Financial Aid Office at **(310) 825-4246** or email [finaid@uclaextension.edu](mailto:finaid@uclaextension.edu).

# Frequently Asked Questions

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**1. Do I apply as a graduate student if I already have a bachelor's, master's, or doctoral degree?**

Status is defined by the certificate. Students must meet certificate prerequisite(s). If you are applying for the Paralegal Training Program (graduate track), Landscape Architecture, or the Post-Baccalaureate Program in Classics, you apply as a graduate student. If you are applying for the Pre-Medical and General Science, or Paralegal Training (undergraduate track) Programs listed on page 3, apply as an undergraduate student even if you already have an undergraduate degree or a graduate degree.

**2. What is a professional student?**

A professional student is someone doing a post-graduate program. This category does not apply to UCLA Extension students or programs. Do not check this category on any of your forms.

**3. Do I need to list all schools on Form 591, even if I only registered, but never attended some of them or attended but never finished courses, or never received financial aid from them?**

Yes, you must list all schools at which you have registered, even if you never attended the classes or attended and did not complete classes or are currently attending.

**4. Once I am accepted for financial aid, is it good for the entire time I am taking classes in my program?**

No, you must reapply for Financial Aid every year. A year is July 1 through June 30. To meet the deadlines, you should reapply by early spring of each year.

**5. How long does it take to be approved for financial aid?**

It can take up to four months.

**6. I understand that if I am 24 or older I am considered independent, but what if I am under 24 and I am independent?**

You need to contact the Financial Aid Office to request the 2020-2021 Independent Appeal Form.

**7. Do I need to pay the school anything before receiving my financial aid?**

Yes, you must pay your Certificate Fee. The payment form is available from your Program Department or UCLA Extension Registration Office. The fees are listed on page 3 in this guide.

**8. What paperwork do I need to complete in order to apply?**

See page 9, Step 3.

**9. How is the amount of money I will receive determined and who determines it?**

The amount is determined by a very complex formula set by the U.S. Department of Education.

**10. Do international students qualify for federal financial aid?**

No.

**11. Do concurrent courses qualify for federal financial aid?**

No.

**12. Can I apply for an Extension Grant if I am receiving Federal Financial Aid?**

No.

**13. Do I need to send my SAR to the UCLA Extension Financial Aid Office?**

Yes. We do not receive an electronic report of your SAR.

**14. I only want to apply for the Pell Grant. Do I have to complete the FAFSA?**

Yes. Since financial need is a criterion, you must complete a FAFSA. Pell Grants are only applicable to the Pathway Certificate program.

**15. I went to another college and UCLA is not listed under the school section on my SAR. What should I do?**

You need to call **(800) 433-3243** and have the federal processor add UCLA's name and school code 001315 to your SAR. Request that a new SAR be emailed to you.

**16. Every agency that I speak with says UCLA Extension will electronically receive all corrections I have made on my SAR. Is this true?**

No. UCLA Extension does not receive anything electronically. You must wait to receive a new SAR.

**17. I received my SAR. Do I need to review it?**

Yes. You must review the entire document. If there are any errors, follow the directions on the first page. If you are not sure what to do, call the UCLA Extension Financial Aid Office at **(310) 825-4246** or email [finaid@uclaextension.edu](mailto:finaid@uclaextension.edu).

**18. If I am attending two colleges at the same time, can I receive financial aid from both colleges?**

No. You may only receive federal aid from one institution at a time. However, private loans may be available to meet any gap in your educational financing needs. Refer to the UCLA Extension website for more information at [uclaextension.edu/financialaid](http://uclaextension.edu/financialaid).

**19. How and when do I enroll in UCLA Extension courses?**

You may enroll in classes six weeks prior to the beginning of the quarter. You may access the quarterly catalog via our website: [uclaextension.edu](http://uclaextension.edu). To enroll in classes via our website, a valid major credit card (American Express, Discover, MasterCard, JCB, Visa, or debit card) **is required**. In order for your financial aid check to be released, you must be enrolled in a minimum of six units in an eligible undergraduate and/or four units in an eligible graduate certificate. Note: Only courses that are a part of your certificate curriculum are eligible for funding.

**Special note to students enrolling in the Pre-Medical and General Science Certificate:** Courses numbered in the 400, 700-900 series, as well XLC concurrent and on-line courses are not eligible for funding.

**20. How can I view my Financial Aid history?**

You can use the **National Student Loan Data System (NSLDS)** to view information on any federal student aid you have have received, including loan and/or grant amounts, outstanding balances, loan status, and disbursements. You can also look up your loan servicer using NSLDS.

The National Student Loan Data System (NSLDS) is the U.S. Department of Education's central database for student aid. It receives data from schools, agencies that guaranty loans, the Direct Loan program, and other U.S. Department of Education programs. NSLDS provides a centralized, integrated view of Title IV loans and grants that are tracked through their entire cycle; from aid approval through closure.

You can access NSLDS by visiting [www.nslsds.ed.gov](http://www.nslsds.ed.gov). You will need to provide your Social Security number (SSN), the first two letters of your last name, your date of birth, and your FSA ID in order to use the site.

The NSLDS Student Access web site is available 24 hours a day, seven days a week. However, maintenance of the NSLDS database can occur on the weekends or late hours. This may cause the site to be unavailable for a brief period while maintenance is performed.

**Address:**

UCLA Extension  
Financial Aid Office  
1145 Gayley Avenue, Second Floor  
Los Angeles, CA 90024

**Phone:**

(310) 825-4246

**Office Hours:**

9am-5pm (M-F)

**Fax:**

(310) 825-5686

**Email:**

[finaid@uclaextension.edu](mailto:finaid@uclaextension.edu)

**Website:**

[uclaextension.edu/financialaid](http://uclaextension.edu/financialaid)

**Appointments:**

You may schedule an appointment by phone or email.

**Types of Aid:**

Federal Direct Loans Stafford Loans  
(subsidized and unsubsidized),  
Pell Grants, Veterans Benefits,  
Extension Grants, Endowed Scholarships

Please **DO NOT** submit financial aid documents via email. Emailed documents **WILL NOT** be accepted and your application will not be processed.

**How to Submit financial aid documents**—To ensure the security of sensitive information, please submit

- Via U.S. Mail (U.S. Postal Service)
- In person delivery to the Financial Aid Office at UCLA Extension

# Maximum Loan Amounts – Federal Direct Loans

MAXIMUM ANNUAL LOAN AMOUNTS – FEDERAL DIRECT LOANS		
Borrower's Academic Level	Dependent Student* Sub and/or Unsub	Independent Student Sub and/or Unsub
<b>First Year Undergrad Student (0-36 units)</b> <ul style="list-style-type: none"> <li>▪ 1 academic year in length (3 quarters)</li> <li>▪ 2/3 academic year in length (2 quarters)</li> <li>▪ 1/3 academic year in length (1 quarter)</li> </ul>	\$5,500 (no more than \$3,500 subsidized)	\$9,500 (no more than \$3,500 subsidized)
<b>Second Year Undergrad Student (37-72 units)</b> <ul style="list-style-type: none"> <li>▪ 1 academic year in length</li> <li>▪ 2/3 academic year in length</li> <li>▪ 1/3 academic year in length</li> </ul>	\$6,500 (no more than \$4,500 subsidized)	\$10,500 (no more than \$4,500 subsidized)
<b>Third Year and Fourth Year Undergrad Student (73-108; 109+ units)</b> <ul style="list-style-type: none"> <li>▪ 1 academic year in length</li> <li>▪ less than 1 academic year</li> </ul>	\$7,500 (no more than \$5,500 subsidized)	\$12,500 (no more than \$5,500 subsidized)
<b>Graduate Student**</b>	N/A	\$20,500

\*For dependent students whose parents cannot borrow under the Federal Parent Direct Loan program, the amount under the unsubsidized program is the same as for an independent student.

\*\*Graduate students are no longer eligible for subsidized programs effective July 1, 2012.

MAXIMUM AGGREGATE LOAN AMOUNTS – FEDERAL DIRECT LOANS	
Borrower's Academic Level	Subsidized and Unsubsidized
<b>Dependent Undergraduate Student</b>	\$ 31,000 (no more than \$23,000 subsidized)
<b>Independent Undergraduate Student</b>	\$ 57,500 (no more than \$23,000 subsidized)
<b>Graduate Student</b>	\$138,500 (no more than \$65,500 subsidized)

If you are close to your loan limits and/or have exceeded the aggregate limits, eligibility for funding will vary based on the processed results of your Free Application for Federal Student Aid (FAFSA). All discrepancies must be resolved before your eligibility for funding can be determined.

# Other Types of Financial Aid

For further information on these other types of financial aid, refer to the General Information Section of the Extension catalog or go to [uclaextension.edu/financialaid](http://uclaextension.edu/financialaid).

## Extension Grant

A limited number of need-based grants are awarded by Extension to individuals not eligible for Federal Financial Aid. Up to \$400 in enrollment fees can be waived.

## Endowed Scholarships

There are a limited number of these scholarships available once you have begun a program.

## Veterans Benefits

If you are a veteran, we urge you to contact the Veterans Administration at [www.vba.va.gov](http://www.vba.va.gov) to determine your eligibility. If you are eligible, the Veterans Administration will approve the following:

- Classes leading to a Veterans Administration-approved Certificate.
- For a listing of Veterans Administration-approved certificates, please visit our website at [uclaextension.edu/financialaid](http://uclaextension.edu/financialaid). UCLA Extension programs and courses do not qualify for the Cal-Vet College Fee Waiver Program.

## Private Alternative Loans

Private loans are sponsored by banks and private lending institutions, not by the federal government. The interest rate and repayment schedules may vary from one lending institution to another. Eligibility is based on your income and creditworthiness. You will need to contact lenders directly to compare their service packages and determine the best provider for your specific needs.

## AmeriCorps

Each year, over 50,000 Americans of diverse age and background engage in intensive volunteer service to the country via AmeriCorps, a network of national service programs developed to meet critical needs in education, public safety, health, and the environment. AmeriCorps members serve through more than 2,100 nonprofits, public agencies, and faith-based organizations. They tutor and mentor youth, build affordable housing, teach computer skills, clean parks and streams, run after-school programs, and help communities respond to disasters. On completion of successful service, AmeriCorps alumni can elect to be provided with an education award. Former members are eligible to use their educational award payments to pay for UCLA Extension certificates, course sequences, or individual classes. For further information on AmeriCorps visit [www.AmeriCorps.org](http://www.AmeriCorps.org).

The programs, policies, procedures, and fees in this guide were correct at the time of print and are subject to changes without notification.

## DIRECTORY OF CONTACT NUMBERS

### UCLA Extension

#### THE ARTS

Landscape Architecture  
(310) 825-9414 Fax: (310) 206-7382

#### BUSINESS, MANAGEMENT & LEGAL

Paralegal Training Program  
(310) 825-0741 Fax: (310) 825-9242

#### HUMANITIES & SCIENCES

Pre-Medical and General Science Program  
(310) 825-7093 Fax: (310) 206-5066

Post-Baccalaureate Program in Classics  
(310) 825-7093 Fax: (310) 206-5066

#### FINANCIAL AID OFFICE

(310) 825-4246 Fax: (310) 825-5686

#### RECORDS & TRANSCRIPTS

(310) 825-3708 Fax: (310) 825-1439

#### REGISTRATION/CASHIER

(310) 825-9971 Fax: (310) 206-3223

#### EXTENSION CATALOG REQUEST

(310) 206-3599

### UCLA

Student Accounting Services  
(Financial Disbursement)  
(310) 825-9194

Student Loan Services  
(Pre-Loan Debt Management Session)  
(310) 825-9864

### Government Agencies

California Student Aid Commission/EdFund  
(888) 224-7268

Federal Student Aid Processing  
(800) 433-3243

Federal Pell Grant (Student Aid Report)  
(319) 337-5665

Internal Revenue Service  
(800) 829-1040

The University of California does not discriminate in the provision of services on the basis of age, race, gender, sexual orientation, creed, or disability.

## 2020-2021 Master Promissory Note Loan Supplemental Certification

**589**

This form is required for all students applying for a Federal Direct Loan (subsidized and unsubsidized).

Note: Your loan application will be processed and certified for the amount you request below, not to exceed the maximum quarterly prorated amount indicated on page 14.

\$ \_\_\_\_\_ .00

**The amount awarded and other details of your loan will be described in a disclosure statement mailed to you from your lender.**

Loan Period (Month/Year): From: \_\_\_\_\_ To: \_\_\_\_\_

Print Name: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Please **DO NOT** submit financial aid documents via email. Emailed documents **WILL NOT** be accepted and your application will not be processed.

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- Via U.S. Mail (U.S. Postal Service)
- In person delivery to the Financial Aid Office at UCLA Extension



# 2019 California State Tax – Withholding Statement **590**

For use by individuals to declare California residency status for tax purposes. (UC Form 590)  
**See instructions on next page.**

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_  Male  Female

Address (Number and Street): \_\_\_\_\_

City: \_\_\_\_\_ State : \_\_\_\_\_ Zip Code: \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Daytime Phone Number: \_\_\_\_\_

Marital Status:  Single  Married Date of Birth (mm/dd/yyyy): \_\_\_\_\_

Email: \_\_\_\_\_

**IMPORTANT, PLEASE READ CAREFULLY.** Check the box which corresponds to your status of California residency for tax purposes. You must check one and only one box. Then, sign and date the certification beneath the appropriate box. Failure to sign, date, or provide requested information above will render this certificate void.

## TO: THE REGENTS OF THE UNIVERSITY OF CALIFORNIA

**Certificate of Residency**

Under penalties of perjury, I hereby certify I am a resident of California, and I reside at the address shown above. Should I become a nonresident at any time, I will promptly inform you. See page 18 for the definition of resident.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Certificate of Nonresidency**

Under penalties of perjury, I hereby certify I am a nonresident of California for tax purposes. Should I become a resident at any time, I will promptly inform you. See page 18 for the definition of resident.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please **DO NOT submit financial aid documents via email**. Emailed documents **WILL NOT** be accepted and your application will not be processed.

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- Via U.S. Mail (U.S. Postal Service)
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# Instructions for Form 590

## California State Tax – Withholding Statement

18

### A. Purpose of Form

Form 590 establishes California residency status for tax purposes. All individuals ultimately have a tax liability to the California State Franchise Tax Board. Nonresidents have taxes withheld up-front, at the time of award disbursement. Residents, on the other hand, do not have taxes withheld by the University of California and instead file tax payments directly with the State.

### B. Law

R&TC Section 18662 and the related regulations require withholding of income or franchise tax on payments of California source income made to nonresidents of this state. To get a withholding publication, call the Withhold at Source Unit at **(916) 845-4900**.

### C. Who is a Resident

The term “resident” includes every individual who is in California for other than a temporary or transitory purpose and any individual domiciled in California who is absent for only a temporary or transitory purpose.

Usually, an individual will be considered a California resident if some or all the following conditions apply. The individual (1) has a street address in California, (2) lives in California at least six months out of the year, (3) has a California driver’s license or identification card. Note: California residents are subject to taxation on their worldwide income.

In general, an individual who comes to California for a purpose which will extend over a long period or indefinite period will be considered a resident. However, an individual who comes to perform a particular contract of short duration will be considered a nonresident.

For assistance in determining resident status, get FTB Publication 1031, “Guidelines for Determining Resident Status,” or call the appropriate telephone number listed below:

**From within the United States: (800) 852-5711**

**From outside the United States: (916) 845-6500**

**For hearing impaired with TDD: (800) 822-6268**

### INSTRUCTIONS FOR COMPLETING THE FORM:

1. Fill in your legal name and street address.
2. Indicate your gender.
3. Provide your Social Security Number (also known as Taxpayer ID number).
4. Provide your daytime phone number.
5. Indicate your marital status. Fill in either “Single” or “Married.”
6. You must now fill in one of the two sections beneath the line “TO: THE REGENTS OF THE UNIVERSITY OF CALIFORNIA.” The first section declares that you are a resident of California. The bottom section declares that you are a nonresident of California.
7. Check the box which corresponds to the portion of the form you are electing to sign (resident or nonresident). Directly beneath the box you select, please sign and date the certification. Your signature constitutes a declaration under penalties of perjury.
8. Please return the form by mail or in person to the UCLA Extension Financial Aid Office, 1145 Gayley Avenue, First Floor, Los Angeles, CA 90024.

# 2020-2021 Financial Aid Supplement

**591**

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ MI \_\_\_\_\_

Social Security Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Certificate: \_\_\_\_\_

Expected Completion Date: \_\_\_\_\_

Number of units you expect to take each term under Financial Aid: Summer '20 \_\_\_\_ Fall '20 \_\_\_\_ Winter '21 \_\_\_\_ Spring '21 \_\_\_\_

1. Have you ever received financial aid while attending UCLA?  Yes  No or UCLA Extension?  Yes  No

If yes, what year(s): \_\_\_\_\_ Applying for Pell Grant only?  Yes  No

2. Did you graduate from high school?  Yes  No If yes, date: \_\_\_\_/\_\_\_\_/\_\_\_\_

High School Name: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_

Did you receive a G.E.D. Certificate?  Yes  No If yes, date: \_\_\_\_/\_\_\_\_/\_\_\_\_ If yes, submit photocopy of GED certificate.

3. List the people in your household; include:

- Yourself (and spouse, if you have one)
- Your children, if you provide more than half of their support, and
- Other people if they now live with you, and you provide more than half of their support and will continue to provide more than half of their support from July 1, 2020 through June 30, 2021.

4. Write the names of all your household family members. Also write in the name of the college any of your household members will be attending at least half time between July 1, 2020 through June 30, 2021 and will be enrolled in a program. If you need more space, use the reverse side.

Name of Family Member	Age of Family Member	Relationship to the Student	Name of college that this family member will attend at least half time during the 2020-2021 academic year
SELF			

5. List all college(s), universities, and trade schools from which you have registered, attended, or graduated. Use the reverse side, if necessary. Complete whether or not you have ever received federal financial aid.

Name of School(s)	City/State	Attended: Month/Year	Degree(s) Earned

6. List the name(s) and address(es) of your parent(s):

Mother's Name: \_\_\_\_\_ Father's Name: \_\_\_\_\_

Address: \_\_\_\_\_ Address: \_\_\_\_\_

7. Will you live with your parents during the 2020-2021 school year?  Yes  No

8. Are you a U.S. Citizen?  Yes  No If "No," attach a copy of your green card of the INS documentation to verify this eligibility status (I-151, I-551, I-94, etc.), your driver's license, and your social security card.

I certify that all information on this form is true and correct to the best of my knowledge.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please **DO NOT** submit financial aid documents via email. Emailed documents **WILL NOT** be accepted and your application will not be processed.

**How to Submit financial aid documents**—To ensure the security of sensitive information, please submit

- Via U.S. Mail (U.S. Postal Service)
- In person delivery to the Financial Aid Office at UCLA Extension

# Financial Aid Applicant 2018 Income Certification

**592**

**Name of Financial Aid Applicant (please print):**

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ MI: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

1. Check box, if this applies:

- I filed taxes and have used the IRS Data Retrieval Tool to retrieve and transfer 2018 IRS income information into the FAFSA. (See page 23 for instructions).
- I/We filed taxes and am unable to use the IRS Data Retrieval Tool on my FAFSA.  
Please explain: \_\_\_\_\_

2. Check ALL boxes that apply to you.

- A.  Attached is a copy of my single filing 2018 IRS tax return transcript. To obtain an IRS tax return, see instruction page or call 1(800) 908-9946. **Note: tax returns are no longer accepted.** You will need your social security number and address on file with the IRS to request a transcript.
- I did not file a 2018 federal income tax return form. You are required to submit a 2018 IRS verification of Non-filing letter (See instructions on how to obtain a verification of non-filing).
- B.  Attached is a copy of our joint filing 2018 IRS tax return transcript. To obtain an IRS tax return, see instruction page or call 1(800) 908-9946. **Note: tax returns are no longer accepted.** You will need your social security number and address on file with the IRS to request a transcript.
- C.  I did not file a 2018 federal income tax return form. You are required to submit a 2018 IRS verification of Non-filing letter (See instructions on how to obtain a verification of non-filing).

3. Check this box ONLY if you are under 24 years of age, born after January 1, 1997 and enrolled in an undergraduate certificate program:

- Parent(s) did not file a 2018 federal income tax return form. Parent(s) are required to submit a 2018 IRS verification of Non-filing letter. (See instructions on how to obtain a verification of non-filing).
- Attached is a copy of my parents filing 2018 IRS tax return transcript. To obtain an IRS tax return, see instruction page or call 1(800) 908-9946. **Note: tax returns are no longer accepted.** Parents will need their social security number and address on file with the IRS to request a transcript.

4. List below all untaxed sources of income and amounts of money received (e.g., SNAP, SSI, Food Stamp) and/or earnings not reported in A, B, or C above.

Source/Agency	Annual Amount (January '18- December '18)	Recipient A, B, or C above

5. I/We hereby certify that all information reported on this form and any attachments hereto are true, complete, and accurate. False statements or misrepresentations will be cause for denial, reduction, withdrawal, and/or repayment of financial aid

**Signatures are required for persons reporting income.**

Signature of Applicant: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Applicant's Mother: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Applicant's Father: \_\_\_\_\_ Date: \_\_\_\_\_

Please **DO NOT** submit financial aid documents via email. Emailed documents **WILL NOT** be accepted and your application will not be processed.

**How to Submit financial aid documents**—To ensure the security of sensitive information, please submit

- Via U.S. Mail (U.S. Postal Service)
- In person delivery to the Financial Aid Office at UCLA Extension

# Instructions for Form 592

## Financial Aid Applicant 2018 Income Certification

### Tax Return Filers

2019 IRS Tax return transcript may be obtained through the following options:

#### Online Request

[www.irs.gov](http://www.irs.gov)

Under Tools, click on *Get a tax transcript / Get Transcript ONLINE*. Be sure to request the "IRS Tax return Transcript" and NOT the "IRS Tax Account Transcript" select "**2019**" in the Tax Year field.

#### Telephone Request

Call 1 (800) 908-9945

#### Paper Request Form

IRS Form 4506T-EZ or IRS Form 4506-T

### Non-Tax Filers

2018 IRS Verification of Non-Filing Letter may be obtained through the following options:

#### Online Request

[www.irs.gov](http://www.irs.gov)

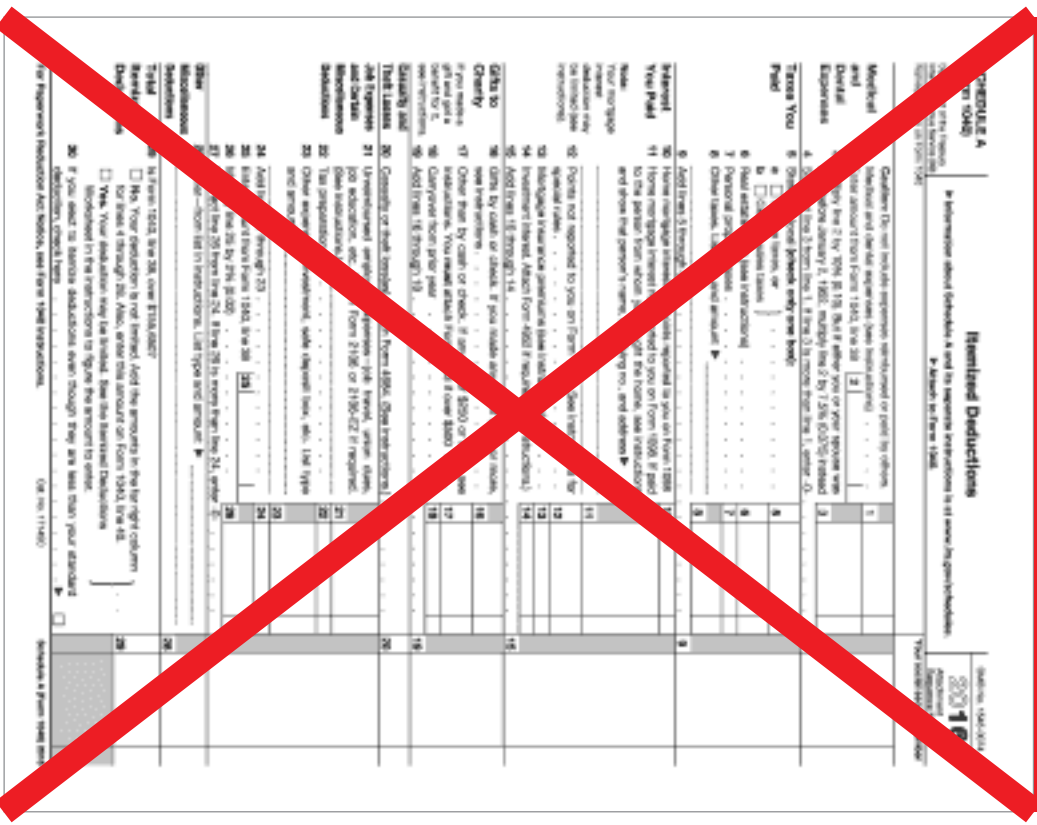
Under Tools, click on *Get a tax transcript / Get Transcript ONLINE*. Be sure to request the "Verification of Non-Filing Letter" and select "**2018**" in the Tax Year field.

#### Paper Request Form

IRS Form 4506T-EZ or IRS Form 4506-T (refer to Line 7 of the 4506-T Form). Do not list UCLA Extension as the third party to receive the "Verification of Non-Filing Letter." Please provide your date of birth on last four digits of your SSN number on the letter.

*Please see examples of the acceptable IRS Forms in this Guide on the next page.*

# Tax Return NOT ACCEPTABLE



# Tax Return Transcript ACCEPTABLE

**Internal Revenue Service**  
United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

**Tax Return Transcript**

Request Date: 03-04-2009  
Response Date: 03-04-2009  
Tracking Number: 100000070432

**Tax Period Provided:** 000-00-0100  
**Tax Period Ending:** Dec 31, 2008

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

**SSN:** 000-00-0100      **SPOUSE SSN:** 000-00-0200  
**NAME(S) SHOWN ON RETURN:** JOHN DOE & JANE DEE  
300 ANYSTREET BLVD  
DALLAS, TX 75000-0000-000

**ADDRESS:**

**FILING STATUS:** Married Filing Joint

**FORM NUMBER:** 1040  
**CYCLE POSTED:** 20091408  
**RECEIVED DATE:** Feb 15, 2009  
**REMITTANCE:** 0.00  
**EXEMPTION NUMBER:** 5

**DEPENDENT 1 NAME CTRL:** ABGR  
**DEPENDENT 1 SSN:** 000-00-0300  
**DEPENDENT 2 NAME CTRL:** ABGS  
**DEPENDENT 2 SSN:** 000-00-0400  
**DEPENDENT 3 NAME CTRL:** ABGS  
**DEPENDENT 3 SSN:** 000-00-0500  
**DEPENDENT 4 NAME CTRL:**  
**DEPENDENT 4 SSN:**  
**PREPARER SSN:**  
**PREPARER EIN:**

**Income**

**WAGES, SALARIES, TIPS, ETC:** \$ 67,000.00  
**TAXABLE INTEREST INCOME: SCH B:** \$ 0.00  
**TAX-EXEMPT INTEREST:** \$ 0.00  
**ORDINARY DIVIDEND INCOME: SCH B:** \$ 0.00  
**QUALIFIED DIVIDENDS:** \$ 0.00  
**REFUND OF STATE/LOCAL TAXES:** \$ 0.00  
**ALIMONY RECEIVED:** \$ 0.00  
**BUSINESS INCOME OR LOSS (Schedule C):** \$ 0.00  
**BUSINESS INCOME OR LOSS: SCH C PER COMPUTER:** \$ 0.00  
**CAPITAL GAIN OR LOSS: (Schedule D):** \$ 0.00  
**OTHER GAINS OR LOSSES: (Form 4797):** \$ 0.00  
**TOTAL IRA DISTRIBUTIONS:** \$ 0.00  
**TAXABLE IRA DISTRIBUTIONS:** \$ 0.00

## Acceptable IRS Forms

# APPENDIX

## How to Transfer Your IRS Tax Information Directly into Your FAFSA

The IRS Data Retrieval Tool transfers your IRS tax information directly into your FAFSA.

To use the Data Retrieval Tool, complete the following steps:

- Go to **fafsa.ed.gov** and select the “Start Here” button.
- Log in using your FSA ID.
- Select the “Continue” or “Make a Correction” button.
- Select the “Financial Information” tab from the top of the page.

### Instructions for the parent to request the parent IRS information:

1. Go to “Parent Financial Information” page.
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool.
3. If eligible, select which parent is providing information on the FAFSA.
4. Enter the FSA ID for the parent providing the information.
5. Click “Link to IRS.”
6. Review the information displayed and select the “Transfer My Information into the FAFSA” option.

### Instructions for the student to request the student IRS information:

1. Go to “Student Financial Information” page.
2. Answer the questions in the first box to see if you are eligible to use the IRS Data Retrieval Tool.
3. If eligible, click “Link to IRS.”
4. Review the information displayed and select the “Transfer My Information into the FAFSA” option.
5. Proceed to the Sign and Submit page.

*If you'd like to know more about the tool, FinAid offers a in depth summary, <http://www.finaid.org/fafsa/irsdataretrievaltool.phtml>, on their website.*

## Financial Aid Packet Checklist

Your completed Financial Aid Packet consists of the following items:

- 2020-2021 SAR — Your SAR will be sent to you via email after you complete the FAFSA. (5 pages)
- Federal Direct Loan Master Promissory Note (MPN) — **complete at [www.studentloans.gov](http://www.studentloans.gov), 8 pages printed & processed in PDF format.**
- 2020-2021 Master Promissory Note Loan Supplement Certification Form 589, page 16.
- 2019 California State Tax Withholding Statement Form 590, Page 17.
- 2020-2021 UCLA Extension Financial Aid Supplement Form 591, page 19.
- 2018 Financial Aid Applicant Income Certification Form 592, page 20.
- A completed copy of 2018 IRS Tax Return Transcript and/or verification of Non-filing Letter (see Instruction Page 9).
- Copy of Program Fee Receipt (See page 3 for the fee amount — Paralegal and continuing students are not required to submit a receipt.

**Note: The Financial Aid Office reserves the right to request additional information at any time to process your application. Your financial aid packet will be ready for evaluation of eligibility only AFTER you have submitted all of the above required and completed documents with appropriate signatures. Please be sure your documents are readable and accurate. It is also important that you send all documents together; we will not accept them individually.**

### How to Submit

To ensure the security of sensitive information, please submit

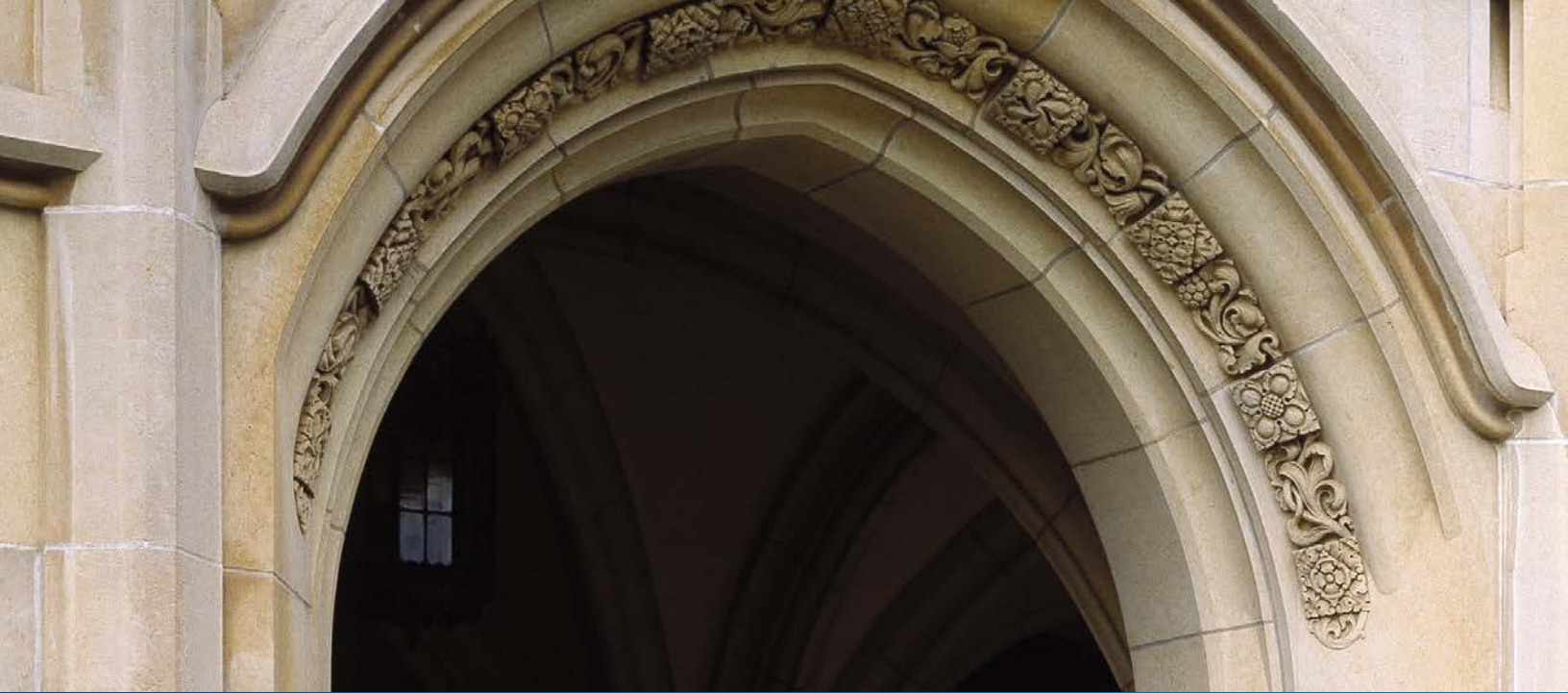
- Via U.S. Mail (U.S. Postal Service)
- In person delivery to the Financial Aid Office at UCLA Extension

**Please DO NOT submit financial aid documents via email. Emailed documents WILL NOT be accepted and your application will not be processed.**

Once your packet is complete, mail it to the UCLA Extension Financial Aid Office:  
1145 Gayley Avenue, Second Floor, Los Angeles, CA 90024.







### **Financial Aid Office**

1145 Gayley Avenue, Second Floor

Los Angeles, CA 90024

Phone: (310) 825-4246

Fax: (310) 825-5686

[finaid@uclaextension.edu](mailto:finaid@uclaextension.edu)

[uclaextension.edu/financialaid](http://uclaextension.edu/financialaid)

Monday-Friday, 9am-5pm

