

DISBURSEMENT GUIDE: **REQUIRED STEPS TO GETTING YOUR MONEY**

PLEASE READ: In order to receive your financial aid funds for the year there are several MANDATORY steps you need to take before any disbursements can be made. Please refer to the checklist below.

- STEP ONE** – ARE YOU ENROLLED IN ENOUGH UNITS?

- STEP TWO** – HAVE YOU VIEWED, ACCEPTED, AND SIGNED YOUR FINANCIAL AID AWARD LETTER ON THE TRITONLINK WEBSITE?

- STEP THREE** – HAVE YOU SUBMITTED ALL REQUIRED FINANCIAL AID DOCUMENTS?

- STEP FOUR** – HAVE YOU RESOLVED ALL ADMINISTRATIVE HOLDS?

- STEP FIVE** – HAVE YOU COMPLETED ONLINE ENTRANCE COUNSELING?

- STEP SIX** – HAVE YOU SET UP DIRECT DEPOSIT? (Optional but recommended)

*If you have completed all six steps and still have not received your financial aid disbursement, please contact our office at the number listed on page five.

STEP-BY-STEP DISBURSEMENT GUIDE

1. STEP ONE – ARE YOU ENROLLED?

Twelve (12) units are required to receive:

Loans for Disadvantaged Students (LDS)
Regent's Scholarship
Primary Care Loan
Outside funding requiring full-time enrollment

Six (6) units are required to receive:

Federal Direct Loans
University Loans

2. STEP TWO – HAVE YOU ACCEPTED YOUR FINANCIAL AID AWARD LETTER?

You must accept or decline your financial aid awards located on your TritonLink Financial Aid page. You may do so here: <https://act.ucsd.edu/studentFinancialAid2/financialaidchecklist.htm>

3. STEP THREE – HAVE YOU SUBMITTED ALL REQUIRED DOCUMENTS?

MASTER PROMISSORY NOTES (1st Time Borrowers Only!):

- ✓ MPNs for Unsubsidized Direct Loan and/or Graduate PLUS Loan Master Promissory Notes can be complete here: <https://studentloans.gov/myDirectLoan/index.action>
- ✓ MPNs for School-Based Loans (i.e. University Loan (ULL), Pharmacy University Loan (PULL), Loans for Disadvantaged Students (LDS), Primary Care Loan (PCL) and American Medical Association Loan (AMA) will be made available to you by the Servicer, Heartland ECSI, once you have accepted your loans.

TRUTH IN LENDING STATEMENTS:

- ✓ If you are an LDS or University Loan recipient (first-time borrower or previous borrower), you must also complete the Truth-in-Lending Disclosure Statements. These will also be made available to you by the Servicer, Heartland ECSI, once you have accepted your loans.

MULTI YEAR AUTHORIZATION PAGE:

- ✓ All first-time aid recipients are required to complete this form prior to any aid being disbursed to you. This form will be noted as a hold on your TritonLink Financial Aid page until it has been processed by the HSFAO.

HRSA COMPLIANCE STATEMENT AND LDS ENTRANCE INTERVIEW FORM *(for LDS Recipients Only!)*

- ✓ If you are an LDS recipient (first-time borrower or previous borrower), you must also complete the HRSA Compliance Statement and Entrance Interview Form. These will be noted as holds on your TritonLink Financial Aid page.
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4. STEP FOUR – HAVE YOU RESOLVED ALL ADMINISTRATIVE HOLDS?

You must resolve any administrative holds on your University account/records before aid will be disbursed to you. You may view your University Account holds here:

<https://students.ucsd.edu/finances/billing-payment/student-accounts/resolving-holds.html>

** Financial Aid holds will be posted to the Financial Aid page of your TritonLink account.*

5. STEP FIVE – HAVE YOU COMPLETED YOUR ENTRANCE COUNSELING?

All students receiving any type of loan (Direct Loan and/or School Based) who have NOT had Entrance Counseling at UCSD must complete the Online Entrance Counseling Session.

For Direct Loan Entrance Counseling, click here:

<https://studentloans.gov/myDirectLoan/counselingInstructions.action?counselingType=entrance>

For School Based Entrance Counseling; shortly after accepting your loan, Heartland ECSI Loan Servicing will send an email regarding the steps to completing the Online Entrance Counseling for School-Based loans (i.e. LDS, ULL, and Pharmacy ULL)

6. STEP SIX – HAVE YOU SET UP DIRECT DEPOSIT? (Optional but recommended)

To apply, access the direct deposit application at <https://students.ucsd.edu/finances/billing-payment/student-accounts/direct-deposit.html>.

**All students receiving financial aid should apply to have funds directly deposited to their bank account for the fastest and most efficient method of delivering aid.*

A NOTE ON WITHDRAWAL, TIME-OFF, AND ENROLLMENT CHANGES

WITHDRAWAL - When a student officially withdraws during the quarter, the percentage of fees refunded and the eligibility for aid received, is determined according to the schedule published in the UCSD General Catalog. If a student has received financial aid funding from any federal loan source (i.e. Direct/Grad PLUS/ LDS/PCL) for the quarter of withdrawal, then the amount of the refund must be returned to the fund or funds received in a manner prescribed by federal regulation.

TIME-OFF AS PART OF THE CURRICULUM - A student may not receive financial aid funds during a quarter in which they are not enrolled.

CHANGES IN ENROLLMENT STATUS - Financial Aid recipients must notify our office prior to any planned gap in enrollment. The University has 30 days to notify a lender of a change in the student's enrollment status. The University does this by sending your current enrollment information to the National Student Loan Clearinghouse. If you have previously received a Federal Direct/Stafford Loan or Grad PLUS Loan from the federal government or an outside lender, information from the Clearinghouse will be requested by your lender/federal servicer in order to determine your enrollment status and whether you should begin repaying your loans.

ADDITIONAL INFORMATION REGARDING HOLDS

After all holds have been satisfied, your financial aid funds will be credited to your account. If the total amount of financial aid funds credited to your account is greater than the charges on your account (including registration fees), you will receive a refund. This refund may either be electronically transmitted to your own bank account (if you have signed up for direct deposit in a timely manner), or sent to your current address in TritonLink if you would prefer to receive funds via the regular mail.

You have a right to cancel all or any portion of your financial aid disbursements, including your Direct Loan proceeds. If you want to do this for any particular quarter, contact the Health Sciences Financial Aid Office (HSFAO) at least two weeks before the scheduled disbursement date for that quarter. ***If you have already received your financial aid funds***, and want to reduce your loan funds, a charge must be placed on your account, to take back the funds. If you do not have sufficient credits to counterbalance this charge, you must make payment to the Cashier's Office either in person, by mail or electronically (with a service fee).

IMPORTANT OFFICE HOURS AND PHONE NUMBERS:

Health Sciences Financial Aid Office
Medical Education & Telemedicine Bldg., (Second Floor)
(858) 534-4664

8:00 a.m. – 4:30 p.m.

UCSD Health Sciences Financial Aid Staff

John Benefield, Executive Director of Enrollment Management & Financial Aid

Jessica Jacobs, Director of Financial Aid

David Hillery, Assistant Director & SSPPS Financial Aid Counselor

Kathleen Hallisy, MS3 & MS4 Financial Aid Counselor and Scholarship Coordinator

Maricela Santacruz, MS1 & MS2 Financial Aid Counselor

Elvee Froehlich, Business Systems Analyst

Financial Aid counselors are available for virtual appointments now! Please visit the following link to schedule an appointment and we will be happy to discuss your financial aid or address any questions or concerns you may have: <https://medschool.ucsd.edu/admissions/financial-aid/Pages/Schedule-an-Appointment.aspx>. You may also email our office directly if you prefer.

Other Campus Financial Services:

Student Financial Solutions Office (SFS)

Location: Student Services Center, Suite 355 (Third Floor)

For Current Business Hours: <https://sfs.ucsd.edu/about/business-hours.html>

Phone: (858) 822-4727 Email: sfs@ucsd.edu

Cashier's Office

Location: Student Services Center, Suite 170 (Ground Floor)

Hours: 9:00 a.m. – 3:00 p.m.

Phone: (858) 822-4727 Email: sfs-cashier@ucsd.edu