

## 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.

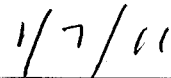
These procedures may only be used for identifying need for international students in graduate level programs that are subject to program fees.

Approved:



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Gail Burd, Vice Provost for Academic Affairs



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Date

## 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 (Estimated Family Contribution) 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.

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

- The Office of Financial Aid will establish separate item 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 following online calculator appears to accurately calculate the EFC in accordance with 'The EFC Formula':

<http://www.nelnetsolutions.com/finaid/efcsimplecalc.asp>

- 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. If the award is offered prior to the student's arrival to the United States, the department may submit the notice of award to Graduate International Admissions for use as part of the financial guarantee. For both incoming and continuing international students, the notice of award should include the following sentence: If you are a nonresident alien for tax purposes, your scholarship will be subject to tax withholding (14% if you are in F or J status, 30% for other non-immigrant status), unless you are exempt under a income tax treaty. Additional information is available at <http://internationalstudents.arizona.edu/tax-withholding>

UAccess will require a date applied for ITIN or SSN in order to have the “FSN” hold removed by financial aid. The office of International Student Programs and Services will assist newly arrived international students with obtaining a SSN or ITIN application date. 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.

## University of Arizona

### Financial Need Calculation for International Student

<i>Student Name:</i>		<i>EmplID:</i>	
<i>Academic Program:</i>		<i>Academic Year:</i>	
<i>Phone Number:</i>		<i>Dept. Contact:</i>	
<i>Notes / comments:</i>			

A. Estimated Cost of Attendance	\$
B. Less: Estimated Family Contribution (EFC):	(\$ )
C. Less: Estimated Aid from Other Sources:	(\$ )
D. Unmet Financial Need (A – B – C)	\$

<i>Signature of Academic Program Manager</i>	<i>Date</i>
<i>Name and Title of Academic Program Manager</i>	