

University of Hawai'i System
Agreement Regarding Students Concurrently Enrolled
at Multiple UH Campuses

Purpose

This document effective July 1, 2021 represents an agreement among the Chancellors and Provost of the ten University of Hawai'i (UH) institutions (campuses):

UH Mānoa
UH Hilo
UH West O'ahu
UH Maui College
Hawai'i Community College
Honolulu Community College
Kapi'olani Community College
Kaua'i Community College
Leeward Community College
Windward Community College

This Agreement supersedes previous versions of a UH systemwide financial aid consortium agreement and provides information regarding application of payments and financial aid for students concurrently enrolled at multiple UH campuses. The purpose of this Agreement is twofold:

- Application of Payments - to establish the practice of applying payments (including Title IV financial aid) toward institutional charges at any UH campus a student is attending; and
- Regulatory Requirements - to meet the regulatory requirements (in conjunction with an individual student concurrent enrollment form) for a consortium agreement among institutions participating in Title IV financial aid programs.

As required by [34 CFR 668.43](#), a consortium agreement among institutions participating in Title IV financial aid is necessary to convey how applicable courses, concurrent enrollment, charges, and financial aid are handled for students who receive assistance from the Title IV financial aid programs and take courses at a host institution. This **UH Agreement Regarding Students Concurrently Enrolled at Multiple UH Campuses** meets the majority of the requirements of a consortium agreement by stipulating how payments for institutional charges across UH campuses will be handled and identifies the responsibilities of both the home and host campuses for students who are enrolled at multiple UH institutions. A student's individual **Concurrent Enrollment Form** meets the remaining requirements of a consortium agreement by identifying any transferable courses in a student's academic program that count toward financial aid eligibility (a requirement under [34 CFR 668.5](#) for students whose financial aid eligibility includes those courses at the host institution).

It is anticipated that once the UH Course Program of Study (CPoS) process has been implemented at all UH campuses, it will be expanded to confirm the host UH campus courses that count toward a student's academic program. At that time, a concurrent enrollment form will no longer be necessary and this UH Agreement Regarding Students Concurrently Enrolled at Multiple UH Campuses can be replaced by a new agreement that relies on the CPoS process for identifying the transferable courses at the host institution rather than an individual student's concurrent enrollment form.

Definitions

1. Home UH Campus – The Home UH Campus is the institution where the student is enrolled in a degree or certificate program. Per federal regulations, a student is permitted to be eligible for financial aid at only one Home Campus at any given time.
2. Host UH Campus – The Host UH Campus is the UH institution where the student is taking courses in addition to any courses at the Home UH Campus. The student must meet admissions requirements of the Host UH Campus, if applicable.
3. Concurrent Registration – Concurrent Registration is the course registration at the student's Home UH Campus and at one or more Host UH Campuses (i.e., other UH campus(es)).
4. UH Application of Payments Procedure - The UH Application of Payments Procedure is a payment process specified by the Associate Vice President for Budget & Finance/Controller that is used to apply payments to charges at UH campuses. Payments are applied to outstanding student charges, which prioritizes tuition, housing, and mandatory fees.
5. Institutional Charges - The term "institutional charges," also referred to as "allowable charges" in the Title IV regulations [[34 CFR 668.164](#)], refers to tuition and mandatory fees, along with any items for which the institution routinely debits the students' ledger accounts for the amount of the charge.

UH Bursar's Office Application of Payments Procedure

http://www.fmo.hawaii.edu/student_accounts/#tab4

The ten UH institutions all fall under the same Hawai'i State Board of Regents governing body, which allows for a single, systemwide UH Application of Payment Process. The UH Application of Payment Process identifies the cash management process for applying financial aid payments toward institutional charges for students enrolled at multiple UH campuses. The application of payment process applies to all UH students, regardless of whether or not a student chooses to apply for maximum financial aid eligibility consideration by completing a Concurrent Enrollment Form. Effective Fall 2021:

1. Payment will be applied to tuition, housing, meal plan, and certain institutional and mandatory fees, in that order. Charges and mandatory fees are applied to students' accounts based on UH Regents and UH Executive policies and are subject to change [See [UH RP 6.203](#) and [UH EP 6.208](#)]. Other institutional fees are applied to students'

accounts based on the definition of institutional charges for Title IV purposes in the Higher Education Act [See [OPE Announcement 2019-03-05](#)].

2. Payment will be made to Home UH Campus by financial aid detail codes such as Pell grant, Subsidized Loans, and Unsubsidized Loans related to Home UH Campus by priority coding. Priority coding will pay tuition, housing (if applicable), and institutional fees at the Home UH Campus, then the Host UH Campus will receive the remainder of financial aid to pay any outstanding tuition, housing (if applicable), and mandatory or institutional fees, in that order.
3. Any remaining credit from financial aid will be refunded to the student through their Home UH Campus [See [UH AP 8.770 Student Refund Policy](#)].

General Information

1. Home UH Campus Enrollment Requirement – In order for the student to be considered for any amount of federal financial aid, the student must enroll in a minimum number of credits at the Home UH Campus according to the policy at that campus.
2. Required Concurrent Enrollment Form – In order for courses taken from a Host UH Campus to be calculated into financial aid eligibility under this Agreement, students must complete a financial aid Concurrent Enrollment Form obtained from the Home UH Campus.
3. Confirmation of Course Transferability – By approving the Concurrent Enrollment Form, the Home UH Campus confirms that the Host UH Campus course(s) upon successful completion are expected to be transferable into the student's eligible program at the Home UH Campus.
4. Enrollment Status Changes – It is the responsibility of the student to inform the Home and Host UH Campuses of any changes in enrollment that impact financial aid eligibility after completion of the Concurrent Enrollment Form. The Home UH Campus is responsible for confirming initial attendance/participation in courses that are applicable for financial aid eligibility and for monitoring changes in enrollment at both the Home UH Campus and the Host UH Campus for students receiving aid under the financial aid Concurrent Enrollment Form.
5. Cost of Attendance – The student shall be assessed for the UH Board of Regents' approved tuition and appropriate fees, and other applicable cost of attendance budget amounts, of the Home and Host UH Campuses offering the particular course(s).
6. Institutional Charges – UH policy for institutional charges [[RP 6.210](#)] states that any financial aid will be applied toward institutional charges at all UH campuses according to the UH Bursar's Office priority regarding the application of payments policy detailed above.
7. Return of Title IV Funds (R2T4) -- If at any point during an academic term the student's enrollment status changes, the student may be required to pay back any financial aid awarded according to the UH Withdrawal and Return to Title IV Financial Aid Policies of the Home UH Campus.

Home Campus Responsibilities

1. Financial Aid Eligibility Determination – For students who have an approved Concurrent Enrollment Form, the Financial Aid Office at the Home UH Campus shall be responsible for determining financial aid eligibility based on the combined credits at both the Home and Host UH Campuses and for awarding student financial aid and for making adjustments in financial aid due to enrollment changes.
2. Financial Aid Disbursements – For students who have an approved Concurrent Enrollment Form, the Financial Aid Office at the Home UH Campus shall be responsible for disbursing financial aid and may seek information or assistance from the Host UH Campus Financial Aid Office as needed in order to obtain information necessary to process those disbursements.
3. Satisfactory Academic Progress – For students who have an approved Concurrent Enrollment Form, the Financial Aid Office at the Home UH Campus shall be responsible for monitoring the student's academic progress and continued eligibility for financial aid, with the assistance as needed from the Host UH Campus.
4. Return of Title IV (R2T4) Funds – For students who have an approved Concurrent Enrollment Form, the Financial Aid Office at the Home UH Campus shall be responsible for any required R2T4 calculation and Return of Federal Title IV Funds according to Federal requirements and deadlines if the student withdraws from courses that constituted the student's enrollment status.
5. Enrollment Reporting – For students who have an approved Concurrent Enrollment Form, the Home UH Campus Registrar Office shall be responsible for reporting the student's combined enrollment status.
6. Last Date of Attendance – For students who have an approved Concurrent Enrollment Form, as required by Federal regulations, the instructor of the Host UH Campus course(s) may be asked to provide the last date of participation in an academically-related activity for determination of the effective date of the student's withdrawal. It is the responsibility of the Home UH Campus to obtain this information.

Host Campus Responsibilities

1. Enrollment Verification and Related Information – The Host UH Campus shall be responsible for assisting as needed in any verification of changes in enrollment for students who have an approved Concurrent Enrollment Form. The Host UH Campus shall provide the student's grades, tuition and fee charges, and other relevant information to the Home UH Campus upon request.
2. Last Date of Attendance – For students who have an approved Concurrent Enrollment Form, as required by Federal regulations, the instructor of the Host UH Campus course(s) may be asked to provide the last date of participation in an academically-related activity for determination of the effective date of the student's withdrawal.

Michael Bruno

Michael S. Bruno
Provost, UH Mānoa

Bonnie D. Irwin

Bonnie D. Irwin
Chancellor, UH Hilo

Maenette K.P. Benham

Maenette K. P. Ah Nee Benham
Chancellor, UH West O'ahu

Rachel Solemsaas

Rachel Solemsaas
Chancellor, Hawai'i Community College

Karen C. Lee

Karen C. Lee
Chancellor, Honolulu Community College

Lui Hokoana

Lui Hokoana
Chancellor, UH Maui College

Louise Pagotto

Louise Pagotto
Chancellor, Kapi'olani Community College

Joseph Daisy

Joseph Daisy
Chancellor, Kaua'i Community College

Carlos Peñalosa

Carlos Peñalosa
Chancellor, Leeward Community College

Ardis Eschenberg

Ardis Eschenberg
Chancellor, Windward Community College

Financial Aid Consortium Agreement (signed page)

Final Audit Report

2021-06-14

| | |
|-----------------|--|
| Created: | 2021-06-14 |
| By: | Kathy Owara-Takeo (OWARATAK@HAWAII.EDU) |
| Status: | Signed |
| Transaction ID: | CBJCHBCAABAAbfmINBIGMQd8qa11DMHL7fkGpZqWivsw |

"Financial Aid Consortium Agreement (signed page)" History

-  Document created by Kathy Owara-Takeo (OWARATAK@HAWAII.EDU)
2021-06-14 - 9:03:56 PM GMT- IP address: 166.122.251.32
-  Document emailed to Lui Hokoana (lhokoana@hawaii.edu) for signature
2021-06-14 - 9:04:26 PM GMT
-  Email viewed by Lui Hokoana (lhokoana@hawaii.edu)
2021-06-14 - 9:36:18 PM GMT- IP address: 66.249.84.7
-  Document e-signed by Lui Hokoana (lhokoana@hawaii.edu)
Signature Date: 2021-06-14 - 9:36:24 PM GMT - Time Source: server- IP address: 166.122.64.89
-  Agreement completed.
2021-06-14 - 9:36:24 PM GMT