

Memo of Assistance Instructions 2010-2011

Requesting an Aid Identification Number (Aid ID)

A department/school must provide the following information to Financial Aid to obtain an Aid Identification Number (Aid ID):

1. Name of the department/school to which the Aid ID is to be issued. Include the name, telephone number, e-mail address, and fax number of the individual responsible for requesting the Aid ID and preparing the Memo of Assistance.
2. The fiscal year for which the Aid ID is requested, i.e. 2010-2011.
3. The speed type to be charged. AAA-NNNNNN-572200 (graduates) or AAA-NNNNNN-571100 (undergraduates).
4. The name associated with the speed type, i.e. Microbiology Training Grant.
5. Send all requests to Michael Teichman at mjt31@case.edu.

An Aid Identification Number cannot be issued without this information.

How to Prepare a Memo of Assistance

1. Report only scholarships and grants for which no service is required. If the student is required to work to receive the funds, the compensation must be paid through the University's Payroll system and Federal, State, and local taxes must be deducted, if required by law.
2. Do not report stipends or payroll deduction payments on the Memo of Assistance.
3. Use the Memo of Assistance for the correct academic year for which the funds are to disburse. If the wrong form is turned in, it will not be accepted.
4. Be sure to check if it is the initial form for the year or if it is a change, i.e. additional/reduction aid, speed type, etc. Before submitting, please verify that the speed type to be charged is current.
5. Be sure that the Student's Name, PeopleSoft ID, Year in School and Expected Graduation Date are on the top of the form.

6. Be sure that the School and Program in which the student is enrolled is included on the form.
7. Total number of credit hours for which the student will enroll each term and the format in which instruction will be provided, if applicable. The Office of University Financial Aid uses the number of credit hours and charges to determine the student's cost of attendance. If this information is inaccurate, the student's budget will be incorrect and this may result in a hardship for the student.
8. Total tuition and fees to be charged each term even if the department is not paying the entire amount.
9. The actual assistance to be provided for each term. Please report the financial support to be provided for the entire academic year. We prepare the award packages for the full period of enrollment and use this information to determine Federal aid eligibility. Use a separate line for each Aid ID. Indicate any restrictions on the funding as to what charges should be covered. This helps our staff determine how to adjust the funds if the student enrolls for fewer hours than reported/expected.
10. Information on the memo provider: name, e-mail, telephone, and fax numbers. This information is used if we must contact you for clarification.

Changes to the Memo of Assistance

- If a department/school revises the award for a student, the revised Memo should always reflect the total amount of financial assistance to be credited for **the entire academic year**.
- The department/school must include all Aid Identification Numbers, even if the source of funding is changing. The offered amount for the term(s) should be reduced to zero if an account transfer is being reported.
- On a separate line, the new Aid ID and speed type must be listed. When an increase of funding is reported, list the full amount of aid to be disbursed for each term, not just the increase.

The Office of University Financial Aid requires a Memo of Assistance for each student who is applying for Federal assistance even if no departmental/school funding is offered (list zero in the amount field). Please comply with our requests for this information so that we may process the students' requests for funding in an efficient manner.

