

Colgate Financial Aid Portal

Requesting Federal Direct Loans Instructions

These instructions are for the Federal Direct Student Loan Request Form. Use this form to request a loan if none are offered to you in your package, or to borrow more than the amount offered on your Awards page.

If you were offered loans as part of your original financial aid package and would like to borrow the loan amount already offered and no more, do not complete this form. Instead, accept the loans that are already offered via the “Pending Aid Offered” screen on your Financial Aid Portal.

To complete the Federal Direct Student Loan Request form, first, log-in to the student Financial Aid [Portal](#). Make sure you have the current award year selected in the top right corner.

Go to the Supplemental Forms page by selecting it from the Menu in the top left corner:

Current Award Year: 20XX-20XX Log Out Help

Home

Documents & Messages

Financial Aid Summary

Pending Aid Offered

Supplemental Forms

Undergraduate College Financing Plan

NY State Supplementary Sheet

Welcome Student

Colgate University Financial Aid Portal

New Students:

- View your financial aid offered (*Financial Aid Summary*)
- Accept or decline Federal Direct Loans and/or Work Study offered (*Pending Aid Offered*)
- Report outside scholarships (*Supplemental Forms*)
- Request to borrow Federal Direct Student Loans (*Supplemental Forms*)
- Submit documents listed as 'not received' (*Documents & Messages*)

Returning Students:

- 2X-2X financial aid offers will be emailed beginning in mid-June.
- Submit documents listed as 'not received' promptly or your aid offer will be delayed.
- If no documents are listed, [contact us](#) if you plan to apply for financial aid.

Domestic Students Applying for Federal Student Aid Only:

- The [FAFSA](#) can be submitted any time during, or in the months preceding, the 2X-2X academic year.
- After your FAFSA is received, complete the Loan Request Form (*Supplemental Forms*)
- Loans for 2X-2X will be processed beginning in late June 20XX

Residents of NY State:

- Complete the [NYS Tuition Assistance Program \(TAP\) application](#).

Returning International Students:

- Your initial application filed prior to enrolling will be used to renew 2X-2X Colgate Grant.

20XX-20XX

- Submit your Consent to Release form** to allow Financial Aid to speak with your parent (*Supplemental Forms*)
- Read [Financial Aid Policies](#)** for important information on eligibility, disbursements, and renewal criteria.
- Fall 20XX billing statement** will be emailed to students from the [Office of Student Accounts](#) in early XX (payment due date Month, X Year)

Questions? [Contact Us](#)
Email: finaid@colgate.edu
Phone: 315-228-7431
Academic Year Hours: M-F, 10am-12pm and 1pm-4:30pm
Summer Hours: M-F, 10am-12pm and 1pm-4pm
Web: <https://www.colgate.edu/financialaid>

Select the “Federal Direct Loan Student Request Form” on the Supplemental Forms page.



Supplemental Forms

Only complete forms that are applicable to you. Once submitted, the Financial Aid Office will process the information you provided. If you have questions, or to amend a form after it was submitted, contact the [Office of Financial Aid](#).

Your Supplemental Forms			
Application	Application Description	Application Status	Status Date
Consent to Release Financial Aid Information	Student's written authorization to disclose financial aid information to third parties (e.g. parents/guardians)		
Consent to Release Aid Status to Colgate Depts.	Student's written authorization to disclose financial aid information to Colgate University Departments		
Consent to Release Aid Status to Outside Agency	Student's written authorization to disclose financial aid information to an outside agency		
Federal Direct Student Loan Request Form	Complete this form to borrow a Federal Direct Loan		
Outside Resource #1 Form	Form for reporting outside resource (e.g. scholarships, tuition benefits, etc.)		

On the form, complete the 1st field to enter the amount to be borrowed. The last two questions are **optional** and only need to be completed if the student is requesting a loan amount for one semester only (ex. fall or spring). Click “Save and Submit”. You will receive a revised award letter once your loan request has been processed.

Federal Direct Student Loan Request Form- Award Year 20XX/20XX

Use this form to request and accept Federal Direct Student Loans for amounts other than what was originally offered. The Financial Aid Office will send you a revised financial aid notice via email after your loan request has been processed.

The Department of Education sets the following annual borrowing limits for undergraduate students:

- First year (0 - 5.99 course credits):
 - \$5,500 – dependent undergraduate students
 - \$9,500 – if your parent was denied a PLUS loan or if you are independent (per FAFSA)
- Second year (6 - 13.99 course credits):
 - \$6,500 – dependent undergraduate students
 - \$10,500 – if your parent was denied a PLUS loan or if you are independent (per FAFSA)
- Third and fourth years (14 course credits or more):
 - \$7,500 – dependent undergraduate students
 - \$12,500 – if your parent was denied a PLUS loan or if you are independent (per FAFSA)

The Department of Education sets the following annual borrowing limits for graduate students:

- Unsubsidized Loan - Up to \$20,500 per academic year

All fields marked with an asterisk are required.

1. Indicate the total loan amount you plan to borrow for the full academic year (loans will be evenly split unless noted below). *

Answer the following two questions, only if you are requesting a loan for one semester (fall only or spring only) or if you do not want the loan evenly split.

1. To borrow for the fall semester only, enter the total amount you plan to borrow for the fall.

2. To borrow for the spring semester only, enter the total amount you plan to borrow for the spring.

Contact us at finaid@colgate.edu or 315-228-7431 if you have questions or if you submit a loan request form in error.

Clicking **Save** stores your application data. You can return any time to finish filling out your application before submitting it. Clicking **Submit** delivers your application data to our institution for consideration.

Clear

Save

Save and Submit

Close