

Colgate Financial Aid Portal

Consent to Release Instructions

To provide consent to release your financial aid information to a third party, such as a parent, scholarship agency, or Colgate department, there are 3 forms available.

1. Consent to Release Financial Aid Information
2. Consent to Release Aid Status to Colgate Departments
3. Consent to Release Aid Status to Outside Agency

Students will need to complete the applicable "Consent to Release" form to give the Office of Financial Aid authorization to discuss details of a student's financial aid information to a third party beyond the student themselves.

First, log-in to the student Financial Aid [Portal](#). Make sure you have the current award year select at the top right corner. Go to the Supplemental Forms page by selecting it from the Menu in the top left corner:

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

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Documents & Messages

Financial Aid Summary

Pending Aid Offered

Supplemental Forms

Undergraduate College Financing Plan

NY State Supplementary Sheet

COLGATE UNIVERSITY

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>

Click on the appropriate Consent to Release Form and complete the fields that are required.



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.)		

Below is an example of one of the “Consent to Release” forms. When finished, save and submit the form (use the “Save and Submit” button at the bottom of the form). The “Consent to Release” information will be saved under the student’s financial aid record for duration of their enrollment, unless the student requests changes in writing.



Consent to Release Financial Aid Information - Award Year 20XX-20XX

Access to a student’s records by any third party, including parents/guardians, is legally [restricted by FERPA](#) unless the student gives written permission or an exception to FERPA applies. Unless otherwise permitted by FERPA, once a student is enrolled, the Financial Aid Office will only respond to written or verbal requests by a person other than you, the student, with general information that is not specific to you.

This form is optional. Only complete it if you authorize the Financial Aid Office at Colgate University to discuss or otherwise disclose information related to your federal, state, institutional, or other financial aid with/to the individuals you list (e.g., parents/guardians).

This consent to release information will remain in effect until you revoke privileges in writing. To amend your answers on this form after submission, contact the [Financial Aid Office](#).

All fields marked with an asterisk are required.

Authorized Individuals

Confirm which individuals Financial Aid is authorized to speak or otherwise disclose information to.

1. First and Last Name and relationship of Authorized Person 1 (First Name Last Name, Ex: Parent)

2. First and Last Name and relationship of Authorized Person 2 (First Name Last Name, Ex: Guardian)

3. First and Last Name and relationship of Authorized Person 3 (First Name Last Name, Ex: Noncustodial Parent)

4. First and Last Name and relationship of Authorized Person 4 (First Name Last Name, Ex: Step-parent)