



HOW TO REQUEST A FEDERAL STUDENT LOAN CHANGE

Requesting a loan change for the Undergraduate Federal Direct Subsidized, Direct Unsubsidized, or Direct Parent Loan for Undergraduate Students.

SFS FORMS SITE

- The federal loan change request forms are listed on sfs.temple.edu/forms. Please find the form that corresponds with the loan type you are requesting an adjustment for.

WHICH FORM DO I NEED?



- To make an adjustment to the **Undergraduate Federal Direct Subsidized or Unsubsidized loan**:
 - Download the **Undergraduate Federal Loan Change Request form**.
- To make an adjustment to the **federal Direct Parent Loan for Undergraduate Students (Parent PLUS loan)**:
 - Download the **Parent PLUS Loan Adjustment Request form**.
 - For any Parent PLUS loan increases, **please make sure that the initial credit check has not expired**. PLUS loan credit checks expire after 180 days.
 - If the credit check for the original Parent PLUS loan has expired, the parent will need to apply for an increase through studentaid.gov AND submit a Parent PLUS Loan Adjustment Request form.
 - **If the original PLUS loan application was endorsed, or if the parent had to appeal the credit decision, the parent will need to apply for an increase through studentaid.gov AND submit a Parent PLUS Loan Adjustment Request form.**

DOWNLOADING THE LOAN REQUEST FORM

- After you click on the form on the SFS Forms site, download and save the form to your computer if you are completing the form electronically.
 - You can also 'Save as a PDF' after clicking 'Print' or Ctrl + P.
- Student Financial Services is accepting electronic signatures on loan adjustment request forms while our office is operating remotely due to the COVID-19 outbreak.
- Students/parents can still print the form and complete with a handwritten signature if they are able to.

The image shows a screenshot of the 'Undergraduate Federal Loan Change Request Form: 2020-2021' from Temple University. The form includes fields for Student Name, TUID, and Contact Phone Number. It contains sections for adjusting various types of loans (Subsidized Direct, Unsubsidized Direct, Parent PLUS, etc.) with options to increase or decrease the amount. A table at the bottom lists 'Annual Subsidized/Unsubsidized Loan Limits' based on credit hours. A print menu is overlaid on the right side of the form, with 'Save as PDF' and 'Save' buttons highlighted in yellow.

Age	Dependent	Independent
Freshman 0-29 credits	\$3,500 limit (\$3,500 max subsidized)	\$5,500 limit (\$3,500 max subsidized)
Sophomore 30-39 credits	\$3,500 limit (\$4,300 max subsidized)	\$5,500 limit (\$4,300 max subsidized)
Junior + Senior 40+ credits	\$3,500 limit (\$3,500 max subsidized)	\$5,500 limit (\$4,300 max subsidized)

EXAMPLE

Decreasing a student's Federal Direct
Unsubsidized loan

EXAMPLE: DECREASING A STUDENT'S UNSUBSIDIZED LOAN

- In this example, our student wants to decrease their total 2020-21 unsubsidized loan from \$2000 to \$500.
- Download the Undergraduate Federal Loan Change Request Form from sfs.temple.edu/forms.
- Complete the applicable sections.
- Don't forget to check off:
 - the loan type you are adjusting
 - What you are looking to do: increase, decrease, full cancellation
 - The total current accepted amount
 - The total new amount you want
- The default period for adjustment on this form is the 2020-21 academic year. If you are adjusting for a specific period or semester, please make a special note of this on the form.

LCHG

TEMPLE UNIVERSITY
Student Financial Services

Undergraduate Federal Loan Change Request Form: 2020-2021

Enter Student Name Enter TU ID Enter Phone Number

Student Name TUID (9-digit) Contact Phone Number

Are you graduating in December?
If "Yes": Do not complete this form. Instead, complete the 2020-2021 Confirmation of Fall Graduation Date Form.
If "No": Proceed. Please note that **all requested increases/decreases will be processed for the full academic year.**

A. I am currently or will be enrolled as a:
 Full-time Student (12+ credits)
 Part-time Student (6-11 credits)

B. Use the Annual Loan Limits table below to indicate the change you are requesting and the loan to which it will be applied.

<input type="checkbox"/> Subsidized Direct Loan	<input type="checkbox"/> Increase <input type="checkbox"/> Decrease* <input type="checkbox"/> Full Year Cancellation*	Current Accepted Amount: \$ <input type="text"/> New Amount: \$ <input type="text"/>
<input checked="" type="checkbox"/> Unsubsidized Direct Loan	<input type="checkbox"/> Increase <input checked="" type="checkbox"/> Decrease* <input type="checkbox"/> Full Year Cancellation*	Current Accepted Amount: \$ <input type="text" value="2000"/> New Amount: \$ <input type="text" value="500"/>
<input type="checkbox"/> Increase Unsubsidized Direct Loan due to Parent PLUS denial	**An email from the parent borrower is also required confirming they do not wish to appeal the credit decision or seek an endorser: sfs@temple.edu	Loan will be increased to the Independent level (see table below), or as high as allowed by the student's eligibility.
<input type="checkbox"/> Reinstatement of my previously declined loan (the loan will be placed back in offered status; you will need to log on to your TU portal to accept)	<input type="checkbox"/> Subsidized Direct Loan <input type="checkbox"/> Unsubsidized Direct Loan	Amount: \$ <input type="text"/>
<input type="checkbox"/> Increase Subsidized/Unsubsidized Direct Loan(s) due to grade-level change		Student's grade level will be reviewed and the Subsidized/Unsubsidized loan(s) will be increased as allowed by the student's eligibility (see table below).

*Decreased/cancelled loans may result in a balance owed to Temple University.

Annual Subsidized/Unsubsidized Loan Limits

Year	Dependent	Independent
Freshman 0-29 credits	\$3,500 total (\$3,500 max subsidized)	\$9,500 total (\$3,500 max subsidized)
Sophomore 30-39 credits	\$6,500 total (\$4,500 max subsidized)	\$10,500 total (\$4,500 max subsidized)
Junior + Senior 60+ credits	\$7,500 total (\$5,500 max subsidized)	\$12,500 (\$5,500 max subsidized)

*Please note: Electronic signatures will be accepted.

FRANCO S. OLIVAREZ Enter Date signed

Student Signature Date

Student Financial Services recommends students upload signed and completed forms in the "Cost & Aid" tab of TUportal

Form can also be sent to Student Financial Services: via TUSafeSend to sfs@temple.edu

This section is for SFS staff use only:

This loan change request was received via:

Course/Staff Name Signature

Date

EXAMPLE

Increasing a Federal Direct Parent PLUS Loan

EXAMPLE: INCREASING A PARENT PLUS LOAN



- Example: A Parent would like to increase their total Parent Plus loan for their dependent Undergraduate student from \$5000 to \$10,000 for the 2020-21 academic year.
- Check to make sure the current Parent PLUS Loan does not have an expired credit check (credit checks expire after 180 days).
- If a Parent's credit check has expired, if the Parent had to apply with an Endorser, or if the Parent had to appeal the credit decision, they will need to:
 - Apply for any increase through the Parent Plus loan application on studentaid.gov
 - Confirm the total amount they want to increase the Parent PLUS Loan to by also submitting the Parent PLUS loan adjustment form to the Student Financial Services office. .
- Download the Parent PLUS loan adjustment form from sfs.temple.edu/forms.
- If you are completing the form electronically due to Temple operating remote, please make sure you save the form as a PDF on your computer.
- Fill in the Student's name and TU ID at the top of the form.
- We will look at the example completed form on the next slide.

EXAMPLE: INCREASING A PARENT PLUS LOAN

- In this example, parent would check off 'Increase' in question 1.
- Parent would check off 'Full Year' in question 2 to change Parent Plus loan total for fall 2020 and spring 2021.
- Place the current total Parent Plus loan amount in the 'Current Parent PLUS Loan Amount' section.
 - Students can check their financial aid offer for the total current PLUS loan amount if they are unsure.
- Place the New total Parent PLUS loan amount in the next box.
- Place the Borrower Parent's info in the last three highlighted sections. The Parent Borrower will need to sign.
 - Due to remote operations, SFS is accepting e-signatures on this form at this time.

TEMPLE UNIVERSITY®
Student Financial Services

PLADJ

2020-2021 Parent PLUS Loan Adjustment Request Form

Please note: Only the parent who borrowed the PLUS loan can request changes to the loan's amount. If your loan is endorsed loan it can only be increased by completing a new application at www.studentloans.gov.

Student's First Name: Student First Name Student's Last Name: Student Last Name TUID#: 9 digit student TU ID

1. Please make the following change to my Parent PLUS Loan:
 Increase Additional PLUS application Decrease* Cancel*

2. Apply this change to:
 Full year Fall only Spring only

Current Parent Plus Loan Amount: \$ 5,000
New Parent Plus Loan Amount: \$ 10,000

*Decreased/Cancelled loans may result in a balance owed to Temple University.

Parent Borrower's Name: Parent Borrower's Signature: 10/8/20
Parent/Borrower Name (Please print) Parent/Borrower Signature Date

This section is for SFS staff use only:
This loan change request was received via:
Counselor/Clerk Name Signature Date

Student Financial Services recommends students upload signed and completed forms in the 'Cost & Aid' tab of TUportal
Form can also be sent to Student Financial Services:
via TUSafeSend to sfs@temple.edu


EXAMPLE

Increasing an Federal Unsubsidized loan if a parent of a dependent undergraduate student is denied after the Parent PLUS loan credit check.

INCREASING AN UNSUBSIDIZED LOAN DUE TO A PARENT PLUS CREDIT DENIAL

- Parent of a dependent undergraduate student would first need to apply for a Parent PLUS Loan through studentaid.gov.
- If the parent is denied, student can submit the Undergraduate Federal Loan Change Form to SFS.
- Student should fill out personal information, check off current enrollment, and then **check off Increase Unsubsidized Direct Loan due to Parent PLUS denial**.
- Student must sign and date form. At this time, both electronic signatures or handwritten signature is accepted.
- **Parent must also email sfs@temple.edu from the email address they listed on Parent PLUS Loan application that they will not pursue an endorser or appeal credit decision.**
- Student can upload this form through TU Portal or submit to sfs@temple.edu through TU Safe Send.

LCHG



Undergraduate Federal Loan Change Request Form: 2020-2021

Enter Student Name
Student Name

Enter 9 digit TU ID
TUID (9-digit)

Enter Phone #
Contact Phone Number

Are you graduating in December?
 If "Yes": Do not complete this form. Instead, complete the 2020-2021 Confirmation of Fall Graduation Date Form.
 If "No": Proceed. Please note that all requested increases/decreases will be processed for the full academic year.

A. I am currently or will be enrolled as a:
 Full-time Student (12+ credits)
 Part-time Student (6-11 credits)

B. Use the Annual Loan Limits table below to indicate the change you are requesting and the loan to which it will be applied.

<input type="checkbox"/> Subsidized Direct Loan	<input type="checkbox"/> Increase <input type="checkbox"/> Decrease* <input type="checkbox"/> Full Year Cancellation*	Current Accepted Amount: \$ _____ New Amount: \$ _____
<input type="checkbox"/> Unsubsidized Direct Loan	<input type="checkbox"/> Increase <input type="checkbox"/> Decrease* <input type="checkbox"/> Full Year Cancellation*	Current Accepted Amount: \$ _____ New Amount: \$ _____
<input type="checkbox"/> Increase Unsubsidized Direct Loan due to Parent PLUS denial	<small>* An email from the parent borrower is also required confirming they do not wish to appeal the credit decision or seek an endorser: sfs@temple.edu</small>	<small>Loan will be increased to the Independent level (see table below), or as high as allowed by the student's eligibility.</small>
<input type="checkbox"/> Reinstate my previously declined loan (the loan will be placed back in offers status; you will need to log on to your TU portal to accept) <input type="checkbox"/> Increase Subsidized/Unsubsidized Direct Loan(s) due to grade-level change	<input type="checkbox"/> Subsidized Direct Loan <input type="checkbox"/> Unsubsidized Direct Loan	Amount: \$ _____ <small>Student's grade level will be reviewed and the Subsidized/Unsubsidized loan(s) will be increased as allowed by the student's eligibility (see table below).</small>

*Decreased/cancelled loans may result in a balance owed to Temple University.

Student signs here

Date

Student Signature

Date

*Please note: Electronic signatures will be accepted.

Student Financial Services recommends students upload signed and completed forms in the 'Cost & Aid' tab of TUportal

Form can also be sent to Student Financial Services: via TUSafeSend to sfs@temple.edu

This section is for SFS staff use only:

This loan change request was received via: _____

Counselor/Clerk Name: _____ Signature: _____

Date: _____

EXAMPLE

Returning a Refund to reduce a loan

EXAMPLE: RETURNING A REFUND TO REDUCE A LOAN



- Reducing a paid loan on your account may result in a balance due, which you can re-pay using the refund you were issued.
- If the reduction is for a Federal Parent PLUS loan; have the parent borrower of the PLUS loan complete the Parent PLUS Adjustment Request Form available on the SFS forms site, sfs.temple.edu/forms.
- If the loan reduction is either a Federal Subsidized or Unsubsidized loan you can complete the appropriate [Loan Change Request Form](#) available on the SFS forms site.
- Instructions on returning a refund to Temple University can also be found under the **Refunds** section of the SFS FAQs site: <https://sfs.temple.edu/faqs>.

EXAMPLE: RETURNING A REFUND TO REDUCE A LOAN



- Example: Student's has a credit balance that has resulted in a \$2500 Parent PLUS Loan refund for the fall 2020 semester. How can they return the \$2500 refund to Temple and reduce the Parent PLUS loan?
- Download the Parent PLUS loan adjustment form.
- Fill in the appropriate fields.
- Upload the completed form either through the requirement listed on TU Portal, or by submitting to sfs@temple.edu through TU SAFE SEND.
- Please allow for 2-3 weeks for SFS to process the form.
- Once the Parent PLUS Loan adjustment form has been processed, reducing the Parent PLUS loan by the refund amount will result in a balance on the student's account.
- The student or parent can then use TU Pay to make an electronic check payment back to Temple University to return the refund.
- If a student or parent have any questions on the amounts they should write into the form, they can schedule an appointment with an SFS counselor at <https://sfs.temple.edu/about/appointments>.
- If you are returning the refund for a specific semester, make sure you check off the appropriate semester on the form.

Submitting SFS forms electronically

- Temple staff are currently working remotely and continuing to process financial aid related items. None of our physical offices are available to visit in person.
- During this time, most completed forms (wet or electronic signature is OK) **must be sent via email (sfs@temple.edu) to our office using TUSafeSend** (in TUportal) which is a secure option for submitting documents.
- Students can also click on the specific form requirement in the SFS channel to upload a requested form.

TU SAFE SEND



TUsafesend is a resource that makes it easy to securely send and receive files from within and outside the University. Note that files are automatically deleted from TUsafesend **14 days** after you upload them, so you don't have to manually clean up. To get started:

- Log in to TU Portal. On the TU Portal Home tab, students will find the TU Safesend Login Page link under TU Applications on the left side of their screen.
- Log in with your Temple AccessNet account and password and click the *Drop-off* button to send files to anyone.
- If you do not have an AccessNet account, you can send files to Temple community members if you know their email address. Start by clicking the *Drop-off* button.
- If you have a Temple AccessNet account and wish to ask anyone outside the University to send you files, log in and click the *Request a Drop-off* button. This method will make the process a lot easier and quicker for them because they will not have to go through a verification process.
- **tusafesend.temple.edu**

TU SAFE SEND - HOW TO FIND LINK ON TU PORTAL



- [Flight](#)
- [Gartner Gateway](#)
- [Gift Fund Request](#)
- [Guest Access Request System](#)
- [Human Resources Training](#)
- [Imaging](#)
- [Knowledge Base \(Login Page\)](#)
- [Lifeworks Employee Assistance Program](#)
- [Microsoft Download](#)
- [MyHousing / Meal Plans](#)
- [Next Steps Admin Panel](#)
- [Organization Chart](#)
- [Owl Connect](#)
- [Performance Development System](#)
- [Protected Data Access Tracking](#)
- [Room Request \(Events and Meetings\)](#)
- [TUSafeSend Login Page](#)
- [TUhelp](#)
- [Tableau](#)
- [Telecom Self Service](#)
- [WebEx](#)
- [Workflow \(Banner\)](#)
- [Zoom](#)



UNIVERSITY FORMS

SEARCH:

OFFICE / DESCRIPTION	CATEGORY	
Filter by Office	Filter by Category	
1 PURCHASING Accessibility Exception Request	Forms	↗
2 FACULTY AFFAIRS External Reviewers Reporting (WORD)	Forms	↗
3 FACULTY AFFAIRS 2020-2021 Faculty Affairs Important Dates	Guidelines	↗
4 UNDERGRADUATE STUDIES Third Course Attempt Request	Applications	↗
5 HUMAN RESOURCES Employee Return Spreadsheet	Forms	↗
6 HUMAN RESOURCES Return To Campus Approval Form	Forms	↗
7 HUMAN RESOURCES Return To Campus Planning Checklist	Forms	↗
8 UNDERGRADUATE STUDIES	Applications	↗

- [Student Status](#)
- [Advising Sessions](#)
- [DARS](#)
- [Enrollment Verification](#)
- TUCREDENTIALS**
[Transcript, Diploma](#)
- [Apply to Graduate](#)
- [View Application to Graduate](#)
- [FERPA Waivers Menu](#)
- TEMPLE GRADES**
[Midterm Progress Ratings, Final Grades](#)
- [Midterm Progress Ratings Key](#)

STUDENT ACCOUNT

DISCLAIMER
Tuition and fees are set annually each summer, regardless of the method of instruction. For the 2020-21 academic year, some or all instruction may be delivered remotely. Tuition, [↗](#)

SFS FORMS



- SFS Forms are located at sfs.temple.edu/forms.
- If you have a question about what documents are needed for your specific situation, please email SFS at sfs@temple.edu or schedule an appointment.
 - Information on how to schedule an appointment: <https://sfs.temple.edu/about/appointments>
- Check the Cost and Aid tab on TU Portal for any financial aid requirements. There are certain requirements that request documents are uploaded through the secure Temple Dashboard.
 - Click on the requirement listed under the SFS Channel on the Cost and Aid tab of TU Portal for more information.


UPLOADING SFS FORM THROUGH TU PORTAL





- Students can also upload requested SFS forms through the specific requirement on TU Portal.
- If a requirement for a form has been officially listed as a requirement on TU Portal, students can:
 - Log into TU Portal.
 - Click on the Cost and Aid tab.
 - Look to the right, where the SFS Channel is located.
 - Click on the correct academic year.
 - Click Need to Submit/Resubmit, then on the requirement to upload the form.

AID YEAR: 2020-2021 AID YEAR: 2019-2020


[← Need to Submit / Resubmit](#)
To submit documents for a requirement you can either use the upload tool below or fax them to 215.204.5897


REQUIREMENTS THAT NEED TO BE SUBMITTED


 Undergraduate Loan Adjustment Request
Instructions:
The Office of Student Financial Services (SFS) has received your request for a change to one or more of your Federal Direct Loans. [>](#)

LEGEND  Upload  Website  Follow Instructions  Not Eligible Yet

SELF SERVICE BANNER

 Financial Aid Package [>](#)

 College Financing Plan [>](#)

 Need Help? [>](#)

QUESTIONS?

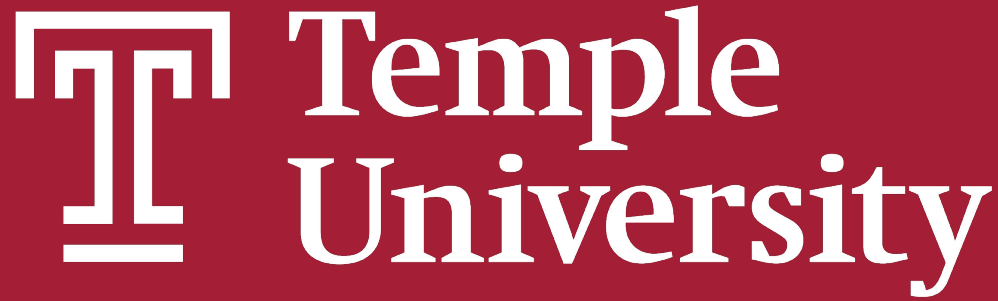


Contact SFS

- Email: sfs@temple.edu
- Please include your 9 digit TU ID on any email correspondence.
- We utilize a ticketing system when you contact us and will create a ticket at the time of your call or email. We will then have a professional staff member get back in touch.

Schedule a Phone/Virtual Appointment:

- QLESS
 - Download the QLESS app.
 - Available on both iPhone and Android devices.
 - Schedule an appointment through <https://sfs.temple.edu/about/appointments>.
- Family Education Rights and Protection Act Waiver
 - In order to provide a waiver of FERPA rights to a specific person, students should follow instructions listed on <https://sfs.temple.edu/policies/family-educational-rights-and-privacy-act>.



Temple
University