



9.4 Entrance Counseling

Policy Statement

The Bursar's Office Division will maintain compliance with the Federal Regulations to help first time student borrowers manage their debt.

Reason for policy

The Bursar's Office Division Entrance Counseling policy is federally mandated and is needed to aid first time student borrowers in managing their debt from the beginning of the loan.

Procedures

The Federal Perkins Loan program requires entrance counseling and acknowledgement of loan indebtedness and rights and responsibilities before the student borrower's first loan disbursement. For first time student borrowers, the "Entrance Interview Questionnaire" is mailed with the Federal Perkins Loan Master Promissory Note and the Federal Perkins Loan Rights and Responsibilities. Once this information is returned to our office, it is kept in the student borrower's electronic loan file for the life of the loan.

Forms/Instructions

Entrance Interview Questionnaire:

http://www.busfin.uga.edu/bursar/ls_entrance_questionnaire.pdf

UGA Cosigner Loan Information:

http://busfin.uga.edu/bursar/bursar_cosigner_loan/

UGA Perkins Loan Information:

http://busfin.uga.edu/bursar/bursar_perkins_loan/

Additional contacts

Michele Sellers

Phone Number: 706-542-2965

Responsibilities

Responsible University Senior Administrator: Vice President for Finance & Administration

Responsible University Administrator: Associate Vice President - Finance Division

Policy Owner: Bursar's Office Division

Policy Contact: Michele Sellers

Phone Number: 706-542-2965

Record Retention

This series documents and is a monitoring tool for all Perkins and National Direct Student Loans. This series consists of files for each borrower. This series may include but is not limited to: repayment schedules; statements of rights and responsibilities; records of actions taken; and related documentation and correspondence.

Record Copy: Student Loans

Retention: 5 years after loan repayment or assignment to U.S. Department of Education, [BOR 0472-06-015](#)

Federal Code: [34 C.F.R. 674](#)

[◀ Application and Approval](#) | [Exit Interview ▶](#)

Policy Dates

Effective Date:

Date Last Updated: 05/12/2017

Date of Last Review:

Date of Approval:

Previous Version of Policy: