



HOW TO[®]

Avoid Common Perkins Loan Paperwork Mistakes

Have you realized your Perkins Loan money was not disbursed to your BAR account? The most common reason Perkins Loan borrowers do not receive their loan money is the submission of incomplete loan paperwork to the Loan Services Office. Errors, such as not providing two completed references or parental information on the Personal Data Form, not signing for quarterly disbursements on the Federal Perkins Loan Promissory Note, and not submitting all requested documents, prevent loan money disbursement. Here are some instructions on filling out your Perkins paperwork to help you:

- Avoid not receiving your Perkins Loan money.
- Avoid making a visit to the Loan Services Office to complete your Perkins forms.

The UCLA Federal Perkins Loan package consists of a cover letter, **Statement of Rights and Responsibilities**, **Federal Perkins Loan Promissory Note**, **Interim Truth-In-Lending Statement**, **Personal Data Form** and a pre-addressed return envelope.

Statement of Rights and Responsibilities

Failure to sign the back of the document is the most common borrower error on this form. Read the Perkins Loan Statement of Rights and Responsibilities. Write in the requested information in the provided spaces:

- Print your last name, first and middle name.
- Sign and date the document.
- Provide your Social Security number and phone number.

Federal Perkins Loan Promissory Note

The most common borrower omission on this document is not signing for and dating all of the quarterly disbursements to you.

- In **Section A: Borrower Section**, you are the borrower. Fill in the information not printed on the form such as your social security number, date of birth, telephone number, your driver's license number and the state where licensed.
- In **Section B: School Section**, the information in this section is provided by the school and may be left blank.
- In the body of the Federal Perkins Loan Promissory Note above **Terms and Conditions**, the *Loan Amount* and the *Loan Period* columns have printed quarterly disbursement dollar amounts and disbursement dates. Sign and date for quarterly disbursements under *Date Signed* and *Borrower's Signature*.
- Following the section **Promise to Pay**, sign and date the appropriate lines at the bottom of the page.

Truth-In-Lending Statement

- Confirm the information printed on this statement is correct: your name, address, telephone, Social Security and UCLA Student ID numbers, and the *Amount Financed*.
- Sign and date on the line provided at the bottom of this statement.

Personal Data Form

You will not get your Perkins Loan money without a completed Personal Data Form. In particular, do not leave information sections blank, draw lines through sections, or write *N/A*. Brief explanatory statements are necessary in extenuating circumstances and situations.

- **Personal Information Section:** Remember to write in your driver's license number, the state where you are licensed and/or your California ID number, and your major. If you are unemployed, write *unemployed* or fill out the information.
 - ◆ **Spouse:** Provide the requested information or write in *not married*.
 - ◆ **Parents/Guardians:** Write in the names of your parents/guardians. If the remainder of requested information is not available, briefly explain the reason. For example, if you have a parent who has passed away, provide that parent's name, followed by the word *deceased* in parentheses.
 - ◆ **Brothers/Sisters Over 18 Not Living at Home:** If you have siblings over 18 years old not living at home, write in their names, addresses and phone numbers.
- **Previous Educational Loans at Institutions Other Than UCLA:** Provide information on loans you acquired while at other educational institutions, such as UC Irvine, Occidental, etc.
 - ◆ **Banking Information:** Provide checking and/or savings account numbers and information.
- **References:** Provide **two** personal references who have known you for three or more years, are over 21, who do not reside with you, and are not students or your parents. Reference information is critical; employment information and addresses are required. If you are unable to provide complete references on any one person, choose another person as a reference.
- **Sign and date this form** certifying that all of the information being submitted is true and correct.

Return Mailing

When you have completed the individual Perkins Loan forms, submit your **Statement of Rights and Responsibilities, Federal Perkins Promissory Note, Interim Truth-In-Lending Statement, and Personal Data Form** in the enclosed pre-addressed envelope. You must provide postage to mail the forms to the Loan Services Office. Alternatively, you can personally deliver the required forms to our office or drop box at Loan Services Office, A227 Murphy Hall. Keep your copies of Perkins Loan paperwork safe and secure for future reference.

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The Bruin Dollars and \$ense™ How To Series® is also available on the Student Loan Services website at www.loans.ucla.edu.

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