



HOW TO[®]

Complete Perkins Loan Documents Online

Completing Perkins Loan documents at UCLA has never been easier. Using the Student Loan Services & Collections' (**SLS&C**) online electronic signature process, students who have accepted a Perkins Loan offer can conveniently fill out and submit their loan forms from most any computer with internet access! This online method:

- Decreases Perkins Loan document package processing time
- Minimizes the chance of submitting incomplete forms (prompts indicate required fields)
- Eliminates the hassle of mailing and paying postage

Best of all, when students electronically complete their Perkins Loan document package they also electronically sign a *Federal Perkins Loan Master Promissory Note*. This master promissory note *will remain valid at UCLA for up to 10 years*. This means no need to fill out another set of Perkins Loan documents when accepting future Perkins Loan offers within that time period.

If you are offered and you accept a Perkins Loan on your electronic Financial Aid Notification (**eFAN**), you will be *emailed a notice within 24 to 48 hours* informing you that your *Perkins Loan Master Promissory Note* is available for signing. You will be directed via a hyperlink to the SLS&C website to initiate the online process.

Step 1: Gathering Needed Information & Computer Set Up

Before beginning the process, you will need to make certain you have available the following:

- Your FAFSA PIN (or Experian Authentication)
- Your UCLA LOGON ID
- Home and work contact information for your spouse (if applicable)
- Home and work contact information for your parents/guardians
- Home and work contact information for **two** references
(The references can not be students, nor individuals living at the same address with you, your parents/guardians or each other. You may not use your parent/guardian as a reference. Siblings who are over 21 years of age and living on their own can be listed as references.)
- Computer capable of running either:
 - ◆ Netscape Navigator/Communicator 6.1 or better; Microsoft Internet Explorer 6.0 or better; Mozilla Firefox 2.0 or better; Apple Safari 2.0 or better
- Adobe Acrobat Reader 3.02 or better installed. (If you do not have *Acrobat Reader*, go to <http://www.adobe.com/products/acrobat/readstep2.html> to install it.)
- Ability to temporarily disable any pop-up blocking software

If you have met the requirements stated above, you are ready to start the online signature process.

Step 2: Completing Your Online Documents

After following the link provided by email and then logging on to *ISIS*, you will be asked to **complete via the web three online forms**. Once completed and submitted, they will be **valid for up to a 10-year period**. You will not need to fill out Perkins Loan documents again at UCLA while these documents are recognized as active. (Read the *Federal Perkins Master Promissory Note* for further details.) At UCLA, the three forms which make up the Federal Perkins Loan online document package are: **Personal Data Form, Statement of Rights and Responsibilities, Federal Perkins Loan Master Promissory Note**.

Personal Data Form (PDF)

You will not be able to proceed without **fully completing** the *Personal Data Form*. In submitting this form, you profess to be transmitting information that is accurate and true. You will be asked a few preliminary questions for the purpose of individualizing your PDF. (When answering a check box question, always select the answer that best describes your situation.) Regarding some of the sections that make up the form—

- **Parents/Guardians:** Provide the name and address of your mother/father/guardian. If your mother/father/guardian is not employed, check the indicator box and move to the next section.
- **References:** Provide **two** personal references who have known you for three or more years; are over 21; do *not* reside with you, each other, or your parents/guardians; and are *not* students or your parents/guardians. Using a sibling as a reference is acceptable, providing that he/she meets the reference requirements mentioned. 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. (Also, if a reference is not employed, check the indicator box and move to the next section.)
- **Electronically signing the PDF** is your certification that all of the information being submitted is true and correct.

Statement of Rights and Responsibilities

You will be asked to agree to what is stated in this document. In turn, it is very important that you read the Perkins Loan *Statement of Rights and Responsibilities*.

Federal Perkins Loan Master Promissory Note

This is the document that is your 'promise to pay' the loan back according to the terms outlined in the note. You will be signing this document via **E-Sign On-Line™** through the *Affiliated Computer Services (ACS)* website. Before electronically signing, it is of primary importance that you, as the borrower, read the promissory note and print a copy of it for your records.

Step 3: Retain and Review Your Loan Forms

After you have completed, printed, and submitted online your **Personal Data Form, Statement of Rights and Responsibilities, Federal Perkins Loan Master Promissory Note**, remember to keep your printed copies of them in a safe, secure place for future reference. Review them periodically, especially before accepting future loans, when preparing to leave UCLA, as well as prior to going into repayment.

UCLA attempts to provide up-to-date information in our Bruin Dollars and \$ense™ How To Series®. Please be aware that the content of this document is based upon information that was correct at the time of publication. All information pertaining to and gathered from both UCLA and other sources is subject to change without notice.

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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