



2012-2013 financial aid assessment school sign-up form

Welcome! Please complete this form as thoroughly as possible. If you have questions, please contact us at 1.888.210.4857 or support@tads.com for assistance.

Once this form is completed, please fax it to us at 612.548.3361 and we'll complete the setup process and send credentials for the administrator web interface.

As always, we are here to assist and welcome your calls.

Agreement Between TADS and Financial Aid Program

1. Auncor, Inc. d/b/a TADS (hereafter referred to as **TADS**), agrees to assist

School Name: _____ **City, State:** _____
(hereafter referred to as **FINANCIAL AID PROGRAM**) by processing application forms submitted by families seeking financial aid.

2. **TADS** will make every due and deliberate effort to provide **FINANCIAL AID PROGRAM** with accurate financial need analysis according to the level of processing it has ordered. Prior to making awards, however, administrators should carefully examine all **TADS** reports, employing their personal knowledge of the applicant families to check for the "reasonableness" of all data. In the event of an error by **TADS**, **TADS'** liability is limited to correcting the error and generating new reports.

3. **FINANCIAL AID PROGRAM** understands that **TADS** software, documentation and output formats are Copyrighted by **TADS**, and as such may not be duplicated, distributed or stored in an information retrieval device without the express written permission of **TADS**.

4. The **TADS** services, software and associated documentation (if any) is provided for the term of this agreement, which is a period of one year from the date executed by **TADS**.

5. **FINANCIAL AID PROGRAM** agrees not to disclose any portion of the documentation or software supplied by **TADS** to any person other than duly authorized individuals associated with **FINANCIAL AID PROGRAM** and its affiliates and agrees to take the reasonable steps necessary to preserve the full confidentiality of trade secrets and proprietary rights of **TADS**.

6. **FINANCIAL AID PROGRAM** agrees that at the termination of this agreement, the clauses regarding the confidentiality of the information supplied by **TADS** shall remain in full force and effect.

7. This agreement shall be governed by the laws of the STATE of Minnesota. Any failure by **TADS** to insist upon strict adherence to this agreement shall not be construed as a waiver of the limitation of, or extension of, this agreement.

Our program agrees to these terms ☐ Yes ☐ No

Name: _____

Title: _____

Signature: _____

Date: _____



A. District or School Information

Name of School, District or Financial Aid Program

Shipping Address Line 1

Address Line 2

City	State	Zip	Fax
	P K	1 2 3 4 5 6 7 8	9 10 11 12 13
Grades in school <i>(choose all that apply)</i>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Grades eligible for aid <i>(choose all that apply)</i>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

B. Primary Contact Information

Last Name

First Name

Title

Phone Number

Address / Building / Room Number *(if not same as shipping address for school)*

E-mail Address

C. Secondary Contact Information

Last Name

First Name

Title

Phone Number

Address / Building / Room Number *(if not same as shipping address for school)*

E-mail Address

If you require additional personnel to be included in this process, please attach their information on a separate sheet.

D. School Association Information

1. Is your school associated with an umbrella organization such as a diocese, synod, etc? ☐ Yes ☐ No

If 'yes', which organization? _____



A. Application Fees

1. How much cost do you want to add to the Application Processing Fee to cover your local expenses? \$ _____
2. How much of the Application Processing Fee will your program subsidize? \$ _____
3. Will you reimburse TADS if parents do not send payment for required processing fees? ☐ Yes ☐ No
TADS will send the applicant one request for payment if their application is submitted without payment

B. Annual Program Fees

1. Annual program fee (*choose one option from the choices below*):
☐ \$160 Single School Program
☐ \$0 Consolidated Multi-School Program (*two or more schools-one administrator*)
2. Do you require Grant Management? (*if you answer 'yes,' please complete Page 5 of this form*) ☐ Yes ☐ No

C. Parent Application and School Report Deadlines

1. How should TADS enforce parental deadlines? (*choose one option from the choices below*):
☐ We do not specify deadlines for our parents ☐ We specify deadlines; TADS should process late applications
☐ We specify strict deadlines; TADS should not process late applications, but return late applications to parents instead

2. What are your parental deadlines and when do you want TADS reports in your office?

a. Parent application deadlines*

#1 _____ (mm/dd/yy)
 #2 _____ (mm/dd/yy)

b. Need reports by**

#1 _____ (mm/dd/yy)
 #2 _____ (mm/dd/yy)

* TADS will continue to process applications after these deadlines and will notify you through email once the application is processed.
 **This is the date that TADS will make every attempt to have your reports as complete as possible. Please allow a minimum of 15 business days between the parent deadlines and the reports complete deadline. More days are preferred by TADS as we continue to work "slow to respond" applicants.

D. Report Delivery

Unless otherwise requested, all TADS report notifications are sent via email.
 Please make sure that we have a valid email for the Primary Contact on Administrator form 2.

E. Parent Application Options

1. Number of Parent Application Packets you want sent to your office (*20 applications per packet*): # English _____ # Spanish _____
The cost of one packet is \$20 including shipping. It is not necessary to include payment with your order for Parent Application Forms. TADS will send you an invoice for these items.
2. Number of Worksheet Packets you want sent to your office (*20 worksheets per packet*): # English _____ # Spanish _____
The cost of one packet is \$5.00 including shipping. It is not necessary to include payment with your order for Parent Application Forms. TADS will send you an invoice for these items.
3. Number of additional Tuition Aid Brochures you want sent to your office (*20 brochures per packet*): # English _____
The cost of one packet is \$8 including shipping. It is not necessary to include payment with your order for Parent Application Forms. TADS will send you an invoice for these items.
4. Should parents be allowed to apply online? ☐ Yes ☐ No
5. Who specifically is eligible to apply for financial aid with this program?
Some schools only allow parishioners, some only allow non-parishioners, others may allow only tithing parishioners or students who are past their first year of enrollment.)



IMPORTANT! If you have one tuition structure for all students, please complete this page. If you have more than one tuition structure for your school, please attach a copy of your tuition schedule / structures to this packet and TADS will create a custom set of tuition structures for you.

Determining Tuitions: If the following form cannot adequately describe your tuition structure, please include your tuition structure on a separate sheet. TADS will create a custom structure for you in our system.

A. How are Tuitions Determined?

1. Is tuition the same for all students? *(if you offer discounts for any students or multiple children, answer "no")* ☐ Yes ☐ No

If you marked 'Yes', list tuition and go on to the next page *(skip the rest of this page)*

\$ _____

If you marked 'No', continue to the next question #2 below

2. Please select any of the following that pertain to your tuitions:

Note: you cannot choose both a and b

- ☐ a. We offer multi-child discounts as below *(please list actual tuition amount per student, not the discount or percentage. If at some point children are free, please enter "\$0" into the space provided):*

First Child: \$ _____ Second Child: \$ _____ Third Child: \$ _____

Fourth Child: \$ _____ Fifth Child: \$ _____ Sixth Child: \$ _____

- ☐ b. Our tuition is based on grade in school *(please list actual tuition amount per student):*

Grade School:

Pre-Kindergarten: \$ _____ Kindergarten: \$ _____ First Grade: \$ _____

Second Grade: \$ _____ Third Grade: \$ _____ Fourth Grade: \$ _____

Fifth Grade: \$ _____

Middle School:

Sixth Grade: \$ _____ Seventh Grade: \$ _____ Eighth Grade: \$ _____

High School:

Ninth Grade: \$ _____ Tenth Grade: \$ _____ Eleventh Grade: \$ _____

Twelfth Grade: \$ _____ Thirteenth Grade: \$ _____



IMPORTANT! If you are using TADS suggested values, you do not need to complete this form; leave it blank and proceed to the next page. Values presented below in orange are the **TADS suggested values**. Answers that are underlined are the TADS default choices to questions.

A. Allowed Monthly Expenses for a Family of Four

- | | | |
|---|---|--|
| 1. Maximum Allowed Housing Expense
\$2,200 \$_____ | 2. Minimum Housing Expense
\$0 \$_____ | 3. General Allowance for food, etc.
\$1,600 \$_____ |
|---|---|--|

B. Contributions to Student Education

1. How should TADS distribute Household Contribution to Education to each household student? ☐ Prorate ☐ Divide

2. Amount from Student Earnings and Savings applied toward Student's Tuition

- | | | | |
|---|---|--|--|
| a. Amount exempt from earnings
\$3,000 \$_____ | b. Percent earnings applied
35% _____% | c. Amount exempt from savings
\$1,500 \$_____ | d. Percent savings applied
15% _____% |
|---|---|--|--|

- | | Grade School | High School | College/Trade School |
|---|-----------------|-----------------|----------------------|
| 3. Minimum tuition for students not in your school(s): | \$0 \$_____ | \$0 \$_____ | \$0 \$_____ |
| 4. Maximum tuition for students not in your school(s): | \$4,000 \$_____ | \$8,000 \$_____ | \$10,000 \$_____ |
| 5. Maximum allowed for non-tuition expenses (books, bus, uniforms, etc.) for all students: (including students applying at your school or at other schools) | \$0 \$_____ | \$0 \$_____ | \$0 \$_____ |

6. If your school(s) have widely differing tuitions (*This item is relevant only for multi-school programs*):

- | | |
|--|---|
| a. Minimum Tuition Allowed:
\$0 \$_____ | b. Maximum Tuition Allowed:
\$99,999 \$_____ |
|--|---|

C. Yearly Maximums Allowed for certain Expense Items

- | | | |
|--|--|--|
| 1. Out-of-pocket medical costs
\$18,000 \$_____ | 2. Contribution to charity
\$4,000 \$_____ | 3. Child support per child
\$13,000 \$_____ |
| 4. Alimony payments
\$11,000 \$_____ | 5. Retirement contribution
\$10,000 \$_____ | |
| 6. Should elderly care and child day care expenses be capped by the lower of two parental incomes? <input type="radio"/> <u>Yes</u> <input type="radio"/> No | | |
| 7. Max % of capped day care expenses: 75% _____% 8. Min. % of stated day care expenses: 25% _____% | | |

D. Percent of Net Asset Type Added to Weighted Assets

- | | | | |
|--|---|--|--|
| 1. Liquid assets
100% _____% | 2. Home equity
20% _____% | 3. Business equity
40% _____% | 4. Real estate other than home
40% _____% |
| 5. Other Personal Assets
40% _____% | 6. Retirement: Self-Managed
40% _____% | 7. Retirement: Company Managed
20% _____% | |

E. Other Values Affecting the Use of Assets

- | | |
|---|-----------------|
| 1. Retirement exclusion per year. Years are calculated by taking the age of the elder head of household and subtracting 21: | \$4,500 \$_____ |
| 2. Percent of excess weighted assets added to Household Adjusted Income: | 30% _____% |

F. Percentage of HAI applied to HCE

1. What percentage of Household Adjusted Income should be applied to the Household Contribution to Education?

- | | | | | | | |
|----------------|---------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| a. \$0-\$8,000 | b. \$8,001-\$12,000 | c. \$12,001-\$17,000 | d. \$17,001-\$23,000 | e. \$23,001-\$30,000 | f. \$30,001-\$38,000 | g. \$38,001 and over |
| 20% _____% | 25% _____% | 30% _____% | 35% _____% | 40% _____% | 45% _____% | 50% _____% |



IMPORTANT! If you only have one grant, please complete this page. If you have more than one grant for your school, please copy this page and submit a page for each grant your school has.

Multi-Level Grant Management: If you are interested in a multi-level grant management system for your multi-school organization, please contact us and we will create a custom structure for you.

A. Fund Description

1. Please name or describe this fund: _____

B. Fund Amounts

1. Total amount of Grant Fund: \$ _____
 2. Amount of Grant Fund that should be reserved for late applicants: \$ _____
 3. Late grant distribution date: _____(mm/dd/yy)

C. Selection Criteria

1. Should applications that have minor unresolved issues (rated Fair) be excluded? ☐ Yes ☐ No
 2. Should applications that have major unresolved issues (rated Poor) be excluded? ☐ Yes ☐ No
 3. List the grade range eligible for this fund: Grades _____ to _____

D. Method of Grant Distribution

1. Method of distribution (*choose up to three*): ☐ Equal Ratio ☐ Equal Unmet Need ☐ Equal Stress

E. Minimum and Maximum Grants

Please answer either question #1 or #2 below. Do not fill out both questions.

1. If minimum and maximum grants are the same for all applicants in the group selected above, enter those amounts:

a. Minimum Grant: \$ _____ b. Maximum Grant: \$ _____

2. If grants should be a percentage of each applicant's tuition, enter those amounts:

a. Absolute dollar minimum: \$ _____
 b. Minimum percent of tuition: _____ %
 c. Maximum percent of tuition: _____ %