

2026-2027 Student Loan Adjustment Request

Federal & Private Loan Change Form

Student's Last Name	Student's First Name	SIS/PeopleSoft Student ID (1234567)	CWRU Network ID (abc123)
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All adjustments will be processed based on gross amounts (total funds before federal origination fees). Total financial aid, from all sources, cannot exceed the Cost of Attendance (COA). Additionally, federal loan eligibility must be reviewed before any change is processed.

Option 1: Adjust by Balance or Refund Amount – If this section is completed, Option 2 should be left blank.		
Reason for the change (complete all that apply)	Applicable Semester (choose from the options below)	Amount of refund
*I'd like my balance covered (e.g. the university bill)		Not Applicable
I'd like a refund to cover expenses (e.g. books, supplies, personal expenses)		

**Note that certain charges cannot be covered by federal funding and others (such as the Medical Plan) require a separate permission granted on the [Excess Aid Permission](#) form. If charges cannot be covered or permission not granted, aid will be adjusted to cover the balance, and you may be provided a refund, allowing you to make the payment for the remaining charges directly.*

Option 2: Adjust by Specific Amount – If this section is completed, Option 1 should be left blank.				
Loan Program	Action Requested (complete all that apply)	Applicable Semester (complete all that apply)	Gross Change	New Total
Federal Direct Subsidized				
Federal Direct Unsubsidized				
Federal Direct Graduate PLUS (available to legacy borrowers only)				
Federal Direct Parent PLUS				
Private Loan				

Note that for undergraduate students, the order of reduction/cancellation is listed below and helps to protect your lower costs and interest-subsidized loan eligibility. In cases where federal regulation requires a specific order, such as a requirement to borrow all subsidized loan funds before an unsubsidized loan can be borrowed, the order change may not necessarily match your requested order above.

- Direct Unsubsidized, Direct Subsidized, Direct Parent PLUS

Submission Instructions:

Submit using your CWRU email (or the parent email used for the PLUS application) to the location listed below:

- School of Medicine – medfinancialaid@case.edu
- All other students and parents of undergraduate students – financialaid@case.edu

Signatures and Affirmations

I affirm that I have read and understand the following points and that I am choosing to move forward with my requested loan adjustment.

1. Reducing or canceling disbursed loans may leave an unpaid balance for CWRU charges on my university account that I am responsible for paying.
2. The Office of Financial Aid will adjust my loan amounts to align with updated eligibility, including credit-hour changes under the Schedule of Reduction.
3. Following a federal court hearing, certain academic programs are temporarily designated as professional programs for federal financial aid purposes. This designation is the result of ongoing legal proceedings and may increase or decrease my eligibility for specific types of federal student aid.
4. The definition of which academic programs constitute professional programs is subject to change at any time based on future court rulings, congressional legislation, or federal regulatory actions. The University has no control over these determinations, and mid-year federal definition revisions may eliminate or reduce my eligibility for future loan disbursements, causing me to need additional aid resources for this or future academic years

Note: We only accept handwritten (wet) signatures or digital signatures drawn with a stylus or mouse. Typed names are not accepted.

Student Signature	Date
Parent Signature (Required only for Federal Direct Parent PLUS)	Date