



# Account Action Plan

LUC.edu/bursar | bursar@luc.edu | 773.508.7705 | Sullivan Center 190

Submission of this form does not guarantee that your card will not be deactivated. The Office of the Bursar will notify you if/when your Action Plan has been accepted. Only those who resolve their balance or have an approved action plan will no longer be at risk for ID deactivation.

Student Name: \_\_\_\_\_ Loyola ID: 0000 \_\_\_\_\_

Account Balance: \_\_\_\_\_ As of: \_\_\_\_\_  
(See Account Summary by Term in LOCUS)

All current students who have a past due balance of **\$8,000 and over** must submit an Account Action Plan detailing what actions they plan to take in order to resolve their balance. Failure to submit an acceptable action plan can result in ID card deactivation. ID card deactivation will block access to dorms and meal plans, as well as many services and facilities at Loyola. **Please be aware that a promise to pay by a future date would not be deemed an acceptable action plan.** An Account Action Plan must be approved by an Office of the Bursar staff member in order to avoid ID card deactivation or reinstate ID card access. Submission of this form alone is not a guarantee for approval. Please answer all questions below:

**1. Have you filed your FAFSA for the current academic year?**

**Yes** – Date submitted: \_\_\_\_\_

**No** – Planned Completion Date: \_\_\_\_\_

**N/A**

**2. Are all Financial Aid To-Do list items complete?**

**Yes** – Date completed: \_\_\_\_\_

**No** – Planned Completion Date: \_\_\_\_\_

**N/A**

**3. Have you applied for any additional federal or private loans? (Please attach a copy of the approval/denial)**

**Yes**

Type of Loan: \_\_\_\_\_

Loan Amount: \_\_\_\_\_

Application Date: \_\_\_\_\_

**No**

**4. Have you had any recent conversations with the Financial Aid Office regarding your financial situation?**

**Yes** – Outcome of Discussion: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**No**

**5. Were you on an iPlan that has since been cancelled?**

**Yes** – Cancellation Reason: \_\_\_\_\_

**No**

**6. Which of the following applies to you?**

Intend to enroll in future term

Have applied for graduation

o Neither (explain): \_\_\_\_\_

**7. Additional actions you plan on taking to resolve your balance (additional paper may be used):**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please attach any additional information regarding your Account Action Plan that may assist the Office of the Bursar to review your plan such as document submission confirmations, loan applications/decisions, or statements of verified funds.

**8. Calculate your resolution:**

Current balance (“Balance for all Accounts” on Account Summary By Term in LOCUS) \_\_\_\_\_

Loans or other aid you currently have in process Amount: \_\_\_\_\_  
Anticipated Disbursal Date \_\_\_\_\_

Personal payments you have made Amount: \_\_\_\_\_  
Date received by OTB \_\_\_\_\_

Final Balance (must equal zero/paid in full) \$ -0-  
Account paid in full by \_\_\_\_\_

By signing below, you acknowledge your obligation to pay this debt and any subsequent charges that may post to your account (late fees, dorm damage fees, etc.). You further acknowledge/understand that submission of this signed form is only a petition to avoid ID card deactivation or reinstate your ID card access. The final decision to do so will be at the discretion of the Loyola University Chicago Office of the Bursar. Registration, official transcript, and diploma holds can only be lifted once the balance is paid in full and your payment has cleared.

Student Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Decisions and requests for further information will be sent to your LUC.edu student email address.

**To be completed by Office of the Bursar staff**

Action Plan Approved? Reviewed By: \_\_\_\_\_  
Yes – Date: \_\_\_\_\_  
No – Reason: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_