



California Polytechnic State University
Student Accounts Office
Administration Building, Room 211
SLO, CA 93407
(805) 756-1428

ROBERT NOYCE TEACHER SCHOLARSHIP: MATH EXIT PACKET
A forgivable loan program

Please read all provided instructions, and then complete and submit the following (4) documents together to the Student Accounts Office (submission options are provided at the bottom of this page):

- **Robert Noyce Disclosure Statement (also referred to as a Truth in Lending Statement)**
This form needs to be requested by contacting your loan repayment counselor: studentaccounts-loans@calpoly.edu (include your full name and ID#).
- **Statement of Rights & Responsibilities** (2 pages)
This form is included in this packet.
- **Student Loan Worksheet** (2 pages)
This form is included in this packet.
- **Employment & Contact Update**
This form is included in this packet.

Because you have entered into a legal and binding student loan repayment agreement, all information requested is required without exception. The most common mistakes made on these forms are:

- Answering Worksheet questions with, "N/A" (this is never an acceptable response);
- Leaving a Worksheet line blank; and
- Illegible writing, or completing and signing in pencil.

The two page Student Loan Worksheet must be completed with acceptable responses. Please use the information provided below as a guide:

BORROWER INFORMATION:

- All requested information is required **except** cell and pager information. However, including it is recommended, as it can help in our efforts to keep your account current.
- **The complete Social Security Number is required on each document.**
- **We would prefer that you provide your personal email address on this document**, not your Cal Poly assigned email address. However, if you do not have a personal email address, please provide the Cal Poly assigned address.
- If you do not have a local address, you may answer "same as permanent address" in the local address section.

SPOUSAL INFORMATION:

- If you answered "yes" to question (3), please complete this section. Otherwise, leave it blank.

BORROWER'S PARENTAL INFORMATION:

- No matter your age, unless a parent is deceased, or you have no contact, this information is required (do not leave the line blank. Please respond with *Deceased, No Contact, Ward of the Court*, etc.). Your parents will never be expected to repay your loan. The information is used for contact purposed only (if we cannot reach you at an address you have provided, we will contact the parent for assistance).
- If your parents are divorced, you still need to reference both.
- Please refer to the *Employer Responses* section for additional information.

SPOUSE'S PARENTAL INFORMATION:

- If you are not married you may leave this section blank. Otherwise, the information is required. Please refer to the *Borrower's Parental Information* section (above) for assistance.

REQUIRED REFERENCE INFORMATION:

- All references must be at least 18 years of age; reside in the United States; and have a home address & phone number.
- Unless the reference you are listing is a relative, the reference cannot be a Cal Poly staff member or current Cal Poly student.
- No reference you list can have the same home address or phone number as you, your parents, or other references listed.
- If the reference is attending college (other than Cal Poly), please use the reference's permanent home address, NOT the school address.
- References CAN have the same employer.

EMPLOYER RESPONSES:

- If employed, all information is required.
- If a student, indicate school of attendance.
- If unemployed, please indicate.
- If self-employed, please indicate – and include cell phone #.

DO NOT:

- **Do not** leave a line blank, unless instructed to do so.
- **Do not** sign any document in pencil.
- **Do not** use "N/A" on any line.
- **Do not** cross through a line.
- **Do not** forget the zip codes.

EXIT PACKET SUBMISSION OPTIONS:

In person or by mail: please use the address at the top of this form.

By fax: 805-756-2774.

By email attachment: studentaccounts-loans@calpoly.edu

Noyce Math Loan Lender:

California Polytechnic State University
Student Accounts Office
Administration Bldg., Room 211
San Luis Obispo, CA 93405
(805) 756-2608
Studentaccounts-loans@calpoly.edu

Noyce Math Loan Billing Service:

ECSI
181 Montour Run Road
Coraopolis, PA 15108
(888) 549-3274
www.ecsi.net or
cservice@ecsi.net

I understand that (please initial each line item):

- _____ 1) The Robert Noyce Scholarship/Stipend funds are being awarded to me as a forgivable loan. If I do not satisfy the academic and service requirements as outlined in my Promissory Note I will be required to repay the Noyce funds, plus any and all associated interest and fees.

- _____ 2) I will be required to begin repaying the Noyce scholarship funds awarded within thirty-one days of failing to satisfy the requirements of the academic program for which the funds were awarded. The academic requirements include: 1) Maintaining at least half-time enrollment each term with a GPA of at least 2.7 until graduating from the academic program; 2) Graduating from the academic program for which the Noyce funds were awarded; and 3) Successful participation in all semi-annual and annual submission of demographic/employment/education related survey information associated with the Noyce Scholarship/Stipend program: a) During my continued enrollment in my academic program; and b) And after graduating from the academic program.

- _____ 3) If I fail to meet the academic and/or survey requirements of the Noyce Scholarship/Stipend program for which the funds were awarded, I automatically forfeit the cancellation benefit, and all Noyce funds that were disbursed to me are due and payable according to the terms of my Promissory Note.

- _____ 4) I have six years beyond graduating from the academic program for which my Noyce Scholarship/Stipend funds were awarded to satisfy the service requirement. The service requirement consists of working as a mathematics teacher as outlined in my Promissory Note, with one year’s Noyce scholarship/Stipend award being cancelled (forgiven) for every 2 years of teaching service. I am responsible for successfully submitting proof of teaching before the teaching period and immediately following the teaching period – for every year of teaching. I understand that the Request for Cancellation form is available through the billing service, ECSI. Noyce Scholarship/Stipend funds not cancelled within the six year window must be repaid. Repayment will commence 6 years and thirty-one days after I graduate from the academic program for which the funds were awarded.

- _____ 5) Cal Poly and/or its billing service DOES report all repayment information to at least one major credit bureau. Accurately reported information is NOT negotiable, even after the loan has been paid in full.

- _____ 6) If I am expected to repay the Noyce program funds. I understand that there is never a prepayment penalty. I may make payment in excess of the amount expected at any time. Unless otherwise notified, any amounts received in excess of the amount expected will be applied to the principal balance and WILL NOT take the place of my regularly scheduled payments.

- _____ 7) In my last quarter of half time enrollment (undergrad = 6 units and grad = 4 units) I must arrange for my REQUIRED student loan exit interview. I will do so by accessing the Student Accounts Office web page: http://www.afd.calpoly.edu/Student_Accounts/ (click on Student Loan Information). Failure to complete the exit interview process as requested will result in Cal Poly withholding all services until the loan is paid in full, or the exit interview process is completed – whichever comes first.

- _____ 8) My loan may be subject to late fees of up to 20% of the past due installment.

**STATEMENT OF RIGHTS & RESPONSIBILITIES
Robert Noyce Scholarship/Stipend Program (Math)
Page 2 of 2**

A forgivable loan lent by California Polytechnic State University, SLO

- _____ 9) I must, without exception, notify the billing service, ECSI, and Monitors within 10 days if (A) I withdraw from Cal Poly; (B) my name should change (I will need to provide verification of the change) ; (C) I drop below half time units; (D) my billing address and/or phone number should change (do not rely on the Post Office’s Address Change form, CONTACT THE BILLING SERVICE DIRECTLY); or (E) I think I’m eligible for a deferment or forbearance (forms should be requested and eligibility determined by the billing service, ECSI: www.ecsi.net).
- _____ 10) ECSI will attempt to notify me with information related to my disbursements; my exit interview requirement; and loan repayment information. I understand that it is my responsibility – even during enrollment at Cal Poly – to maintain a current address and phone number on my ECSI loan account: www.ecsi.net.
- _____ 11) If I fail to pay my loan as agreed, I will no longer have access to Cal Poly services (records & enrollment); my loan will be assigned to a collection agency, and may be accelerated (loan balance due and payable IN ITS ENTIRETY); all loan benefits will no longer be available to me; and I will be required to pay all collection, court, and attorney’s fees if my loan becomes, or continues to be, past due.
- _____ 12) If I allow my loan to be more than 90 days past due, it will be considered in default, and such a status may compromise my ability to receive future Title IV funds, or additional institutional loan funds, through Cal Poly, SLO, until such time as the defaulted loan is paid in full. Further, Cal Poly, SLO will withhold all services until such time as the loan is paid in full.
- _____ 13) I am expected to contact the billing service, ECSI, BEFORE THE DUE DATE, if I cannot make my payment on time. Cal Poly will withhold all services until my delinquent (late)/defaulted loan account has been brought current and/or paid in full.
- _____ 14) I understand that whether or not I receive my monthly billing statement, my payment is due on time. I further understand that I am expected to promptly answer all communications – written or otherwise – from Cal Poly and/or ECSI.
- _____ 15) I authorize Cal Poly access to any and all of my demographic, contact, enrollment, and employment information from any third party for purposes of enforcing the terms and conditions of any Noyce Scholarship/Stipend repayment obligation I might incur.

I attest that I have read and understand my repayment responsibilities and the options available to me. As outlined in the Promissory Note, I understand that if I do not fulfill the Noyce Math academic and service requirements, the Noyce scholarship funds disbursed to me will convert into a loan that must be repaid. This loan must be repaid in a timely manner as called for in my Promissory Note. The payment terms associated with this loan program were mutually agreed upon between me and my lending institution, Cal Poly, San Luis Obispo. In signing below I acknowledge that I have printed out an exact copy of this form, and that said copy will be considered the “borrower’s copy”.

Print Full Name	Signature	Date of Signature	Social Security Number
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STUDENT LOAN WORKSHEET - 2 page document
For The Robert Noyce Scholarship/Stipend (Math)
lent by Cal Poly, San Luis Obispo

REV 07/05

COMPLETE BOTH PAGES OF THIS WORKSHEET AND SUBMIT WITH SUPPORTING DOCUMENTS (SEE PAGE ONE)

BORROWER INFORMATION:

1. NAME: FIRST MIDDLE LAST			2. DATE OF BIRTH: (MO/DAY/YEAR)		
3. MARTIAL STATUS: <input type="checkbox"/> SINGLE <input type="checkbox"/> MARRIED		4. SOCIAL SECURITY NUMBER		5. DRIVER'S LICENSE OR STATE IDENTIFICATION CARD STATE: NUMBER:	
6. LOCAL (SCHOOL) ADDRESS. IF YOU DON'T HAVE ONE YET, COMPLETE PERMANENT ADDRESS ONLY. CITY STATE ZIP			7. PERMANENT MAILING ADDRESS. REFERENCE AN ADDRESS WHERE YOU CAN ALWAYS GET YOUR MAIL CITY STATE ZIP		
8. REQUIRED PHONE NUMBERS:		LOCAL AT SCHOOL (WITH AREA CODE)	PERMANENT (WITH AREA CODE)	WORK (WITH AREA CODE & EXTENSION)	
9. MORE REQUIRED INFORMATION:		E-MAIL ADDRESS (PLEASE PROVIDE YOUR PERMANENT EMAIL ADDRESS, NOT YOUR SCHOOL EMAIL)		CELL PHONE (WITH AREA CODE)	
10. BORROWER'S EMPLOYER, NAME OF COMPANY AND COMPLETE MAILING ADDRESS					

SPOUSE INFORMATION: IF YOU ARE NOT MARRIED SKIP TO QUESTION #15

11. NAME: FIRST MIDDLE LAST			12. DATE OF BIRTH: (MO/DAY/YEAR)		
13. SOCIAL SECURITY NUMBER		14. IS YOUR SPOUSE ATTENDING SCHOOL? <input type="checkbox"/> NO <input type="checkbox"/> YES			
IF "YES" WHERE? NAME, CITY & STATE OF SCHOOL					

BORROWER'S PARENTAL INFORMATION: (REQUIRED)

15. FATHER: NAME: FIRST MIDDLE LAST				FATHER'S EMPLOYER			
MAILING ADDRESS				EMPLOYER'S MAILING ADDRESS			
CITY STATE ZIP		PHONE NO. WITH AREA CODE		CITY STATE ZIP		PHONE NO. WITH AREA CODE	
16. MOTHER: NAME: FIRST MIDDLE LAST				MOTHER'S EMPLOYER			
MAILING ADDRESS				EMPLOYER'S MAILING ADDRESS			
CITY STATE ZIP		PHONE NO. WITH AREA CODE		CITY STATE ZIP		PHONE NO. WITH AREA CODE	

SPOUSE'S PARENTAL INFORMATION: REQUIRED IF YOU ARE MARRIED; OTHERWISE SKIP TO QUESTION #19

17. FATHER: NAME: FIRST MIDDLE LAST			18. MOTHER: NAME: FIRST MIDDLE LAST		
MAILING ADDRESS		HOME: AREA CODE & PHONE NO.	MAILING ADDRESS		HOME: AREA CODE & PHONE NO.
CITY	STATE	ZIP	WORK: AREA CODE & PHONE NO.	CITY	STATE
				ZIP	WORK: AREA CODE & PHONE NO.

REFERENCES: Please review page 1 of this packet for more information.

19. List two (2) relatives, other than your parents, who will always know your address. You may use close family friends if you do not have relatives with U. S. addresses. Each reference must have a different home address and phone number and they cannot be the same as yours, your parents, or any other reference listed. References must be at least 18 years old and cannot be current Cal Poly staff or students.

1. RELATIVE REFERENCE NAME	HOME: AREA CODE & PHONE NO.	EMPLOYER NAME	EMPLOYER: AREA CODE & PHONE NO.
HOME: MAILING ADDRESS	CITY	STATE	ZIP

2. RELATIVE REFERENCE NAME	HOME: AREA CODE & PHONE NO.	EMPLOYER NAME	EMPLOYER: AREA CODE & PHONE NO.
HOME: MAILING ADDRESS	CITY	STATE	ZIP

20. List three (3) references, other than Cal Poly students, staff, or previously listed references who will always know your address. Each reference must have a different home address and phone number and they cannot be the same as yours, your parents, or any other reference listed. References must be at least 18 years old.

1. REFERENCE NAME	HOME: AREA CODE & PHONE NO.	EMPLOYER NAME	EMPLOYER: AREA CODE & PHONE NO.
HOME: MAILING ADDRESS	CITY	STATE	ZIP

2 REFERENCE NAME	HOME: AREA CODE & PHONE NO.	EMPLOYER NAME	EMPLOYER: AREA CODE & PHONE NO.
HOME: MAILING ADDRESS	CITY	STATE	ZIP

3. REFERENCE NAME	HOME: AREA CODE & PHONE NO.	EMPLOYER NAME	EMPLOYER: AREA CODE & PHONE NO.
HOME: MAILING ADDRESS	CITY	STATE	ZIP

I certify that to the best of my knowledge the information provided is true and correct. I acknowledge that I am receiving a loan that must be repaid, and that I am required to notify Cal Poly, and the student loan billing service, ECSI, of all changes until the loan is paid in full. I understand that my failure to repay this loan as outlined in the promissory note terms and conditions will result in Cal Poly, SLO withholding all University services until my loan delinquency is resolved.

BORROWER'S SIGNATURE

DATE OF SIGNATURE

The Robert Noyce Scholarship/Stipend program awards scholarships to Cal Poly, San Luis Obispo students who are in their final year and are majoring in mathematics, and stipends to science, technology, engineering, or mathematics (STEM) professionals who enroll at Cal Poly seeking to become K-12 mathematics teachers. A Noyce Scholarship/Stipend recipient (the student who received the award) is required to provide updated employment and contact information in writing to the school that disbursed the scholarship award (Cal Poly, San Luis Obispo). **WARNING: COMPLETING/SUBMITTING THIS FORM IS A NOYCE SCHOLARSHIP PROGRAM REQUIREMENT.** IF YOU DO NOT RETURN THE COMPLETED FORM TO THE MATHEMATICS DEPARTMENT (ADDRESS PROVIDED BELOW) WITHIN 30 DAYS OF THE MAY 15th DUE DATE YOU WILL BE OUT OF COMPLIANCE WITH YOUR NOYCE PROGRAM.

BORROWER INFORMATION (please print clearly)

Borrower's name (last, first): _____

Borrower's mailing address: _____

Borrower's daytime phone number: _____

Borrower's EMAIL address: _____

Borrower's last 4 digits of Soc. Sec. #: _____

Mail completed form to:

**California Polytechnic State University
COS&M Attn: Dr. Todd Grundmeier
San Luis Obispo, CA 93407-0403**

Lending Institution:

California Polytechnic State University
Student Accounts Office
San Luis Obispo, CA 93407

CANCELLATION GUIDELINES (please check off all that apply)

I, the Noyce Scholarship/Stipend recipient, am NOT currently employed as a full-time mathematics teacher. I understand that I have six years from the date I graduate from my mathematics program for which the funds were awarded to complete my teaching service obligation.

Reason for not teaching at this time: _____

OR

I, the Noyce Scholarship/Stipend recipient, am currently - or have previously - taught in a K-12 school district as a mathematics teacher at least part time. The district where I am, or was, meets one or more of the Noyce teacher cancellation criteria.

BORROWER SIGNATURE

I declare that the information above is true and correct. I further declare that I will notify Cal Poly or ECSI (billing service) immediately upon any change in my status.

Borrower's signature: _____ Date: _____

SCHOOL (EMPLOYER) CERTIFICATION (to be completed by school-designated authorized official)

The district where recipient is teaching meets one or more of the following Noyce teacher cancellation criteria. Check all that apply.

- It has a higher percentage of individuals from families with incomes below the poverty line;
- It has a high percentage of secondary school teachers not teaching in the content area in which the teachers were trained to teach; or
- It has a high teacher turnover rate.

CERTIFICATION PERIOD

Please confirm the start and end dates for the teaching periods. One year's Noyce Scholarship award is forgiven (cancelled) for every two years of teaching service the recipient performs (according to the guidelines of the program).

Current service teaching period: Start Date: _____/_____/_____ End Date: _____/_____/_____

School name: _____

School district: _____

School address: _____

School phone: _____

Name of official: _____

Official's signature: _____

Title of official: _____

Signature Date: _____

CAL POLY ADMINISTRATION USE ONLY

Date Reviewed: _____

Date Reviewed: _____

Noyce Scholarship Program Administrator: _____

Student Accounts Office: _____

ECSI Process: _____



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(805) 756-1428

REVIEW YOUR FORMS BEFORE SUBMISSION

Make sure you review all your forms and submit them together. Incomplete forms will be rejected. There will be a hold placed on your records that will not be removed until you successfully complete the exit process, or pay the debt in full – whichever occurs first.

Robert Noyce Disclosure Statement:

- Make sure you read the information provided on the Disclosure Statement. Let your loan counselor know if you have questions: studentaccounts-loans@calpoly.edu .
- Sign and date the Disclosure Statement. Keep a copy for your records.

Statement of Rights & Responsibilities:

- Make sure you read the information on the Statement of Rights & Responsibilities. Let your loan counselor know if you have questions: studentaccounts-loans@calpoly.edu .

Student Loan Worksheet (2 page document):

- Make sure you read over the instruction page that is included in this packet.
- Provide all required information and sign and date the bottom of the second page.

Employment & Contact Update form:

- Provide all required information and sign and date the form.

Robert Noyce Exit Packet Submission Options:

You must submit your completed forms together:

Disclosure Statement
Statement of Rights & Responsibilities (2 pages)
Student Loan Worksheet (2 pages)
Employment & Contact Update form

Submission options:

In person, or by mail: use the address at the top of this form.

By fax: 805-756-2774.

Email attachment: studentaccounts-loans@calpoly.edu .