

Policy Number: 02-90-025

Policy Title: STUDENT FINANCIAL PLANNING

Effective Date: September 8, 2017

Page 1 of 1

1. **Policy Statement**

This policy establishes OHSU's commitment to providing all students with a comprehensive program of debt management counseling and financial planning services. These services include, but are not limited to, individual meetings with a financial counselor, ongoing educational activities, and online information resources with links to resources/tools to help students strategically manage the repayment of educational debt. All student loan borrowers are expected to use the debt management counseling and financial planning services which are specifically tailored to the needs of OHSU students. Students who do not borrow to finance their education are also encouraged to utilize these financial planning services.

2. **Definitions**

- A) **Student Loan Borrower** includes students who have borrowed any type of student loan to assist them in paying for either their direct education expenses (such as tuition, fees, books/supplies, equipment) or their indirect expenses (such as housing, food, transportation).
- B) **Student Loan** includes any federal, state, private, alternative or institutional loan obtained to support attendance in an academic program at OHSU.

3. **Responsibilities**

The Office of the Provost will work with the schools and programs to tailor debt management counseling and financial planning services for students by degree program.

Implementation Date: June 30, 2012

Revision History: September 8, 2017

Related Policies and Procedures: N/A

Responsible Office: Office of the Provost, academicpolicy@ohsu.edu

Supersedes: CAP Policy 2-01-1012

Key Words: