Checklist for Students and Parents of Entering and Transfer Undergraduate Students, 2016-2017

Authorize our office to discuss your financial information with your parents and other

- Complete the Authorization to Release Financial Information as soon as your student is admitted to the University. This one is really important! Without it on file, after July 1, 2016, federal law requires that SFS no longer disclose any information about the student account to anyone other than the student.

Applying for all forms of need-based financial aid

- Complete and submit the Free Application for Federal Student Aid, March 1
- Complete and submit the CSS Profile, March 1
- Complete and submit the Financial Aid Application Certification Form, March 1
- Submit a signed copy of the Parent’s 2015 Federal 1040 form, March 1
- Submit a copy of the Parent’s 2015 Federal W-2 form, March 1
- Submit a copy of an IRS Tax Return Transcript of the Parent’s Federal 1040 (only if this is requested by our office!)
- Submit a signed copy of the Student’s 2015 Federal 1040 form, March 1 (or the Student Non-Tax Filer form, if a 1040 was not filed. Go to http://sfs.virginia.edu/forms/2017.)
- Submit a copy of an IRS Tax Return Transcript of the Student’s Federal 1040 (only if this is requested by our office!)
- Check your To Do List in SIS regularly for other required documents and complete and submit them promptly

Applying for a Federal Direct Loan

- Accept or Reduce the loan amount in SIS after awards are Official, June
- Complete the Master Promissory Note at www.studentloans.gov, June
- Complete the Entrance Counseling at www.studentloans.gov, June

Applying for a Federal Parent PLUS Loan

- Complete the University’s Parent PLUS Loan Application at http://sfs.virginia.edu/forms, after May 1
- Complete the Federal PLUS Loan Application and Master Promissory Note at www.studentloans.gov, after May 1

Statement of Charges, QuikPay@UVa and Direct Deposit

- Complete setup to designate Authorized Payers, June 1st
- Sign up for Direct Deposit through the student’s SIS account, July 1st
- Read the Fall Semester Statement of Charges, mid-July
- Pay Fall Semester Balance Due, August 20th
- Read the Spring Semester Statement of Charges, mid-December
- Pay Spring Semester Balance Due, January 5th

Enrolling in the Payment Plan (This is optional for every family, but you must enroll for each semester for which you want to use the payment plan; $35 per semester fee)
☐ Sign up for the payment plan through QuikPay@UVa, after May 1st

Accepting Federal Work Study Awards
☐ Accept or Reduce the Federal Work Study amount in SIS after awards are Official, June
☐ Read the email detailing Federal Work Study procedures, July
☐ Review the work study postings at Cavlink, and apply for a job, August

Accepting a Federal Perkins Loan
☐ Accept or Reduce the loan amount in SIS after awards are Official, June (If you decline your Perkins, it cannot be reinstated to your award!)
☐ Complete the Master Promissory Note at http://ipromise.campuspartners.com, June