

Checklist for Students and Parents of Entering and Transfer Undergraduate Students, 2017-2018

Important things to do by July 1, 2017

- Complete the [Authorization to Release Financial Information](#). This one is really important! Without it on file, after July 1, 2017, federal law requires that SFS no longer disclose any information about the student account to anyone other than the student.
- Complete setup to [designate Authorized Payers](#), June 1st
- [Sign up for Direct Deposit](#) through the student's SIS account, July 1st

Term Charges and Payment Options

Statement of Charges, QuikPay@UVa and Direct Deposit

- Read the Fall Semester Statement of Charges, **mid-July**
- Pay Fall Semester Balance Due, **August 16, 2017**
- Read the Spring Semester Statement of Charges, **mid-December**
- Pay Spring Semester Balance Due, **January 10, 2018**

Applying for 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/2016>.)
- 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 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**

Using Your Financial Aid

If you have already been awarded financial aid and want to use your Federal Direct Loan:

- Accept or Reduce the loan amount in SIS after awards are Official, **throughout June**
- Complete the Master Promissory Note at www.studentloans.gov, **no later than August 1**
- Complete the Entrance Counseling at www.studentloans.gov, **no later than August 1**

If you have already been awarded financial aid and want to use your Federal Perkins/Nursing Loan:

- Accept or Reduce the loan amount in SIS after awards are Official, June (***If you decline your Perkins/Nursing loan, it cannot be reinstated to your award!***)
- Complete the Master Promissory Note at <https://www.ecsi.net/promw28/>, June

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 in [Handshake](#) at the Career Center website, and apply for a job, August