

Checklist for Students and Parents of Entering and Transfer Undergraduate Students, 2018-2019

Important things to do by July 1, 2018

- Complete the [Authorization to Release Financial Information](#). This one is really important! Without it on file, after July 1, 2018, 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 Users, July 1st. The University is transitioning this spring from QuikPay@UVA to OnPlanU for its payment system. [Students can set up parents and others now in QuikPay@UVA](#), and when OnPlanU becomes operational, those accounts will be carried over automatically to the new system.
- [Sign up for Direct Deposit](#) through the student's SIS account, July 1st

Term Charges and Payment

- Review the Fall 2018 Term Charges, **mid-July**
- Pay Fall Semester Balance Due, **August 15, 2018**
- Review the Spring 2019 Term Charges, **mid-December**
- Pay Spring Semester Balance Due, **January 9, 2019**

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 2016 Federal 1040 form, March 1
- Submit a copy of the Parent's 2016 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 2016 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/2019>.)
- 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