

## 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 1<sup>st</sup>. [Students can set up parents and others now in UVAPay](#).
- [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](http://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](http://www.studentloans.gov), **no later than August 1**
- Complete the Entrance Counseling at [www.studentloans.gov](http://www.studentloans.gov), **no later than August 1**

If you have already been awarded financial aid and want to use your Institutional or Nursing Loan:

- Accept or Reduce the loan amount in SIS after awards are Official, June (*If you decline your Institutional or 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

Enrolling in the optional [Payment Plan](#) (This is optional for every family, but you must enroll for each semester for which you want to use the payment plan; \$45 per semester fee)

- Sign up for the payment plan

#### **Additional Checklist Calendar Items for all Students and Parents**

- Establish a monthly budget for your student for the Fall 2018 and Spring 2019 semesters.
- If you have a state pre-paid educational savings account, **contact the administrator early** to be sure they have all they need to get their payment to the University of Virginia before the August and January due dates. UVA will bill the Virginia Pre-paid Education Plan (VPEP) according to the roster they provide us each term. It is still your responsibility to let them know that you wish to have them make a distribution for each term you want them to pay.