Checklist Calendar for Students and Parents of Current Undergraduate Students Returning for 2018-2019

Authorize our office to discuss your financial information with your parents and other (if you have not already done so in a prior year)

☐ Compete the Authorization to Release Financial Information form by July 1
☐ 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.

Applying for all available 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
☐ Check your To Do List in SIS regularly for other required documents and complete them promptly

Accepting and using 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 and using a Federal Parent PLUS Loan

☐ Complete the University’s Parent PLUS Loan Application, after May 1
☐ Complete the Federal PLUS Loan Application and Master Promissory Note at www.studentloans.gov, after May 1

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 on Handshake and apply for a job, August

Accepting and using 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 https://heartland.ecsi.net/, June

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
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

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.