

## 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)

- Complete the Authorization to Release Financial Information form by July 1
- Complete setup to designate Authorized Users, July 1<sup>st</sup>. 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](http://www.studentloans.gov), June
- Complete the Entrance Counseling at [www.studentloans.gov](http://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](http://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.