

### Checklist Calendar for Students and Parents of Current Undergraduate Students Returning for 2023-2024

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

- Complete setup to designate Authorized Users, July 1<sup>st</sup>  
[Students can set up parents and others now in UVAPay](#). Without this account in place for parents and others who may be helping pay the student's costs, federal law requires that SFS no longer disclose any information about the student account to anyone other than the student.

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
- 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-July
- Complete the Master Promissory Note at <https://studentaid.gov/mpn/>, June-July
- Complete the Entrance Counseling at <https://studentaid.gov/entrance-counseling/>, June-July

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 <https://studentaid.gov/mpn/parentplus/landing>, after May 1

Accepting Federal Work Study Awards

- Accept or reduce the Federal Work Study amount in SIS after awards are official, June-July
- 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 Institutional Loan

- Accept or reduce the loan amount in SIS after financial aid offers are official, June
- Complete the Master Promissory Note at <https://heartland.ecsi.net/>, June-July

Term Charges and Payment

- Review the Fall 2023 Term Charges, **mid-July**
- Pay Fall Semester Balance Due, **August 16, 2023**

- Review the Spring 2024 Term Charges, **mid-December 2023**
- Pay Spring Semester Balance Due, **January 10, 2024**

Enrolling in a [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 a payment plan

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

- Establish a monthly budget for your student for the Fall 2023 and Spring 2024 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.