FINANCIAL AID APPLICATION CHECKLIST

Use this checklist to plan what you need to do to apply for and receive financial aid for the 2023-24 academic year. Due to limited resources, student aid is often offered on a first-come, first-served basis. Many of these checklist items have deadline dates which vary from school to school, so you should indicate the date by which you will need to complete each item for each school. Check off each Application Processing Action Item as you complete it. You can get help for many of these Application Processing Action Items from each college's website or financial aid office, your guidance or college counselor, or your local reference librarian. Make copies and complete this checklist for each school to which you are planning to apply.

☑	Due Date (if any)	Application Processing Action Item for: _____ (School Name)
☐	_____	Request information and application forms from the school listed above. Request information regarding any need-based and non-need-based institutional grants and scholarships. When you receive this information, note all required application materials and their deadlines below.
☐	_____	Request information, required application forms, and materials from your state regarding all state student aid programs for postsecondary education. When you receive this information, note all required application materials and their deadlines, many of which appear in the checklist below.
☐	_____	Investigate private sources of financial aid. Check with your school and local libraries, local businesses and civic organizations, and your parents' employer(s). Take advantage of *free* Internet scholarship search engines, such as: - FinAid – https://finaid.org - Big Future by The College Board – https://bigfuture.collegeboard.org/scholarship-search - Fastweb – www.fastweb.com
☐	_____	Check the following sources to verify the legitimacy of any financial aid consultants or search services you may use or hire and for tips on avoiding scholarship scams: - U.S. Department of Education: https://studentaid.gov/resources/scams - Federal Trade Commission: https://www.consumer.ftc.gov/articles/how-avoid-scholarship-and-financial-aid-scams - Better Business Bureau: www.bbb.org

☑	Due Date (if any)	**Application Processing Action Item**

☐ _____ Obtain a Federal Student Aid (FSA) ID for use throughout the federal aid process during and after college from the U.S. Department of Education's FSA ID website at https://studentaid.gov/fsa-id/sign-in/landing. The FSA ID confirms an individual's identity and should only be created by the owner of the FSA ID. Since the FSA ID is used as a legal signature and enables access to numerous U.S. Department of Education websites, it should never be shared with others.

☐ _____ If your parent(s) are required to provide information on the Free Application for Federal Student Aid (FAFSA®), a separate FSA ID is required for the parent. The FSA ID may be obtained at the website listed above.

☐ _____ File your 2023-24 FAFSA as soon as possible on or after October 1, 2022 and by June 30, 2024. You may complete your FAFSA using the https://studentaid.gov/h/apply-for-aid/fafsa website or the myStudentAid mobile app. Alternatively, you may print a PDF FAFSA at https://studentaid.gov/apply-for-aid/fafsa/filling-out, or obtain a paper FAFSA by calling the Federal Student Aid Information Center at 1.800.433.3243. For the hearing impaired, the telecommunications device for the deaf (TTY) line is 1.800.730.8913. A PDF or paper FAFSA must be mailed for processing, which may cause delays.

☐ _____ Complete and submit all institutional financial aid application materials before all deadlines.

☐ _____ Apply for state financial aid before the application deadline and promptly reply to any requests for additional information.

☐ _____ Promptly respond to any school requests for additional information or documentation, such as copies of tax return transcripts, verification worksheets, or other forms.

☐ _____ Review your Student Aid Report (SAR), which is sent to you via email or postal mail after you file the FAFSA, for accuracy. If necessary, correct inaccurate items online at https://studentaid.gov/h/apply-for-aid/fafsa or on the paper SAR, if you receive one.

☐ _____ Read all application materials and financial aid notifications. Most financial aid funds have conditions for receipt and renewal, such as earning a certain grade point average (GPA) or being enrolled full time. *Details are important, so be sure to avoid costly mistakes!*

☐ _____ Promptly sign and return your financial aid offer if your school requires your signed acceptance of the aid being offered. Some schools give students the option of accepting financial aid offers electronically. Contact the financial aid office if you have any questions about your offer.

☐ _____ Notify the financial aid office if you have applied for assistance, but no longer wish to attend the school.

☑	Due Date (if any)	Application Processing Action Item

☐ _____ Complete the promissory note for any loan(s) you are offered and accept. The financial aid office may have you sign either an electronic or paper promissory note. If you do not want to use an electronic promissory note, ask the financial aid office for a paper version. Check with the financial aid office regarding any loan counseling you must complete before you may receive the loan proceeds.

Important note: Before you sign the promissory note, make sure you read and understand all of your rights and responsibilities. *Remember this is a source of financial assistance that must be repaid!*

☐ _____ If you are offered Federal Work-Study (FWS), find out how students are placed in FWS positions and what FWS positions are available, including descriptions of job responsibilities and wages.

☐ _____ Promptly notify the financial aid office of any private scholarship, grant, or other type of student aid you have received or expect to receive.

☐ _____ Keep copies of all application materials in your records for future reference.