NASFAA
NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS

FINANCIAL AID APPLICATION CHECKLIST

Use this checklist to plan what you need to do to apply for and receive financial aid. Due to limited resources, student aid is often awarded on a first-come, first-served basis. Many of these checklist items have deadline dates, so you should indicate the date by which you will need to complete each item. Check off each Action Item as you complete it. You can get help for many of these Action Items from each college's website, 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)
☐	_____	Request information and application forms from the school(s) to which you are planning to apply. 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 on the Web – www.finaid.org • The College Board – http://apps.collegeboard.com/cbsearch_ss/welcome.jsp • 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: www.studentaid.ed.gov/students/publications/lsa/index.html • Federal Trade Commission: http://www.ftc.gov/scholarshipscams • Better Business Bureau: www.bbb.com
☐	_____	Obtain a Federal Student Aid Personal Identification Number (FSA PIN) for use throughout the federal aid process during and after college from the U.S. Department of Education's PIN website at www.pin.ed.gov.

☑	Due Date (if any)	Application Processing Action Item
☐	_____	File your Free Application for Federal Student Aid (FAFSA) as soon as possible on or after January 1, 2013. You may file the FAFSA electronically using FAFSA on the Web, which contains built-in edits to help prevent costly mistakes, at www.fafsa.gov. You may also file a PDF FAFSA, available at http://www.fafsa.ed.gov/options.htm or a paper FAFSA, obtained by calling the Federal Student Aid Information Center at 1-800-433-3243.
☐	_____	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 federal tax returns, verification worksheets, or other forms.
☐	_____	Review your Student Aid Report (SAR), which is sent to you via e-mail or postal mail after you file the FAFSA, for accuracy. If necessary, correct inaccurate items on-line at www.fafsa.gov 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 award letter if your school requires your signed acceptance of the aid being offered. Some schools give students the option of accepting financial aid awards electronically. Contact the financial aid office if you have any questions about your award.
☐	_____	Notify the financial aid office if you have applied for assistance, but no longer wish to attend the school.
☐	_____	Complete the promissory note for any loan(s) you are offered and wish to accept. Before you sign the promissory note, make sure you read and understand all of your rights and responsibilities. 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 one. Check with the financial aid office regarding any loan counseling you must complete before you may receive the loan proceeds.
☐	_____	If you have been awarded 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 outside or private scholarship, grant, or other types of student aid you have received or expect to receive.
☐	_____	Keep copies of all application materials in your records for future reference.

© 2013 NASFAA