



## Financial Aid Planning Calendar & Checklist For New Undergraduate Students

### August

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- Review your career plans and decide which schools are right for you.
- Request catalogs and admission information.
- Inquire about fall visit programs for prospective students.
- Ask your guidance office about tests for which you will need to register (ACT, SAT). These scores must be sent to the colleges where you are applying.

### September

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- Register to take tests (ACT, SAT) required for admission.
- Set up a time to meet with your high school guidance counselor. Your counselor is a great resource to help with your preparation and planning efforts.
- Meet with Admission Representatives who are visiting your school. Start to contact college admission offices of schools that interest you.
- Begin to research private scholarship opportunities sponsored by your school, community and civic organizations.
- Start running scholarship search via the Internet. Check useful free resources over the Internet, such as:
  - College Board's Scholarships Search at: [www.collegeboard.com/paying](http://www.collegeboard.com/paying)
  - FastWeb Scholarship Search at: [www.fastweb.com](http://www.fastweb.com)
  - Scholarship Help Search at: [www.scholarshiphelp.org/](http://www.scholarshiphelp.org/)

Check also tips for avoiding scholarship scams:

- Department of Education: [www.ed.gov/about/offices/list/oig/misused/sscams.html](http://www.ed.gov/about/offices/list/oig/misused/sscams.html)
- Federal Trade Commission: [www.ftc.gov/bcp/online/pubs/alerts/ouchalrt.shtm](http://www.ftc.gov/bcp/online/pubs/alerts/ouchalrt.shtm)

To check the legitimacy of a scholarship search organization or individual:

- Better Business Bureau: <http://search.bbb.org/search.html>

### October and November

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- Attend College fairs and financial aid information nights to gather information on schools and student aid.
- Work on admission and scholarship application essays.
- Take the SAT or ACT.
- Arrange campus visits for your school choices.
- Begin submitting your college admission applications.
- Choose those teachers or guidance counselors who can share insight as to your ability to thrive and succeed when selecting who will write your letters of recommendation. Be considerate to give them plenty of time to prepare your letter. Sharing a resume / list of activities you have been involved in during high school will assist them as they write your letter.
- Narrow the selection to your top college choices, then request financial aid information from these schools.
- Apply for outside funding or scholarships.
- Complete the early aid estimator at: <http://www.carroll.edu/finaid/prostudents/estimator/>

## December

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- ❑ Check with each school's financial aid office regarding deadlines.
- ❑ Be sure your applications for admission are mailed to your top schools.
- ❑ **PARENTS:** Save year-end payroll stub if it shows your earnings for the year. Gather financial information for completion of the needs analysis forms.
- ❑ Both parents and students obtain a Personal Identification Number (PIN) from the U.S. Department of Education at: [www.pin.ed.gov](http://www.pin.ed.gov). This PIN serves as your signature when you apply for the FAFSA online.
- ❑ Continue to search and apply for private scholarships.

## January

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- ❑ **PARENTS:** Get your income tax returns prepared early. They are needed to complete the FAFSA. They may be requested by schools to prove eligibility for financial aid.
- ❑ **STUDENTS:** Get your income tax returns prepared early. They are needed to complete the FAFSA. They may be requested by schools to prove eligibility for financial aid.
- ❑ Complete the FAFSA and submit as soon after January 1<sup>st</sup> as possible. If you are filing the FAFSA online go to [www.fafsa.ed.gov](http://www.fafsa.ed.gov). If you are filing a paper FAFSA, obtain the form from your high school counselor, public library or from the school you plan to attend.
- ❑ Make and keep copies of all forms you submit.
- ❑ Continue to search and apply for private scholarships.

## February and March

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- ❑ Promptly respond to any requests from college admission or financial aid offices.
- ❑ Check to see if your mid-year transcripts have been sent to the schools to which you have applied.
- ❑ Watch the mail for your FAFSA Student Aid Report (SAR). Review your SAR for accuracy. If necessary, correct inaccurate items.
- ❑ Watch the mail for college Financial Aid Award Letters.
- ❑ Start looking for a summer job. You will need the money!

## April and May

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- ❑ Watch the mail. Compare the financial aid offers you receive.
- ❑ Look for summer orientation information.
- ❑ Make your final decision and send in the admission deposit by the deadline.
- ❑ Financial aid award letters must be signed and returned to the institution by the deadline.
- ❑ Notify the schools you will not be attending.
- ❑ Finalize summer job plans.

## **June, July and August**

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- ❑ Complete the necessary promissory note for any loans you have been offered and wish to accept. Before you sign the promissory note, make sure you read and understand all of your rights and responsibilities. Entrance counseling for Federal Stafford loans may be completed at: <http://www.carroll.edu/finaid/award/counseling.cc>
- ❑ Verify that your final high school transcript has been sent.
- ❑ Complete any needed financial aid information you received from your college.
- ❑ Finalize your budget for the year.
- ❑ If you have been awarded Federal Work-Study assistance, find out which FWS positions are available at: <http://www.carroll.edu/employment/stujobs.php?more=86>.
- ❑ Notify the financial aid office of any outside scholarship, grant or other types of student aid you have received or will receive.
- ❑ Time to start packing!!

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