

SENIOR YEAR COLLEGE/FINANCIAL AID CHECKLIST

At any point - ask for help ———

- ☐ From your high school counselor
- ☐ From College OPTIONS (530) 244-4022 **collegeoptions.org**
- ☐ From the college you applied to; don't hesitate to call the Admissions, Financial Aid or Housing office—they want to help!

September ———

- ☐ Attend the Financial Aid Information Night at your school. (check with your counselor for your school's date)
- ☐ Estimate your Expected Family Contribution (EFC) **tinyurl.com/myefc**
- ☐ U.S. Citizens and eligible non-citizens: Complete the FAFSA on the Web Worksheet at **studentaid.gov/apply-for-aid/fafsa/filling-out**
- ☐ Check out CA Dream Act information and resources at **dream.csac.ca.gov**
- ☐ Create a personalized electronic or paper calendar of deadlines for college admission and financial aid applications.
- ☐ Start drafting essays for college applications and scholarship applications, including letters of recommendation.
- ☐ Check out SAT and/or ACT resources and information at **sat.collegeboard.com** or **act.org**.
- ☐ Memorize your Social Security number. If you do not have a Social Security number, talk to your counselor.
- ☐ Apply for a driver's license or state ID card if you don't already have one. You may need one for financial aid verification purposes.
- ☐ Obtain a Federal Student Aid ID (FSA ID) for yourself and one parent at **studentaid.gov/apply-for-aid/fafsa/filling-out**.
You will need this to file your FAFSA electronically.

- ☐ Research career options thoroughly; the better informed you are, the more effective your college search will be. **onetonline.org**
- ☐ Attend local college fairs and meet college representatives visiting your school.
- ☐ Your e-mail address should be appropriate for communicating with colleges, lenders & employers.

October ———

- ☐ **Oct 1:** FAFSA and CA Dream Act Applications are available online at **studentaid.gov/fafsa** or **dream.csac.ca.gov**. Submit the appropriate application as early as possible. We suggest you use the DRT (Data Retrieval Tool) from FAFSA to report your income from the IRS. Provide required e-signatures and email address for faster processing. **Due March 2** if you want to be considered for the priority Cal Grant.
- ☐ **Oct 1:** CSU & UC applications are available. Check other colleges for application availability.
- ☐ The College Board's CSS PROFILE is an additional financial aid application that some private colleges require. Research if you need to complete this application. **cssprofile.collegeboard.org**
- ☐ Attend the Financial Aid Information Night at your school. (check with your counselor for your school's date)
- ☐ Visit colleges or take a virtual tour online.
- ☐ Planning to live on-campus? Research your potential colleges' housing application processes. **(some have application deadlines as early as October)**

November ———

- ☐ Start researching and applying for scholarships. Some have early deadlines.
- ☐ Review your FAFSA Student Aid Report and make corrections at **studentaid.gov/fafsa** if necessary. If you don't receive your report within three weeks of submitting your FAFSA, call toll free at 800-433-3243.
- ☐ Nov 30 CSU & UC applications due. Check other colleges for deadlines. Priority application deadline for CSU campus Educational Opportunity Program (EOP).

December ———

- ☐ Confirm official SAT/ACT scores were sent to colleges as needed.
- ☐ Apply for scholarships at the colleges you have applied to; some deadlines are as early as December.

January ———

- ☐ Watch for application confirmation emails from your college(s); create a "portal" for each college you applied to. Monitor each portal for admissions decisions.
- ☐ Check your online portal at each college you applied to and your email on a weekly basis. Respond to colleges' requests for information promptly.
- ☐ Keep a copy of everything you submit (paper or electronic copy).
- ☐ Apply for scholarships!

SENIOR YEAR COLLEGE/FINANCIAL AID CHECKLIST

February

- ☐ Manage your Cal Grant status online using WebGrants for Students at mygrantinfo.csac.ca.gov
- ☐ Math and English assessment tests: check each college you applied to. Do you need to take these tests? You may be able to waive these assessments through SAT, ACT or AP exam scores.
- ☐ Apply for scholarships!

March

- ☐ **March 2** is the Cal Grant priority deadline to submit the FAFSA or CA Dream Act application.
- ☐ Watch for college acceptance letters and financial aid offers via email and your college portal(s).
- ☐ Manage your Cal Grant. Look for email messages from the California Student Aid Commission and check your status. mygrantinfo.csac.ca.gov
- ☐ Planning to attend a community college? Apply, take assessment tests, send in your high school transcripts, and sign up for an orientation. Apply for EOPS & SSS.
- ☐ Apply for scholarships!

April

- ☐ Watch for college acceptance letters and financial aid offers via email and your college portal(s).
- ☐ Evaluate all financial aid offers carefully. Ask questions!
- ☐ Utilize College OPTIONS Cost of Attendance Comparison Worksheet to determine your actual "net" cost at each college you are considering. Carefully examine your and your family's budget and "cash flow." Can you afford your intended college for the 4-5 years you will be attending? collegeoptions.org (look at the Financial Aid section)
- ☐ Consider grants, work-study and other aid (e.g., scholarships) you don't have to repay before accepting a student loan.

- ☐ Notify the financial aid offices at all your possible colleges of any scholarships received that are not on your award offer. Ask them how these changes will affect your award offer from them.
- ☐ If you are short of funds necessary to pay mandatory deposits to the college (e.g. tuition, dorms, meal plans, etc.), ask the college if you can defer deposits and/or make payments on an installment plan.
- ☐ Use your college portal to accept and/or decline your financial aid awards.
- ☐ Manage your Cal Grant status using WebGrants for Students at mygrantinfo.csac.ca.gov. If you do not have any information available on the "Award Detail" tab by mid-April, call toll free 888-224-7268 and ask them to help you determine your status.

- ☐ Make sure you have fulfilled any financial aid verification requests from your college's financial aid office. If you are unsure if you have any requirements, check your portal or contact the financial aid office.

- ☐ Apply for scholarships!

May

- ☐ **May 1** is the deadline to notify the four-year college that you plan to attend. Use your college portal to accept your offer of admission (you might have to make an enrollment deposit and/or register for orientation by May 1 as well).
- ☐ Look for a summer job, sign up for a summer class at the community college or volunteer with a business or organization to help investigate your career interests.
- ☐ Arrange your college housing plans.
- ☐ Missed the March 2 Cal Grant priority deadline? Complete the FAFSA to be considered for federal and institutional aid and to be considered for a Cal Grant at a California community college.

Summer

- ☐ Confirm your high school graduation and college of attendance. mygrantinfo.csac.ca.gov
- ☐ Keep checking your college portal. Follow through on any "to-do" items.
- ☐ If you have Special Circumstances due to job loss, death, hardship, divorce, large medical expenses, an unusual family/parental situation, etc., which were not reflected on your financial aid application, contact your college's financial aid office ASAP so they can determine if they can use Professional Judgment to make adjustments to your financial aid award.
- ☐ Make sure your "master promissory note" is signed for any Federal student loans. studentloans.gov
- ☐ Read the fine print on your student loan agreement, especially if the loan is a non-government (private) loan. Know your repayment obligations while you are in school as well as after you graduate.
- ☐ Financial aid "disbursements" (distribution of the funds) typically come after the semester/quarter starts. If you are unable to afford any costs that will come due before aid disbursements, communicate with your college's financial aid office.
- ☐ Four-year college-bound students: Attend your college's orientation.
- ☐ Register for classes.
- ☐ Claim scholarships you won. You may need to turn in copies of your fall class schedule (or some other proof of enrollment). Check with each scholarship provider.

Apply for financial aid and scholarships every year you plan to attend college.

Revised 8-1-2022