NASFAA FINANCIAL AID NIGHT

FINANCIAL AID APPLICATION CHECKLIST

Use this checklist to plan what you need to do to apply for and receive financial aid for the 2027-28 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 that 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 with 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 Items 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 • Big Future by The College Board • CareerOneStop • Fastweb
☐	_____	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: "Avoiding Student Aid Scams" • Federal Trade Commission: "How to Avoid Financial Aid and Scholarship Scams" • Better Business Bureau: "Scam Prevention Guide"

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☑	Due Date (if any)	Application Processing Action Items
☐	_____	Create a StudentAid.gov account username and password (FSA ID) for use throughout the federal aid process during and after college. 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 (ED) 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 2027-28 FAFSA as soon as possible once it is available on October 1, 2026, and by June 30, 2028. You may complete your FAFSA on the StudentAid.gov website. Alternatively, you may complete a PDF FAFSA or obtain a PDF FAFSA printout by calling the Federal Student Aid Information Center (FSAIC) at 1.800.433.3243. For the hearing impaired, the telecommunications device for the deaf (TTY) line is 1.800.730.8913. The PDF FAFSA must be mailed for processing, which may cause delays, and additional postage may be required.
☐	_____	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 FAFSA Submission Summary, which is sent to you via email or postal mail after you file the FAFSA, for accuracy. If necessary, correct inaccurate items online by logging into your StudentAid.gov account or on the paper FAFSA Submission Summary, 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 review and acknowledge acceptance of your financial aid offer, if your school requires that you accept the offer. Most schools give students the option of accepting financial aid offers electronically, but others may require your signed acceptance of the aid being offered. Contact the financial aid office if you have any questions about your offer.

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☑	Due Date (if any)	Application Processing Action Items
☐	_____	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 accept. At most schools, the financial aid office will have you sign an electronic 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 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.

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