

# FINANCIAL AID CHECKLIST *FOR INCOMING STUDENTS*

**Print and use this checklist as a record to help you navigate the financial aid process. Remember to check myUCF on a regular basis to track your progress.**

## Free Application For Federal Student Aid (FAFSA)

The FAFSA is required for federal, state, and institutional aid, as well as some scholarships. Complete and electronically submit the FAFSA at [www.fafsa.ed.gov](http://www.fafsa.ed.gov). To ensure that your tax return data is entered correctly, use the IRS Data Retrieval Tool available on the FAFSA on the Web (FOTW). The IRS Data Retrieval Tool can only be used for tax filers whose tax returns have already been processed by the IRS. If you have already filed your FOTW and need to correct the tax information, you may log in to your saved FOTW to use the IRS Data Retrieval Tool. Note: Students and parents must obtain an FSA ID to complete the FAFSA.

**Date Submitted:** \_\_\_\_\_

## Student Aid Report (SAR)

As a result of filing the FAFSA, you will receive a Student Aid Report (SAR). The SAR summarizes the information you provided on your FAFSA, and will usually contain your Expected Family Contribution (EFC), the number used in determining your eligibility for federal student aid. Review your SAR carefully to make sure it's correct and complete.

**Note:** *It could take 1 to 2 weeks for UCF to receive the results of your application from the federal processor.*

**Date Reviewed:** \_\_\_\_\_

## Award Letter

You will receive a financial aid award letter in the mail if you are a first time UCF student. But, if you are a returning student, you will receive an electronic notification to your Knights Email. **Only return this award letter if you WILL NOT attend UCF during the 2016-17 academic year.**

**Date Reviewed:** \_\_\_\_\_

## Conditions for Receiving Aid

In order to receive financial assistance at UCF, you must meet certain eligibility requirements found at [www.finaid.ucf.edu/receiving/conditions.html](http://www.finaid.ucf.edu/receiving/conditions.html). Only courses required for your degree count for financial aid purposes.

**Date Reviewed:** \_\_\_\_\_

## Students Rights and Responsibilities

While receiving aid at UCF, you have certain rights and responsibilities found at [www.finaid.ucf.edu/receiving/rights.html](http://www.finaid.ucf.edu/receiving/rights.html).

**Date Reviewed:** \_\_\_\_\_

## Enrollment Requirements

To be considered for most forms of financial aid, you must be enrolled full-time. The minimum hours required for financial aid programs can be found on the Program Eligibility Charts found on our website at [www.finaid.ucf.edu/receiving/pec.html](http://www.finaid.ucf.edu/receiving/pec.html) .

Date Reviewed: \_\_\_\_\_

## Verification

If selected for verification, you must provide the requested information. Please review your To Do List on myUCF for the items required to complete your financial aid file. All documents submitted should include your UCF ID.

Requested Document: \_\_\_\_\_ Date submitted: \_\_\_\_\_

Requested Document: \_\_\_\_\_ Date submitted: \_\_\_\_\_

Requested Document: \_\_\_\_\_ Date submitted: \_\_\_\_\_

Requested Document: \_\_\_\_\_ Date submitted: \_\_\_\_\_

## Federal Direct Stafford Loans

Federal Direct Stafford Loans are non-credit based student loans for undergraduate and graduate students. Offered loans must be accepted, reduced, or declined for each term, fall 2015 and spring 2016, **separately** on myUCF.

→ Accept, reduce, or decline fall 2016 and spring 2017 loan/s.

Date Completed: \_\_\_\_\_

→ On-Line Entrance Counseling – *First time Federal Direct Stafford Loan borrowers* at UCF only.

Date Completed: \_\_\_\_\_

→ Master Promissory Note (MPN) - *First time Federal Director Stafford Loan borrowers* at UCF only.

Date Completed: \_\_\_\_\_

## Federal Work Study

If you have been awarded Federal Work Study, you may search the Job Connection for postings on our website under Types of Aid, Student Employment.

Date eligibility requirements reviewed: \_\_\_\_\_

## Contingency Admission Status

You must be fully admitted into a degree seeking program or an eligible certificate program before your financial aid can be disbursed.

Final admission documents - Date submitted: \_\_\_\_\_

## Funds for Books

There are two options for purchasing books. You must select one or the other of the two programs, not both. Book programs are available three weeks before the start of each semester. Funds must be re-paid by the payment due date.

- Short-Term Advance for Books
- Textbook Purchase Program (Must opt-in on myUCF)

**Date applied for one of the two programs:** \_\_\_\_\_

## Deferment of Tuition & Fees

Deferments allow you to extend the payment beyond the published due date for tuition & fees and on campus housing. Once you are registered, the amount available for deferment can be found on the fee invoice as estimated aid or on your student account as anticipated aid. Additional information can be found on our website at [www.finaid.ucf.edu/receiving/deferrals.html](http://www.finaid.ucf.edu/receiving/deferrals.html).

**Date Reviewed:** \_\_\_\_\_

## Financial Aid Status

You are responsible for monitoring your status. Check your admission and financial aid status on myUCF frequently. Check for notifications in your Knights Email account.

**Date/s Reviewed:** \_\_\_\_\_

## Satisfactory Academic Progress (SAP) Policy

The policy identifies standards that you must maintain in order to be eligible to receive and maintain financial assistance. The SAP policy can be found at [www.finaid.ucf.edu/receiving/sap.html](http://www.finaid.ucf.edu/receiving/sap.html).

**Date Reviewed:** \_\_\_\_\_

## Direct Deposit

If set up on myUCF (Student Center, Finances), funds received from UCF will go into your personal bank account. Direct Deposit prevents delays due to lost checks or change of address.

**Date set up:** \_\_\_\_\_

## Additional Resources

You are required to inform us of any additional aid you expect to receive not yet listed on the award notification or found under View Financial Aid on myUCF. Any subsequent awards may necessitate a revision of your financial aid award package. ***This includes, but is not limited to, any private scholarships or third party tuition payments/waivers, departmental payments, etc.***

**Date office notified:** \_\_\_\_\_

Additional Notes:

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