



# FINANCIAL AID CHECKLIST



*Need help paying for college? Follow the steps below to apply for financial aid.*

## FIRST STEPS (October - January)

### 1. Obtain your FSA ID.

Who needs to obtain a FSA ID? **Students**, so you can retrieve tax information, if applicable, and sign the FAFSA and promissory note for Direct Loans. And **parents**, so they can retrieve tax information, if applicable, sign the FAFSA, and apply for a Plus Loan if needed. Visit <https://fsaid.ed.gov> to obtain a Federal Student Aid ID (FSAID). Write them down!

### 2. Complete your FAFSA – every year.

Visit <https://studentaid.gov/fafsa> to complete a Free Application for Federal Student Aid (FAFSA) to be considered for federal and state aid. Complete the FAFSA after October 1 of your senior year of high school and yearly thereafter. You will need your tax data from 2 years prior to the start of the academic year (e.g. for fall 2022 academic year you will need your 2020 tax data). Your tax data can automatically be transferred to the FAFSA form by designating that the Data Retrieval Tool be used to import the data from your tax return.

A&M-SA's priority date for filing the FAFSA is January 15.

### 3. Search and apply for outside/private scholarships.

A&M-SA partners with ScholarshipUniverse to match you with potential scholarships: <https://tamusa.scholarshipuniverse.com/>. Students will be able to access ScholarshipUniverse once their Jaguar login credentials have been issued by IT.

### 4. Congratulations!

You have been admitted. A&M-SA begins sending out Financial Aid Package Notifications — detailing grants, workstudy, loans, and scholarships — as early as March 1.

## ADDITIONAL DOCUMENTATION (December - August)

### 5. Verification

The Department of Education or A&M-SA may select any student's FAFSA for a process called Verification. Approximately one-third of all college students are selected for FAFSA verification. Selected students are required to complete an online worksheet as well as providing selected documentation if needed. If this is required, you will receive an email with a link to our **FAFSA verification portal**. You will set up an account that will allow you to complete the verification worksheet along with any other requirements and instructions on how to complete them.

Upon completion, your financial aid advisor will review and let you know if there is any further action required on your part. Other documents such as but not limited to birth certificates, passports, marriage licenses, and selective service registration confirmations may be required. Your financial aid office will notify you if needed.

If you do not receive an email notification from us, that means you were not selected for verification and should proceed to “You’re Almost Home!” which follows.

# YOU'RE ALMOST HOME! (May - September)

## 6. Review and Accept the Financial Aid Offer.

- Sign into **JagWire**.
- Select the Paying for College tab.
- Select Financial Aid Awards.
- Select Aid Year.
- Click on Accept Award Offer tab.
- Click Accept All Offered Amounts or indicate the amount you would like to borrow in the available text box.

## 7. Complete Master Promissory Note and Entrance Counseling, if required.

- Log on to <https://studentaid.gov/>.
- Hover over Complete Aid Process.
- Select **Complete Entrance Counseling**.
- Follow the on-screen instructions to complete.
- Next, go back to My Home Page.
- Hover over Complete Aid Process.
- Select **Complete a Mastery Promissory Note**.
- Follow the on-screen instructions to complete.

## 8. Texas Grant

This program is to provide a grant to enabled well-prepared eligible students to attend public and private non-profit institutions of higher education in the state of Texas. To be considered for this grant, students should submit the **FAFSA** or **TASFA**. Funding is limited so students are encouraged to apply as early as possible. The amount of the award is determined by the institution but the amount at minimum is equal to the student's tuition and required fees.

## 9. Do you still have a balance? There are several options for covering your remaining balance.

- Parent Plus Loan:** Go to studentaid.gov to complete; also requires Master Promissory Note.
- Alternative (private) Loans** are administered and processed by private lending institutions to be used for educational costs. Alternative loans are not part of the Federal student loan programs and should be used for circumstances where you have exhausted all other options in regards to financing your education.
- Payment Plan:** Contact the Office of Student Business Services for more information. This is the office that handles all inquiries regarding billing, invoices, and payment plans. They can be reached at 210.784.2035 or [sbs@tamusa.edu](mailto:sbs@tamusa.edu).

## 10. Federal Work Study

Please note that even if you have Federal Work Study as part of your Financial Aid package, it is not guaranteed. All proceeds from working are paid directly to you, not applied to your student account. For more information, visit

<https://www.tamusa.edu/financialaid/work-study.html> .

