

Four-Year College Planning Checklist

Freshman Year

- ___ **Student and Parents:** Explore possible career and college major interests.
- ___ **Student and Parents:** Meet with guidance counselor for a recommended schedule of college prep courses to be taken throughout high school for careers and college majors of interest.
- ___ **Student:** Establish good study habits and commit to a consistent study routine. Strive for a high GPA, especially in required college prep courses. Manage time effectively.
- ___ **Student:** Learn to use the library effectively, including computer research. Enhance vocabulary skills and writing abilities.
- ___ **Student:** Become involved in school and community service activities for use on résumé when applying to colleges and for scholarships. Strive for leadership positions.
- ___ **Parents:** Calculate your expected family contribution (EFC) to know whether eligible for need-based financial aid and whether legal repositioning of income and assets to increase eligibility is feasible and warranted.
- ___ **Student:** Update guidance counselor about your career and college major interests and reaffirm that high school course selections remain appropriate. Formulate your sophomore year college prep course schedule.
- ___ **Student:** Seek summer employment for income and savings for college.

Sophomore Year

- ___ **Student and Parents:** Begin college selection process. Review catalogs and Web sites of colleges that have preferred attributes and academic course majors of interest. Research their history for providing financial aid.
- ___ **Parents:** Recalculate your EFC for determining and implementing appropriate financial aid enhancing strategies prior to the base year calculation.
- ___ **Student:** Consult guidance counselor about registering for the Preliminary Scholastic Aptitude Test (PSAT). These scores are mandatory to be eligible for the National Merit Scholarship Program and certain other scholarships. Take the PSAT test in October for practice in taking college admission tests and to establish eligibility for scholarships.
- ___ **Student:** Continue to participate in school and community service activities to be a more attractive college admissions candidate and improve opportunities for scholarship awards.
- ___ **Student:** Update guidance counselor about your career and college major interests and reaffirm that high school course selections remain appropriate. Formulate your junior year college prep course schedule.
- ___ **Student:** Seek summer employment for income and savings for college.

Junior Year

September–December

- ___ **Student:** Review your cumulative grade point average for possible improvement. Take advanced-placement (AP) courses.
- ___ **Student:** Register and take in October the PSAT test for the second time in order to qualify for National Merit Scholarship eligibility.
- ___ **Student:** Obtain schedule for SAT and ACT test dates. Register and prepare to take SAT and ACT tests during fall, spring, and summer—the earlier the better to determine whether a test preparation class is needed to improve test score results.
- ___ **Student and Parents:** Attend college night programs and college fairs. Obtain information about colleges of interest.
- ___ **Student and Parents:** Narrow preferred school choices to between ten and twelve that include at least one resident in-state school, one safe school, one reach school, and six to eight “good” financial aid schools that meet your selection criteria.
- ___ **Student and Parents:** Begin to schedule college campus visits. Research local resources for scholarships and grants through guidance counselor, church, employer, chamber of commerce, and local business organizations. Avoid scams that ask for money and offer guarantees.
- ___ **Parents:** Recalculate your EFC. Last chance to reposition income and assets before the base year for determining financial aid calculations that start as of January 1.

January–May

- ___ **Student:** Strive to achieve high GPA. Graduating in the top ten percent of the class can offset lower SAT and ACT scores and improve opportunities for being admitted and receiving financial aid from more schools.
- ___ **Student:** Register to take the SAT and ACT tests in spring and summer if did not take in fall. Take test prep course if concerned about results. Have the scores sent to the schools being considered.
- ___ **Student:** If enrolled in advanced-placement courses, take AP tests.

Summer

- ___ **Student and Parents:** Research and review career interests. Interview people working in the careers of interest. Formulate course curriculum for senior year. Seek summer employment.
- ___ **Student and Parents:** Continue to visit colleges being considered.

Senior Year

September–October

- ___ **Student:** Register and retake the ACT and SAT tests in October if necessary. Submit the highest test results to all schools of interest. Note: This submission involves a fee if not completed at the time of test registration.
- ___ **Student:** Compose essays and a résumé for college admissions and scholarships. Seek out two teacher references, and make sure the guidance counselor is familiar with your capabilities and aspirations.
- ___ **Student and Parents:** Firm up narrowed list of eight to twelve colleges for application. Make sure to include “good” financial aid schools that meet selection criteria and where the student profiles in the top twenty percent relative to all other applicants. Include at least one in-state fallback school.
- ___ **Student and Parents:** Obtain admission applications and prepare to meet specified requirements for narrowed list of colleges. Determine and be prepared to meet admission and financial aid application deadlines. Start submitting through the guidance department the required admissions package for each school. Be prepared to encounter possible resistance from the guidance counselor for submitting the recommended eight to twelve school applications; guidance counselors typically prefer just two or three.
- ___ **Student and Parents:** Continue to visit college campuses on the narrowed list. Thoroughly explore campus, classrooms, and dorms. Speak with students and faculty. Meet with admissions and financial aid officers. Include, if possible, the experience of a student on-campus overnight stay.

November–December

- ___ **Student and Parents:** Complete and submit admission applications before all filing deadlines.
- ___ **Student and Parents:** Obtain from guidance department the FAFSA and the CSS PROFILE financial aid forms. Prepare preliminary IRS tax return. Preliminarily, prepare the FAFSA and, if required, the PROFILE as well as other school specific financial aid forms for submission in order to meet all financial aid filing deadlines. Note: The FAFSA form cannot be submitted before January 1.

January–May

- ___ **Parents:** Finalize preliminary income tax return for answers on financial aid forms. Complete and submit the FAFSA and, if required, the PROFILE as well as other school-specific financial aid forms by no later than February 1. Keep copies. Meet all financial aid deadlines starting with the earliest.
- ___ **Student:** Verify that midyear transcripts have been sent to each school receiving your application for admission.
- ___ **Parents:** Monitor mail for the Student Aid Report (SAR) and, if submitted, the CSS PROFILE acknowledgment. Note your EFC amount. Review and make any corrections. Resubmit if necessary. If SAR is correct, retain and submit to your final-choice college for selections.
- ___ **Parents:** Send verification and final IRS tax return to each college requesting verification.
- ___ **Student and Parents:** Monitor mail for college acceptances and financial aid awards.
- ___ **Student and Parents:** Review and compare financial aid offers for possible appeal. If housing deposit is required for more than one school, make sure to make any refund requests within deadline.
- ___ **Student and Parents:** If appropriate, appeal financial aid awards in an intelligent, nonthreatening manner.
- ___ **Student and Parents:** Review final financial aid awards and make final college selection by May 1. Send required deposit, signed financial aid award offer, SAR, and final grade transcript when available. Submit all pertinent loan applications. Notify other colleges of your final decision.
- ___ **Student:** Seek summer employment, possibly at the chosen school's locale.