

## Financial Aid Checklist for U.S. Citizens and Permanent Residents

To see your account, records, financial aid, received documents go to Student Services Online - <https://ssol.columbia.edu/>

### Have you ....

- 1) Completed the FAFSA and received your SAR? U.S. Citizens and Permanent Residents complete your FAFSA at [www.fafsa.ed.gov](http://www.fafsa.ed.gov). Please use the SIPA school code, E00128, to ensure that SIPA receives your data. Once your FAFSA is completed, it will take approximately 6-8 weeks until the school receives the results. Then within two weeks, you receive a Financial Aid Award Letter Packet.
- 2) Applied for the Federal Stafford Loan Loans? You must submit the Federal Stafford Loan Request form, e-sign the Master Promissory Note at the lender's web site and complete the Stafford Loan Entrance Interview online. **We recommend all of these steps be completed no later than six weeks prior to the start of the term.**
  - 2.1) **Federal Stafford Request Form (Fill-able PDF which could be faxed or emailed to SIPA Financial Aid Office)** [http://sipa.columbia.edu/resources\\_services/financial\\_aid/forms\\_online.html](http://sipa.columbia.edu/resources_services/financial_aid/forms_online.html)
  - 2.2) **Federal Stafford Loan Master Promissory Note.** You may choose any lender your wish by the submitting the promissory note at their web site. For a list of possible lenders, you may use the following links:  
[http://www.columbia.edu/cu/sfs/docs/Grad\\_Fin\\_Aid/Federal/Stafford.html](http://www.columbia.edu/cu/sfs/docs/Grad_Fin_Aid/Federal/Stafford.html)  
<http://www.columbia.edu/cu/sfs/pdfs/Top20Lenders.pdf>
  - 2.3) **Stafford Loan Entrance Interview**  
[http://www.columbia.edu/cu/sfs/docs/Financial\\_Aid/Entrance\\_and\\_Exit\\_Interviews.html#N1001F](http://www.columbia.edu/cu/sfs/docs/Financial_Aid/Entrance_and_Exit_Interviews.html#N1001F)
- 3) Applied for a Federal Perkins loan? If you are eligible, this fund will be included on your award letter. Qualified students must complete and sign a Master Promissory Note. This note could be completed by downloading the form and mailing it to the address provided on the form. **Do not complete this step unless the award is in your letter:**  
[http://www.columbia.edu/cu/sfs/pdfs/Federal\\_Perkins\\_Loan\\_Master\\_Promissory\\_Note.pdf](http://www.columbia.edu/cu/sfs/pdfs/Federal_Perkins_Loan_Master_Promissory_Note.pdf)
- 4) Applied for an alternative loan to cover the difference? If you are planning on covering the difference in awarded federal aid and the cost of attendance with a PLUS loan or a private loan, please visit:  
[http://www.columbia.edu/cu/sfs/docs/Grad\\_Fin\\_Aid/Private\\_Loans/index.html](http://www.columbia.edu/cu/sfs/docs/Grad_Fin_Aid/Private_Loans/index.html)

### For a Graduate PLUS Loan:

[http://www.columbia.edu/cu/sfs/docs/Grad\\_Fin\\_Aid/Private\\_Loans/index.html](http://www.columbia.edu/cu/sfs/docs/Grad_Fin_Aid/Private_Loans/index.html)  
<http://www.columbia.edu/cu/sfs/pdfs/Top20Lenders.pdf>

- 5) **Set-up your CU account for automated refunds?** If all of your charges have been paid and your student account has a credit balance, you may be entitled to a refund. Refunds are not issued on any anticipated credits for financial aid, scholarships, or the payment plan, only on actual credits. If you incur any charges after receiving a refund, you are responsible for paying those charges. Refunds are issued by direct deposit into your U.S. checking or savings account within 5 business days or by mailing a check within 10 business days. The check will be mailed to your local address listed in SSOL. **Refunds are not available until after the add/drop period so you should be prepared to pay your own personal expenses for the first month of classes.**

Please note: The option to request a refund will NOT appear if there is not an actual credit on the account. You will only be able to request a refund online if there is an actual credit (not an anticipated one) on your student account.

- 5.1) **Set-up direct deposit** [https://ssol.columbia.edu/?tran%5b1%5d\\_tran\\_name=sadd](https://ssol.columbia.edu/?tran%5b1%5d_tran_name=sadd)
  - 5.2) **Set-up your CU account for automated refunds on Student Services Online (SSOL)** <http://ssol.columbia.edu/>
  - 5.3) **Endorse your private loan check:** Once your private loan has been received by the cashiers department, the cashiering office will notify you that your check needs to be endorsed. The Cashiering Office is located at 210 Kent Hall.
- 6) **Set up Third Party Billing?** If someone else will be paying any portion of your bill directly to Columbia University, you need to complete Third Party Billing Information. Please explore the following link for more information:  
<http://www.columbia.edu/cu/sfs/docs/billing/Sponsored-Students/index.html>