

**College of the Atlantic**  
**FINANCIAL AID CHECKLIST**

Check Boxes When Completed – Note that 2016 taxes are used

**EARLY DECISION:**

- ☐ File *FAFSA* and *COA Financial Aid Application* by:  
ED I: December 10, 2017                      ED II: January 20, 2018  
Use the IRS Data Retrieval Tool (DRT) in the student and parent sections of the FAFSA as applicable.
- ☐ Provide copies of 2016 tax forms (first two pages only, please)                      ☐ Parents and ☐ Student
- ☐ If student was not required to file taxes in 2016, submit *Taxes Non-Filer Statement*                      ☐ N/A
- ☐ Submit *COA Noncustodial Parent Declaration of Finances* form and 2016 tax forms                      ☐ N/A

**REGULAR ADMISSION:**

- ☐ File the *FAFSA* as soon as October 1, 2017 but no later than February 1, 2018. COA requires all eligible filers to use the IRS Data Retrieval Tool (DRT) in the student and parent sections on the FAFSA. This will pull in 2016 tax information automatically, expediting processing and reducing the chances of errors.
- ☐ File *COA Financial Aid Application* as soon as possible but no later than Feb. 1.
- ☐ Submit copies of student & parent 2016 federal taxes (first two pages only, please).
- ☐ If the student is not required to file 2016 taxes, submit *Taxes Non-Filer Statement* & all W-2s.                      ☐ N/A
- ☐ Submit *COA Noncustodial Parent Declaration of Finances* form and 2016 federal taxes (first two pages only, please) no later than Feb. 1.                      ☐ N/A
- ☐ I received and reviewed my *Student Aid Report (SAR)* that was delivered to the student and parent email addresses listed on the *FAFSA*.
- ☐ I have responded to any and all the “Comments” on my SAR if applicable so that there are no issues requiring further action on my part.

**IF ADMITTED:**

- ☐ Sign and return *Financial Aid Award Notice* (Student signature required)
- ☐ Fill out and return *College Work Study Profile (CWS)* if applicable                      ☐ N/A
- ☐ Complete: 1) an online Master Promissory Note (MPN); and 2) Stafford loan entrance counseling at [www.studentloans.gov](http://www.studentloans.gov) if you intend to accept any loan and do not have an active MPN on file.

## NOTES

The *FAFSA (Free Application for Federal Student Aid)* is a government form that is required to calculate financial aid eligibility. It can be filled out online at [www.fafsa.gov](http://www.fafsa.gov). This step is extremely crucial – please take your time and review it carefully. When calculating financial aid awards, your *prior-prior year's* (2016) tax information provides key data. This is part of the new *Early FAFSA* process that the Department of Education has initiated for 2018-2019 to help families get more accurate information at an earlier date in the college application process. By using the IRS Data Retrieval Tool (DRT) in the student *and* parent sections (assuming the student filed taxes, too) you pull 2016 tax information directly into the FAFSA thereby expediting the process and reducing the chances of errors.

When your *FAFSA* has been completed and processed, the student and parent(s) will receive a *Student Aid Report (SAR)* notification at the email addresses listed on the *FAFSA*. This is not the same as the initial email notification that may say “FAFSA successfully submitted” – this simply means the system accepted it but it has not been review yet. The subsequent email notifying you about the SAR typically comes 2-3 days after the submission. *It is important to review the SAR and be sure that all information is correct. There is a “Comments” section; please be sure to follow any directions or answer any questions that appear there.* You will need to know your Federal Student Aid (FSA) ID in order to review and make any necessary corrections so be sure to write that down when initially filing your *FAFSA*.

You'll also need to complete a *COA Financial Aid Application* by February 1. This form needs to be signed by the prospective student and custodial parent(s). Certain information requested is intentionally redundant with the FAFSA so that we can cross-check information for accuracy.

If you did not file federal income taxes the previous year because you were not required to by law, then we need a *Taxes Non-Filer Statement* and copies of any W-2s you received if you did have some employment. Still, if you had any federal or state tax withholdings, you may be entitled to a tax refund even if you weren't required to file taxes so don't make the mistake of “giving away” money that's rightfully yours for the claiming!

If the parents are legally separated or divorced, we require a ***COA Noncustodial Parent Declaration of Finances*** form filled out by the noncustodial parent. In the event of legal joint custody, the *FAFSA* is filed with the parent the student lives with (or most recently lived with) and not necessarily the one claiming them as a dependent on tax forms. The other parent fills out the ***COA Noncustodial Parent Declaration of Finances*** form.

If all applicable boxes have been checked and you have not been notified by this office of a verification request or any other missing items, you are done! You will receive a *Financial Aid Award Notice* indicating any aid you may be eligible for if you are offered admission. We try to include these with letters of admission if possible. If we cannot, but the financial aid file is complete, then the award notice will be sent very soon after the letter of admission. We do not calculate aid eligibility for students that have not been offered admission.

If you have any questions, Bruce Hazam or Amy McIntire will be more than happy to help you. You can email us at [bhazam@coa.edu](mailto:bhazam@coa.edu) or [amcintire@coa.edu](mailto:amcintire@coa.edu), or use the phone or fax numbers below.

**Tel: 1-800-528-0025**

**Fax: 207-288-4126**