



**Commonwealth of Massachusetts
Division of Professional Licensure
Office of Private Occupational School Education
1000 Washington Street • Boston • Massachusetts • 02118**

TECHNICAL ASSISTANCE HANDOUT

In order to assist schools with organizing their students' files, below is a sample checklist. This checklist can be used as a coversheet, or placed on the inside cover of each student's financial aid folder. As items are added to the folder, checkmarks or completion dates should be used in the spaces provided. Schools may modify this form to fit their individual needs; however, the form will be most useful when formatted to fit onto a single page.

FINANCIAL AID FOLDER CHECKLIST

Student Name _____ Start Date _____

- ___ Financial Aid Award Letter/ Payment Plan
- ___ ISIR
- ___ Needs Analysis
- ___ FAFSA (Signed and Dated/If student is dependent, parent signature)
- ___ Student Information Sheet
- ___ Crossover student

If selected for verification: ___ Yes ___ No

- ___ Verification Worksheet
- ___ (Student) ___ (Parent) Copy of Tax Return -signed & dated
- ___ (Student) ___ (Parent) Non-Tax Filer Form

- ___ Entrance Counseling
- ___ Voluntary Student Account Authorizations Form
- ___ Student Loan Application (MPN)
 - ___ Plus Loan Consent to obtain credit report ___ (Accepted) ___ (Denied)
 - ___ Plus Loan (MPN)/ ___ Parent's Social Security Card / Citizenship Document
- ___ Exit Counseling

- ___ Student Statement of Understanding
- ___ Social Security Card ___ Driver's License ___ Eligible Non-Citizen Document
- ___ Enrollment Agreement
- ___ SLM Financial Career Training Loan Documents
- ___ Professional Judgment Form and Documentation (approved by Corporate)
(Professional Judgment of Income data, Dependency Override, Selective Service, ext....)
- ___ Other forms (VA, VESID, WORKMAN'S COMP) _____
- ___ Institutional forms

Comments: _____