

Sample Assessment Meeting Checklist

Key objectives for the Assessment meetings:

- Assess how the student is feeling about her college plans.
 - Take note of any potential barriers to the student's college enrollment.
 - Review the latest status of the students' financial aid, highlighting possible appeals or additional loans the student will need to consider.
 - Discuss additional costs the student may face, or may be able to waive (e.g. the college's health insurance).
 - Review key summer tasks deadlines for the student's intended institution.
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To do before the meeting:

- Review information from the caseload spreadsheet and high school exit survey about student's postsecondary plans and school-year performance _____
- Review important summer tasks at student's intended institution. _____
 - Pull up briefing document if student is attending a "popular" institution, or generic guidelines for students attending other institutions _____
- Check whether student has completed the FAFSA _____

Assess how the student is feeling about her college plans:

- Begin meeting with open-ended question to assess how student feels about her college plans _____
- Take note of any issues the student raises _____
- Ask additional probing questions to get at other issues the student may face _____

*****COMPLETE THE INTAKE FORM WITH THE STUDENT*****

Guidelines for the financial aid award letter discussion with student

- *Helpful resources: college briefing documents; Financial Aid Award Letter calculator; Guidelines to the financial aid appeal*
- Log on to student's my.college.edu page, if student brought login info. **If the student did not bring log-in info, use guidelines on briefing document to help student get the log-in info during the meeting** _____
- Help student complete FAFSA, or fix errors, if student has not already done so _____
- Review student's latest financial aid award letter compared to the cost of attendance _____
 - Cost of Attendance information is provided in the briefing documents for the popular colleges. If the student is attending a different institution, try googling the college's name and "cost of attendance."
 - Enter the cost of attendance and award letter information into the Award Letter Calculator
 - Discuss with students what they will receive in grant aid, what they are expected to borrow, and what they will have to come up with out of pocket or from supplemental loans
 - Visit <http://www.direct.ed.gov/RepayCalc/dlentry1.html> to help students to identify what they can expect to pay in monthly payments after they leave college for the loans they assume. Note for students that these are monthly payment amounts for **one year** of college.
- Discuss with student whether to appeal her financial aid award letter. See guidelines in the "Guidelines to the financial aid appeal" document _____
- Remind students that college may deduct additional scholarship money they receive from their existing grant aid. They should call their financial aid office to ask their college's policy on this. _____
- **If the student appears to face a gap between her financial aid (including federal/state loans) and the total cost of attendance:** _____
 - Ask whether the student and her family have a plan to address this gap
 - Refer student to www.studentloans.gov where he can explore loan options, including a Direct PLUS loan her parents may be able to take out.
 - Students will need their social security # and FAFSA pin to access this website.
 - Students whose parents are denied for a PLUS loan may qualify for an additional \$4,000 in unsubsidized Stafford loans.
 - **Note:** Students may ask about taking out a private loan themselves, rather than having their parents take out a loan. This usually requires finding a co-signor, and often the loan has a very high interest rate, so this is an avenue we'd advise students not to take.

Sample Assessment Meeting Checklist

Guidelines for the tuition bill discussion with students

- Helpful resources: college briefing documents
- Help the students interpret the charges (e.g. tuition, activity fee) and credits (e.g. financial aid grant) _____
- Confirm that all of the financial aid the student is expecting from her award letter is included on the bill _____
- Review health insurance costs, if any, and whether the student's college will accept her current insurance. If appropriate, review steps student needs to take to waive school insurance. _____
 - Health insurance waiver information is provided in the briefing documents for the popular colleges. If the student is attending a different institution and health insurance is required, try googling the college's name and "health insurance waiver"
- Ask whether the student has signed Master Promissory Notes (MPN) for any federal loans s/he is taking out. If not, direct the student to www.studentloans.gov where s/he can complete the MPN(s) online _____
 - Students will need their social security # and FAFSA pin to access this website.
- Help students interpret an overall "credit" to their account. For instance, if they have a \$1,000 credit on their account, but have a loan for \$4,000, they would be better off taking a \$3,000 loan. _____
- **If the student faces a gap between financial aid (including federal/state loans) and the total cost of attendance:** _____
 - Ask whether the student and her family have a plan to address this gap
 - Refer student to www.studentloans.gov where she can explore loan options, including a Direct PLUS loan her parents may be able to take out.
 - Student will need her social security # and FAFSA pin to access this website.
 - Discuss tuition payment plan options with student (tuition payments are made on a monthly basis rather than upfront). _____
 - Tuition payment options, including payment plans, are provided in the briefing documents for the popular colleges. If the student is attending a different institution, try googling the college's name and "tuition payment plan"
 - **Note:** Students may ask about taking out a private loan themselves, rather than having their parents take out a loan. This usually requires finding a co-signor, and often the loan has a very high interest rate, so this is an avenue we'd advise students not to take.

Next steps:

- Copy intake form for student, and review next steps from meeting _____
- Schedule a follow-up meeting with the student, if needed _____
- Remind student how to / when she can reach you _____

To do after meeting:

- Log the student meeting on the Student Interaction form _____
- *If you were able to schedule a follow-up meeting with the student:* Set up a text reminder for the student for the day before the scheduled meeting _____
- *If you were **not** able to schedule a follow-up meeting with the student:* Schedule a time for calling the student in a week or two to check in on how they are doing _____