

# FINANCIAL AID UNDERGRADUATE CHECKLIST:

## After you have received your financial aid package

Congratulations! You've decided to attend to Shepherd University, and we are thrilled to welcome you to the Ram Family! Below is a checklist to assist you in accepting your financial aid award and getting your finances in line to pay for your education. Our financial aid counselors are available if you have questions: 304-876-5470 or [FAOweb@shepherd.edu](mailto:FAOweb@shepherd.edu).

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- ☐ **Pay your enrollment deposit and save your spot at Shepherd University** here: [shepherd.edu/admissions/enrollment-deposit](https://shepherd.edu/admissions/enrollment-deposit)
- ☐ **Fill out your FAFSA** if you haven't already: [studentaid.gov/h/apply-for-aid/fafsa](https://studentaid.gov/h/apply-for-aid/fafsa)
- ☐ **Make sure your aid is not delayed:** Check [RAIL](#) to see if there are any unsatisfied requirements under the financial aid "Eligibility" section that may prevent aid from disbursing.
- ☐ **Lock in your aid:** Log into RAIL to accept or decline your financial aid offers: [shepherd.edu/rail](https://shepherd.edu/rail)
  - Click on 'Financial Aid.'
  - Click on 'Award.'
  - Click on 'Award for Aid Year,' select the correct year, and click 'Submit.'
  - Click on the 'Terms & Conditions' tab; accept 'Terms and Conditions.'
  - Click on the Accept Award Offer tab.
  - Review, then accept or decline your offer.
  - Submit your decision at least one week prior to the semester's start.
- ☐ **If you are accepting a loan:** Students accepting Federal Direct Subsidized and/or Unsubsidized Loan funding for the first time must complete BOTH of the following requirements by logging onto [studentaid.gov](https://studentaid.gov) with your FSA ID:
  - ☐ Entrance Counseling
  - ☐ Master Promissory Note
- ☐ **If your parent wants to apply for a Parent PLUS Loan:** Your parent must complete BOTH of the following requirements after logging into [studentaid.gov](https://studentaid.gov) with their FSA ID:
  - ☐ Complete the Parent PLUS Application process
  - ☐ If approved and a first-time Parent PLUS borrower, complete the Parent PLUS Master Promissory Note
- ☐ **If you need to apply for a private loan:** You can pursue credit-based loans from private lenders to help fund educational expenses. Private loan information can be found at [shepherd.edu/private-loans/](https://shepherd.edu/private-loans/), including ELM Select, a private loan search engine.

- ☐ **If you accepted Federal Work Study or are interested in part-time student employment:** Visit the Student Employment website ([shepherd.edu/studentemployment](http://shepherd.edu/studentemployment)) to apply for jobs. Please note: Federal Work Study funds are paid to the student via paycheck. They do not apply directly to tuition and fees.
- ☐ **If you are receiving an institutional scholarship:** In order for most scholarships to disburse, you must be enrolled in at least 12 credit hours. In addition, many scholarships require students earn at least 30 credit hours during the academic year to maintain eligibility for the following year.
- ☐ **If you are receiving a private scholarship check:** To utilize a private scholarship, bring it to the Office of Financial Aid to be added to your account. If the check is made out to you and Shepherd University, it will need to be endorsed over to Shepherd University and will then be credited to your student account.
- ☐ **If you are using Veterans Benefits:** Our VA Certifying Official is housed in the Office of the Registrar. Please contact them at [veterans@shepherd.edu](mailto:veterans@shepherd.edu) to set up your benefits. We also recommend completing a FAFSA at [studentaid.gov](http://studentaid.gov) to supplement any VA benefits you may be receiving.  
More resources for student veterans may be found at [shepherd.edu/veterans](http://shepherd.edu/veterans).
- ☐ **If you need to cancel, reduce, or change a loan:** You have the right to cancel, reduce, or change the loan amount you originally accepted by contacting the Office of Financial Aid in writing at [FAOweb@shepherd.edu](mailto:FAOweb@shepherd.edu).
- ☐ **If you want to set up a payment plan:** Contact the Business Office at 304-876-5284 or visit their website at [shepherd.edu/finance](http://shepherd.edu/finance).
- ☐ **If you are expecting a refund:** To receive your refund, select a refund preference with BankMobile. For more information, visit [bankmobiledisbursements.com/refundchoices/](http://bankmobiledisbursements.com/refundchoices/). Otherwise, you will receive a paper check to your local mailing address listed on your account. Refunds may be expected the first week of classes.
- ☐ **Go to class!** Financial aid is funding to assist with educational expenses incurred while attending classes in pursuit of your degree. You must attend your classes regularly and engage in the requirements for each class; otherwise, your financial aid may be revoked either partially or in full. This would result in an amount due by you to the University immediately.
- ☐ **Maintain required enrollment.** Direct Federal Loans require at least half-time enrollment for disbursement (6 hours per semester for undergraduates). Some grant programs require full-time enrollment (12 hours for undergraduates). Other grants disburse based on how many hours a student is enrolled. A loan/grant will be reduced or canceled based on not meeting enrollment requirements by the last day to add or drop a class. Add/Drop dates can be found at [shepherd.edu/registrar](http://shepherd.edu/registrar).
- ☐ **Be an informed student!** Know your status at all times through [RAIL](http://RAIL) and check your Shepherd email account regularly.

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## QUESTIONS? We are here to help!

**Shepherd**  
UNIVERSITY

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[www.shepherd.edu/financialaid](http://www.shepherd.edu/financialaid)

### Office of Financial Aid

Office: 304-876-5470

Fax: 304-876-5238

[FAOweb@shepherd.edu](mailto:FAOweb@shepherd.edu)

For Self-Payments

### Business Office

Office: 304-876-5284

Fax: 304-876-5002

[subusinessoffice@shepherd.edu](mailto:subusinessoffice@shepherd.edu)