



Post-Secondary Enrollment Checklist for Fellows / Handout / Y2 Name: _____

Review the Enrollment Checklist below. Please note that you may need to add/remove action items depending on what is required for your chosen post-secondary institution/pathway but generally the steps listed below are part of the enrollment journey to most pathways. You can add rows where appropriate to the table and include the actual due date provided to you by your post-secondary institution/pathway. For some of these, you will be reminded to complete the steps through our Google Classroom/check ins. For others, you'll need to make sure you're taking these steps on your own in order to successfully enroll. **You'll see this arrow icon next to the ones that are most essential/prioritized** 



Where I intend to enroll next year (postsecondary institution): _____

Note: These enrollment steps are geared towards 2-year and 4-year colleges, but if you are planning on a different pathway like military, a trade school/progressive pathway, or the workforce, you should customize your steps for your pathway. Consider things like payment plans, placement or job skills tests, fees, orientations/trainings, boot camp preparation, or other things you need to do in order to successfully start your next path. Reference [this resource](#) for additional ideas.





COVID-19 Note: We have adjusted the recommended due dates to be a little later (usually these steps would start in May, but we know many institutions have pushed back decision day to June 1st. Make sure you are checking in with your program or school for up-to-date deadlines and new communication about all enrollment steps.

For May and June					
Recommended Due Date	Actual Due Date for your program	Action Item	Extra Resources	Suggested Evidence	PD Initials or Virtual Comment
June 15 		Student Account Check. Access your online student account to check for any notices, sign up for orientation, check financial aid, etc.	CCC (City Colleges) Student Portal Guide	Portal or Student Account URL/Link: Your User Name: Your Password: (keep this somewhere safe)	
June 15		Confirm Enrollment to Institution of Choice. Confirm enrollment with deposit needed and/or submit forms needed to waive the deposit.			


Post-Secondary Enrollment Checklist for Fellows / Handout / Y2 Name: _____

June 15		Funding Check. Double check that your post-secondary institution is added to your FAFSA to be sure they have the info needed to provide you with financial aid - this is a good time to call your financial aid office to ask if they need any verification documents from you.	Video Video: Negotiating for More Financial Aid	Insert a screenshot of (1) your award letter and (2) your FAFSA with your chosen college listed on it to your PD: <i>INSERT SCREENSHOT HERE OR SEND TO YOUR PD VIA EMAIL</i>	
June 15 		Funding Check. Accept your financial aid package.			
June 15 		Orientation Registration. Sign up to attend required orientation and plan for transportation to/from orientation. <i>COVID-19 Note: It's likely that orientations are shifting online and/or postponed. Check with the school or program for updated information</i>		Screenshot of orientation registration: Date of orientation: Travel plans:	
June 15		Housing Check. If planning to live on campus: complete any housing paperwork (including roommate preference forms) and make any necessary housing deposits to hold your place in that specific dorm/apartment (typically \$200-\$500). Investigate how meal plans work and add them to this plan if needed.		What housing options are you considering? Will you have roommates?	
		<i>Any other unique steps to add for your pathway or institution?</i>			
June 30		Funding Check. Complete loan entrance counseling		Insert screenshot of completed loan entrance	




Post-Secondary Enrollment Checklist for Fellows / Handout / Y2 Name: _____

		and sign mastery promissory notes for all loans.		counseling:	
June 30 		Placement Exam Registration. Sign up or choose a date to take your placement exams and plan for transportation to/from the exam. <i>COVID-19 Note: It's likely that placement exams are now virtual or perhaps postponed. Reach out to school for most updated information.</i>		Date of Placement Exam: Travel Plans:	
June 30 		Family Connection. Talk with your family about college. Explain your needs, financial responsibility, your limited accessibility while you're taking classes, and how they can support you.		How did the conversation go? Provide a quick summary and any details that you'd like to share.	
June 30		Medical Check. Submit all required medical documentation for your college (e.g. health insurance waiver, immunization record)		<i>Insert screenshot and/or picture of medical documentation:</i>	
June 30		Housing Check. If planning to live off campus but not at home: Complete an application for an apartment close to campus and within your budget. Consider how you will set up utilities, internet, budget for food, cell phone, transportation and other expenses. Make any necessary deposits.		<i>Insert a screenshot of your completed application here:</i>	
June 30 		PD Check-in. Practice checking in with your PD over the phone.		Date and Time of Check-in: How did the conversation go? Provide a quick summary and any details that you'd like to share.	



Post-Secondary Enrollment Checklist for Fellows / Handout / Y2 Name: _____

For July and August					
Recommended Due Date	Actual Due Date for your program	Action Item	Extra Resources	Suggested Evidence	PD Initials or Virtual Comment
July 15		Student Account Check. Again. Access your online college student account for any new notices, sign up for orientation, check financial aid, etc. Remember that you should get in the habit of checking your new email and student account regularly to ensure you do not miss any important communication.	CCC (City Colleges) Student Portal Guide	Portal URL/Link: User Name: Password:	
July 15 		Take Placement Exam. Prepare for and complete any placement exams required by your college. <i>COVID-19 Note: It's likely that placement exams are now virtual or perhaps postponed. Reach out to school for most updated information.</i>	www.KhanAcademy.org	Date of Placement Exam: Results:	
July 15		Funding Check. Log into your student account or call your financial aid office to confirm that your financial aid does not have any holds and that you have completed all verification requirements.		Insert screenshot of your student account showing that your financial aid has been disbursed:	
		<i>Any other unique steps to add for your pathway or institution?</i>			
July 30		Attend new student orientation. Register online in advance and show up at least 20 minutes early!		Orientation Date:	

Post-Secondary Enrollment Checklist for Fellows / Handout / Y2 Name: _____

		<p>(NOTE: attend the earliest option possible to be sure you can register for the classes you need).</p> <p><i>COVID-19 Note: It's likely that orientations are shifting online and/or postponed. Check with the school or program for updated information</i></p>		Travel Plans:	
July 30 		<p>Academic Success Check. After taking your placement test, meet with your academic advisor and register for your classes.</p>		Academic Advisor Name: Class Schedule:	
July 30		<p>Send Final Transcripts. After graduation, request that your final transcripts are sent to your college (often needed before you can register for classes).</p>		Date requested final transcripts:	
July 30 		<p>PD Check-in. Practice checking in with your PD over the phone, and discuss your payment plan for next year.</p>		Date and Time of Check-in:	
		<p><i>Any other unique steps to add for your pathway or institution?</i></p>			
August 15		<p>Student Account Check. Log into your new college email address and check for any communication from your college. Add this account to your phone or wherever you check email most, and double check that your OneGoal/high school email addresses are forwarding email to your college account.</p>		Post-secondary email: Personal email:	
August 15		<p>Financial Success Check. Make a plan with your family and/or your college for paying for textbooks (typically \$300-600 each semester). If you are living on campus</p>		How will you pay for your books? How will you pay for rent?	

Post-Secondary Enrollment Checklist for Fellows / Handout / Y2 Name: _____

		and/or in an apartment- make a plan for how you will pay for rent on a monthly basis.			
July + August 		PD Check-in. Check in with your PD over the phone, and discuss items from May and June if they're not yet complete. Discuss any concerns or fears you have about day one of college.		Time and Date of Check-in July: Time and Date of Check-In August: Any notes or next steps?	