

## Access Fund Application Checklist

- ☐ Undergraduate student?
- ☐ What faculty are you in?
  - If you are in Law, Dentistry, or Medicine, you cannot book an appointment until January
- ☐ Satisfactory academic standing?
  - Minimum 2.0 GPA
- ☐ Previously applied to the Access Fund?
  - Maximums: \$3000/year, \$6000/lifetime
- ☐ Minimum student contribution of \$1500 either through part-time work or summer savings?
- ☐ Opted out of the Access Fund?
- ☐ Applied for student loans, including Canada Student Loans?
  - If yes, how much did you receive?
- ☐ Has the student reached the maximum amount of loan they are eligible for up to \$10,880? Please look at the notice of assessment to determine if they have room to appeal.
  - ☐ Yes
  - ☐ No – assist student with appeal
- ☐ Have you defaulted on student loans/Emergency student loans?
  - Yes – Require a letter (ineligible if default on ESL)
- ☐ Are you married or common law?
  - If yes, is your spouse a student? If yes, Are they applying for the Access Fund?
  - If yes, you and your spouse must go through the application process together (book them both into the same appointment slot)
- ☐ Allowable monthly expenses:

Single student at home	\$505/month
Single student away from home	\$1058/month
Single parent (excluding children)	\$1312/month
Married/Common-law (excluding children) <b>FAAs:</b> Married/Common-law students who both attend U of A should attend the same appointment	\$2038/month
Each child	\$555/month

**\*\*\*Exceptional expenses will be considered with sufficient documentation.\*\*\***

- ☐ Informed student about the late/no show policy in place for Access Fund appointments:  
**\*\*Please note that applicants who are more than 5 minutes late or have incomplete applications, will have their appointments cancelled and will not be eligible to rebook until the next funding period.\*\***
- ☐ Has the student filled out Information Verification form?
  - If the student is booking over the phone, please remind them to print of an application or come early to their appointment. Please also make a note that they are missing an IV form.
- ☐ Highlighted back page of this form and thoroughly explained what the student will be required to bring to the interview.
- ☐ Inform the student that they will be receiving an invitation to a google calendar meeting with the required documents checklist and the application form attached to the meeting. They must print the forms and fill out the application form.
- ☐ Check to make sure the attachments are included in the meeting on google calendar.

**Applicants REQUIRE the following at the time of their appointment:**

- ☐ **University ONEcard**
- ☐ **Fees Assessment.** This can be found on Bear Tracks under the *Financials* section. Please ensure the numbers are not cut-off. You can also ask for one at the Student Access Centre (First floor of the Admin. Building). They are free of charge, just bring your ONEcard.
- ☐ **Spring/Summer Fee Assessment.** Please bring in a copy of this document **ONLY** if you have taken Spring/Summer courses in the year that you are applying for the Access Fund.
- ☐ **Student Loan Notice of Assessment.** If you are ineligible for loans please read the section on letters below. Canadian students who are ineligible are required to bring in a copy of the Notice of Assessment that states they are ineligible.
- ☐ **Bank Statements.** We require bank statements for the three previous months for all accounts under the applicant's name.
- ☐ **Pay Stubs.** It is necessary for each applicant to bring in May, June, July and August pays stubs from the summer (If your pay cheque is received through direct deposit and is visibly present on your bank statements, the pay stubs are not required).
- ☐ **Completed Access Fund Application Form.** All sections up to and including, Section 6: Financial Information and the budget table.
- ☐ **Study Permits and proof of funds documentation:** (For international students only) Applicants must provide a copy of their study permits and proof of funds documents that were given to the government of Canada detailing your financial plan when entering the country.

**Documentation required for consideration of EXCEPTIONAL EXPENSES. These include:**

- ☐ **Credit card or Line of Credit statements from the previous 3 months.** If asking to cover minimum payments or interest payments, statements must be provided with proof that the expenses were for educational expenses.
- ☐ **Higher accommodation costs.** Tenancy agreement/receipts/utility bills must be provided. Applicants are expected to live with a roommate where possible (mature, married and students with dependents are exempt).
- ☐ **Medical/Dental/Optical.** Receipts or official documentation must be provided. Please note that if you have opted out of the Students' Union Health & Dental Plan these costs will **not** be considered.
- ☐ **Documentation for any exceptional expenses you wish to have considered.** Eg. Cell phone, internet, day care costs

**Letters are required for consideration of SPECIAL CIRCUMSTANCES. These include:**

- ☐ **International students.** Please explain why your original financial plan is no longer sufficient.
- ☐ **Defaulting on a student loan/Bankruptcy.** Please explain the circumstances of your default.
- ☐ **Required Contribution.** Students are expected to contribute \$1500 to their education if they are available to work during the Spring/Summer period. If you are unable to work please explain the reason why.
- ☐ **Any other exceptional cases requesting more funding require a letter.**