





Transfer Checklist for Success

Welcome to Southwestern University! Please explore our exciting list of enrollment-related events and deadlines. If you have any concerns or questions, please call 1.800.252.3166, or for additional information, visit southwestern.edu/admission/transfer-students/deposited-students.





 = required to complete enrollment

PRIOR TO JUNE 1 OR UPON DEPOSIT

- ☐ **Mark Move-In/Welcome Week Dates on Calendar**
August 16, 2025
- ☐  **Sign up for Sprog Orientation**
<https://www.southwestern.edu/sprog-orientation/for-students/registration/>
June 17-18, June 20-21, June 23-24
- ☐  **By June 1 or as soon as possible: Review and complete your Incoming Transfer Housing via The Housing Director.**
southwestern.edu/housingregistration
(Once you click the link, you may need to refresh the page.)
**Please note in early June, Residence Life will communicate further instructions via your SU email about the roommate and housing selection process.*
- ☐  **Due June 16: Required health records must be submitted**
southwestern.edu/health-center
Submit immunization records (including meningitis (ACWY) in the past 5 years) and TB test within the last 12 months. Please go to the Health Center website and log into the patient portal using your SUeID and password, and upload the required documents.
- ☐  **First week of June: For student-athletes ONLY**
You will receive a detailed message from Healthy Roster in your SU email, our athletic training portal that you will use during your time as a student athlete at Southwestern. Many online forms will need to be completed; most importantly the Health History, Medical Record and an updated sports physical. While you are at your physician's office, please ask for your Sickle Cell Test results because the NCAA requires Southwestern to have that on file. **Please note this paperwork is different from what is required for Health Services, but these activities should be coordinated simultaneously while working with your doctor's office. Everything is required to be completed and submitted by August 1, 2025 in order for you to practice/play in the Fall of 2025.*

- ☐ **By June 1: Submit FAFSA**
studentaid.gov
If you plan to apply for need-based financial aid and have not yet submitted a Free Application for Federal Student Aid (FAFSA), you should do so immediately. Call 800.252.3166 for assistance.
- ☐ If you are selected for verification, you will be notified via your Southwestern email address. Verification documentation requirements will be indicated on that email. These documents are due by June 13, 2025.

PRIOR TO SPROG ORIENTATION:

- ☐  **By June 1: Complete New Student Questionnaire**
You will be pre-registered in at least two courses prior to Sprog. One will be your Advanced-Entry Seminar (AES). The other course will be an introduction course for your intended major, when possible. If you are undecided about your major, we will register you in a general education course. Please complete the following survey (available in mid-February) to ensure appropriate pre-enrollment: <http://tinyurl.com/NewStudent2025>
- ☐  **Establish SUeID and Password**
In your admission portal, you will find your SUeID and temporary password. Review and follow the instructions for creating your password. Bring your SUeID and password to Sprog Orientation.
- ☐  **Upload your photo for your Pirate Card**
You will receive an email from piratecardphoto@southwestern.edu asking you to submit a photo to the CloudCard Online system. Please pay close attention to the photo requirements. If you do not receive the emails or have difficulty with the link, please go directly to this link: <https://southwestern.campusm.exlibrisgroup.com/campusm/home#menu> Select Pirate Card icon > Profile tab > "Click to submit a new photo" Complete this well in advance of Sprog or orientation to allow time for approval and printing.
- ☐  **Complete Vehicle Registration for Parking Decal**
<https://www.southwestern.edu/life-at-southwestern/office-of-residence-life/campus-parking-information>
The parking fee will be billed each semester for all registered students, whether residing on or off-campus, who will be parking



a vehicle on campus at any time, using the online form. You may register up to two different vehicles. The parking decal will be issued and mailed to your SU Mail Box. You may opt-out of the parking fee before each semester begins through the Vehicle Waiver form that resides on the Campus Parking Information page (additional information available later in this packet).

☐ **Take a Foreign Language Placement Exam**

southwestern.edu/academics/language-placement

If you have not started a language or plan to change your language sequence, take the exam prior to Sprog Orientation.

☐ **Clear holds from your account**

my.southwestern.edu

Both the Student Handbook and Payment Terms Agreement must be read and accepted before you can register. Use your SUeID and password to log into Self Service.

☐ **Complete Scholarship Thank You Letter**

The University's policy to thank scholarship donors requires you, as a recipient, to complete our electronic thank you note process prior to your scholarship funds being posted to your student account. Upon completion of your thank you note, the University will apply the portion of your financial aid award, funded by these private donors, to your account within 5-7 days. Instructions for completion of this electronic process will be sent to your SU email beginning June 2025 from scholarships@southwestern.edu.

☐ **Due June 1: Provide permission to access billing, financial aid, & grade information.**

<https://selfservice.southwestern.edu/Student/StudentRecordsRelease>

Assign Proxy Access to a parent, guardian, or other individual for whom you wish to grant online access to your billing, financial aid, or grade information.

☐ **Due June 1: Provide permissions to speak with University departments regarding FERPA-protected information.**

<https://selfservice.southwestern.edu/Student/PersonProxy>

Assign Student Records Release access to a parent, guardian, or other individual for whom you wish to grant phone call or email access with University departments regarding FERPA-protected information.

☐ **June 1: Set up authorized payers to view E-bills & make payments.**

<https://www.southwestern.edu/live/files/10590-2023-set-up-payers-final>

Invite parents/guardians to the payment portal where E-bills can be viewed & payments can be made.

☐ **Sign up for emergency alerts**

southwestern.edu/emergency-alerts

The Southwestern University Emergency Notification System (ENS) allows the University to communicate with you in times of immediate need. Learn about ENS and provide your contact information by accessing the Self Service tab in my.southwestern.edu. Use the far left tab and click on User Options. Select User Profile to edit or add information related to Emergency Notifications.

☐ **Review Crime Statistics**

southwestern.edu/life-at-southwestern/safety-security/annual-security-reports

The Annual Security Report is published every year by October 1 and contains three years of selected campus crime statistics and certain campus security policy statements in accordance with the Clery Act. The Clery Act is designed to assist the campus community in making decisions which affect personal safety by requiring institutions of higher education to provide certain campus security information to current students, prospective students, and employees annually.

☐ **Buy the right computer**

southwestern.edu/computer-info

Through arrangements with both Apple and Dell, Southwestern students have the ability to buy discounted technology items and recommended software.

☐ **#BeSouthwestern!**

Follow us on Twitter and Instagram—@SouthwesternU—to keep up-to-date on events, announcements, and exciting opportunities!

☐ **Meal plans**

dining.campusdish.com/mealplans

If you are living in residential buildings that require a meal plan, you will automatically be enrolled in a 12-meals-per-week meal plan. Off-campus students can sign up for a 5-meals-per-week meal plan, if desired. Changes to your meal plan can be made via The Housing Director through 5 p.m. on Friday, August 29, 2025.

☐ **Phishing awareness**

southwestern.edu/phishing

Southwestern will NEVER ask you for your password via email, and you should not send money to anything that feels suspicious, even if it says it is from Southwestern. If ever uncertain, always validate any questionable requests by contacting the InfoDesk at 512.819.7333.

JUNE

☐ **By June 13: Advanced-Entry Seminar placements are announced**

☐ **June 17-18, 20-21, or 23-24: Attend Sprog Orientation**



- ☐ **By June 26: Complete a Texas Residency Form**
<https://www.southwestern.edu/live/files/10200-texas-residency-update-pdf>

Students receiving a Tuition Equalization Grant (TEG) must complete and return this form. Refer to your financial aid award letter to determine whether you are a TEG recipient.

- ☐ **By June 26: Report any scholarships from outside organizations**
southwestern.edu/scholarships-financial-aid/self-service-information

Use your Self Service Financial Aid portal.

- ☐ **By June 26: Complete Direct Loan Entrance Counseling and a Direct Loan Master Promissory Note**
studentaid.gov

Students who plan to use Direct Subsidized and/or Unsubsidized Loans should complete Direct Loan Entrance Counseling and a Direct Loan Master Promissory Note.

- ☐ **By June 26: Complete a Direct PLUS Loan Application and a Direct PLUS Loan Master Promissory Note**
studentaid.gov

Parents who plan to use a Direct PLUS loan should complete both a Direct PLUS Loan Application and a Direct PLUS Loan Master Promissory Note.

Understanding Your Tuition Bill & Charges

For detailed explanations on how to access your e-bill, see:

southwestern.edu/business-office/student-accounts/understanding-your-billing-statement/

- ☐ **After June 30, review your e-bill through your Transact portal**
southwestern.edu/live/files/9488-2021-transact-payment-portal-instructions.pdf

Your Fall 2025 e-Bill will be released on **June 30, 2025**.

- ☐ **After July 1: Payment Plan Registration**
southwestern.edu/business-office/student-accounts/payment-plan
Create a no-interest, no-credit-check, flexible monthly payment plan. A \$25 non-refundable application fee is required upon enrollment. Enroll by July 9, 2025, to take advantage of the 4-month payment plan option.

- ☐ **Payments from 529 Plans and Texas Tomorrow**
Please contact the Business Office at studentaccounts@southwestern.edu to let us know about your plan. Contact your 529 plan provider and arrange for disbursements to arrive at SU by the due dates. Be sure to include the student name and SU ID number on the check.

Remittance address:

Southwestern University

Student Accounts

1001 E. University Ave.
Georgetown, TX 78626

JULY

- ☐ **July 1: Post office box information**
An email will be sent to your SU email address with details on postal service information and where to find your SU post office box information in your self service portal. **Please note: Packages may be sent to this box after August 1, 2025, and the post office will hold for your arrival.*

- ☐ **Mid-July: Review Welcome Week**
southwestern.edu/live-at-southwestern/welcome-week/
Get a sneak peek at what to expect during Welcome Week including when and where you need to be for free, informative lunches throughout the week, your Advanced Entry Seminar, advising, and more.

- ☐ **Student Account Optional Charges & Waivers**
For more information go to:
southwestern.edu/business-office/student-accounts/waivers-foroptional-charges
(Site will open no earlier than May 1, 2025)

- ☐ **Optional Dewar Tuition Insurance**
WAIVER LINK: tuitionprotection.com/southwestern
All students are automatically enrolled in the Dewar Tuition Refund Plan for the academic year. The Tuition Refund Plan provides coverage of tuition and on-campus room & board when you must withdraw from school due to a medical or mental health illness before the semester is complete. Complete the waiver no later than July 10, 2025 to reverse the charge from your tuition statement.

- ☐ **Enroll or Waive Student Health insurance**
WAIVER LINK: eiiq.org/institution/southwestern-university
All Southwestern students are required to have health insurance as a condition of enrollment and are automatically charged for the University's student health insurance plan annual premium (12-month coverage) for the academic year. Rates for 2025-26 will be released in the spring. Information about the University's health insurance program, including current coverage options is online.

****Early enrollment -**

Early enrollment is highly recommended if you decide to keep the SU Student Health Insurance plan. Students who complete early enrollment will ensure they have access to their health insurance ID card on August 10, the effective date of the policy.



** Waiver –

Students who have health insurance coverage that meets the necessary requirements may waive the SU Student Health Insurance plan. Complete the waiver no later than July 10, 2025 to reverse the charge from your tuition statement.

Please note: health insurance information requested for the waiver on the EIIA website is in addition to the required paperwork for SU Health Services and/or SU student-athletes.

☐ **Optional vehicle registration-waiver required each semester.**

VEHICLE REGISTRATION LINK: <https://www.southwestern.edu/life-at-southwestern/office-of-residence-life/campus-parking-information/>

WAIVER LINK: swu.mobi/parking-waiver

All students are automatically charged a vehicle registration charge of \$120 per semester. If you are bringing a car to campus you must complete your automobile registration prior to Sprog Orientation. If you are not parking a vehicle on campus, the charge may be waived each semester by completing the Vehicle Registration Waiver form found at the link above. Complete the waiver no later than July 10, 2025 to reverse the charge from your tuition statement.

☐ **Sign up for direct deposit**

southwestern.edu/business-office/student-accounts/student-account-refunds

In Self-Service, set up direct deposit bank information to receive student account refunds and reimbursements.

☐ **July 11, 2025: Fall payments due**

Payment due dates are listed online at

southwestern.edu/business-office/student-accounts

Please note the Spring 2026 tuition will be due on December 12, 2025. For students who deposit after June 1, please contact the business office, after completing registration, regarding your fall payment due date.

☐ **July 21, 2025: Late-payment fee**

southwestern.edu/business-office/student-accounts/late-payment-policy/

Late-payment penalties are assessed when students fail to pay their current charges by the due dates. A late-payment fee of \$150 is charged to all unpaid accounts. Students with past-due balances may be dropped from classes and will not be allowed to move into on-campus housing until the account is paid in full, a payment plan is set up, or there is confirmed financial aid noted on the account.

AUGUST

☐ **Before moving on campus or attending class (whichever is earlier): Complete interactive online courses**

You will receive an email to your SU email address linking you to online courses that address critical issues such as sexual assault prevention, healthy relationships, and healthy decision-making related to alcohol and drug use in college. **(You must complete these courses before you move in to your residence hall room or attend classes; requires about two and a half hours in total).**

☐ **Join PirateConnect**

pirateconnect.southwestern.edu

Join the PirateConnect platform to expand your Southwestern network and explore diverse career options by joining the six career communities within the platform.

☐ **August 1: Submit updated college transcript**

To receive credit for courses taken in the spring or summer, be sure to request final transcripts from your college or university.

☐ **August 1: Submit AP/IB scores**

Contact the College Board and/or International Baccalaureate to send your AP/IB scores to qualify for and obtain college credit (if applicable).

☐ **August 11, 2025: Black & Gold Advantage**

The opt out period for the Black & Gold Advantage program opens. If you do not want to use this program for your textbooks you must opt out by September 8.

☐ **August 16: Move-In**

Information regarding check-in logistics and move-in appointments will be provided via SU email and on the Residence Life website.

southwestern.edu/reslife

☐ **August 16-22: Required Welcome Week**

southwestern.edu/life-at-southwestern/welcome-week/

See complete Welcome Week schedule for all program events and location.



A FEW EXTRA TIPS FOR OUR INTERNATIONAL STUDENTS

- ☐ Acquire Student Health Insurance
- ☐ Submit Translated Transcripts showing graduation date and completion of requirements. All records must be submitted in English or certified English translations of your official transcript.
- ☐ Confirm with the Office of Study Abroad & International Student Services that all immigration paperwork has been completed for a successful arrival in the United States and Texas.
- ☐ Watch for specific emails from the Office of Study Abroad & International Student Services to learn about International Student Orientation and pre-arrival programming.
- ☐ International students should make plans to arrive early for International Student Orientation and required Welcome Week. Please make travel plans to arrive to campus by Thursday, August 14 by 5:00 p.m. During Welcome Week, your Advanced Entry Seminar course will begin.

TO OUR SU PARENTS/FAMILY MEMBERS

As a parent or family member of an incoming student, you are an important part of the Southwestern community. Below are a few steps that will assist in your family's transition this fall. Please visit our Parent and Families webpage (<https://www.southwestern.edu/parents>) regularly for the latest updates and resources to support your student's journey at Southwestern.

- ☐ Mark your calendar for **Move-In, August 16.**
- ☐ **Attend Sprog Orientation with your student!**
June 17-18, June 20-21, June 23-24
- ☐ **Complete the Parent Information Form.**
This allows the University to communicate with you throughout your student's Southwestern career.
[southwestern.edu/parentinfoform](https://www.southwestern.edu/parentinfoform)
- ☐ Check your email all summer for tips, virtual programming, and dates for **Send-Off Parties**, hosted by current parents, in locations around the state of Texas.
- ☐ **Obtain parent access to student information.** The disclosure of a student's academic and financial records is prohibited by law without the express written consent of the student. Through Self-Service, students have the ability to provide proxy access at selfservice.southwestern.edu/student/personproxy and Student Records Release access at selfservice.southwestern.edu/Student/StudentRecordRelease. For more information, see the FERPA document within the deposit packet.
- ☐ **Set up authorized payers to view eBills and make payments.**
[southwestern.edu/live/files/9481-2021-set-up-payerspdf](https://www.southwestern.edu/live/files/9481-2021-set-up-payerspdf)