

Checklist for Success

WELCOME TO SOUTHWESTERN UNIVERSITY!

This checklist outlines key tasks and deadlines to complete before arriving on campus. Review each section carefully, check off items as you go, and stay on track for a smooth start to your Southwestern experience.

Follow us on Instagram [@SouthwesternU](#) for important reminders, updates, and a glimpse of life on campus.

Plan Ahead — Key Dates

- **Sprog Orientation (Choose one):**
June 16 • June 18 • June 25 • June 27 • July 27 (available once earlier sessions fill)
Sign-up information will be emailed when available. *(Required)*
 - **Move-In Day:** August 15, 2026 *(Required)*
 - **Welcome Week:** August 15–22, 2026 *(Required)*
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Housing, Health, & Campus Life

BY JUNE 1

- Complete your **First-Year Housing Application** in The Housing Director. *(Required)*
<https://www.southwestern.edu/housingregistration>
Residence Life will email room-selection instructions in early June.

BY JUNE 15

- Upload required **health records** (meningitis vaccine within 5 years and TB test within 12 months) via the Health Center portal. *(Required)*
<https://www.southwestern.edu/health-center>
- Submit all athletic health forms (including sports physical and sickle-cell test) by August 1.
(Required for student-athletes)

Questions? Contact Residence Life at reslife@southwestern.edu and the Health Center at 512.863.1252.

Academic Preparation

BY JUNE 1

- Complete the **New Student Questionnaire: *(Required)***
southwestern.edu/NewStudent2026
- Take the **Foreign Language Placement Exam: *(Required if applicable)***
<https://www.southwestern.edu/academics/language-placement>
- Complete the **ALEKS Math Knowledge Check** (instructions via SU email). *(Required)*

BY AUGUST 1

- Upload your **Pirate Card photo: *(Required)***
<https://southwestern.campusm.exlibrisgroup.com/campusm/home#menu>
- Submit official **final high school/college transcripts** showing completed coursework. *(Required)*
Transcripts should be sent directly from your previous institution to:

Office of Admission

Southwestern University
1001 E. University Ave.
Georgetown, TX 78626

- Submit **AP/IB scores** to obtain credit through the College Board or International Baccalaureate. *(if applicable)*

Questions? Contact Academic Success & Advising at advising@southwestern.edu.

Learn About Your Required Seminar

All new students enroll in a required seminar as the foundation of their academic experience. Explore available seminar options at:

- **First-Year Seminar (FYS):**
<https://www.southwestern.edu/academics/first-year-seminar>
- **Advanced-Entry Seminar (AES):**
<https://www.southwestern.edu/academics/advanced-entry-seminar>

Financial Aid & Billing

BY JUNE 26 *(Required)*

- Check your Self Service portal for any Financial Aid items that need to be completed.
<https://www.southwestern.edu/scholarships-financial-aid/self-service-information>

AFTER JUNE 30

- Review your **Fall 2026 eBill** in the Transact Payment Portal: *(Required)*
<https://www.southwestern.edu/live/files/11861-2025-accesing-student-account-in-transactpdf>

BY JULY 8

- Enroll in an optional **Payment Plan** (\$25 setup fee):
<https://www.southwestern.edu/business-office/student-accounts/payment-plan>

BY JULY 10

- Fall payment due.** *(Required)*

AFTER JULY 20

- A late-payment fee of \$150 applies.** Unpaid balances may delay class registration or housing.
- Set up Direct Deposit** for student account refunds or reimbursements (if applicable).
<https://www.southwestern.edu/business-office/student-accounts/student-account-refunds>
- Payments from 529 Plans and Texas Tomorrow** *(Required if applicable)*
If you plan to use a 529 or Texas Tomorrow plan, please contact the Business Office at studentaccounts@southwestern.edu to let us know your plan details.
Contact your 529 plan provider early to arrange for disbursements to arrive by payment due dates.
Be sure to include the student's **name** and **SU ID number** on all checks.

Mailing Address for Checks:

Southwestern University
Student Accounts
1001 E. University Ave.
Georgetown, TX 78626

Questions? Contact Financial Aid at finaid@southwestern.edu and the Business Office at studentaccounts@southwestern.edu.

Permissions & Accounts

BY JUNE 1

These steps allow your **parents or guardians** to access your academic, billing, and financial aid information. Access is not automatic — **you must grant permission** through Self-Service.

- Assign Proxy Access** so parents/guardians can view billing, financial aid, and grades.
Student Records Release: *(Required if parents/guardians will access student information)*
<https://selfservice.southwestern.edu/Student/StudentRecordsRelease>
- Set up FERPA permissions** to allow parents/guardians to speak with University offices about your records.
(Required if parents/guardians will access student information)
Person Proxy: <https://selfservice.southwestern.edu/Student/PersonProxy>
- Add Authorized Payers** so parents/guardians can view eBills and make payments.
Setup Guide: *(Required if parents/guardians will make payments)*
<https://www.southwestern.edu/live/files/11861-2025-accesing-student-account-in-transactpdf>

Questions? Contact the Business Office at studentaccounts@southwestern.edu.

Optional Charges & Waivers

BY JULY 10

- Waive Dewar Tuition Insurance (or remain enrolled):
<https://tuitionprotection.com/southwestern>

BY AUGUST 10

- Decide whether to opt out of the **Black & Gold Advantage** textbook program (deadline September 7).
- Waive or enroll in **Student Health Insurance**: *(Required — one action must be taken)*
<https://eiia.org/institution/southwestern-university>
Early enrollment ensures ID card access by August 10.
- Complete **vehicle registration** (or waiver): *(Required)*
<https://www.southwestern.edu/life-at-southwestern/office-of-residence-life/campus-parking-information>

BY AUGUST 29

- Review meal plans at <https://sudining.campusdish.com/mealplans>.
Changes can be made until **August 29 at 5 p.m.** via The Housing Director.

Questions? Contact the Business Office at studentaccounts@southwestern.edu.

Summer Prep & Communication

- After July 1:** Check your SU email for your **Post Office Box** assignment and mailing information.
 - Monitor your SU email for **housing updates** and **move-in details**.
 - Complete required **online courses** (sexual assault prevention, substance safety, and healthy relationships).
(Required)
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Parents & Families

- Attend **Sprog Orientation** with your student.
- Complete the **Parent Information Form**:
<https://www.southwestern.edu/parentinfoform>
- Encourage your student to set up **Proxy Access** and **Authorized Payers**.
- Visit the **Parents & Families webpage**:
<https://www.southwestern.edu/parents>

Pro Tips

- Check your **SU email daily** — it's the official communication channel.
- Complete items early; missing deadlines may delay housing or registration.