The College Planning Network
Frequently Asked Questions

Who should I contact if I have additional questions or want to sign up as a CPN member?
All questions should be directed to info@collegeplanningnet.com or you can call our toll-free number at 866-207-5545.

FEES

What are my fees associated with joining the College Planning Network?

- One-Time Advisor Enrollment Fee - $495
- $79/month Advisor fee charged on the 15th of every month
  - This fee is fully reimbursable when you submit 10 new clients to The College Planning Network within a calendar year.
- Each client that is submitted to The College Planning Network is $495; there is an additional fee to upgrade to the Platinum Package
  - *Refer to the College Planning Network Pricing Sheet for more information*

What are my fees associated with signing up a client?
There is a $495 enrollment fee for each client that is submitted to The College Planning Network. Any additional services will require an additional fee.

What are the client fees?
$29/month minimum monthly maintenance fee charged 30 days after enrollment

What if I want to charge my client more than the minimum $29 month fee?
We will charge your clients whatever monthly fee you desire over $29/month. If you want us to charge $39/mo, we will reimburse you the $10/mo ($39 - $29) for all of your clients at the end of the calendar year in the form of a Bonus Check as long as you are still an active and good standing member of The College Planning Network.

Who handles the billing for the client's monthly fee?
CPN handles the all the client's monthly billing.

What are the charges for students that already have a sibling in CPN?
The $495 enrollment fee is waived. The family is only charged an additional monthly fee.

How do I cancel my membership with the College Planning Network?
To cancel your membership with CPN we need a written statement, either through email or by mail, stating that you would no longer like to be a member of the College Planning Network. If you are canceling within 60 days of your enrollment you will receive a full refund. No refund will be given after 60 days. The advisor monthly fee is non-refundable.

What is the refund policy if one of my clients cancels?
Refunds for the client's $495 enrollment fee are determined on a case-by-case basis. Refunds will be credited to your next client's enrollment fee. The client monthly fee is non-refundable.

Where do I find the bonus items from the enrollment form?
All of the bonus information is located on your advisor webpage under Resources.

CLIENT SUBMISSION

How do I submit a client to CPN?
First you must become an active member with CPN. Then, are two ways to submit a client. You can fill out the Client Submission Form located on your CPN advisor webpage and email, send or fax the form to us or you can fill out the form online located on your advisor webpage, under Add a Client. All information on the form needs to be completed or we will be unable to process your client.

Why does CPN need the family's social security numbers and dates of birth?
This is for security purposes and this information is also needed to complete financial aid applications. For a family to create their CPN username and password they will need to enter the student's date of birth.

How long after I submit the Client Submission Form is my client entered into CPN?
After CPN receives the form the client will be entered within 1-2 business days.

When does my client receive their welcome email?
The welcome email will be sent to the client the evening they are made active in CPN. The email is usually sent around 11 PM Eastern Time to all email addresses listed in CPN.

Will I receive notification when an email is sent to my client?
You are copied on the welcome email sent to the client. On your advisor webpage, under Event Log, you are able to view all emails that were sent out to your client.

CLIENT CONTACT

Where can I see any correspondence to my client from CPN?
Any correspondence with your client is documented under your Client Contacts.

How can I follow the progress of my client?
Every client has an individual checklist. You will be able to see if and when each item has been completed and the date of completion.

STUDENT INTERVIEW

How long after my client is active do they get contacted to schedule their student interview?
The student is contacted, through email, two weeks after they have received their welcome email. If we have not gotten a response after three emails have been sent, we will call the student to schedule the interview.

When is the ideal time for a student to complete their Student Interview?
The best time to schedule an interview is in the student's junior year of high school. However, we encourage students to schedule an interview at any time if guidance, mentoring, or coaching related to college and careers might be helpful.

How does my client schedule for their Student Interview?
CPN sends out reminder emails for the student to sign up for their student interview. The student can either email us at studentservices@collegeplanningnet.com or call us at 866-207-5545 with their top 3 preferred dates and times. A College Planning Network representative will contact them to confirm a date and time.

How do I find out the results of my client's student interview?
Once the results of the student's interview have been written, you will receive an email informing you that the results are available to view on your advisor webpage.

FAFSA AND CSS PROFILE

What information do I need for my client's FAFSA to be submitted?
To submit your client's FAFSA we need the following:

- Answer Key – All information needs to be complete and accurate. We can not submit a FAFSA with partial data. Many clients use the CFME- CASH software to generate the answer key.
- PIN Authorization Form – Located on both your webpage and your clients. We cannot sign your client's FAFSA without written authorization.

Who is responsible for obtaining the client to sign the PIN Authorization Form?
At the time you are signing up a client for our services we ask that you obtain the signed the PIN Authorization form. If we do not receive the form from you, we will contact the client asking them to sign the form during the fall of the student's senior year.

What happens if my client does not sign the PIN Authorization Form?
CPN will make several attempts to retrieve the signed PIN Authorization Form from your client. Our next step would be to get you involved to try and obtain the form. If we are both unsuccessful, we will submit their FAFSA without an electronic signature. We will mail a Signature Page to the client that they will have to sign and than send to the Department of Education.

What information do I need if my client is applying to a Profile school?

- Profile Answer Key– All information needs to be complete and accurate. We can not submit the CSS Profile with partial data.
- CSS Profile Info Request Form – Located on your advisor webpage. We need your client's CollegeBoard Username and Password to submit their CSS Profile. We cannot submit their CSS Profile without this information.

Who is responsible for obtaining the client's CSS Username and Password and credit card information if they are applying to a Profile School?
If you know that your client will be applying a Profile school we ask that you obtain the CSS Profile Info Request Form at the time you are signing up the client for our services. If we do not receive the form from you, we will contact the client asking them to sign the form during the fall of the student's senior year.

What happens if my client does not fill out the CSS Profile Request Form?
CPN will make several attempts to retrieve the CSS Profile Info Request Form from your client. Our next step would be to get you involved to try and obtain the form. If we are both unsuccessful, we will be unable to access or submit the Profile Form. CollegeBoard does not allow you to fill out or submit the form without this information.

What is the cost associated with applying to a Profile school?
There is an application fee, the fee is not charged by us, but is paid to CollegeBoard for administering the application. There is a one-time registration fee and an additional charge of for EACH school the application is sent to.

What is the first day that a FAFSA can be submitted?
The FAFSA is not available to view or for submission until January 1st.

Can CPN enter the information into the FAFSA before January 1st and than submit it on January 1st?
No, information cannot be entered into the FAFSA before January 1st.

How do I know when my client's FAFSA has been submitted?
You will receive email notification when each client's FAFSA has been submitted. You can also find this information by viewing your client's checklist on your advisor webpage.

TAX INFORMATION

When and how does CPN update my client's FAFSA with their current taxes?
Starting in February, CPN will contact your client asking them to send/email/fax a copy of their tax return. To update the FAFSA, we need the first two pages of the tax return along with a copy of each parent's W-2. We cannot update the FAFSA without all necessary tax information.

Why does CPN need a copy of each parent's W-2?
To update the FAFSA, you need to enter the income of each parent individually. Also required is each parent's individual contribution to their 401K (if applicable). This information is only found on the W-2s.

ADDITIONAL FORMS

Who is responsible for finding out if the college the student is applying to has additional financial forms required?
It is the responsibility of the client to find out if any of the colleges that the student is applying to have any additional financial forms required. They should then send the form to CPN.

Who is responsible for filling out those forms?
CPN will fill out any additional financial aid forms. For us to complete, the client will need to send/email us the form. Please allow at least two weeks for completion. *Please note that CPN does not complete scholarship applications or state financial aid forms.*

LOAN APPLICATIONS

Who completes the loan applications, including the Stafford and Parent Plus Loans?
It is the client's responsibility to complete any loan applications, including the Stafford Direct and Parent Plus Loans. The reason for this is because the loan applications also act as a contract stating the loan will be repaid and CPN cannot sign a contract for the family. Although we will not fill out their forms, we will help your client walk through the application and answer any questions that they might have. We also can not choose a lender for the client but we will provide a list of the alternative loans CPN clients have had success in obtaining in the past that the client can choose from. This list is available on both your client's and your webpage.