GUIDE TO YOUR FINANCIAL AID INFORMATION IN CUNYfirst

Learn how to access, view, and manage the financial aid information in your CUNYfirst Student Center:

- View your “To Do” List & Complete the Supplement Form
- View your Financial Aid Awards
- Accept or Decline your Federal Work-Study or Perkins Loan
- View your Pending Financial Aid and Refunds
- Add your Bank Account and Enroll in Direct Deposit
- View your Federal Work-Study Paycheck and W-2 Form
VIEW YOUR “TO DO” LIST

After you have filed your financial aid applications, the “To Do” list in your CUNYfirst Self-Service Student Center will alert you to any outstanding items with your record that must be finalized to complete your financial aid package.

STEP# 1: Login to CUNYfirst at https://home.cunyfirst.cuny.edu.

STEP# 2: Select HR/ Campus Solutions from the left menu.

STEP# 3: Navigate to Self Service followed by Student Center.

In the To Do List section, you will see a list of outstanding items. Click the more link to see more information.

STEP# 4: Review the current outstanding items with your financial aid applications. You will need to sort and filter by institution to make sure you are viewing items related to your college.

NOTE: If you will be attending BMCC, you are only required to resolve the items listed for BMCC. Any unresolved items listed for other CUNY Colleges will not prevent you from finalizing your Financial Aid or conducting other business at BMCC.
By clicking on each **To Do Item**, you can view the details concerning the item, including the office contact information, and instructions on how to resolve the item.

**NOTE**: You must resolve each To Do item on your Item List. Failure to resolve the items will delay final processing and awarding of your financial aid.

<table>
<thead>
<tr>
<th>Item List</th>
<th>Due Date</th>
<th>Status</th>
<th>Institution</th>
<th>Administrative Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013 Parent(s) Fed Tax Trns</td>
<td>06/24/2014</td>
<td>Initiated</td>
<td>Borough of Manhattan CC</td>
<td>Financial Aid</td>
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<tr>
<td>2013 Std Fed Tax Trns</td>
<td>06/24/2014</td>
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<td>Financial Aid</td>
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<tr>
<td>2014 V1 Dep Verification Wrk</td>
<td>06/24/2014</td>
<td>Initiated</td>
<td>Borough of Manhattan CC</td>
<td>Financial Aid</td>
</tr>
<tr>
<td>CUNY Supplement Form</td>
<td>06/24/2014</td>
<td>Initiated</td>
<td>Borough of Manhattan CC</td>
<td>Financial Aid</td>
</tr>
</tbody>
</table>

The instructions on the **To Do Item Detail** may ask you to download and submit a form to the Financial Aid Office. To access the form, you may need to copy and paste the web address in the browser. Click on **Return** to go back to your Item List.
One of your “To Do” list items will be to complete the Supplement Form. The Supplement Form is an application used by CUNY to determine potential eligibility for the Federal Perkins Loan Program and the New York State Aid to Part-Time Study (APTS) program.

**STEP# 1:** Login to CUNYfirst at [https://home.cunyfirst.cuny.edu](https://home.cunyfirst.cuny.edu).

**STEP# 2:** Select **HR/Campus Solutions** from the left menu.

**STEP# 3:** Navigate to **Self Service** followed by **Student Center**.

**STEP# 4:** In the **Finances** section, click the **Supplement Form** link.

**STEP# 5:** On the **Select Aid Year to View** page, you may see listings for multiple aid years and multiple colleges. Click the link for the college and aid year you wish to view.
VIEW YOUR FINANCIAL AID AWARDS

Your Student Center provides information about your financial aid awards. These are listed for the entire academic year and also broken down by term.

STEP# 1: Login to CUNYfirst at https://home.cunyfirst.cuny.edu.

STEP# 2: Select HR/ Campus Solutions from the left menu.

STEP# 3: Navigate to Self Service followed by Student Center.

STEP# 4: In the Finances section, click the View Financial Aid link.

STEP# 5: On the Select Aid Year to View page, you may see listings for multiple aid years and multiple colleges. Click the link for the college and aid year you wish to view.
STEP# 6: On the **Award Summary** page, you will be able to view the total aid for the entire academic year and by individual terms. In the **Terms** section, there are hyperlinks for more detailed information which are discussed in the next steps.
STEP# 7: By clicking on the Full-Yr Financial Aid Summary link, you will be able to see your Estimated Financial Aid Budget for the academic year.

STEP# 8: Click on the hyperlinked budget amount to see your Estimated Financial Aid Budget Breakdown by term.
**STEP # 9:** Return to the **Award Summary** page and, in the **Terms** section click the **View Scheduled Disbursement Dates** link.

The **Scheduled Disbursements** page displays the projected dates for disbursement of your financial aid awards into your student account.

**NOTE:** The scheduled disbursement dates listed here represent the earliest date those awards can be transferred into your CUNYfirst student account. Your actual disbursement date may be different and will appear when your financial aid is posted to your account. To view your actual disbursement dates, you will need to check the **Account Activity** page in your **Student Center** [see p. 13 in this booklet].
ACCEPT OR DECLINE YOUR FEDERAL WORK-STUDY AND PERKINS LOAN

You are required to either accept or decline certain types of financial aid awards, such as Federal Perkins Loan or Federal Work-Study.

STEP# 1: Login to CUNYfirst at https://home.cunyfirst.cuny.edu

STEP# 2: Select HR/Campus Solutions from the left menu

STEP# 3: Navigate to Self Service followed by Student Center

STEP# 4: In the Finances section, click the Accept/Decline Awards link.

STEP# 5: On the Select Aid Year to View page, you may see listings for multiple aid years and multiple colleges. Click the link for the college and aid year you wish to view.
STEP# 6: Review your entire awards package. Notice that some of your awards such as PELL, TAP, SEOG come pre-accepted and require no further action by you. Note: If you wish to decline your PELL, TAP or SEOG award, you must speak to the Financial Aid Office at your college.

If you are awarded Federal Work-Study or Federal Perkins Loan, you **MUST** accept your award(s) by checking the “Accept” checkbox for each award. After checking Accept or Decline, do not forget to hit the SUBMIT bottom at the bottom of the page.

**NOTE:** If you do not indicate acceptance of your Federal Work-Study or Federal Perkins Loan, you risk losing the awards.

Click on the Award hyperlink to receive more detailed information about the award and its requirements. Below is an example of the Federal Work Study detail screen.
The following steps provide instructions on how to view your pending financial aid in CUNYfirst Self-Service.

**NOTE**: Financial aid that is "pending" means that you have been awarded the aid, and it is being used as a credit towards your tuition bill, but it hasn't actually been paid out.

**STEP# 1**: Login to CUNYfirst at [https://home.cunyfirst.cuny.edu](https://home.cunyfirst.cuny.edu).

**STEP# 2**: Select **HR/Campus Solutions** from the left menu.

**STEP# 3**: Navigate to **Self Service** followed by **Student Center**.

**STEP# 4**: In the **Finances** section, click the **Account Inquiry** link to see the details of the **Account Summary**.
**STEP# 5:** Under the **Account Inquiry** tab, you will be able to view your pending financial aid by clicking the “**pending aid**” sub-tab. If you have pending financial aid that covers your tuition and fee charges in full, you will not be required to make a payment to the Bursar.

**IMPORTANT NOTE:** Your financial aid awards will NOT appear on your **Account Summary** page for at least 2-3 business day after you complete your initial enrollment. If you make any change to enrollment that affects your financial aid eligibility, your recalculated financial aid awards will also not appear for 2-3 business days.
VIEW YOUR FINANCIAL AID REFUND

When your awards are disbursed to your CUNYfirst account, they will be applied to any unpaid tuition and fee charges. If you have a financial aid credit balance after the payment of your tuition and fees, you will receive a refund that will be electronically deposited to your personal bank account or sent to your home address in the form of a paper check.

Please note the difference between a disbursement and a refund: your financial aid is disbursed to your CUNYfirst account, not to you personally. Only after all charges on your account are satisfied will you see your refund. A refund appears on your CUNYfirst account 1-2 days after a disbursement is posted. You will receive that refund 3-5 days after it posts. Keep this timeframe in mind when doing your financial planning.

Detailed information about all disbursements and refunds can be seen on your Account Activity page. View your account activity information by doing the following:

**STEP# 1:** Login to CUNYfirst at [https://home.cunyfirst.cuny.edu](https://home.cunyfirst.cuny.edu).

**STEP# 2:** Select **HR/Campus Solutions** from the left menu.

**STEP# 3:** Navigate to **Self Service** followed by **Student Center**.

**STEP# 4:** In the **Finances** section, click the **Account Activity** link from the drop down menu.
The Account Activity page will display the activity occurring in your account for the academic year.

![Account Activity Image]

In this example, the Scholarship, TAP, SEOG, and the first-half of the Pell grant were disbursed to the student account on January 20th. Refunds were processed the next day on January 21st. The refund was issued to the student 3-5 days after it was posted to the account. Similarly, a second Pell disbursement was made on March 2nd, followed by another refund on March 3rd. The student received that refund on March 6th.

**REMEMBER**

- **Disbursement** - the transfer of funds into your CUNYfirst Student Account.
- **Refund** - the return of funds to you that are not needed to pay your tuition and fees. Refunds are issued either as a direct deposit payment to your bank account or mailed to your home as a check. You will receive your refund within 3-5 days after the refund posts to your student account.
ENROLL IN DIRECT DEPOSIT IN CUNYfirst SELF-SERVICE

The following steps show how to add a Bank Account on Self-Service and enroll in Direct Deposit to receive refunds and work study payments.

STEP# 1: Login to CUNYfirst at https://home.cunyfirst.cuny.edu.
STEP# 2: Select HR/Campus Solutions from the left menu.
STEP# 3: Navigate to Self Service followed by Campus Finances.
STEP# 4: Click Manage My Accounts.

STEP# 5: On the My Accounts page, click the Add Account button. You will then be prompted to enter your Financial Institution Details. After entering the required account information, click the Next button at the bottom of the screen. NOTE: Enter your routing number as it appears on your check and click enter. CAUTION: DO NOT USE THE ROUTING NUMBER SPYGLASS!
STEP# 6: To make the bank account you just added as your direct deposit account, click the **Enroll In Direct Deposit** button.

![Image of Enroll In Direct Deposit panel]

**Manage My Accounts Result**

- You have successfully added the account Test Account.

**Financial Institution Details**

<table>
<thead>
<tr>
<th>Nickname</th>
<th>Test Account</th>
</tr>
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<tr>
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<tr>
<td>Account Number</td>
<td>XXXX6789</td>
</tr>
<tr>
<td>Account Holder</td>
<td>Test T. Account</td>
</tr>
</tbody>
</table>

![Image of Direct Deposit Distribution panel]

**STEP# 7:** On the **Enroll in Direct Deposit** panel, select the Account Nickname to designate as the direct deposit account and click **Next**.
STEP# 8: On the Enroll in Direct Deposit Agreement page; select the checkbox next to the statement “Yes, I agree to the terms and conditions of this agreement.” and click on SUBMIT button.

STEP# 9: The process to Enroll in Direct Deposit is complete!
If you have been placed in a Federal Work-Study job and have begun working, you can view your timesheet deadlines on the BMCC Financial Aid website (http://www.bmcc.cuny.edu/finaid/) and you can also view your paystubs in CUNYfirst Self-Service.

The following steps provide instructions on how to view your federal work-study paystubs in CUNYfirst Self-Service.

**STEP# 1:** Login to CUNYfirst at https://home.cunyfirst.cuny.edu.

**STEP# 2:** Select HR/ Campus Solutions from the left menu.

**STEP# 3:** Navigate to Self Service, then Payroll & Compensation.

**STEP# 4:** Click the View Work-Study Paycheck link.

The View Paycheck page will provide you details regarding each federal work-study paycheck and a link to access the PDF version of the paystub.
VIEW YOUR FEDERAL WORK-STUDY W-2 FORM

If you have worked in the federal work-study program, you will receive a W-2 Form for the calendar year with your taxable earnings. The W-2 form will be mailed to you from the college and will be available for you to access in CUNYfirst.

The following steps provide instructions on how to view your federal work-study W-2 forms in CUNYfirst Self-Service.

**STEP # 1:** Login to CUNYfirst at [https://home.cunyfirst.cuny.edu](https://home.cunyfirst.cuny.edu).

**STEP # 2:** Select **HR/Campus Solutions** from the left menu.

**STEP # 3:** Navigate to **Self Service** followed by **Payroll & Compensation**.

**STEP # 4:** Click the **View Work-Study W-2 Form**.

**STEP # 5:** Click the **Year End Form** to view a PDF version of your W-2 Form.

If you are having problems accessing your Federal Work-Study W-2 Form, please visit the Financial Aid Office.
Learn more about the opportunities available to finance your college education by visiting BMCC’s Office of Financial Aid Website at http://www.bmcc.cuny.edu/finaid.

Do you have a question about your financial aid application or award status?
E-mail us at: finaid@bmcc.cuny.edu and we will respond promptly to your inquiry (usually by the next business day).

<table>
<thead>
<tr>
<th></th>
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<th>Phone</th>
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<tbody>
<tr>
<td>Office of Financial Aid</td>
<td>N-365</td>
<td>212-220-1430</td>
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<tr>
<td>Financial Aid Web Lab</td>
<td>S-143</td>
<td>212-220-1430</td>
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<td>Admissions’ Office</td>
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