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 YOUR FEDERAL WORK-STUDY
- VIEW YOUR PENDING FINANCIAL AID & YOUR REFUNDS
- ADD YOUR BANK ACCOUNT AND ENROLL IN DIRECT DEPOSIT
- ENROLL IN A TUITION PAY PLAN & VIEW YOUR 1098-T FORM
- COMPLETE A DIRECT LOAN PROCESSING FORM
- 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 application record that must be finalized before you may receive a financial aid awards 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.
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>2016 PAYROLL TAX TRANSFER</td>
<td>04/18/2018</td>
<td>Initiated</td>
<td>Borough of Manhattan CC</td>
<td>Financial Aid</td>
</tr>
<tr>
<td>2018 V1 Dep Verification Wrk</td>
<td>04/18/2018</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.

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**COMPLETE THE SUPPLEMENT FORM**

One of your “To Do” items will be to complete the Supplement Form. This is an application used by CUNY to determine potential eligibility for 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. Specify the college and aid year you wish to view.

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VIEW YOUR FINANCIAL AID AWARDS

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

**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 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 Aid Year link for the college and aid year you wish to view.

**STEP# 6:** On the Award Summary page, you will be able to view your awards for the entire academic year and for individual terms. You can access additional information through several hyperlinks which are explained on the following pages.
**STEP# 7:** Click on the Full-Yr Financial Aid Summary link to see your Estimated Financial Aid Budget for the academic year.

<table>
<thead>
<tr>
<th>Financial Aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-Yr Financial Aid Summary</td>
</tr>
<tr>
<td>Financial Aid Year 2017-2018</td>
</tr>
<tr>
<td>The information below is a calculation of your estimated need.</td>
</tr>
<tr>
<td><strong>Estimated Financial Aid Budget</strong> 14,990.00</td>
</tr>
<tr>
<td>Expected Family Contribution</td>
</tr>
<tr>
<td>Estimated Need</td>
</tr>
<tr>
<td>Total Aid</td>
</tr>
</tbody>
</table>

Currency used is US Dollar.
This is your financial aid eligibility based on your estimated financial aid (budget) costs, family contribution, and estimated need for this aid year.

**STEP# 9:** Return to the Award Summary page and, in the Terms section click the View Scheduled Disbursement Dates link.

<table>
<thead>
<tr>
<th>Terms</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018 Spring Term</td>
</tr>
<tr>
<td>Award Description</td>
</tr>
<tr>
<td>Federal PELL Grant Spring</td>
</tr>
<tr>
<td>Initial TAP-Spring</td>
</tr>
<tr>
<td><strong>Term Totals</strong></td>
</tr>
<tr>
<td>2017 Fall Term</td>
</tr>
<tr>
<td>Award Description</td>
</tr>
<tr>
<td>Federal PELL Grant Fall</td>
</tr>
<tr>
<td>TAP Fall</td>
</tr>
<tr>
<td><strong>Term Totals</strong></td>
</tr>
</tbody>
</table>

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 the actual disbursement dates, you will need to check the Account Activity page in your Student Center [see p. 13 in this booklet].

<table>
<thead>
<tr>
<th>Financial Aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Financial Aid Budget</td>
</tr>
<tr>
<td>Financial Aid Year 2017-2018</td>
</tr>
<tr>
<td>Listed below is an estimate of items used to determine your costs.</td>
</tr>
<tr>
<td><strong>Estimated Financial Aid Budget Breakdown</strong></td>
</tr>
<tr>
<td><strong>2018 Spring Term</strong></td>
</tr>
<tr>
<td>Category Description</td>
</tr>
<tr>
<td>Books and Supplies</td>
</tr>
<tr>
<td>Activity Fees</td>
</tr>
<tr>
<td>Consolidated Fees</td>
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<tr>
<td>Technology Fee</td>
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<tr>
<td>Housing</td>
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<tr>
<td>Lunch</td>
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<tr>
<td>Loan Fees</td>
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<tr>
<td>Personal Expenses</td>
</tr>
<tr>
<td>Transportation</td>
</tr>
<tr>
<td>Tuition</td>
</tr>
<tr>
<td><strong>Term Total</strong></td>
</tr>
</tbody>
</table>

Currency used is US Dollar.
If any accept amount is zero or if the scheduled disbursement date is blank, your award will not be disbursed. Please proceed to Award Acceptance page to accept or decline these awards.
ACCEPT OR DECLINE YOUR FEDERAL WORK-STUDY AWARDS

You are required to either accept or decline certain types of financial aid awards, such as 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 Aid Year link for the college and aid year you wish to view.

STEP# 6: Review your entire awards package. Most of your awards such as PELL, TAP, SEOG come pre-accepted and require no further action by you. If you are awarded Federal Work-Study, you MUST accept your award (s) by checking the “Accept” checkbox next to 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 promptly indicate acceptance of your Federal Work-Study award, you risk losing it. If you wish to decline your PELL, TAP or SEOG award, you must speak to the Financial Aid Office at your college.

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.
VIEW YOUR PENDING AID

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.

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 3 business days 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 3-5 business days.
VIEW YOUR FINANCIAL AID REFUND

When your awards are disbursed to your CUNYfirst account, they will 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 Table]

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. Student received the refund on January 25th. 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. Refunds are made available to the student within 3-5 days after the date the refund posts to your account. You need to make allowances in your financial planning to account for the timeframe between the initial disbursement date and the date you may expect to receive your refund.
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](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.

STEP# 6: To make the bank account you just added as your direct deposit account, click the Enroll In Direct Deposit button.

**Enroll in Direct Deposit**

- **Account Nickname:** Test Account
- **Account Type:** Checking
- **Routing Number:** 011000138
- **Account Number:** XXXX6789
- **Account Holder:** Test T. Account

**Enroll in Direct Deposit**

- **Account Nickname:** Test Account
- **Account Type:** Checking
- **Routing Number:** 011000138
- **Account Number:** XXXX6789
- **Account Holder:** Test T. Account

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!

NOTE: If you do not have a bank account to enroll in CUNYfirst, BMCC has partnered with Santander Bank to offer student bank accounts with free checking and savings options that can be linked to your BMCC Smart ID Card. Most students are eligible to participate in the bank account program, if you want additional information, please call 1.877.768.2265.

You may discover that your financial aid awards will not cover all your tuition and fee charges. The CUNY tuition payment plan allows you to arrange to pay your “out of pocket” tuition charges over a period of up to six months. This means that the burden of having to pay off your entire balance at the start of the academic term is reduced. Enrollment in the payment plan allows you to set up monthly payments with a credit/debit card or with electronic check.

The deferred payment plan is interest free benefit but there is an enrollment fee of $95 per term. For students and their families who opt for direct withdrawals from their bank accounts, a discount will be provided which will lower the enrollment fee to $40 per term.

The following steps provide instructions on how to enroll in a tuition payment plan from 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 followed by Student Center.
STEP# 4: In the Finances section, select your institution and click Enroll/Manage Payment Plan.

The link takes you to the Nelnet Tuition Pay Plan enrollment website. You need to complete the enrollment process and choose your payment method (credit/debit/electronic check).
CUNY is required by the Internal Revenue Service (IRS) to issue the Form 1098-T, Tuition Statement, to students who have made payments towards qualified tuition and related expenses within the reporting tax year. This information will help the students or parents of dependent students determine eligibility to claim the American Opportunity Tax Credit or Lifetime Learning Tax Credit. To find out more about Form 1098-T tax incentives, access IRS Publication 970, Tax Benefits for Higher Education, or visit www.cuny.edu/1098tfaq.

You cannot get a Form 1098-T statement if:

- You received federal grants, scholarships or third-party payments that met or exceeded your total tuition amount for the entire calendar year.
- You received loans to cover tuition for a particular semester, but the loans disbursed during a different calendar year.

The following steps provide instructions on how to view your 1098-T form 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 Student Center.

**STEP# 4:** In the Finances section, select “other financial...” from the dropdown menu and click View 1098-T.

**STEP# 5:** Select the Tax Year link to open the related Form 1098-T. You can download the Form 1098-T in PDF. Turn off your pop-up blocker to allow the form to appear in a new tab on the browser. “No Data Available” will appear next to the year if you are not eligible for a 1098T Form for that year.

**NOTE:** CUNY offers a paperless Form 1098-T option. To access the paperless form, you must click on Grant Consent on the View 1098T page. By consenting to receive an electronic Form 1098-T, you will not receive future paper forms through the mail. If you do not select the electronic option, you will receive a paper Form 1098-T sent to the mailing address listed on CUNYfirst Self Service.
VIEW YOUR FEDERAL WORK-STUDY PAYCHECK

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 at: [http://www.bmcc.cuny.edu/finaid/](http://www.bmcc.cuny.edu/finaid/). You can 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](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 and download a PDF version of your W-2 Form.

**NOTE:** If you have problems accessing your Federal Work-Study W-2 Form, please visit the Financial Aid Office.
If you want to request a direct loan for the award year, you must complete the Direct Loan Processing Form. Additional requirements to request a direct loan can be viewed on our website at [http://www.bmcc.cuny.edu/finaid/](http://www.bmcc.cuny.edu/finaid/).

The following steps provide instructions on how to access the Direct Loan Processing Form 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 **Student Center**.

**STEP# 4:** In the **Finances** section, click the **Direct Loan Processing 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.

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### For More Information

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](http://www.bmcc.cuny.edu/finaid).

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<table>
<thead>
<tr>
<th>Office of Financial Aid</th>
<th>Room N-365</th>
<th>212-220-1430</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Aid Web Lab</td>
<td>Room S-115C</td>
<td>212-220-1430</td>
</tr>
<tr>
<td>Admissions’ Office</td>
<td>Room S-310</td>
<td>212-220-1265</td>
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<tr>
<td>Bursar’s Office</td>
<td>Room S-330</td>
<td>212-220-1300</td>
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<tr>
<td>Registrar’s Office</td>
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<td>212-220-1290</td>
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<tr>
<td>Scholarship Office</td>
<td>Room S-365</td>
<td>212-220-8133</td>
</tr>
</tbody>
</table>