CUNY | CUNYfirst
Fully Integrated Resources and Services Tool

Financial Aid

STUDENT FINANCIAL AID GUIDE

Learn how to access, view, and manage your financial aid on CUNYfirst:

☑	VIEW YOUR "TASKS & HOLDS" & COMPLETE THE SUPPLEMENT FORM
☑	VIEW YOUR FINANCIAL AID AWARDS & DISBURSEMENTS
☑	COMPLETE A DIRECT LOAN PROCESSING FORM
☑	ACCEPT, DECLINE, OR REDUCE YOUR OFFERED FEDERAL WORK-STUDY OR OFFERED FEDERAL DIRECT LOANS
☑	VIEW YOUR BALANCE, PENDING FINANCIAL AID & YOUR REFUNDS
☑	VIEW YOUR FORM 1098-T
☑	VIEW YOUR FEDERAL WORK-STUDY PAYCHECK AND W-2 FORM

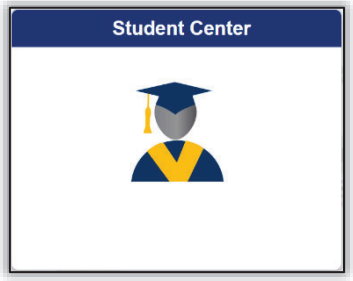
YORK College

VIEW YOUR "TASKS & HOLDS"

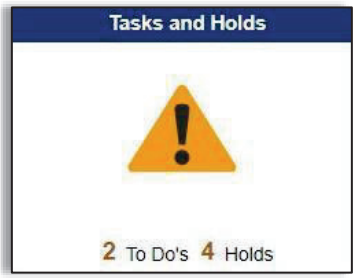
After you have filed your financial aid application(s) and it has been received by your college, the "Tasks and Holds" in your CUNYfirst Student Center will alert you to any outstanding items with your application record. You must address the items before your financial aid package will be finalized.

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

STEP# 2: Select **Student Center**

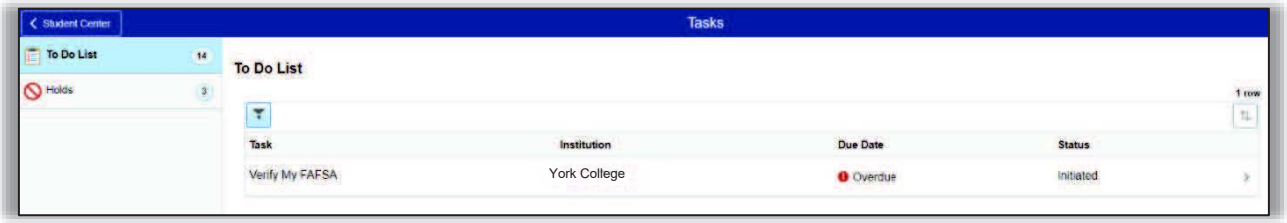


STEP# 3: Then select the **Task and Holds** tile.

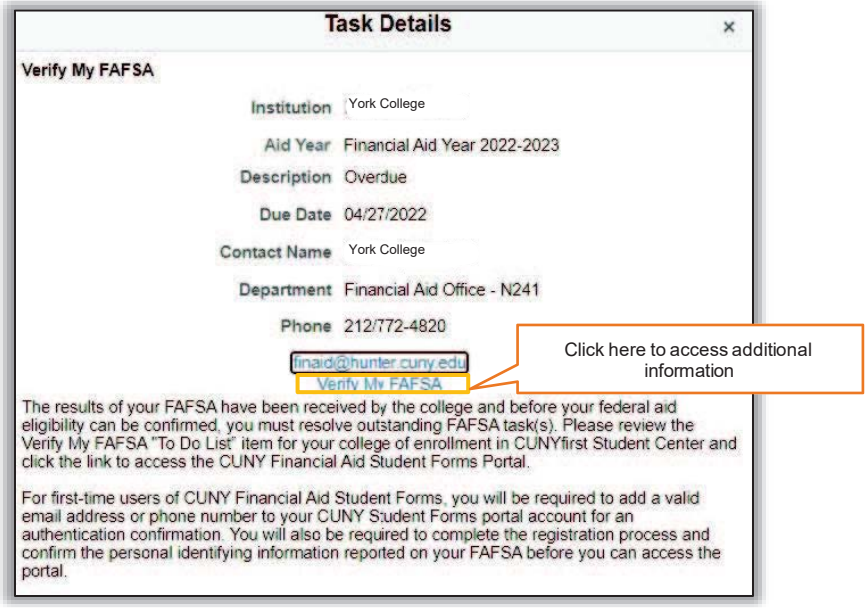


On the left sidebar the To Do List option will show all open tasks. By clicking on each **To Do Item**, you can view the item's details, including the office contact information, and instructions on how to resolve the item.

Note: You must resolve each **To Do Item** on your Item List for your college of enrollment. Failure to resolve the actionable items will delay final processing and awarding of your financial aid.

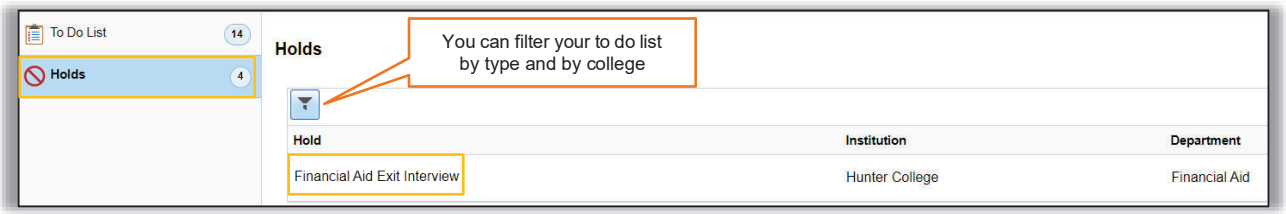


YORK College



A blue link will populate on your instructions, (in the example above it shows "Verify My FAFSA") which will provide a link to an external website.

On the left sidebar the **Holds** option will show all holds. By clicking on each **Hold**, you can view the details, including the office contact information, and instructions on how to resolve it.

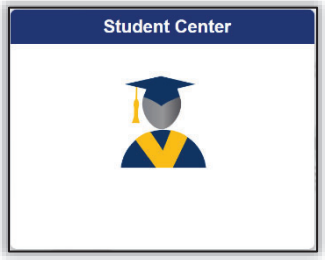


COMPLETE THE SUPPLEMENT FORM

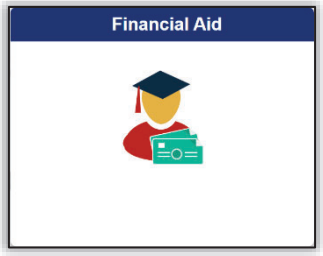
The Supplement Form is an application used by CUNY to determine potential eligibility for the New York State Aid for Part-Time Study (APTS) program. You will need your NY State Tax information to complete this form. To access the form:

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

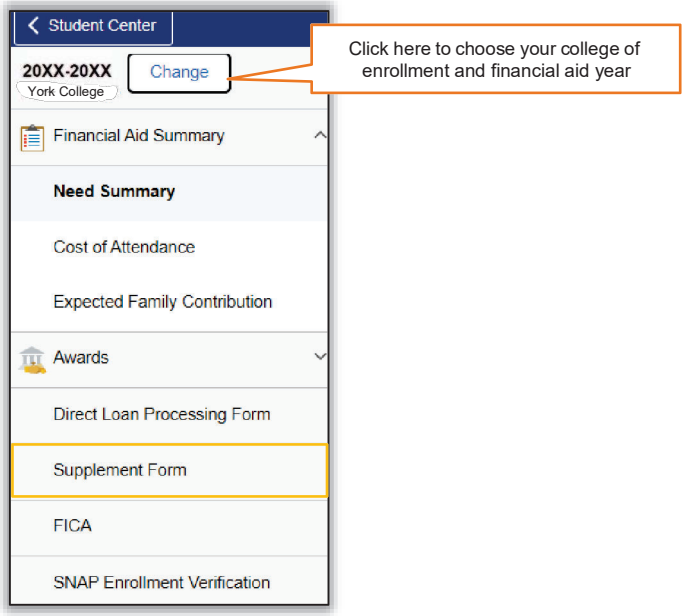
STEP# 2: Select **Student Center** Tile



STEP# 3: Select the **Financial Aid** Tile

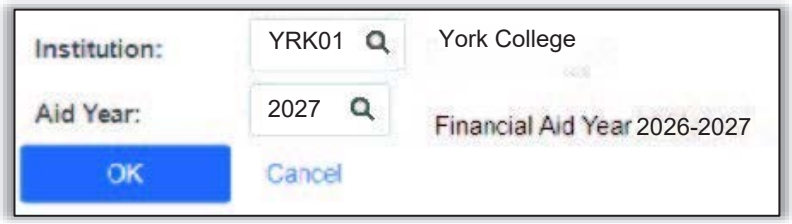


STEP# 4: Select **Supplement Form**, from the left sidebar of the page.



YORK College

STEP# 5: On the **Select Aid Year to View** page, you may see listings for multiple colleges and multiple aid years. Specify the college and aid year you wish to view.



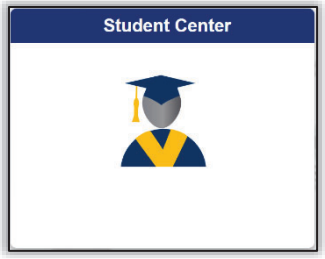
STEP# 6: Follow the on-screen prompts and complete and submit the form using your NYS Tax information.

VIEW YOUR FINANCIAL AID AWARDS & DISBURSEMENTS

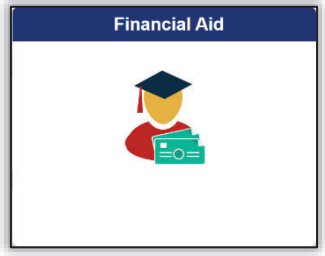
Your Student Center provides information about your financial aid package. Financial Aid offers are posted for the entire academic year by term.

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

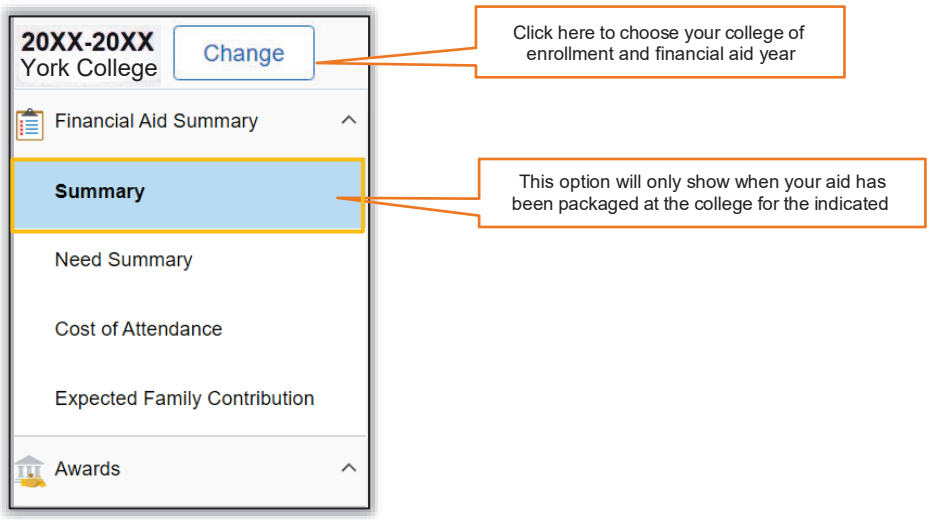
STEP# 2: Select the **Student Center** tile



Fi**STEP# 3:** Select the **Financial Aid** tile

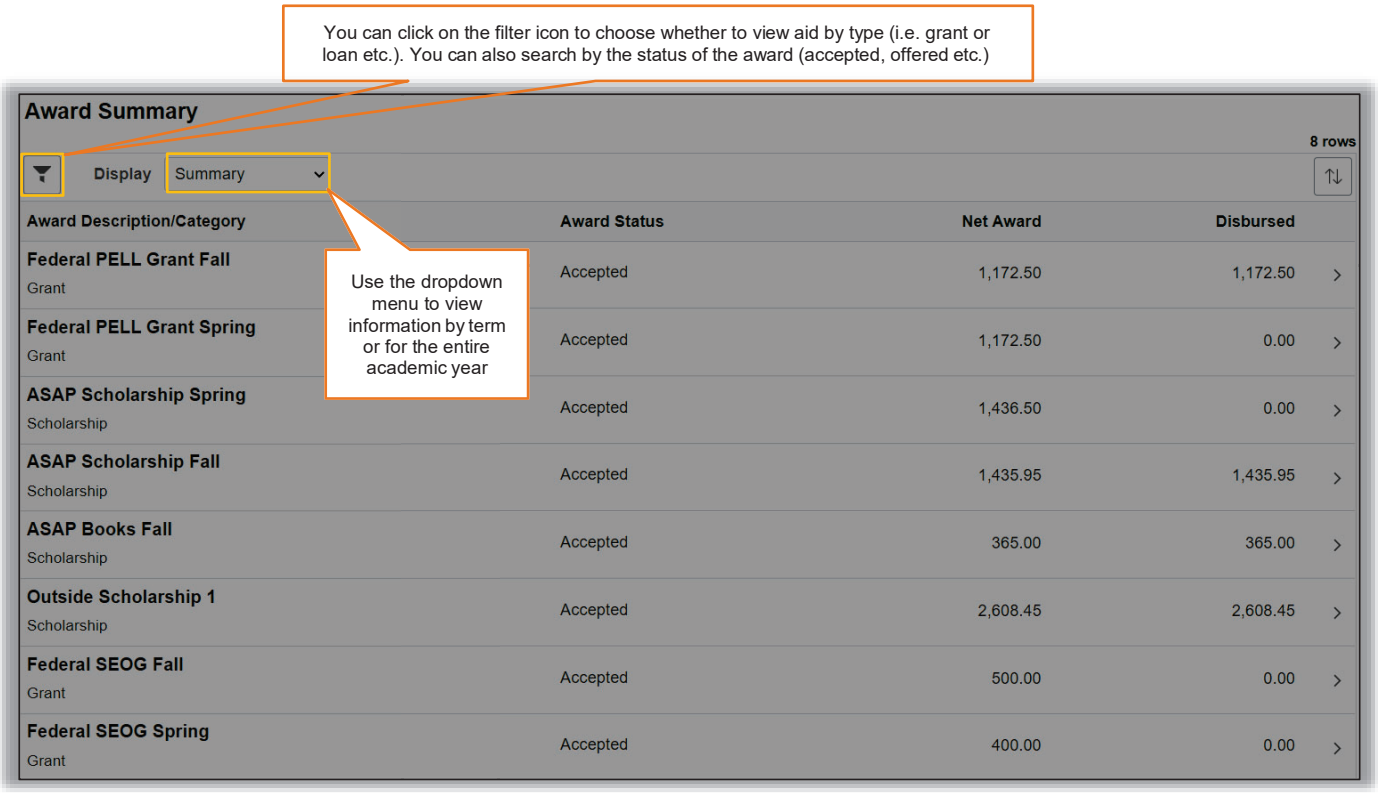


STEP# 4: Select **Summary** on the left sidebar of the page, you may see listings for multiple aid years and multiple colleges. Note the award **Summary** option will only display if you have an aid package at that college. If the **Summary** is not present, then your aid has not yet been packaged.

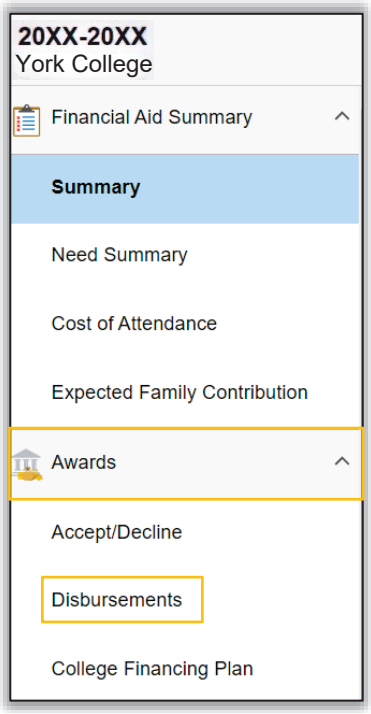


YORK College

STEP# 5: On the right side of the page, you will be able to view your aid package for the entire academic year.

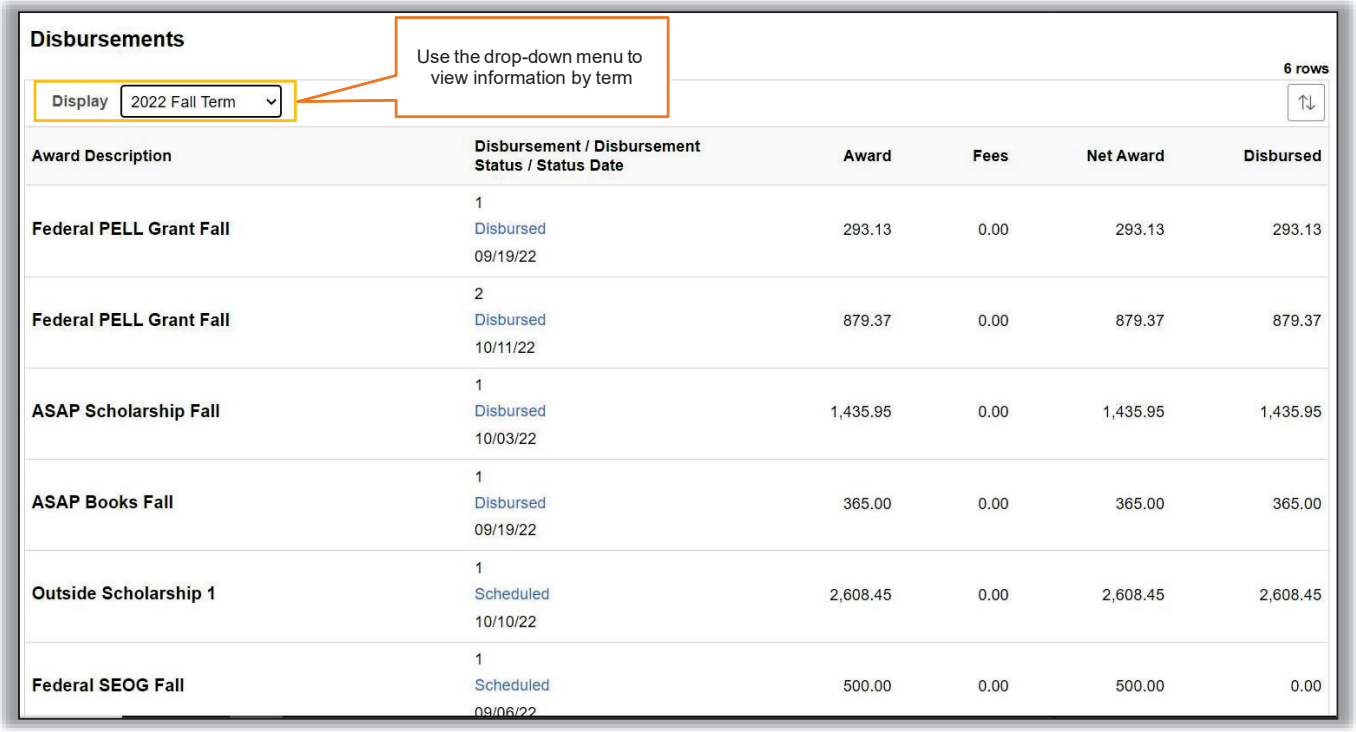


STEP# 6: Click the "Awards" section of the left sidebar to open the sub menu and then click on **Disbursements** to view Disbursement information.



The **Disbursements** page, under the **Disbursements/Disbursement Status/Disbursement Date** column displays:

- a number corresponding to the number of the disbursement for that type of aid,
- the word “scheduled” (i.e. projected) or “disbursed” indicates the status of the disbursement
- the date scheduled or the date it disbursed.



Award Description	Disbursement / Disbursement Status / Status Date	Award	Fees	Net Award	Disbursed
Federal PELL Grant Fall	1 Disbursed 09/19/22	293.13	0.00	293.13	293.13
Federal PELL Grant Fall	2 Disbursed 10/11/22	879.37	0.00	879.37	879.37
ASAP Scholarship Fall	1 Disbursed 10/03/22	1,435.95	0.00	1,435.95	1,435.95
ASAP Books Fall	1 Disbursed 09/19/22	365.00	0.00	365.00	365.00
Outside Scholarship 1	1 Scheduled 10/10/22	2,608.45	0.00	2,608.45	2,608.45
Federal SEOG Fall	1 Scheduled 09/06/22	500.00	0.00	500.00	0.00

The columns to the right display the amount disbursed for a particular **Award Description**. Certain types of aid such as Pell and single semester loans have multiple disbursements per term. The number under the **Disbursements/Disbursement Status/Disbursement Date** column indicates which disbursement in the term it is.

If the aid has already disbursed, the date that the disbursement occurred to your CUNYfirst account is displayed.

Certain types of aid, like Federal Direct Loans, have an origination fee that is deducted from the loan at the time of disbursement, the amount deducted will appear under the **Fees** column. The **Net Award** column indicates the total amount available to be disbursed to your CUNYfirst account after loan fees are deducted.

Note: The scheduled disbursement dates listed represent the **earliest date** those disbursements can occur on your CUNYfirst account. Your actual disbursement date may be different if your eligibility for that type of aid or packaging of that aid occurred after the first scheduled disbursement date.

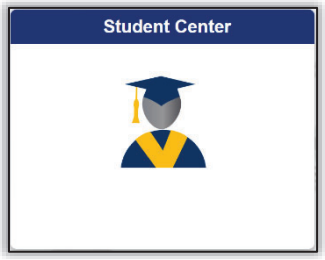
COMPLETE THE DIRECT LOAN PROCESSING FORM

If you have filed a FAFSA and your award package does not contain a Federal Direct loan and you wish to request one to assist with your educational expenses, the following steps provide instructions on how to access the Direct Loan Processing Form in your CUNYfirst Student Center.

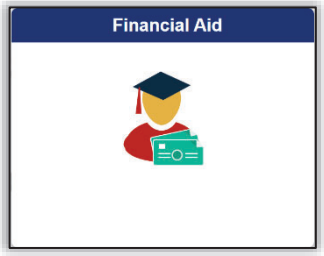
Note: You must complete the FAFSA and resolve your To Do list items before you can submit a loan request.

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

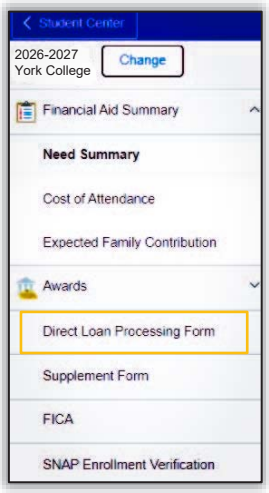
STEP# 2: Student Center Tile



STEP# 3: Select the **Financial Aid** Tile



STEP# 4: Click the **Direct Loan Processing Form** link from the left sidebar.



YORK College

STEP# 5: The instructions to the Direct Loan Request will appear. You must acknowledge that you have read the instructions by **selecting the checkbox at the bottom** of the page and click **Agree** button.

2022-2023 CUNYFIRST DIRECT LOAN REQUEST INSTRUCTIONS

1. Federal Direct Loan (FDL) applicants must have a **completed FAFSA on file** with their CUNY College of attendance **before** applying for a student loan. *If you have any questions, please contact a financial aid representative at your college.*
2. Please check your CUNY To-Do List in Student Self-Service. Some outstanding items may prevent the processing of your loan request. If you have been selected for verification you need to complete this process prior to the processing of your loan.
3. At the time of submission of your loan request, you are admitted to a **degree granting** program and are/or will be **registered for a minimum of 6 credits/units.**

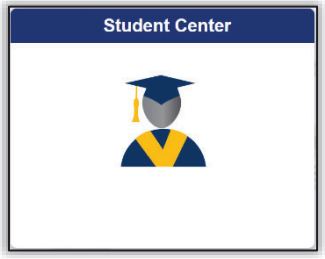
STEP# 6: Then the **Select Aid Year to View** page will appear. You can select your college of enrollment and the current financial aid year by clicking on the spyglass to the right of the corresponding box. Click the **Next** button to access the form.

STEP# 7: Follow the on-screen prompts and complete and submit the form.

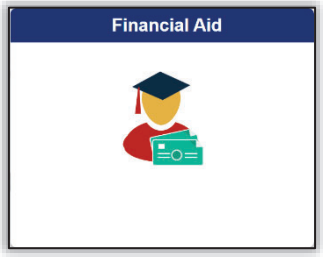
ACCEPT, REDUCE, OR DECLINE YOUR OFFERED FEDERAL WORK-STUDY OR OFFERED FEDERAL DIRECT LOANS

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

STEP# 2: Student Center Tile

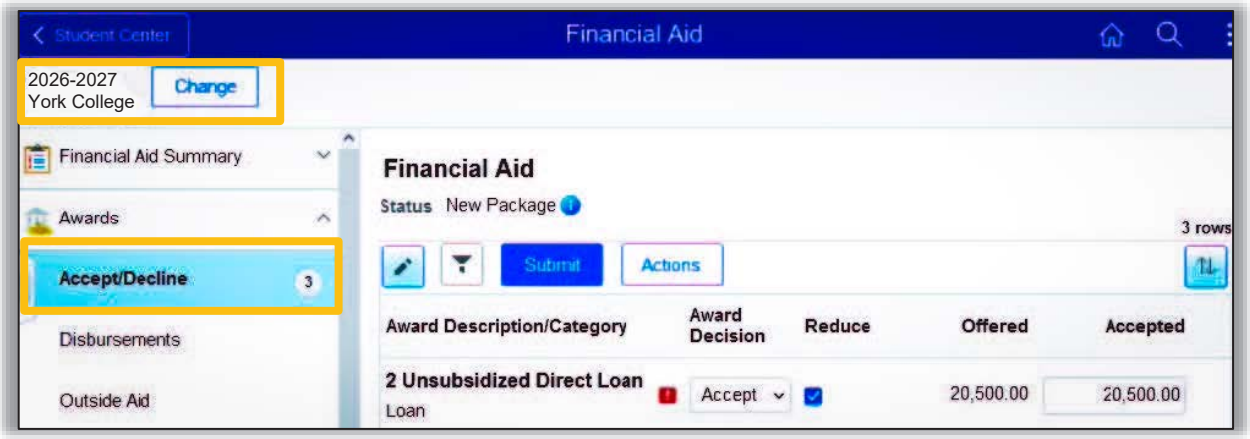


STEP# 3: Click on the **Financial Aid** Tile



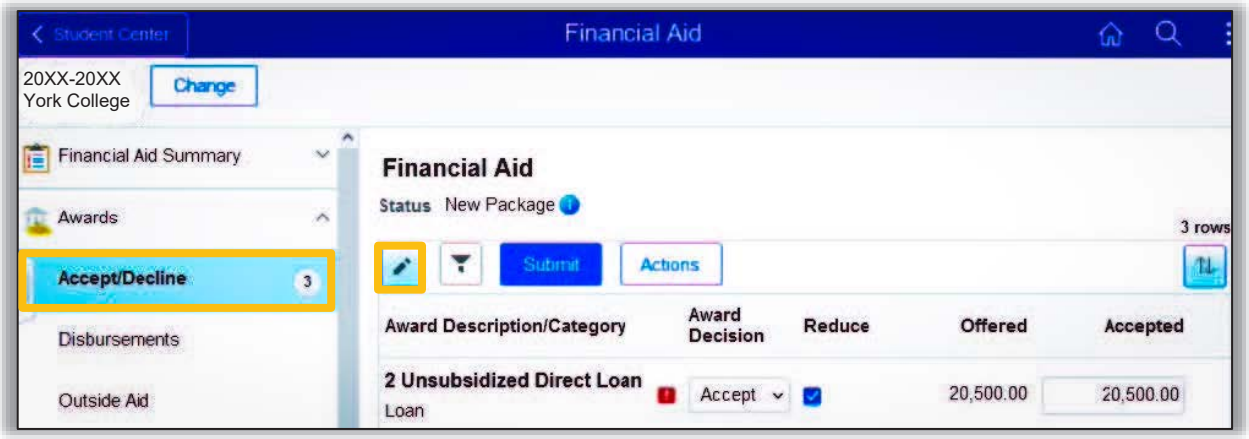
STEP# 4: Confirm the financial aid year that you wish to review at the top left section of the page. Students will only have the option to accept and decline direct loan and federal work-study offers. All grant aid and scholarships are automatically packaged as offered and accepted and do not require action on this page.

STEP# 5: Navigate to **Awards** on the left sidebar to open the dropdown menu, click on **Accept/Decline**



YORK College

STEP# 6: Click on the **Pencil icon** to activate the **Submit** and **Actions** buttons.



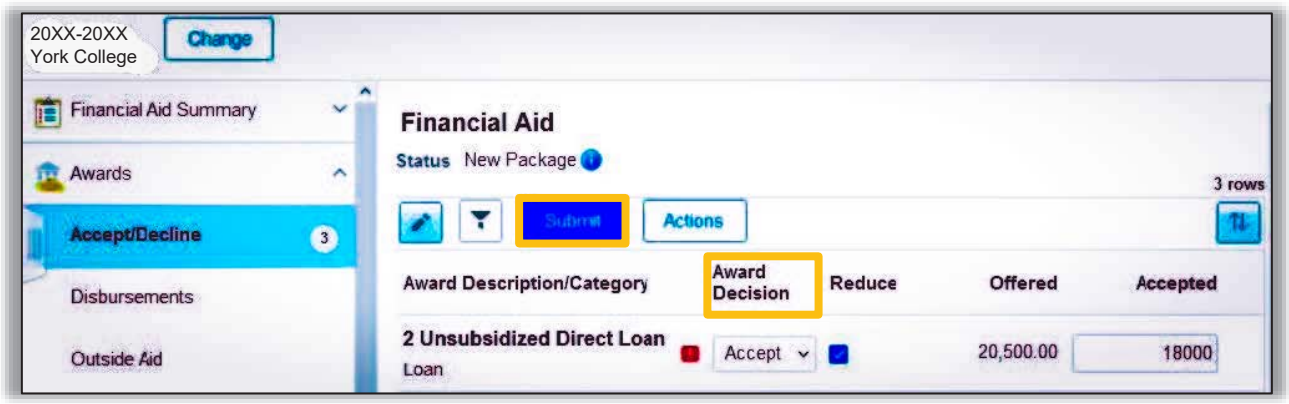
STEP# 7: Click on the dropdown option under the **Award Decision** column.

From the dropdown you can choose to accept, decline, or reset. If you want to reduce the award you must first select the **Accept** option from the dropdown menu (this will activate the reduce check box) and then click on the **reduce check box**. The dollar amount will be adjustable in the **accepted column** and allow you to lower the amount.

The **reset** option allows you to start over again before you finalize your submission.

The **decline** option allows you to set the offer to $0.

The **Actions** button will allow you to accept all, decline all or reset all.



STEP# 8: Click the **Submit** button to finalize your decision.

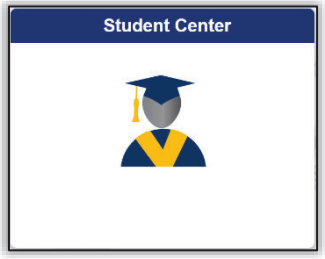
VIEW YOUR BALANCE, PENDING FINANCIAL AID & REFUNDS

The following steps provide instructions on how to view your pending financial aid in CUNYfirst Student Center.

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 has not yet been disbursed.

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

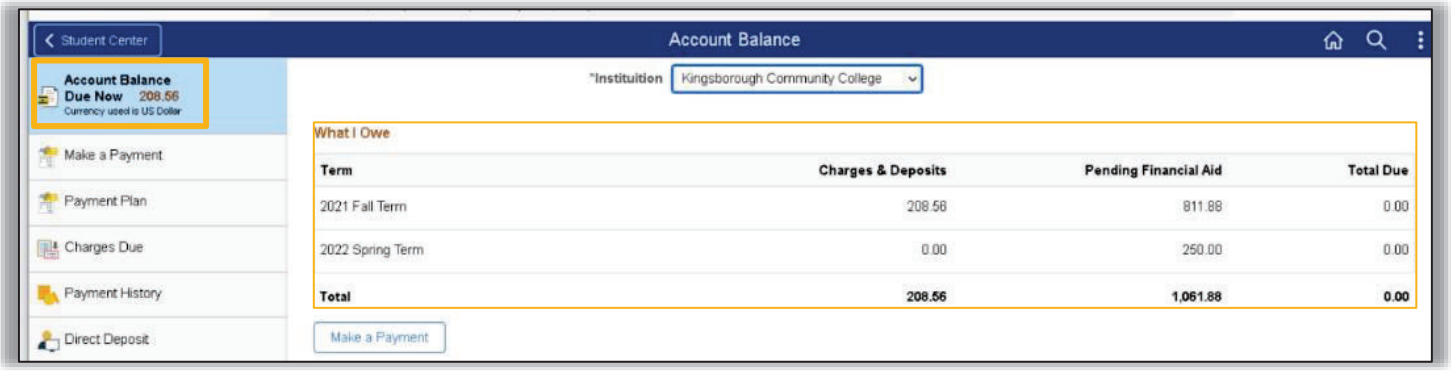
STEP# 2: Select the **Student Center** tile



STEP# 3: Select the **Financial Account** tile.

STEP# 4: Select the **Account Balance** option from the left sidebar to view your current balance by term. You can see:

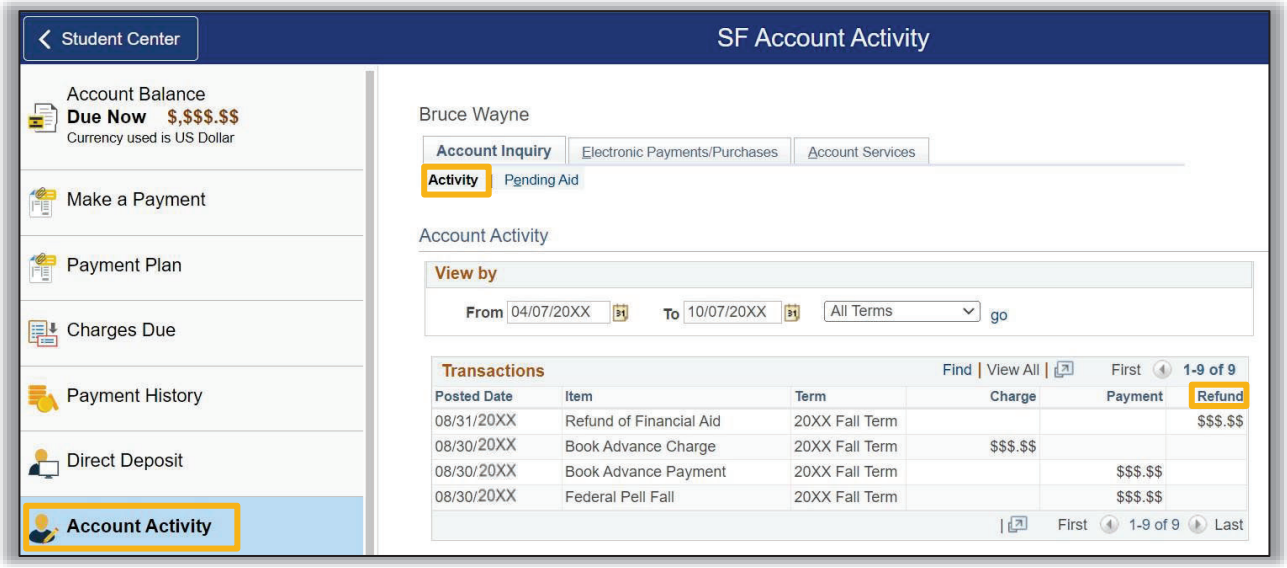
- Current charges under the **Charges and Deposits** column
- Pending financial aid under the **Pending Financial Aid** column
- The **Total Due** column shows how much you may still owe after aid has been applied



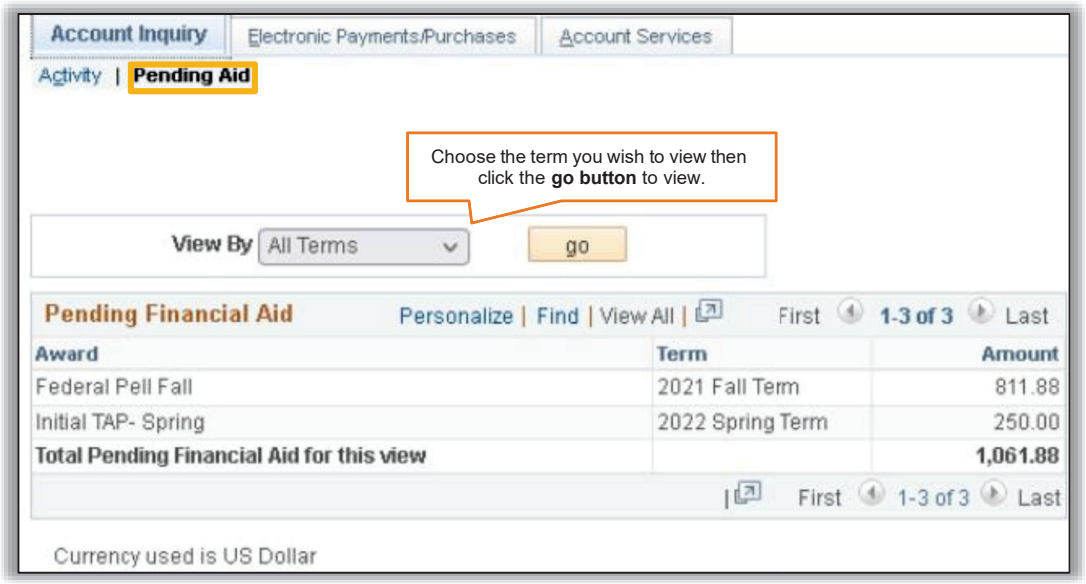
YORK College

STEP# 5: Select the **Account Activity** option from the left sidebar and the **Activity Link** at the top of the page to see whether aid has been applied already or to see any payments you may have made.

You can view refunds by the processed date in the **Refunds** column on the right.



STEP# 6: Click the **Pending Aid** link to see the specific type of aid and amount that is currently pending to disburse.



YORK College

VIEW YOUR FORM 1098-T

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, visit **www.cuny.edu/1098tfaq**.

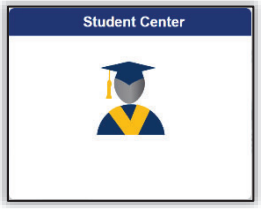
Note: A Form 1098-T statement will not be issued to you if you received federal grants, scholarships or third-party payments that met or exceeded your total tuition charges for the entire calendar year.

CUNY offers a paperless Form 1098-T option. To access the paperless form, you must click on **Grant Consent** on the View 1098-T 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 be sent a paper Form 1098-T at the mailing address listed on CUNYfirst Student Center profile.

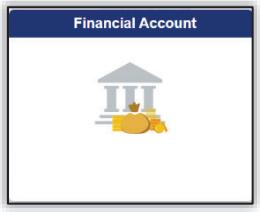
The following steps provide instructions on how to view your 1098-T form in CUNYfirst.

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

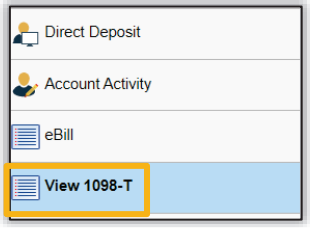
STEP# 2: Click on the **Student Center** tile:



STEP# 3: Select the **Financial Account** tile.



STEP# 4: On the left sidebar click on **View 1098-T** option.



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 1098-T Form for that year

YORK College

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 Student Center.

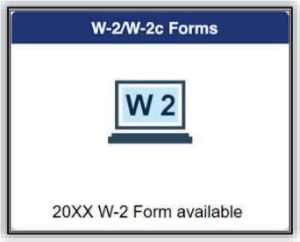
STEP# 1: Login to CUNYfirst at **https://home.cunyfirst.cuny.edu**.

STEP# 2: Click on the **Student Center** tile:

STEP# 3: Click on the **Payroll** tile:

STEP# 4: You will have an option to consent to receiving your W-2 or W-2C electronically by checking the off the "*I consent…*" box:

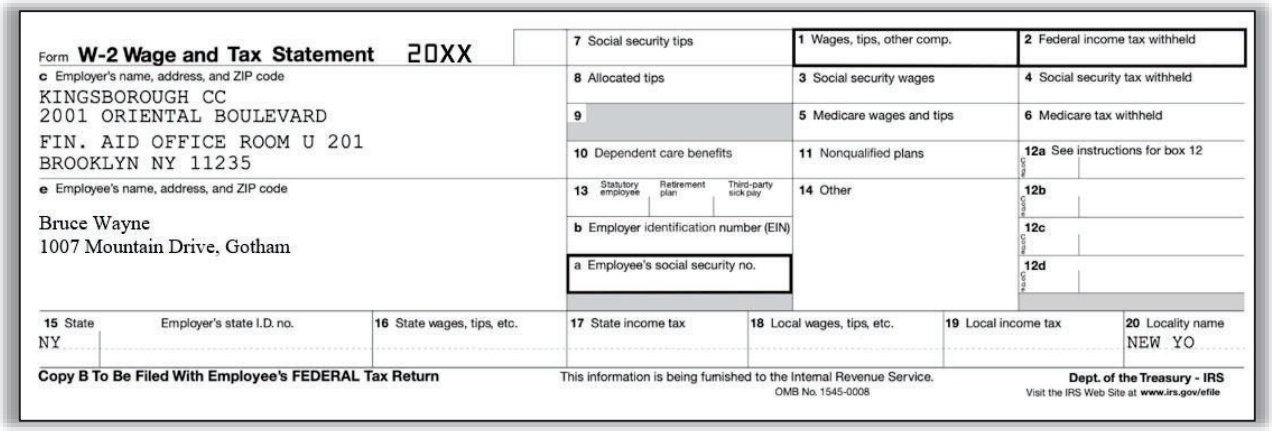
You can view your W-2 / W-2C by clicking on the W-2/W-2C Forms Tile:



YORK College

STEP# 5: You can select the "**Tax Year**" W-2/ W-2C forms you wish to access.

Select: **View Form** to access your W-2/ W-2C



Form **W-2 Wage and Tax Statement** 20XX

c Employer's name, address, and ZIP code
KINGSBOROUGH CC
2001 ORIENTAL BOULEVARD
FIN. AID OFFICE ROOM U 201
BROOKLYN NY 11235

e Employee's name, address, and ZIP code
Bruce Wayne
1007 Mountain Drive, Gotham

7 Social security tips	1 Wages, tips, other comp.	2 Federal income tax withheld
8 Allocated tips	3 Social security wages	4 Social security tax withheld
9	5 Medicare wages and tips	6 Medicare tax withheld
10 Dependent care benefits	11 Nonqualified plans	12a See instructions for box 12
13 Statutory employee / Retirement plan / Third-party sick pay	14 Other	12b
b Employer identification number (EIN)		12c
a Employee's social security no.		12d

15 State	Employer's state I.D. no.	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name
NY						NEW YO

Copy B To Be Filed With Employee's FEDERAL Tax Return

This information is being furnished to the Internal Revenue Service.
OMB No. 1545-0008

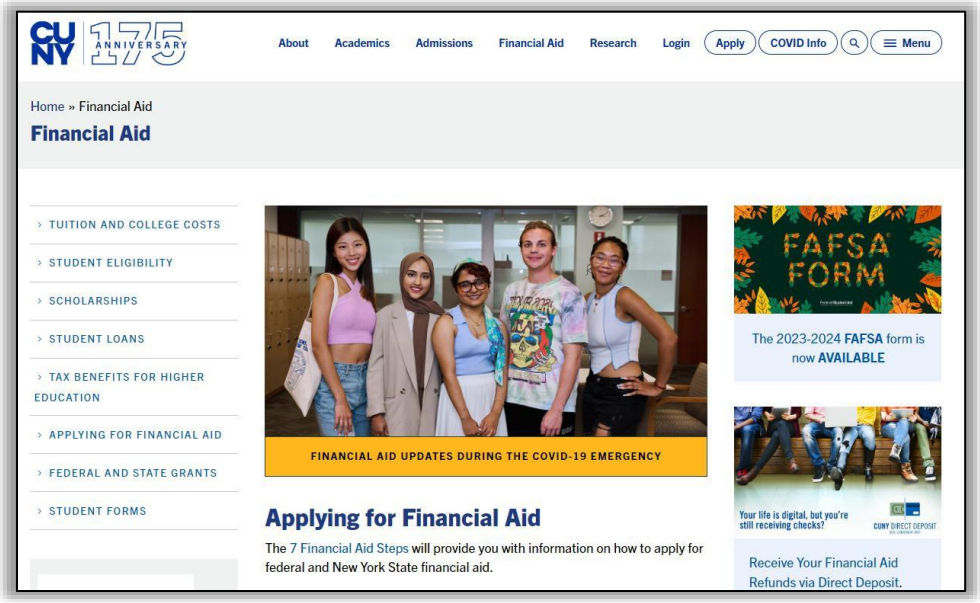
Dept. of the Treasury - IRS
Visit the IRS Web Site at www.irs.gov/efile

YORK College

FOR MORE INFORMATION

For additional questions about your financial aid application or award, please contact a financial aid representative at your college.

Learn more about the opportunities available to finance your college education by visiting CUNY's Financial Aid Website at: **cuny.edu/financialaid**



Never miss an aid refund! Enroll in Direct Deposit: https://www.cuny.edu/financial-aid/tuition-and-college-costs/refunds/direct-deposit/

YORK College