STUDENT FINANCIAL AID GUIDE
Learn how to access, view, and manage your financial aid on CUNYfirst:

<table>
<thead>
<tr>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>View your “Tasks &amp; Holds” &amp; Complete the Supplement Form</td>
</tr>
<tr>
<td>View Your Financial Aid Awards &amp; Disbursements</td>
</tr>
<tr>
<td>Complete a Direct Loan Processing Form</td>
</tr>
<tr>
<td>Accept, Decline, Or Reduce Your Offered Federal Work-Study Or Offered Federal Direct Loans</td>
</tr>
<tr>
<td>View Your Balance, Pending Financial Aid &amp; Your Refunds</td>
</tr>
<tr>
<td>View Your Form 1098-T</td>
</tr>
<tr>
<td>View Your Federal Work-Study Paycheck and W-2 Form</td>
</tr>
</tbody>
</table>
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.
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.
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](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.
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.

STEPP# 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

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.

Click here to choose your college of enrollment and financial aid year

This option will only show when your aid has been packaged at the college for the indicated academic year.
**STEP# 5:** On the right side of the page, you will be able to view your aid package for the entire academic year.

You can click on the filter icon to choose whether to view aid by type (i.e. grant or loan etc.). You can also search by the status of the award (accepted, offered etc.).

<table>
<thead>
<tr>
<th>Award Description/Category</th>
<th>Award Status</th>
<th>Net Award</th>
<th>Disbursed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal PELL Grant Fall</td>
<td>Accepted</td>
<td>1,172.50</td>
<td>1,172.50</td>
</tr>
<tr>
<td>Federal PELL Grant Spring</td>
<td>Accepted</td>
<td>1,172.50</td>
<td>0.00</td>
</tr>
<tr>
<td>ASAP Scholarship Spring</td>
<td>Accepted</td>
<td>1,436.50</td>
<td>0.00</td>
</tr>
<tr>
<td>ASAP Scholarship Fall</td>
<td>Accepted</td>
<td>1,435.95</td>
<td>1,435.95</td>
</tr>
<tr>
<td>ASAP Books Fall</td>
<td>Accepted</td>
<td>365.00</td>
<td>365.00</td>
</tr>
<tr>
<td>Outside Scholarship 1</td>
<td>Accepted</td>
<td>2,608.45</td>
<td>2,608.45</td>
</tr>
<tr>
<td>Federal SEOG Fall</td>
<td>Accepted</td>
<td>500.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Federal SEOG Spring</td>
<td>Accepted</td>
<td>400.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Use the dropdown menu to view information by term or 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.

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.
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](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.
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.

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](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.
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](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
**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.

Choose the term you wish to view then click the **go button** to view.
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:

![Student Center](https://example.com/student_center.png)

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

![Financial Account](https://example.com/financial_account.png)

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

![View 1098-T](https://example.com/view_1098t.png)

**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.
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](https://home.cunyfirst.cuny.edu).

STEP# 2: Click on the Student Center tile:

![Student Center tile](image)

STEP# 3: Click on the Payroll tile:

![Payroll tile](image)

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:

![W-2/W-2C Consent](image)

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

![W-2/W-2C Forms tile](image)
**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.
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/

http://www2.cuny.edu/financial-aid/information-resources/financial-aid-office