GUIDE TO ENHANCED FINANCIAL AID SELF-SERVICE INFORMATION IN CUNYfirst

The CUNYfirst Student Center provides an easy way to access, view, and manage your financial aid information over the Internet. This booklet provides information on the new features in Self-Service:

- Claiming Your CUNYfirst Account
- Viewing Your Financial Aid “To Do” List
- Viewing Your Financial Aid Awards
- Accepting or Declining Your Federal Work-Study or Federal Perkins Loan
- Viewing Your Pending Aid and Past Payments
- Adding Your Bank Account and Enrolling in Direct Deposit

For More Information

Learn more about the opportunities available to finance your college education by visiting Hunter College’s Office of Financial Aid Website at http://www.hunter.cuny.edu/finaid.

<table>
<thead>
<tr>
<th>Office of Financial Aid</th>
<th>Room N-241</th>
<th>212-772-4820</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Aid Processing</td>
<td>Room N-238</td>
<td>212-772-5017</td>
</tr>
<tr>
<td>Admissions’ Office</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Undergraduate</td>
<td>Room N-203</td>
<td>212-396-6047</td>
</tr>
<tr>
<td>Graduate</td>
<td>Room N-223</td>
<td>212-396-6049</td>
</tr>
<tr>
<td>Bursar’s Office</td>
<td>Room N-238</td>
<td>212-772-4400</td>
</tr>
<tr>
<td>Registrar’s Office</td>
<td>Room N-217</td>
<td>212-772-4474</td>
</tr>
</tbody>
</table>
To view your financial aid payments and pending financial aid in your Student Self-Service, you must first claim your CUNYfirst Account.

**NOTE:** If you have already claimed your CUNYfirst account, it is not necessary to do the account process again. You can go to page 3 for Viewing Your Financial Aid “To Do” List.

To claim your CUNYfirst Account:

1. Go to: [https://home.cunyfirst.cuny.edu](https://home.cunyfirst.cuny.edu) and click "First time users".
2. Enter the required information and click OK.
3. Select your Challenge Questions and Answers – you need to select five of the questions.
4. Choose Your Password – you must then confirm your choice of password by reentering it.

**Password Requirements:** at least 8 characters long, at least 1 uppercase letter AND at least one numeric OR one special character. Your password will expire every 90 days so you will need to create a new password at that time.

5. Your CUNYfirst account is now activated. You will get a confirmation page which you may print for your records.

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

**VIEWING YOUR FINANCIAL AID “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](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 details link to see more information.

**STEP# 4:** Review the current outstanding items with your financial aid applications. You may find it helpful to sort and filter by institution to ensure you are viewing items related to your college.

**NOTE:** If you will be attending Hunter College, you are only required to resolve the items listed for Hunter College. Any unresolved items listed for other CUNY Colleges will not prevent you from finalizing your Financial Aid or conducting other business at Hunter College.

**STEP# 7:** On the **Enroll in Direct Deposit** panel, select the Account Nickname to designate as the direct deposit account and click **Next**.

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**Account Inquiry** | **Electronic Payments/Purchases** | **Account Services**
---|---|---
**direct deposit** |  | **bank accounts**

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**Manage My Accounts**

**Result**

You have successfully added the account Test Account.

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**Financial Institution Details**

<table>
<thead>
<tr>
<th>Nickname</th>
<th>Test Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Type</td>
<td>Checking</td>
</tr>
<tr>
<td>Routing Number</td>
<td>011000138</td>
</tr>
<tr>
<td>Account Number</td>
<td>XXXX06789</td>
</tr>
<tr>
<td>Account Holder</td>
<td>Test T. Account</td>
</tr>
</tbody>
</table>

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**Enroll in Direct Deposit**

**Add Direct Deposit**

Select a financial institution to designate as direct deposit:

**Direct Deposit Distribution**

**Account Nickname**

Test account-6789

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**To Do List**

<table>
<thead>
<tr>
<th>Item</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>03/18/2014</td>
<td>Initiated</td>
<td>Hunter College</td>
<td>Financial Aid</td>
</tr>
<tr>
<td>2013 Std Fed Tax Trns</td>
<td>03/18/2014</td>
<td>Initiated</td>
<td>Hunter College</td>
<td>Financial Aid</td>
</tr>
<tr>
<td>2014 V1 Dep Verification Wrk</td>
<td>03/18/2014</td>
<td>Initiated</td>
<td>Hunter College</td>
<td>Financial Aid</td>
</tr>
<tr>
<td>CUNY Supplement Form</td>
<td>03/19/2014</td>
<td>Initiated</td>
<td>Hunter College</td>
<td>Financial Aid</td>
</tr>
</tbody>
</table>
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.

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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### ENROLLING IN DIRECT DEPOSIT IN CUNYfirst SELF-SERVICE

The following steps provide instructions on adding a Bank Account on Self-Service and enrolling 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.
STEP# 5: Under the Account Inquiry tab, you will be able to view your pending financial aid by clicking the “pending aid” sub-tab.

<table>
<thead>
<tr>
<th>Award</th>
<th>Term</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>CD Fees</td>
<td>Fall</td>
<td>65.85</td>
</tr>
<tr>
<td>Federal SEOG</td>
<td>Fall</td>
<td>200.00</td>
</tr>
<tr>
<td>Federal Pell Grant</td>
<td>Fall</td>
<td>2,250.00</td>
</tr>
<tr>
<td>Federal SEOG</td>
<td>Spring</td>
<td>200.00</td>
</tr>
<tr>
<td>Federal Pell Grant</td>
<td>Spring</td>
<td>312.50</td>
</tr>
<tr>
<td>Total Pending Financial Aid for this view</td>
<td>2,344.85</td>
<td></td>
</tr>
</tbody>
</table>

IMPORTANT NOTE: Your financial aid awards will NOT appear on your Account Summary page for at least 1 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 not appear until the next business day. If you have pending financial aid that covers your tuition and fee charges in full, you are not required to make a payment to the Bursar.

STEP# 6: Once your financial aid has been disbursed, you will see your payment history under the “payments” sub-tab.

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.

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**VIEWING YOUR PENDING AID AND PAST PAYMENTS**

The following steps provide instructions on how to view your pending financial aid and past financial aid payments 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# 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.

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.

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.

**NOTE:** To view your actual disbursements, access Account Inquiry from the link at the bottom of the screen.

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**ACCEPTING OR DECLINING YOUR FEDERAL WORK-STUDY AND FEDERAL 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](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.