



## Office of Financial Aid Services

### 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**



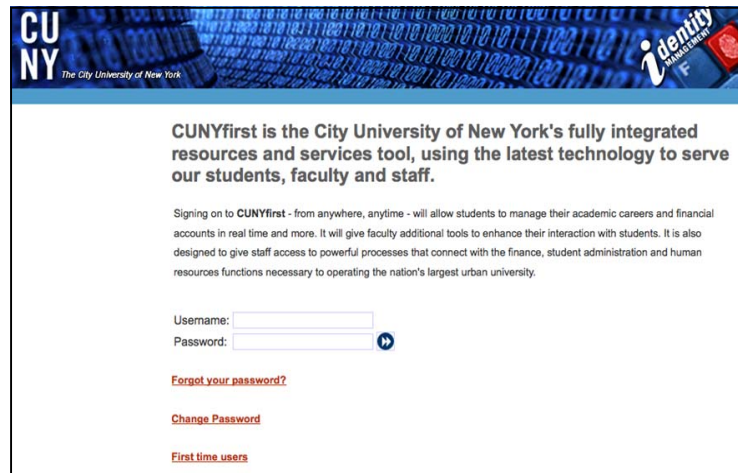
**ADDING YOUR BANK ACCOUNT AND  
ENROLLING IN DIRECT DEPOSIT**

## CLAIMING YOUR CUNYfirst ACCOUNT

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:




**CUNY** The City University of New York

**iidentity** MANAGEMENT

**CUNYfirst is the City University of New York's fully integrated resources and services tool, using the latest technology to serve our students, faculty and staff.**

Signing on to **CUNYfirst** - from anywhere, anytime - will allow students to manage their academic careers and financial accounts in real time and more. It will give faculty additional tools to enhance their interaction with students. It is also designed to give staff access to powerful processes that connect with the finance, student administration and human resources functions necessary to operating the nation's largest urban university.

Username:

Password:  

[Forgot your password?](#)

[Change Password](#)

[First time users](#)

1. Go to: <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.



## 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>.

**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 QC, you are only required to resolve the items listed for QC. Any unresolved items listed for other CUNY Colleges will not prevent you from finalizing your Financial Aid or conducting other business at QC.

Your current To Do items are shown below. To sort or filter your To Do items, change the options below and click Go

View your To Do Items by

Due Date

Institution

Function

To Do Item	Due Date	Status	Institution	Administrative Function
<a href="#">About Pathways.</a> <a href="#">Find out more</a>	09/10/2013	Initiated	Queens College	General
<a href="#">CUNY Supplement Form</a>	12/17/2013	Initiated	Queens College	Financial Aid

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.

Item List				
To Do Item	Due Date	Status	Institution	Administrative Function
<a href="#">About Pathways. Find out more</a>	09/10/2013	Initiated	Queens College	General
<a href="#">CUNY Supplement Form</a>	12/17/2013	Initiated	Queens College	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.

**To Do List**

**To Do Item Detail**

Edison Vera

**CUNY Supplement Form**

<b>Aid Year:</b>	2014
<b>Academic Institution:</b>	Queens College
<b>Administrative Function:</b>	Financial Aid
<b>Due Date:</b>	12/17/2013
<b>Contact:</b>	Queens College
<b>Department:</b>	Financial Aid Office
<b>Phone:</b>	718/997-5123
	<a href="#">Student Services Center Page</a>

**Description**

Please complete the CUNY Financial Aid Supplement Form available on the Student Service Center to be considered for Work-Study, Perkins Loan, or APTS (Aid for Part-Time Study).

[Return](#)



## VIEWING YOUR FINANCIAL AID AWARDS

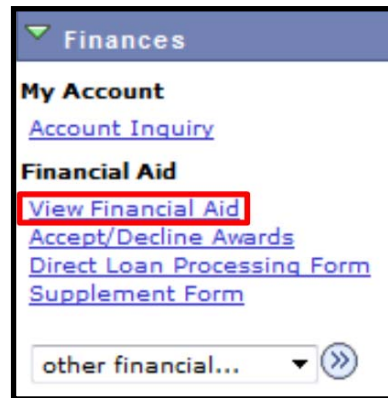
Your Student Center provides information about your financial aid awards. These are listed for the entire academic year and also broken down by term.

**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.

### Financial Aid

#### Select Aid Year to View

Click the aid year you wish to view

Aid Year	Institution	Aid Year Description
<a href="#">2014</a>	Queens College	Federal Aid Year 2013-2014

**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.

## Financial Aid

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### Award Summary

#### Federal Aid Year 2013-2014

Select the term hyperlinks below to see more detailed information.

**Aid Year**

Award Description	Category	Offered	Accepted
Federal PELL Grant Fall	Grant	2,822.50	2,822.50
Federal PELL Grant Spring	Grant	2,822.50	2,822.50
Federal SEOG Spring	Grant	175.00	175.00
Federal SEOG Fall	Grant	175.00	175.00
Federal Work Study Spring	Work/Study	900.00	900.00
Federal Work Study Fall	Work/Study	900.00	900.00
Initial TAP-Fall	Grant	2,050.00	2,050.00
<b>Aid Year Totals</b>		<b>9,845.00</b>	<b>9,845.00</b>

Currency used is US Dollar.

[Full-Yr Financial Aid Summary](#)
ACCEPT/DECLINE AWARDS

[Loan Counseling](#)

**Terms**

**2014 Spring Term** [View Scheduled Disbursement Dates](#)

Award Description	Category	Offered	Accepted
Federal PELL Grant Spring	Grant	2,822.50	2,822.50
Federal SEOG Spring	Grant	175.00	175.00
Federal Work Study Spring	Work/Study	900.00	900.00
<b>Term Totals</b>		<b>3,897.50</b>	<b>3,897.50</b>

**2013 Fall Term** [View Scheduled Disbursement Dates](#)

Award Description	Category	Offered	Accepted
Federal PELL Grant Fall	Grant	2,822.50	2,822.50
Federal SEOG Fall	Grant	175.00	175.00
Federal Work Study Fall	Work/Study	900.00	900.00
Initial TAP-Fall	Grant	2,050.00	2,050.00
<b>Term Totals</b>		<b>5,947.50</b>	<b>5,947.50</b>

Currency used is US Dollar.

**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.

Financial Aid	
Full-Yr Financial Aid Summary	
Federal Aid Year 2013-2014	
The information below is a calculation of your estimated need.	
Estimated Financial Aid Budget	<a href="#">24,434.00</a>
Expected Family Contribution	0.00 -
Estimated Need	24,434.00
Total Aid	9,845.00
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# 8:** Click on the hyperlinked budget amount to see your **Estimated Financial Aid Budget Breakdown** by term.

Financial Aid	
Estimated Financial Aid Budget	
Federal Aid Year 2013-2014	
Listed below is an estimate of items used to determine your costs.	
Estimated Financial Aid Budget Breakdown	
2014 Spring Term	
Category Description	Amount
Books and Supplies	624.00
Activity Fees	44.00
Consolidated Fees	15.00
Technology Fee	100.00
Food (at home)	1,010.00
Housing	5,193.00
Lunch	574.00
Loan Fees	29.00
Medical Expenses	832.00
Personal Expenses	1,186.00
Transportation	510.00
Tuition	2,100.00
<b>Term Total</b>	<b>12,217.00</b>

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

Terms			
<b>2014 Spring Term</b>		<a href="#">View Scheduled Disbursement Dates</a>	
Award Description	Category	Offered	Accepted
Federal PELL Grant Spring	Grant	2,822.50	2,822.50
Federal SEOG Spring	Grant	175.00	175.00
Federal Work Study Spring	Work/Study	900.00	900.00
<b>Term Totals</b>		<b>3,897.50</b>	<b>3,897.50</b>
<b>2013 Fall Term</b>		<a href="#">View Scheduled Disbursement Dates</a>	
Award Description	Category	Offered	Accepted
Federal PELL Grant Fall	Grant	2,822.50	2,822.50
Federal SEOG Fall	Grant	175.00	175.00
Federal Work Study Fall	Work/Study	900.00	900.00
Initial TAP-Fall	Grant	2,050.00	2,050.00
<b>Term Totals</b>		<b>5,947.50</b>	<b>5,947.50</b>

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.

Financial Aid					
Scheduled Disbursements					
Federal Aid Year 2013-2014					
2013 Fall Term					
To view actual disbursements to your financial account, access Account Inquiry.					
Award Description	Category	Accepted Amount	Fee	Net Amount	Scheduled Disb Date
Federal PELL Grant Fall	Grant	1,411.25	0.00	1,411.25	08/19/2013
	Grant	1,411.25	0.00	1,411.25	09/23/2013
Federal SEOG Fall	Grant	175.00	0.00	175.00	09/23/2013
Initial TAP-Fall	Grant	2,050.00	0.00	2,050.00	08/19/2013
<b>Term Totals</b>		<b>5,047.50</b>	<b>0.00</b>	<b>5,047.50</b>	
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.					
<a href="#">Account Inquiry</a>					





## ACCEPTING OR DECLINING YOUR FEDERAL WORK-STUDY AND FEDERAL PERKINS LOAN

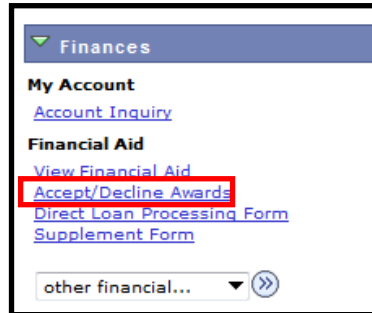
You are required to either accept or decline certain types of financial aid awards, such as Federal Perkins Loan or Federal Work-Study.

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

**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.

### Financial Aid

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#### Select Aid Year to View

Click the aid year you wish to view

Aid Year	Institution	Aid Year Description
<a href="#">2014</a>	Queens College	Federal Aid Year 2013-2014

**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.

Last Updated: 12/11/2013 7:16:27PM      Status: New Package

Award	Category	Career	Offered	Accepted	Accept	Decline
<a href="#">Federal Work Study Spring</a>	Work/Study	Undergraduate	900.00	900.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Federal Work Study Fall</a>	Work/Study	Undergraduate	900.00	900.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Federal PELL Grant Fall</a>	Grant	Undergraduate	2,822.50	2,822.50	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Federal PELL Grant Spring</a>	Grant	Undergraduate	2,822.50	2,822.50	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Initial TAP-Fall</a>	Grant	Undergraduate	2,050.00	2,050.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Federal SEOG Fall</a>	Grant	Undergraduate	175.00	175.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">Federal SEOG Spring</a>	Grant	Undergraduate	175.00	175.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Total</b>			<b>9,845.00</b>	<b>8,045.00</b>		

Currency used is US Dollar.

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.

**Federal Aid Year 2013-2014**

Award: Federal Work Study Fall      Category: Work/Study

Disbursement Date	Description	Award Amount
09/23/2013	2013 Fall Term	900.00

Currency used is US Dollar.

**Message**

- You must be registered for at least six credit hours.
- You must find an eligible part-time job (job listings are available in the financial aid office).
- You must complete all required FWS forms.
- You must be in good academic standing in your college with a 2.0 GPA (C Average) or higher after two years of enrollment.



## 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>.

**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**.

The screenshot shows the 'Finances' section of the CUNYfirst Self-Service portal. Under 'My Account', the 'Account Inquiry' link is highlighted with a red box. A dropdown menu is open, showing options like 'other financial...', 'Account Activity', 'Charges Due', 'Payments', 'Pending Financial Aid', and 'other financial...'. To the right, the 'Account Summary' section displays: 'You owe 250.00.', 'Due Now 250.00', 'Future Due 0.00', and a note: '\*\* You have a past due balance of 250.00. \*\*'. The currency is listed as US Dollar.

The screenshot shows the 'Account Inquiry' page with the 'summary' tab selected (highlighted with a red box). The 'Account Summary' section shows: 'You owe 2,258.55. For the breakdown, access [Charges Due](#)', 'Due Now 138.70', 'Future Due 2,119.85', and a note: '\*\* You have a past due balance of 138.70. \*\*'. Below this is a table titled 'What I Owe'.

Term	Outstanding Charges & Deposits	Pending Payments	Pending Financial Aid	Total Due
2011 Spring Term	10.00			10.00
2011 Fall Term	128.70			128.70
2012 Fall Term	2,119.85		1,519.85	600.00
2013 Spring Term			825.00	
<b>Total</b>	<b>2,258.55</b>		<b>2,344.85</b>	<b>738.70</b>

**STEP# 5:** Under the **Account Inquiry** tab, you will be able to view your pending financial aid by clicking the “**pending aid**” sub-tab.

Pending Financial Aid		
Award	Term	Amount
CD Fees	2012 Fall Term	69.85
Federal SEOG	2012 Fall Term	200.00
Federal Pell Grant	2012 Fall Term	1,250.00
Federal SEOG	2013 Spring Term	200.00
Federal Pell Grant	2013 Spring Term	312.50
Federal Pell Grant	2013 Spring Term	312.50
<b>Total Pending Financial Aid for this view</b>		<b>2,344.85</b>

**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.

Posted Payments		
Date Paid	Payment Type	Paid Amount
03/01/2012	Subsidized Direct Loan	2,239.00
03/01/2012	Unsubsidized Direct Loan	2,985.00
<b>Total Posted Payments for this view</b>		<b>5,224.00</b>



## 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>.

**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**.

Account Inquiry | Electronic Payments/Purchases | Account Services

direct deposit | bank accounts

### My Accounts

**i** You have not created an account profile. Click the Add Account button to add new account details.

**ADD ACCOUNT**

**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.

Enter the account details below and click next to proceed. If your financial institution is not listed, please contact the Bursar's Office. If you would like to learn about the Scholar Support Card program, please visit the [CUNY Scholar Support card site](#).

### Financial Institution Details

Nickname	<input type="text" value="Test Account"/>
Account type	<input type="text" value=""/>
Routing Number	<input type="text" value="011000138"/> BANK OF AMERICA, N.A.
Account Number	<input type="text" value="123456789"/>
Confirm Account Number	<input type="text" value="123456789"/>
Account Holder	<input type="text" value="Test T. Account"/>

[View Sample Check](#)

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

The screenshot shows a web interface with three tabs: 'Account Inquiry', 'Electronic Payments/Purchases', and 'Account Services'. Below the tabs are two sub-tabs: 'direct deposit' and 'bank accounts'. The main heading is 'Manage My Accounts' followed by 'Result'. A green success message box contains a checkmark and the text 'You have successfully added the account Test Account.' Below this is a 'Financial Institution Details' section with the following information:

<b>Nickname</b>	Test Account	
<b>Account Type</b>	Checking	
<b>Routing Number</b>	011000138	BANK OF AMERICA, N.A.
<b>Account Number</b>	XXXXX6789	
<b>Account Holder</b>	Test T. Account	

At the bottom, there are two buttons: 'ENROLL IN DIRECT DEPOSIT' (highlighted with a red box) and 'MANAGE MY ACCOUNTS'.

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

The screenshot shows the 'Enroll in Direct Deposit' page. At the top, there are two tabs: 'direct deposit' and 'bank accounts'. The main heading is 'Enroll in Direct Deposit' followed by 'Add Direct Deposit'. Below this is the instruction 'Select a financial institution to designate as direct deposit'. A 'Direct Deposit Distribution' section contains a dropdown menu for 'Account Nickname' with 'test account-6789' selected (highlighted with a red box). A 'Help' link is visible below the dropdown. At the bottom, there are two buttons: 'CANCEL' and 'NEXT' (highlighted with a red box).

**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.

### Enroll in Direct Deposit Agreement

Review the financial institution information and agreement. Click Submit to complete the Direct Deposit enrollment.

Financial Institution Name	Distribution Type	Amt./Pct.	Priority
test account-6789	Balance		

Currency used is US Dollar

You are about to enroll in Direct Deposit for your refund and/or Work Study checks. Signing up for direct deposit will allow excess from financial aid refunds, Work Study and over payments applied to your student account to be deposited directly into your checking, savings or Scholar Support Card account. You will receive your funds faster through this process instead of a check mailed to you. If you would like information about CUNY's Scholar Support Card program, click the Additional Details link below.

I hereby authorize in accordance with the rules and regulations of the National Automated Clearinghouse Association ("NACHA") my institution to credit any reimbursements and Work Study payments due to me via automated clearinghouse electronic fund transfer ("ACH") to the account(s) referenced above.

You may change your account information as necessary through self-service. Payments made through this process will be available in your account depending on timing of this submission. We recommend that you print this page to retain a copy of this agreement for your records.


The agreement is dated: 12/12/2011

Yes, I agree to the terms and conditions of this agreement.

[CANCEL](#) [BACK](#) [SUBMIT](#)

**STEP# 9:** The process to Enroll in Direct Deposit is complete!

### Enroll in Direct Deposit Result

 **Congratulations! You are now enrolled in direct deposit.**  
View the summary below.

Account Nickname
test account-6789

[MANAGE MY ACCOUNTS](#)

## For More Information

Learn more about the opportunities available to finance your college education by visiting QC's Office of Financial Aid Website at <http://www.qc.cuny.edu/fao>.

Do you have a question about your financial aid application or award status?

E-mail us at: [qc.finaid@qc.cuny.edu](mailto:qc.finaid@qc.cuny.edu) and we will respond promptly to your inquiry (usually by the next business day).

### College Contact Information

Office of Financial Aid	Room 202 Jefferson Hall	718-997-5102
Admission's Office	Room 1st floor Jefferson Hall	718-997-5600
Bursar's Office	Room 200 Jefferson Hall	718-997-4500
Registrar's Office	Room 1st floor Jefferson Hall	718-997-4400
One Stop Service Center	Room 128 Dining Hall	718-997-4141
Honors & Scholarships Office	Room 16 Honors Hall	718-997-5502