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:

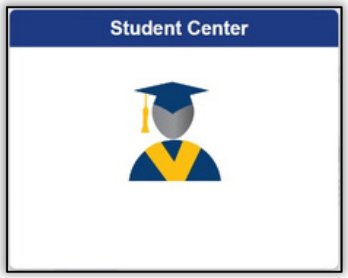
☑	**VIEW YOUR "TASKS & HOLDS"**
☑	**VIEW YOUR FINANCIAL AID AWARDS & DISBURSEMENTS**
☑	**COMPLETE A DIRECT LOAN PROCESSING FORM**
☑	**ACCEPT, DECLINE, OR REDUCE YOUR OFFERED FEDERAL WORK-STUDY OR OFFERED FEDERAL DIRECT LOANS**
☑	**VIEW YOUR BALANCE, PENDING FINANCIAL AID & YOUR REFUNDS**
☑	**VIEW YOUR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

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**.

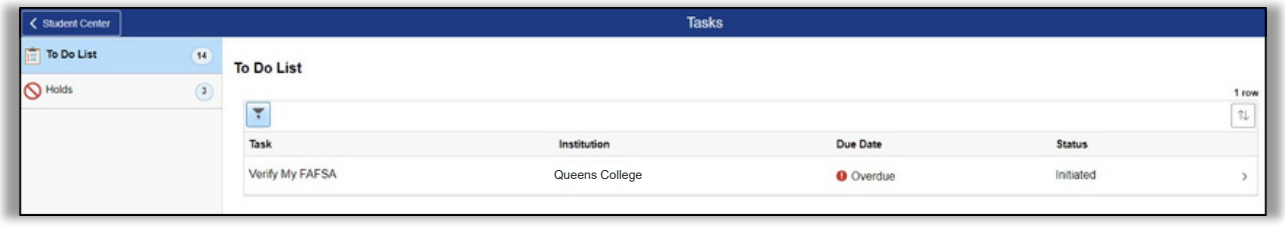
STEP# 2: Select **Student Center**

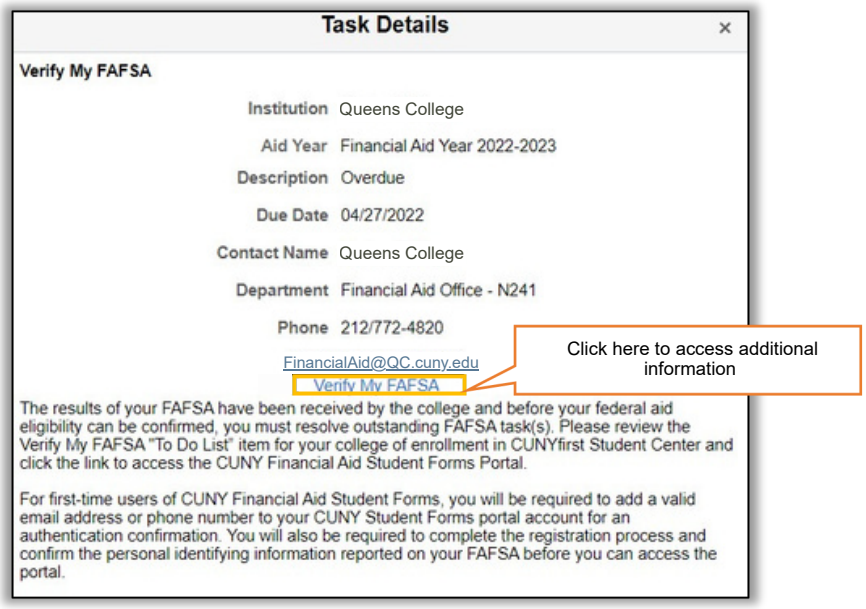


STEP# 3: Then select the **Task and Holds** tile.

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.

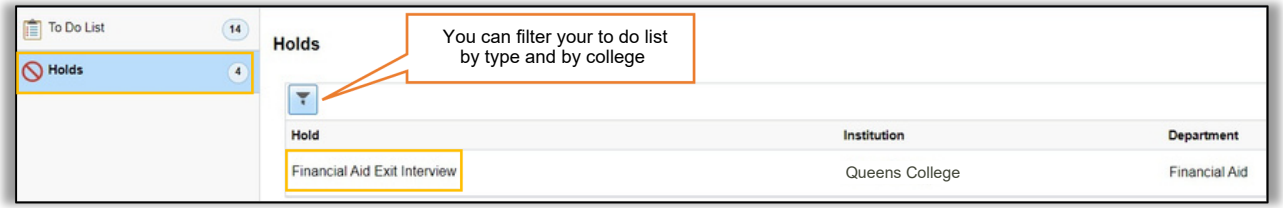
Note: You must resolve each **To Do Item** on your Item List for your college of enrollment. Failure to resolve the actionable items will delay final processing and awarding of your financial aid.





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.

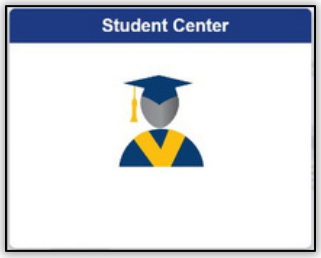


VIEW YOUR FINANCIAL AID AWARDS & DISBURSEMENTS

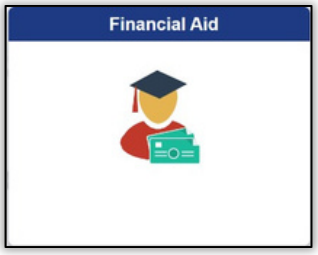
Your Student Center provides information about your financial aid package. Financial Aid offers are posted for the entire academic year by term.

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

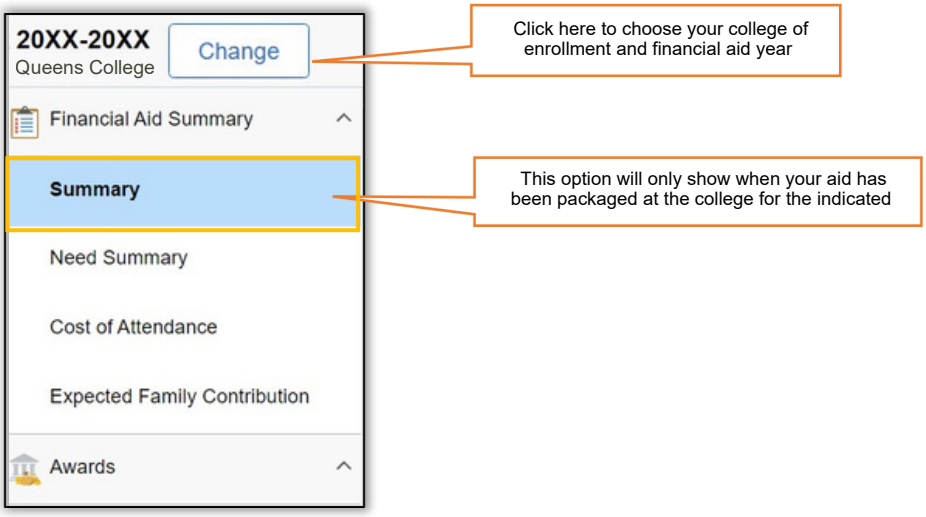
STEP# 2: Select the **Student Center** tile



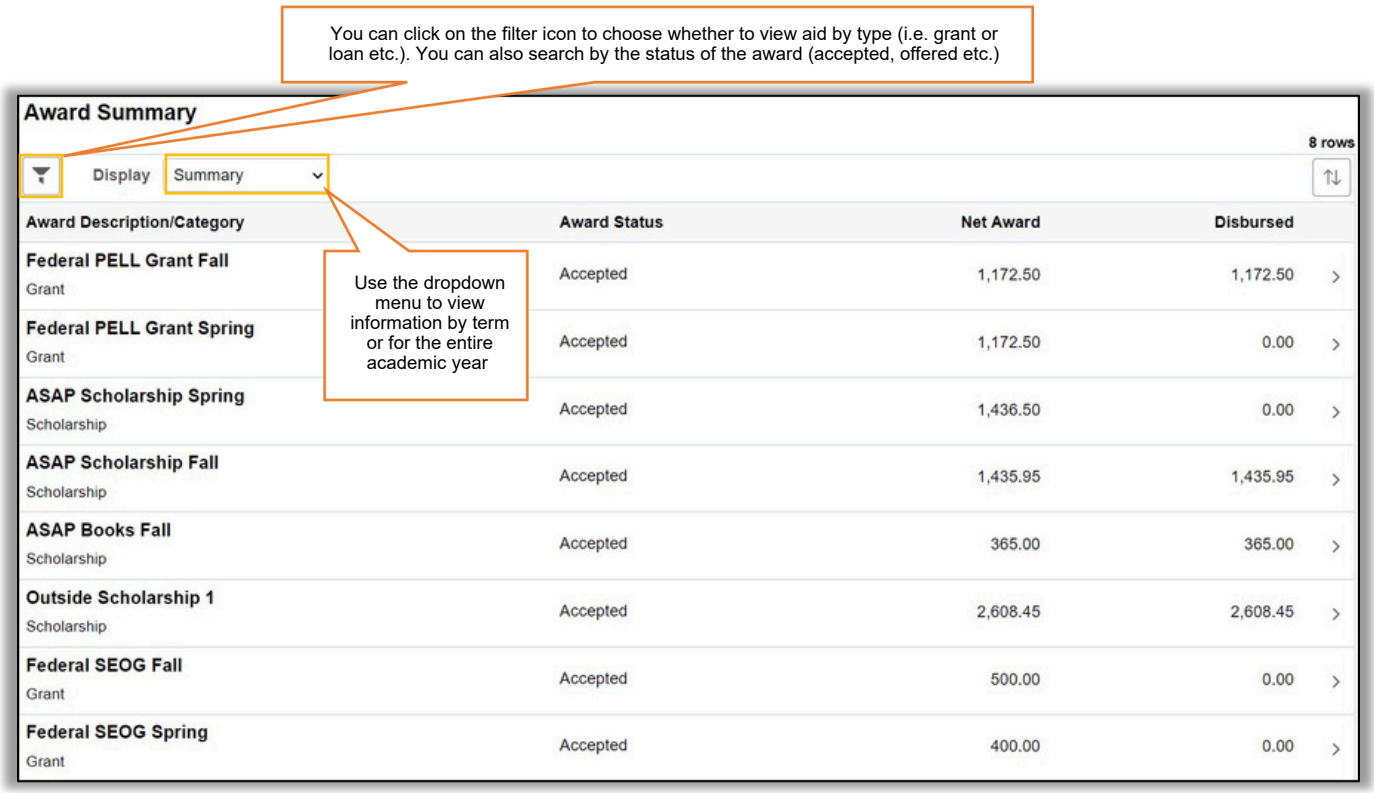
STEP# 3: Select the **Financial Aid** tile



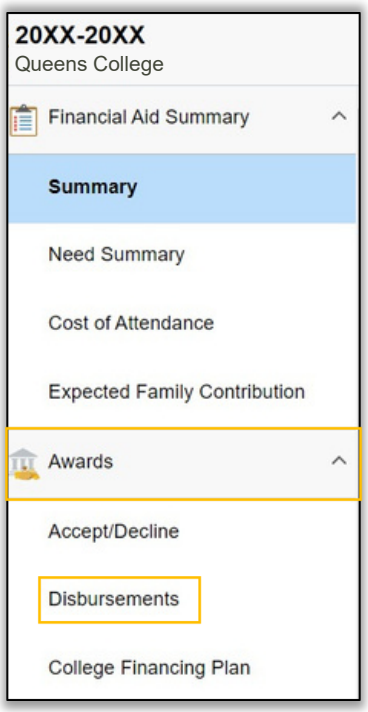
STEP# 4: Select **Summary** on the left sidebar of the page, you may see listings for multiple aid years and multiple colleges. Note the award **Summary** option will only display if you have an aid package at that college. If the **Summary** is not present, then your aid has not yet been packaged.



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

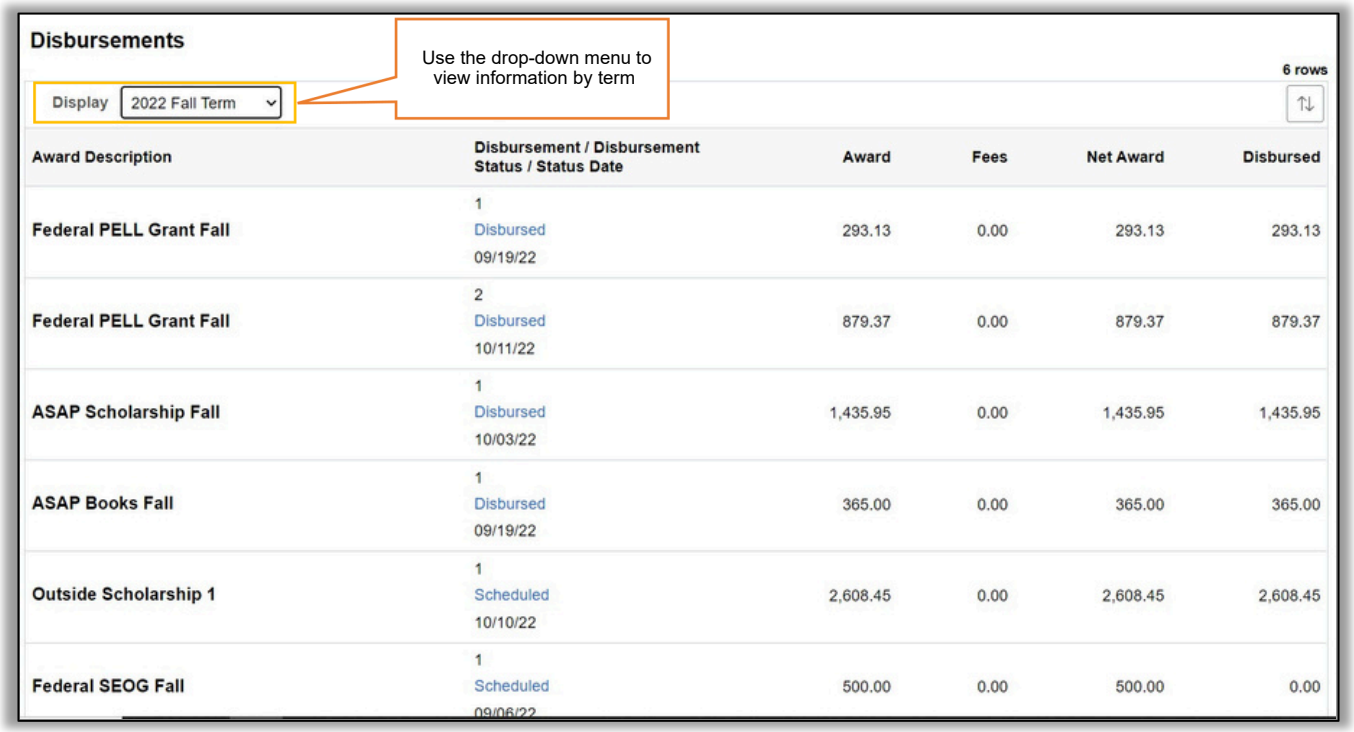


STEP# 6: Click the “Awards” section of the left sidebar to open the sub menu and then click on **Disbursements** to view Disbursement information.



The **Disbursements** page, under the **Disbursements/DisbursementStatus/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.

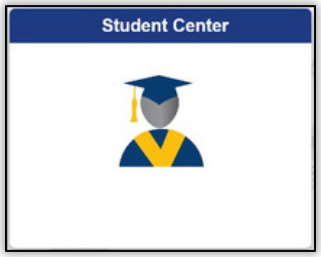
COMPLETE THE DIRECT LOAN PROCESSING FORM

Ifyou 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.

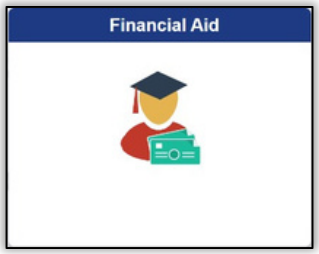
Note: You must complete the FAFSA and resolve your To Do list items before you can submit a loan request.

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

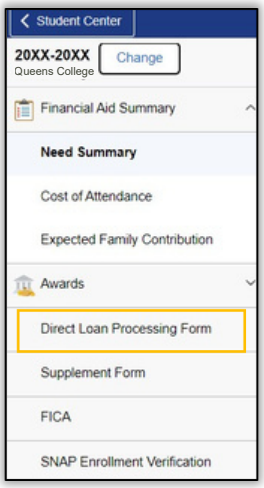
STEP# 2: **Student Center** Tile



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

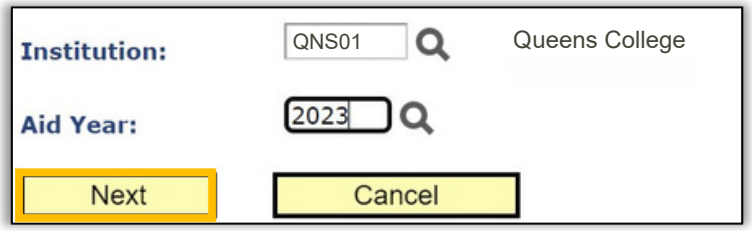


STEP# 4: Click the **Direct Loan Processing Form** link from the left sidebar.



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.

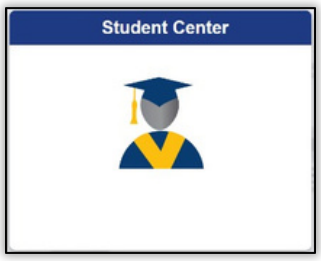


STEP# 7: Follow the on-screen prompts and completeand submit the form.

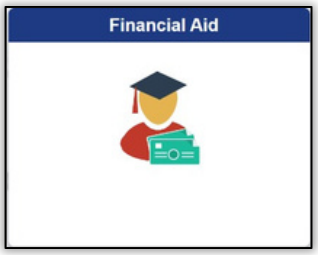
ACCEPT, REDUCE, OR DECLINE YOUR OFFERED FEDERAL WORK-STUDY OR OFFERED FEDERAL DIRECT LOANS

STEP# 1: LogintoCUNYfirst at **https://home.cunyfirst.cuny.edu.**

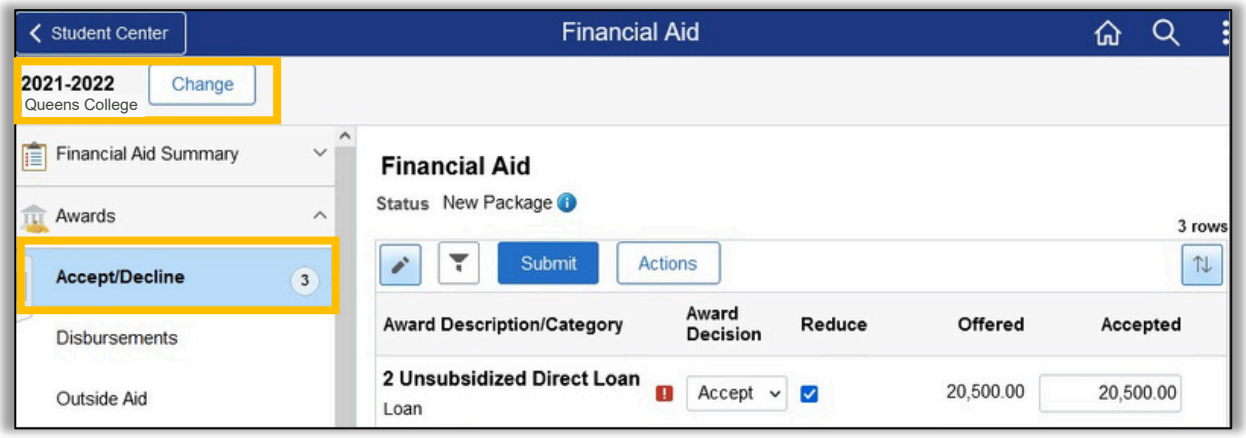
STEP# 2: **Student Center** Tile



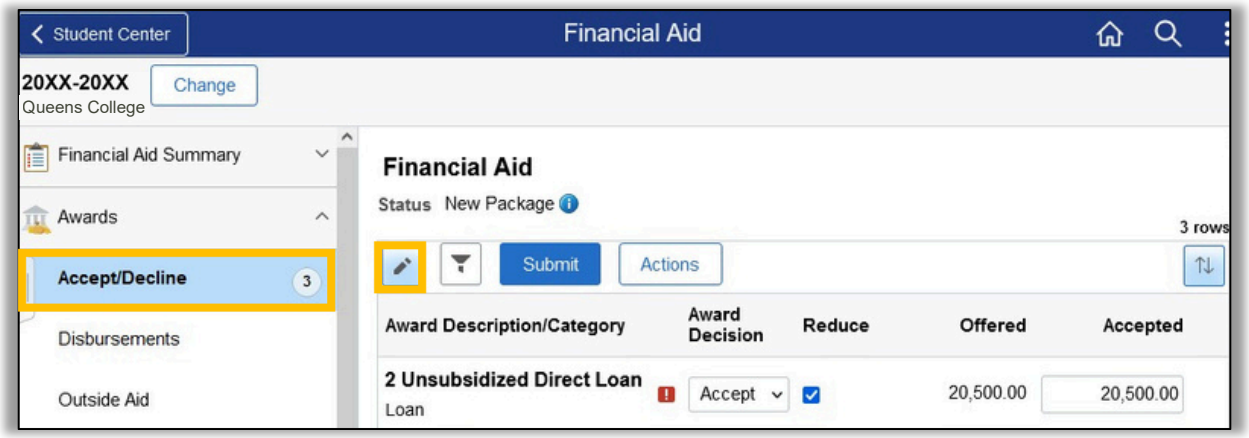
STEP# 3: Click on the **Financial Aid** Tile



STEP# 4: Confirm the financial aid yearthatyou wish to review at the top left section of the page. Students will only have the option to accept and declinedirect loan and federal work-study offers. All grant aid and scholarships are automatically packaged as offeredandaccepted and do not require action on this page.
STEP# 5: Navigate to **Awards** on theleftsidebar to open the dropdown menu, click on **Accept/Decline**



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



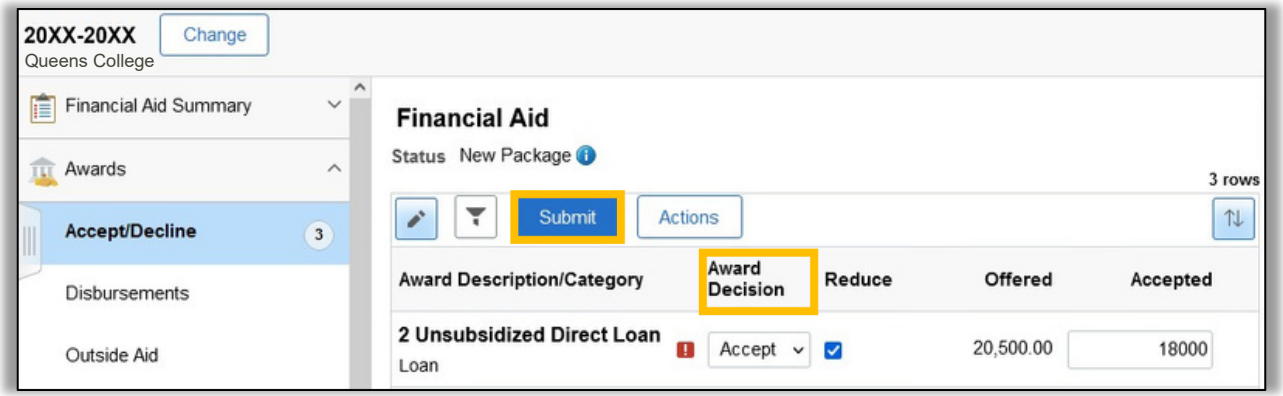
STEP# 7: Click on the dropdown option under the **Award Decision** column.

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.

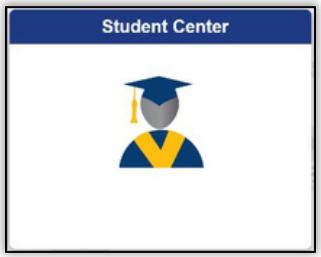
VIEW YOUR BALANCE, PENDING FINANCIAL AID & REFUNDS

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

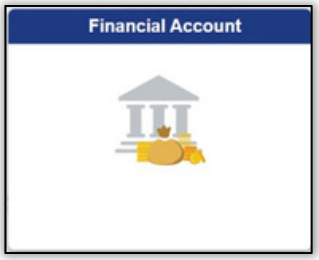
Note: Financialaidthat is "**pending**" means that you have been awarded the aid, and it is being used as a credit towardsyourtuition bill but has not yet been disbursed.

STEP# 1: LogintoCUNYfirst at **https://home.cunyfirst.cuny.edu**.

STEP# 2: Selectthe**Student Center** tile.

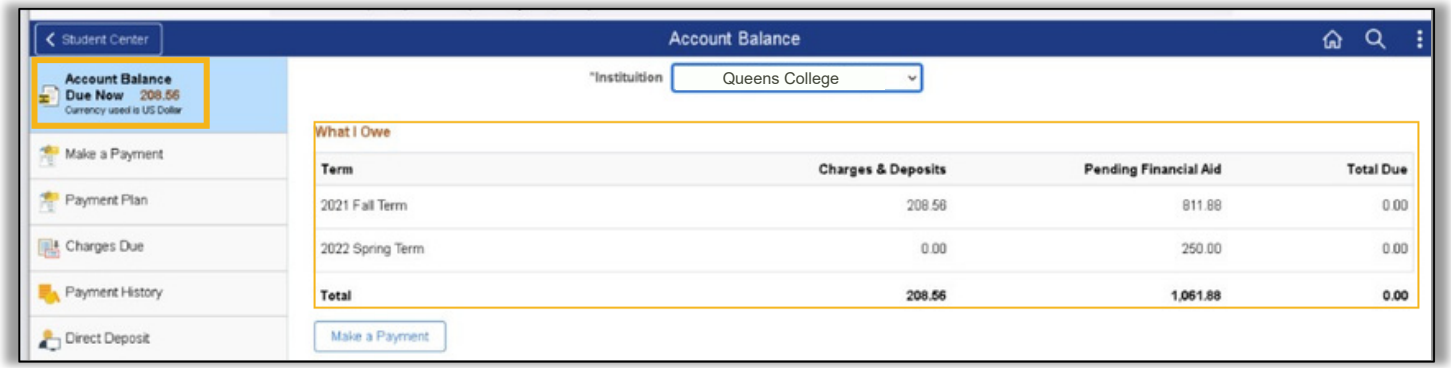


STEP# 3: Select the **Financial Account** tile**.**



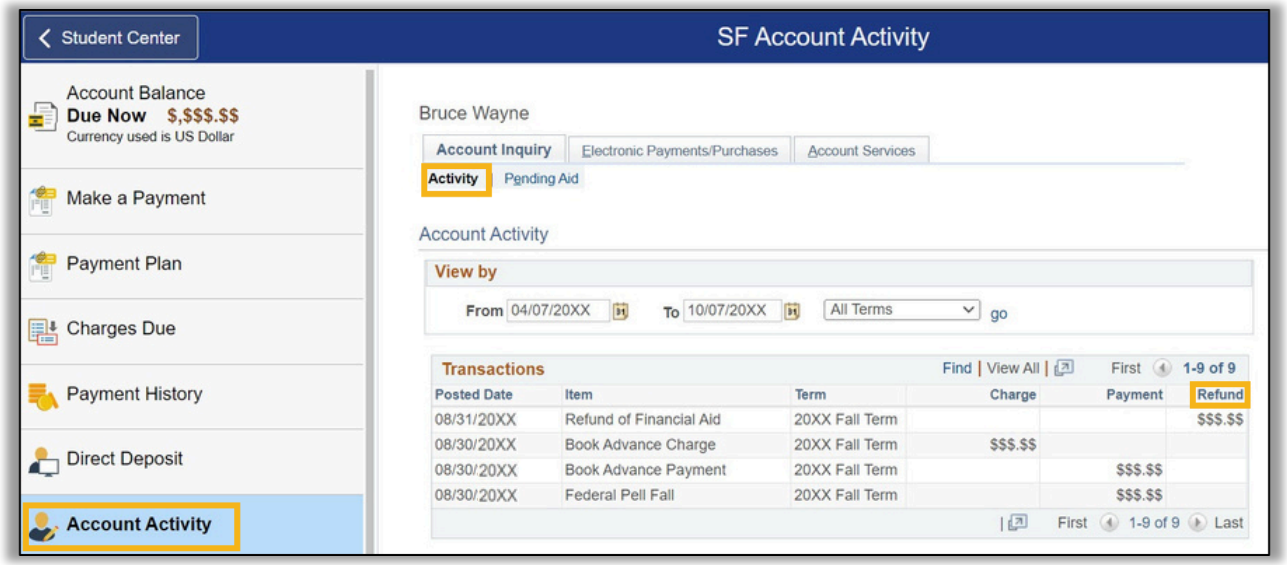
STEP# 4: Select the **Account Balance** option from the left sidebar to view your current balance by term. You can see:

- 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

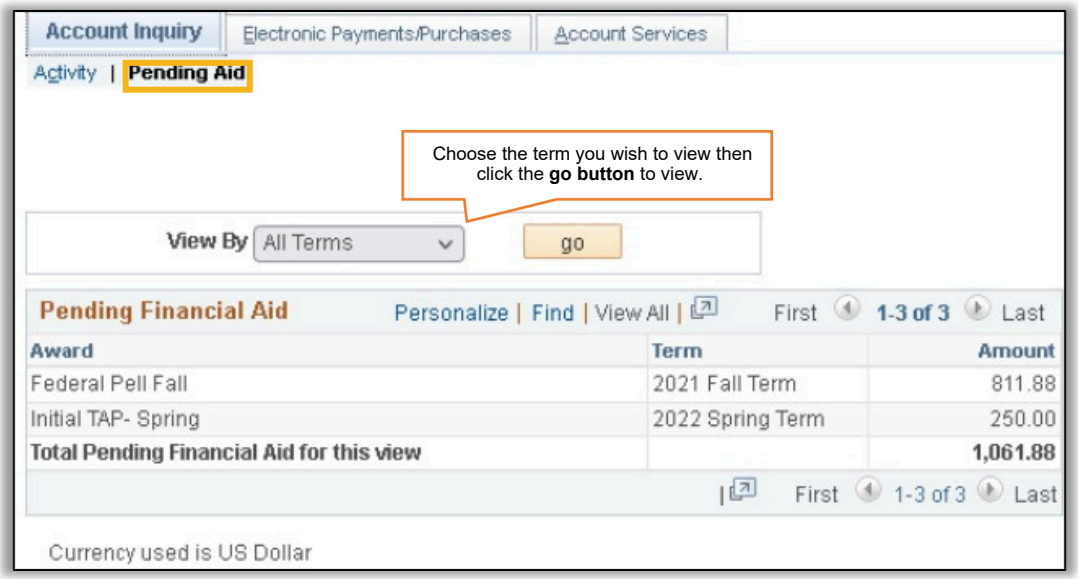


STEP# 5: Select the **Account Activity** option from the left sidebar and the **Activity Link** at the top of the page to see whether aid has been applied already or to see any payments you may have made.

Youcan 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.



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 access incentives, IRS Publication 970, Tax Benefits for Higher Education, visit www.cuny.edu/1098tfaq.

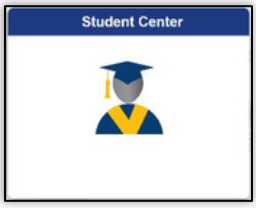
Note: A Form 1098-T statement will not be issued to you if you received federal grants, scholarships or third-party payments that met or exceeded your total tuition charges for the entire calendar year.

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.

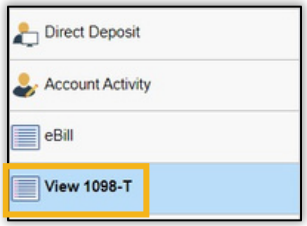
STEP# 1: Login to CUNYfirst at **https://home.cunyfirst.cuny.edu**.

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

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.

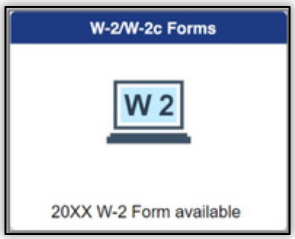
STEP# 1: Login to CUNYfirst at **https://home.cunyfirst.cuny.edu**.

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

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

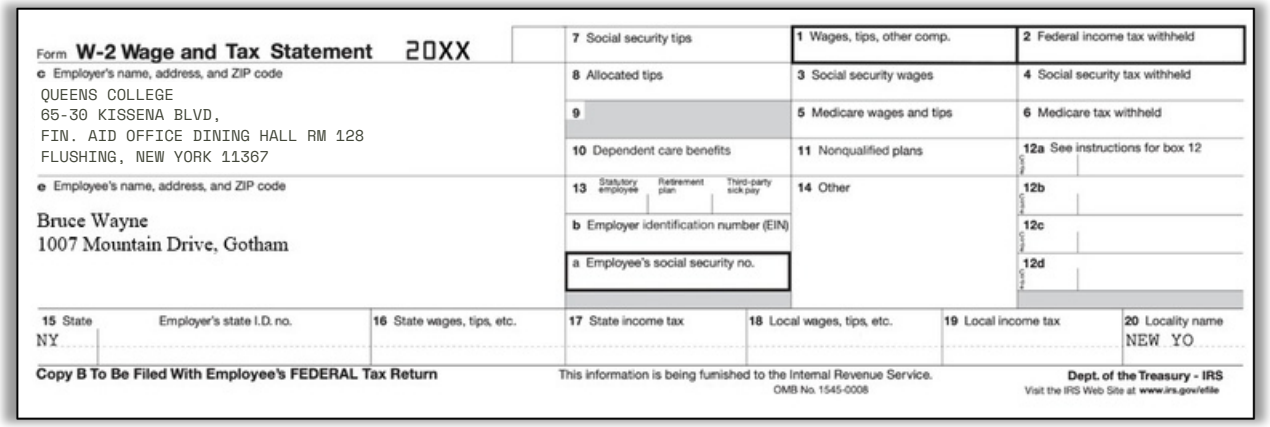
STEP# 4: You will have an option to consent to receiving your W-2 or W-2C electronically by checkingthe off the "*I consent…*" box:

You can view your W-2 / W-2C byclickingontheW-2/W-2C Forms Tile:



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

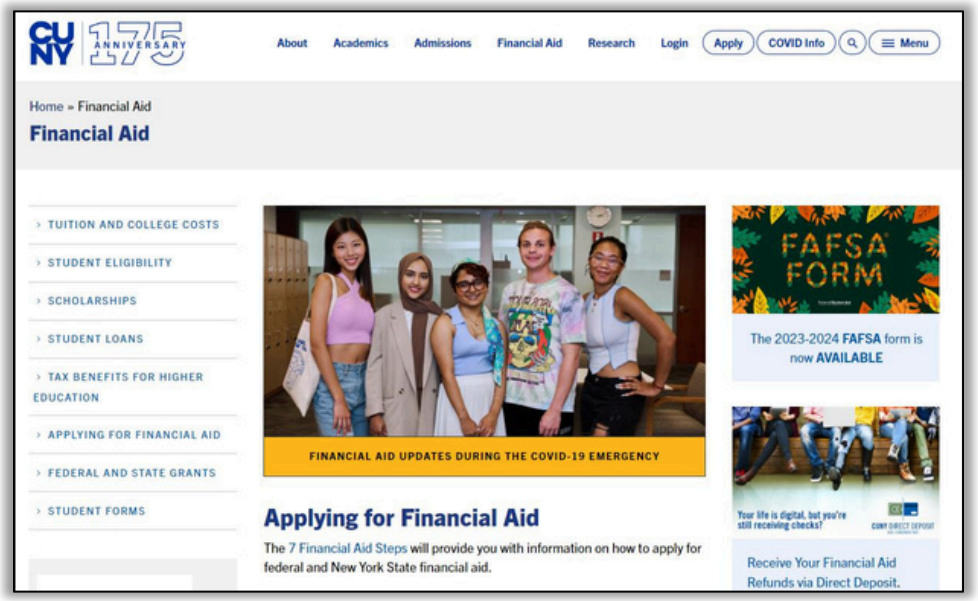
Select: **View Form** to access your W-2/ W-2C



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 Queens College's Financial Aid Website at: https://www.qc.cuny.edu/faid/



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