Hostos Community College
Office of Financial Aid

FILING YOUR 2013-14 FINANCIAL AID APPLICATION

This literature covers several topics you should review before you apply for financial aid for the Fall 2013 & Spring 2014 semesters including:

✓ **Information needed to apply for Financial Aid**

✓ **Instructions on Filing Your FAFSA online application**

✓ **Filing Your TAP online application**

✓ **What Is Verification & How Does It Affect You?**

✓ **How To Request a Free IRS Tax Return Transcript**

✓ **How to view your awards online**

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✓ **Collect the needed information to apply**

File 2012 Income Tax Returns
- You & your spouse (if married) or parents (if dependent) should file 2012 tax returns electronically, if possible
- Wait 2-3 weeks, then proceed with the FAFSA filing process outlined below
- If you are not required to file income taxes, you may skip this step

Collect these items and documents for you and your spouse (if married) and your parents (if under Financial Aid regulations you are considered a dependent student)
- Your social security numbers
- Dates of birth
- Dates of marital status
- Your alien registration/permanent resident number (if you are not a U.S. citizen)
- 2012 tax returns to use for reference when using IRS Data Retrieval option
- W-2 forms
- 2012 New State (IT-201) tax forms for NY state tax filers
- Recent bank, stock, real estate & business amounts (if applicable)

Get Federal PINs for you & one of your parents (if dependent)

- Request Federal PINs at: **http://www.pin.ed.gov**

- If you and a parent already have PINs, use them to sign your application — you can use the same PIN every year

File your FAFSA on the Web http://www.fafsa.gov

- The FAFSA is used to apply for Federal Pell Grant, SEOG, Work-Study and Student Loans

- Select "Start A New FAFSA" if it will be the first time you apply for a FAFSA application. Select "Login" if you have previously applied for a FAFSA application.

- When prompted, create a password. The password you create on this page will be the password you use if you do not submit your FAFSA application and want to continue from where you last stopped. Returning users will also be asked to enter their PIN#.

If you do not know your PIN# you may request a duplicate PIN# by clicking on the link titled "I forgot my PIN", or by following the instructions on how to retrieve a PIN#.

You will also use a PIN# to transfer IRS tax information to your application and to electronically sign the your FAFSA. A PIN# will be needed for the person who's tax information will be used and who's signature is required.

- Make sure you enter the correct information on the following pages including:
  - Name as it appears on their Social Security card,
  - Address including the apartment #
  - The correct and active e-mail account

Entering the School Code

- On the School Selection page, you do not need to enter the name and location of the school that you want to receive your FAFSA information if you know the school code. Towards the right of the page, you may enter in the "Federal School Code" box the school of your choice and click on "SEARCH".
  Hostos CC's Federal School Code: **008611**
  After entering a school code, scroll down and you will see the college listed. Select the school and click on "add". You may add up to 10 schools on the FAFSA application. The TAP application will automatically enter the first school listed on your FAFSA.

Dependency Status

The Dependency Status page will ask you a series of questions to determine if under Financial Aid regulations you are considered an Independent student. Read the questions carefully before checking "yes" or "no". If you are considered a dependent student, you must provide your parent(s) information regardless if your parent(s) are or are not providing you with shelter or income, or if they do not have a social security #.

Financial Information

- Make sure you are aware if the questions asked are regarding the student or the parent.
- Do not skip questions or leave any fields unanswered.
- Do not allow application to skip questions about assets.
  Unreported income or monetary assistance from someone who provided you with support can be entered as untaxed income or where asked "money received not reported anywhere

else on this form" towards the end of the application.
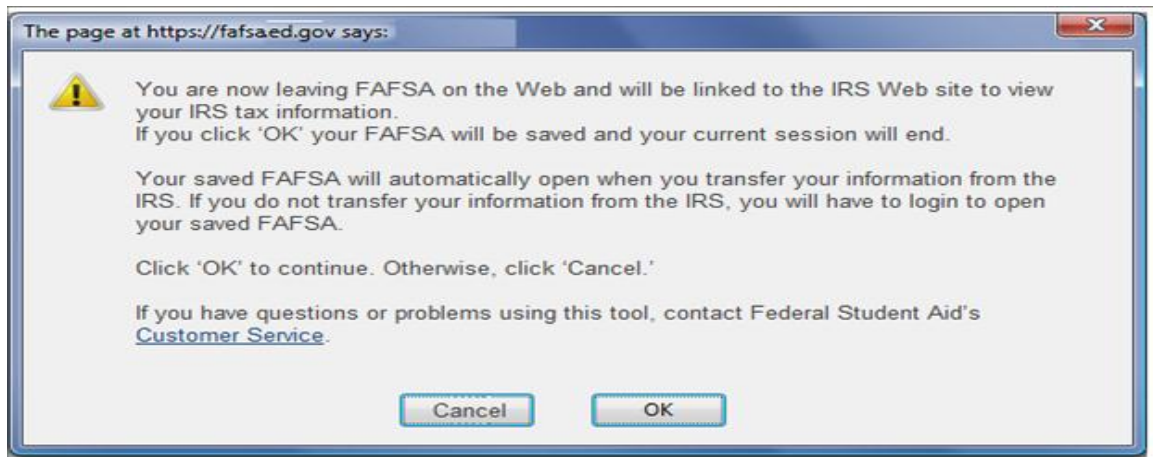
Using the IRS Data Retrieval Tool

The IRS Data Retrieval Tool allows you and your parents to transfer tax information from IRS records directly to your FAFSA. If you & your parent(s) have indicated on your FAFSA that you have already filed 2012 taxes, you may be given the option to use this tool depending on the filing status of the tax payer. If you choose not to use this option, or if you use this option but change an answer that was transferred from the IRS, you may be selected for verification and have to submit documentation and additional information to the Financial Aid Office after your application is processed.

Please Note:

- Electronically filed tax return information will be available online from the IRS site in 2-3 weeks after a tax return is filed.
- Data from paper tax returns will be available online in 6-8 weeks.
- There are 2 separate Financial Information sections on the FAFSA.
  If both you and your parent(s) filed a 2012 income tax return. With your PIN#, you will use the IRS link on the "Student Financial Information" section and also with your Parent's PIN#, you will use the IRS link on the "Parents Financial Information" section.

To use this option you must:
- Have a federal tax return filed with the IRS
- Have filed taxes with a valid social security number (not a tax payer ID)
- Have a Federal Aid Personal Identification Number (PIN) (www.pin.ed.gov)

The page at https://fafsaed.gov says:

⚠ You are now leaving FAFSA on the Web and will be linked to the IRS Web site to view your IRS tax information.
If you click 'OK' your FAFSA will be saved and your current session will end.

Your saved FAFSA will automatically open when you transfer your information from the IRS. If you do not transfer your information from the IRS, you will have to login to open your saved FAFSA.

Click 'OK' to continue. Otherwise, click 'Cancel.'

If you have questions or problems using this tool, contact Federal Student Aid's Customer Service.

[Cancel]   [OK]

If eligible to use the tool, you will be transferred to the IRS Website. The application will notify you that you are leaving the FAFSA website and entering the IRS website to complete the transfer of your tax information.

Internal Revenue Service
United States Department of the Treasury

Log Out | Help

003 Web Page - Input Shared Secrets

Get My Federal Income Tax Information

See our Privacy Notice regarding our request for your personal information.

Enter the following information as it appears on your   Federal Income Tax Return. ❓   Required fields*

First Name*	Joe
Last Name*	Smith
Social Security Number*	***-**- 6789
Date of Birth *	01 / 04 / 1990
Address* ❓	
P.O. Box and/or Street Address	
Apt. Number (Required if it appears on your tax return)	
Country *	United States ⌄
City, Town or Post Office*	
State/U.S. Territory *	Select One ⌄
ZIP Code*	
Filing Status*	Select One ⌄

[Submit]

- On the IRS Web site, you will be prompted to enter information as it appears on your tax return. On the tax return, be aware of:
  - How the address was written on the taxes
  - Any capital or lower case letters
  - If the apt# was entered on the address box or apt box

  The information entered on this IRS webpage is for verification purposes, if the information does not match with IRS records, the data retrieval option may not be used.

IRS.gov

Return to FAFSA | Log Out | Help

Parent <YYYY> Federal Income Tax Information

The information below is your tax information that will help you answers some of the questions on the FAFSA.

	My Tax Information	FAFSA Question Numbers
Tax Year		
Name (s)	<Joe & Jane	
Social Security Number	<***-**-6789>	
Filing Status	<Married-Filed Joint Return>	
Type of Tax Return Filed	<1040>	Question <##> on the FAFSA
Adjusted Gross Income	<$126,721>	Question <##> on the FAFSA
Income Tax	<$31,400>	Question <##> on the FAFSA
IRS Exemptions	<5>	Question <##> on the FAFSA
Education Credits	<$2,500>	Question <##> on the FAFSA
IRA Deductions and Payments	<$2,500>	Question <##> on the FAFSA
Tax-Exempt Interest Income	<$2,500>	Question <##> on the FAFSA
Untaxed IRA Distributions	<-$2,500>	Question <##> on the FAFSA
Untaxed Pensions	<-$2,500>	Question <##> on the FAFSA

Print this page for your records before choosing an option below.

Transfer My Tax Information into the FAFSA
☐ The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information.   (Transfer Now)

Do Not Transfer My Tax Information and Return to the FAFSA
☐ By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA.   (Do Not Transfer)

Once the IRS has authenticated your identity, your IRS tax information will display. You may then choose to transfer your information from the IRS into your FAFSA by checking the "Transfer My Tax Information into the FAFSA" and clicking "Transfer Now" button (see above).

• After you have transferred your data, you will be returned to the FAFSA website to finish your application. Make sure not to change any of the financial data that was transferred from the IRS website. Remember that both you and your parents (if applicable) will need to go through a separate authentication process if you both filed taxes.

Note: IRS retrieval option does not fill all the financial information questions on the FAFSA application. You should:
  - Click every question and answer them accordingly, use the "Helpful Hints" box to the right of the application for help.
  - Do not skip or allow the application to skip any questions about assets.

• After submitting the application, you will be presented with a Confirmation page for your records. On the **Confirmation page**, you may have the optional feature of **linking to the New York State application** (TAP).

• You can view your FAFSA application results (called a Student Aid Report or SAR) in 5-14 days from **http://www.fafsa.gov**.

Note: It is recommended that after you verify your FAFSA and TAP applications have been processed, you visit the office of Financial Aid to verify there are no issues with your application.

Applying for New York State Aid (TAP)

If on your FAFSA Confirmation page, you did not use the "Optional Feature — Start your state application" you may Log in directly at **www.tapweb.org**. Note: if you are not a New York State resident, this option will not be available to you. TAP gives eligible students full-time and part-time tuition awards to supplement any federal student aid you may be receiving.

After logging in to your account:

- Review the pre-filled answers on your application, correct any wrong information & answer any questions that are unanswered.

- The first school entered on your FAFSA application will be the school listed on your TAP application. The TAP school code for Hostos is 1401. If you need to add Hostos, click on the "search" button, type in "cuny (a space) hostos" then click on the prompted Hostos link which will add Hostos to the semester your select.

- You will check the status of your TAP application in 2-4 weeks after completing your application by logging on to **http://www.hesc.org**.

APTS (Aid to Part-Time Study)

If you plan to attend Hostos CC as a part-time student, you may be eligible for a New York State Aid to Part-Time Study (APTS) award. After completing your New York State TAP application, you will need to complete a CUNY supplement form to be considered for this award. Log on to your CUNY Portal account to access the Admissions/Financial Aid Center and complete your "eSupp" (CUNY Supplement) application.

What Is Verification & How Does It Affect You?

The federal government uses a process called verification to help determine the correctness of the financial information on your FAFSA. If you are selected for verification, the Financial Aid Office must collect certain documents from you and your family and match them against the information you provided on your FAFSA. If your application needs to be verified, the Financial Aid Office will send you a letter asking you to provide documentation along with filling out forms that may be sent to you, in order to complete your application process.

Such documentation may include but are not limited to:
Copies of IRS RETURN transcripts of tax forms, W2 forms, Statement from I.R.S. showing proof non-filer of taxes, proof of U.S. citizenship, copy of permanent resident card (front and back), copy of Social Security benefit statement, copy of Budget letter for Public Assistance recipients, copy of food stamp information, proof of registration with Selective Service, copy of Social Security card, copy Birth Certificate, copy of Marriage Certificate.

Note: If IRS Tax Transcripts are one of the required documents needed in order to complete verification, make sure you hand in a RETURN TRANSCRIPT from the IRS dept. We can no longer accept copies of tax returns that you or your tax preparer completed.
You can view instructions on how to order a Return transcript at
www.hostos.cuny.edu/ofa

Samples of some of the mention forms are below:

⬇ IRS TRANSCRIPT ⬇   ⬇ VERIFICATION FORM ⬇

⬇ www.irs.gov ⬇

Food stamp information: **http://www.fns.usda.gov/snap/ebt/online-states.htm**

How Can I View My Awards Online?

TO VIEW YOUR AWARDS ONLINE, YOUR FINANCIAL AID APPLICATION MUST BE PROCESSED AND HAVE NO ISSUES.

There are two options for viewing your Financial aid. Use option (1) to verify if your FAFSA and TAP applications have been processed and have no issues. Option (2) will show if your funds have been transferred to your CUNY1st account.

Using E-FAP (Will also show you your EFC# and awards based on range of Credits you register for the semester)**:**

Go to www.cuny.edu

-> On the right hand side under "Welcome to CUNY" Click on "Portal Log In"

-> Log on by entering your Username and Password

-> Towards to the top of the page, click on the "Admissions/Financial Aid" link

->I n the "Admissions/Financial Aid" box, click on "eFAP (Financial Aid)"

-> On the left side bar, click on "Financial Aid". Make sure the correct award
   year and semester is selected, then click on "Awards"

(If you see a message stating your application has issues, or if you do not see any information, visit the Financial Aid Office).

Using CUNY FIRST (Replacing E-SIMS, classes must be registered to view
your awards. Allow 24-48 hours after you register classes for Financial Aid information to be updated on your CUNY 1st account)**:**

Log on to CUNY FIRST (www.hostos.cuny.edu/first/)

->Self Service Student Center -> (Under "Finances", click on) "Account Inquiry" Make sure you are reading only the row with correct semester and award year.

The "Pending aid" column displays the award that has been funded. (To the right of that column) "Total due", will display if you still have a balance.

If a page stating "you have no outstanding balances" is displayed, click on

->Activity

You will be able to see charges and payments to your account. Make sure the correct semester and term is selected. To know if you have remaining money from grants, add all amounts on the "Payment" column, then subtract from that amount all amounts on the "Charge" column.

For questions about your CUNY 1st or E-FAP account, contact 718-518-6622 (Room C-592)

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Receiving Payment of Financial Aid

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Financial Aid funds are paid to the student's account electronically after classes have been registered. Remaining funds after tuition is met can be paid to student by the following disbursement options:

(1) Direct deposit to your CUNY "Scholar Support Pre-paid   Card" (www.cuny.edu -> Financial Aid -> Information and resources -> Scholars Support)

(2) Direct deposit to the student's bank account (contact the Bursar's Dept.)

(3) Check mailed to the address entered on the student's FAFSA application

- The Financial Aid Office also provides assistance with the FAFSA & TAP applications at the "Microlab" (Savoy Manor Building, Room B102, across the hall from the Financial Aid Office) during office hours. Be sure to read up on what you need to complete an application.