

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

STUDENT

Student Demographics **School Selection** Dependency Status Parent Demographics Financial Information Sign & Submit Confirmation

School Selection

i ■ lastnameapp, based on the information you provided, we have determined that you may qualify for federal student aid. Continue through the application for us to determine how much aid you can receive.

✓ ■ Application was successfully saved.

You can add up to 10 colleges to your FAFSA. If you know your college's school code, use the option to the right to search. If you need help finding your college, use the state (required), city (optional), and school name (optional) fields to begin your search.

State **Select** Federal School Code

City (optional) OR

School Name (optional)

SEARCH [Search Tips](#) **SEARCH**

- 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 screenshot shows the FAFSA application interface in a Microsoft Internet Explorer browser window. The address bar displays the URL: <https://fafsa.ed.gov/FAFSA/app/fafsaexecution.html>. The page has a navigation bar with tabs: Student Demographics, School Selection, Dependency Status, Parent Demographics, Financial Information, Sign & Submit, and Confirmation. The 'Financial Information' tab is active. On the left, a vertical blue bar contains the word 'STUDENT'. The main content area is titled 'Student Tax Information'. It shows a green checkmark icon and the message: 'Application was successfully saved.' Below this, a question asks: 'For 2012, have you completed your IRS income tax return or another tax return?' with a dropdown menu showing 'Already completed'. A green icon with a plus sign indicates a tip: 'You may be able to use the IRS Data Retrieval Tool to view and transfer your tax information from the IRS.' Below the tip are three questions with radio button options: 'Did you file an amended tax return?' (Yes/No), 'Did you file a Puerto Rican or foreign tax return?' (Yes/No), and 'Did you file your taxes electronically in the last 3 weeks (or by mail in the last 8 weeks)?' (Yes/No). At the bottom of the form are 'PREVIOUS' and 'NEXT' buttons. On the right, a 'Help and Hints' sidebar contains the text: 'Student Filed 2012 Income Tax Return? Question 32. You must select the answer that describes your tax filing status: • Already completed • Will file • Not going to file. If you indicate you "Will file" a 2012 tax return and your 2012 income is similar to your 2011...' The browser's status bar at the bottom shows 'Done', 'Internet | Protected Mode: On', and the system clock '12:00 PM 2/7/2013'.

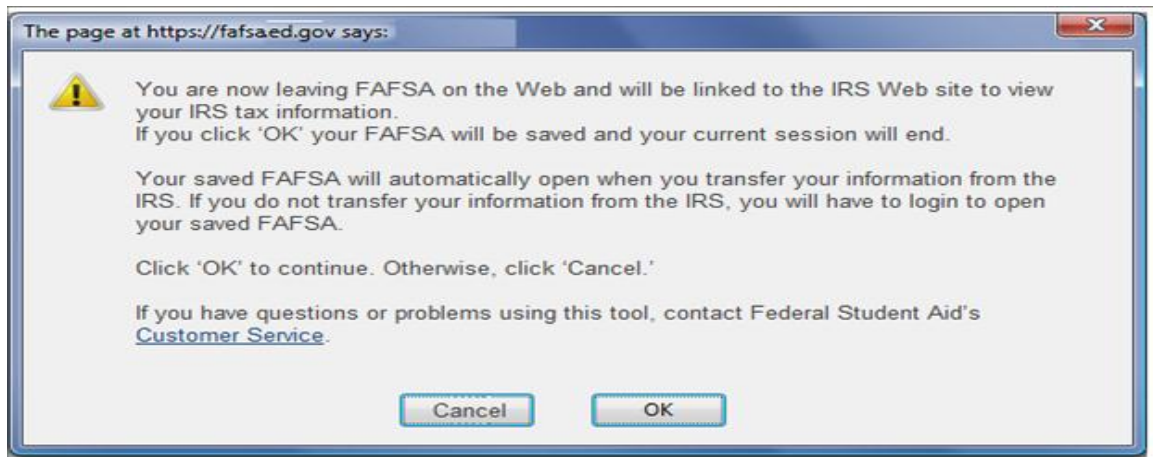
The IRS Data Retrieval Tool allows you and your parents to transfer tax information from IRS records directly to your FAFSA. If you & your parent(s) have indicated on your FAFSA that you have already filed 2012 taxes, you may be given the option to use this tool depending on the filing status of the 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)



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

- 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.

Parent <YYYY> Federal Income Tax Information

The information below is your tax information that will help you answer 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 you 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.

Welcome to CitizenCUNY. Your feedback is welcome >>

Your Portal to Service
CITIZENCUNY

FACULTY/STAFF ADMISSIONS/FINANCIAL AID BLACKBOARD LIBRARIES SERVICES CUNY eMALL HELP MY PROFILE | CUNY.EDU | LOG-OUT

WELCOME

ADMISSIONS / FINANCIAL AID

- CPE Results
- eFAP (Financial Aid)
- eSupp (CUNY Supplement)**

APPLY TO CUNY

Apply Online

CUNY's Online Center for Admissions and Financial Aid

SIGN UP FOR CUNY ALERT

CUNY Alert

Receive text or voice alerts of emergencies and weather-related closings on your campus via cell or home phone and email. Click here to Subscribe or Unsubscribe

ADVISORIES

Be wary of any unexpected e-mail or phone requests to provide personal or financial information, such as your social security number, account usernames and passwords, credit card numbers, and other sensitive information. To determine whether a request is legitimate, contact the organization through a phone number or web address you know to be authentic, rather than by clicking a link, calling a phone number given in the message or replying to the message. Avoid opening any attachment in the message unless you know what it is and why you received it.

TASK LIST

No tasks have been added.

[Add Task](#) | [Options](#)

FAVORITES

- Academic Calendars
- www.cuny.edu
- How to Transfer Credits

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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 ↓



United States Department of the Treasury

This Product Contains Sensitive Taxpayer Data

Request Date:
Response Date:
Tracking Number:

Tax Return Transcript

SSN Provided:
Tax Period Ending:

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

NAME(S) SHOWN ON RETURN:
ADDRESS:

SSN:
SPOUSE SSN:

Married Filing Joint

FILING STATUS:
FORM NUMBER:
CYCLE POSTED:
RECEIVED DATE:
REMITTANCE:
EXEMPTION NUMBER:
DEPENDENT 1 NAME CTRL:
DEPENDENT 1 SSN:
DEPENDENT 2 NAME CTRL:
DEPENDENT 2 SSN:
DEPENDENT 3 NAME CTRL:
DEPENDENT 3 SSN:
DEPENDENT 4 NAME CTRL:
DEPENDENT 4 SSN:
PREPARER SSN:
PREPARER EIN:

Income

WAGES, SALARIES, TIPS, ETC.:
TAXABLE INTEREST INCOME: SCH B:
TAX-EXEMPT INTEREST:
ORDINARY DIVIDEND INCOME: SCH B:
QUALIFIED DIVIDENDS:
REFUNDS OF STATE/LOCAL TAXES:
ALIMONY RECEIVED:
BUSINESS INCOME OR LOSS (Schedule C):
BUSINESS INCOME OR LOSS: SCH C PER COMPUTER:
CAPITAL GAIN OR LOSS: (Schedule D):
CAPITAL GAINS OR LOSS: SCH D PER COMPUTER:
OTHER GAINS OR LOSSES (Form 4797):
TOTAL IRA DISTRIBUTIONS:
TAXABLE IRA DISTRIBUTIONS:
TOTAL PENSIONS AND ANNUITIES:
TAXABLE PENSION/ANNUITY AMOUNT:
RENT/ROYALTY/PARTNERSHIP/ESTATE (Schedule E):
RENT/ROYALTY/PARTNERSHIP/ESTATE (Schedule E) PER COMPUTER:
RENT/ROYALTY INCOME/LOSS PER COMPUTER:
ESTATE/TRUST INCOME/LOSS PER COMPUTER:
PARTNERSHIP/S-CORP INCOME/LOSS PER COMPUTER:
FARM INCOME OR LOSS (Schedule F):
FARM INCOME OR LOSS (Schedule F) PER COMPUTER:
UNEMPLOYMENT COMPENSATION:
TOTAL SOCIAL SECURITY BENEFITS:

↓ VERIFICATION FORM ↓



2013-2014 VERIFICATION WORKSHEET
Federal Student Aid Programs

Office of Financial Aid

What is Verification?

Your application was selected by the U.S. Department of Education for review in a process called "Verification". The Office of Financial Aid must compare information from your FAFSA with information you provide on this worksheet and other documents. If there are differences between your application information and the documents you submit, your application may need to be reprocessed. The Office of Financial Aid cannot make any federal financial aid payments available to you or process a student loan request until all verification requirements have been met and the necessary corrections have been made.

What You Should Do:

- Obtain a 2012 Federal IRS Tax Return Transcript and W-2 forms for yourself, your spouse (if married) or your parents/step-parent (if dependent). The U.S. Department of Education no longer allows a preparer's copy of tax returns to satisfy the Verification requirement. You may order a **TAX RETURN TRANSCRIPT** from the Internal Revenue Service online at www.irs.gov or by phone at 1-800-908-0946. Note: If you used the IRS Data Retrieval tool to transfer your IRS income data to your FAFSA, you may not have to submit the IRS Tax Return Transcript.
- Fill in and sign this worksheet – you and at least one parent (if dependent) must sign the certification (SECTION D) on page 4 of the worksheet.
- Review your Student Aid Report (SAR) to see if you need to submit other documentation (such as default clearance letter, citizenship documentation, proof of receipt of food stamps/SNAP, proof of child support paid, social security card, etc.)
- Submit the completed worksheet, tax return transcripts, and any other documents to the Office of Financial Aid.
- After a financial aid representative reviews your information, you could be asked to submit additional documentation. When all the information has been reviewed and any necessary corrections made, you will be notified about your financial aid awards and payments.

[SECTION A] STUDENT AND FAMILY INFORMATION

Last Name First Name M.I. Social Security Number
Address (include apt. #) Student ID (CUNY FIRST)
City State ZIP Date of Birth
Student's Email Address Phone Number (include area code) Student's Alternate or Cell Phone Number

☐ **INDEPENDENT STUDENTS:** List the people that you (and your spouse) will support between July 1, 2013 and June 30, 2014. Include yourself, your spouse, and your dependent children. Include other people only if they now live with you and you provide more than half their support and will continue to provide more than half their support from July 1, 2013 – June 30, 2014.

☐ **DEPENDENT STUDENTS:** List the people that your parents will support between July 1, 2013 and June 30, 2014. Include yourself, your parents, and your parents' other children if (a) your parents provide more than half of their support or (b) the children would be required to provide parental information when applying for Federal Student Aid. Include other people only if they now live with your parents and receive, and will continue to receive more than half their support from them between July 1, 2013 and June 30, 2014.

Write the names of all family members beginning with you. Also write the name of the college for any family member, excluding your parents, who will be attending college at least half-time between July 1, 2013 and June 30, 2014 and will be enrolled in a degree or certificate program. If you need more space, attach a separate page.

NAME	AGE	RELATIONSHIP	COLLEGE	WILL BE ENROLLED AT LEAST HALF TIME
		Myself	Hostos CC	[] Yes [] No
				[] Yes [] No
				[] Yes [] No
				[] Yes [] No
				[] Yes [] No
				[] Yes [] No
				[] Yes [] No

Continued on other side

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↓ W2 FORM ↓

a Control number		OMB No. 1545-0008				This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.	
b Employer identification number		1 Wages, tips, other compensation		2 Federal income tax withheld			
c Employer's name, address, and ZIP code		3 Social security wages		4 Social security tax withheld			
		5 Medicare wages and tips		6 Medicare tax withheld			
		7 Social security tips		8 Allocated tips			
d Employee's social security number		9 Advance EIC payment		10 Dependent care benefits			
e Employee's first name and initial Last name		11 Nonqualified plans		12a See instructions for box 12			
		13 Statutory employee Retirement plan Third-party sick pay		12b			
		14 Other		12c			
				12d			
f Employee's address and ZIP code							
15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name	

Form **W-2** Wage and Tax Statement

Department of the Treasury—Internal Revenue Service

↓ 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
- > In 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)

Receiving Payment of Financial Aid

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.