

# HOSTOS COMMUNITY COLLEGE

### FILING YOUR 2015-16 FINANCIAL AID APPLICATION

The information in this webpage will guide you in completing your Financial Aid application process for the Summer 2015, Fall 2015 & Spring 2016 semesters. Topics in this guide include:





#### File 2014 Income Tax Returns

You & your spouse (if married) or parents (if dependent) should file 2014 tax returns electronically, if possible, wait 1-2 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 the applicable following items and documents for you and your spouse (if married) and your parents (if under Financial Aid regulations you are considered a dependent student):

- Social security number
- Date of birth
- Date of marital status
- Your alien registration/permanent resident number (if you are not a U.S. citizen)
- 2014 Federal tax documents (1040/1040A/1040EZ/1040X)
- NY State (IT-201) tax documents if filed in NY
- 2014 W-2 forms
- Recent bank, stock, real estate & business amounts

#### Get FSA IDs for you & one of your parents (if dependent)

- Request Federal FSA ID at: http://FSAID.ed.gov
- If you and a parent already have an FSA ID, use them to sign your application — you can use the same FSA ID every year

English | Español Help

Federal Student	PROUD SPONSOR of the AMERICAN MIND®		
Edit Your FSA ID Enter your username and password and s tab.	elect LOGIN to edit your FSA ID information. If you do not	have ai	n FSA ID, select the Create An FSA ID
Create An FSA ID Edit My FSA ID			* Required
Username (or Verified E-mail Address) •	Forgot My Username	Θ	• Create An FSA ID • Frequently Asked Questions
Password •	Forgot My Password	© N>	



#### Filing Your FAFSA Online Application http://www.fafsa.gov

Login	Form Approved	Help and Hints	Rom Key
Student information Instructions are provided for each FAESA question in the Help any path size of the page and are also available by clocking Need Help path size of the page and are also available by clocking Need Help path size of the size of t	UPIC Res 1842 Res Les 2017/2016 d Hints section on the e7 of the bottom of the viog in to FAFSA on the uident's information	The FSA ID, which consists of a sam-created username PNN effective May, 2015. It allows users to electronically access personal information on Fodoral Student Ad Web sites as well as electronically user a FAFSA. Select one: Enter your FSA ID (only the student should bg in with an FSA ID). <b>Or</b> Ther the student's name, Social Security Number and date of birth. You may have to enter your FSA ID later in the process?	Start Your 2015-2016 FAFSA

- The FAFSA is used to apply for Federal Pell Grant, SEOG, Work-Study and Student Loans
- You will be prompted to enter your FSA ID user ID and password or enter your information. Your FSA ID will be used as a federal identifier for your FAFSA and other federal applications. If you do not know your FSA ID or do not remember it, you can create one or request a duplicate FSA ID by clicking on the link titled "Create an FSA ID" or "Forgot Username".
- Select the appropriate Academic Year. If you have applied for FAFSA before, you may be given the option of "Renewal".
- When prompted, create a "save key". The save key 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 saved.
- If you need to return or forward through different pages, use the "previous" & "next" buttons at the bottom right of the page, <u>not</u> the forward or back buttons on your browser.
- Review any pre-filled answers carefully and change any incorrect information including:
  - -Name as it appears on the Social Security card,
  - -Address including the apartment #
  - -The correct and active e-mail account

#### **Entering the School Code**

	Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
	School Sele	ection					
s	i astna studer	merapp, based o nt aid. Continue th	n the information yo rough the applicati	ou provided, we have on for us to determir	e determined that yo ne how much aid yo	u may qualify for u can receive.	federal
U D	🗹 - Applic	ation was succes	sfully saved.				
E N	You can add ug you need help 1 search.	) to 10 colleges to finding your colleg	your FAFSA. If you e, use the state (re	know your college's quired), city (optiona	school code, use th I), and school name	e option to the ri e (optional) field:	ght to search. If s to begin your
1	Sta	te Select		•	Fede	ral School Code	
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	School Nam			(optional)			_
		SEARCH	Search Tips			SEARCH	

#### Hostos CC's Federal School Code: 008611

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. Enter the school code in the "Federal School Code" box towards the right of the page, then click on "SEARCH". 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 can only list one college per semester and will automatically enter the first college listed on your FAFSA which you may change.

#### **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 #. If you are considered an Independent student you do not need to answer questions about your parents.

#### **Financial Information**

- Make sure you are aware if the questions asked are regarding the <u>student</u> or the <u>parent</u>.
- Do not skip questions or leave any fields unanswered including if the application gives you an option to skip questions.
- 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/IRS Link Retrieval Tool



The IRS Data Retrieval Tool allows you to transfer tax information from IRS records to your FAFSA. If you & your parent(s) have indicated on your FAFSA that you have already filed 2014 taxes, you may be given the option to use this tool (titled "LINK TO IRS") depending on the filing status of the tax payer. Using this tool is the best option. If you choose not to use this option, or if you use this option but change a pre-filled answer that was "transferred from the IRS", you may be required to submit tax documentation and additional information to the Financial Aid Office after your application is processed.

#### Note:

- Tax return data and transcripts will be available online in 1-2 weeks from www.irs.gov after a tax return is filed electronically. If taxes were mailed via post office, IRS data be available online in 4-8 weeks.
- For dependent students, there are <u>2</u> separate Financial Information sections on the FAFSA. If both the student and parent(s) filed an income tax return, the student's FSA ID will be used to IRS link the student's tax information, and parent's FSA ID will be used the to IRS link the parent's tax information.
- The IRS Link option <u>cannot</u> be used if:
- Taxes were filed with a tax payer ID instead of a valid social security number issued by the Social Security dept.

#### If you choose use the tool, you will be transferred to the IRS Website

he page a	at https://fafsa.ed.gov says:						
<b>A</b>	You are now leaving FAFSA on the We your IRS tax information. If you click 'OK' your FAFSA will be sa Your saved FAFSA will automatically of IRS. If you do not transfer your information your saved FAFSA. Click 'OK' to continue. Otherwise, click If you have questions or problems using <u>Customer Service</u> .	eb and will be linked to the IRS Web site to view aved and your current session will end. open when you transfer your information from the tion from the IRS, you will have to login to open k 'Cancel.' g this tool, contact Federal Student Aid's					
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On the IRS Website, you will be prompted to enter information as it appears on your tax return. On the tax return, <u>be aware of</u>:

- How the address was written
- 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 authentication purposes, if the information you enter does not match your information on the IRS records, the data retrieval option may not be used. The name and address you enter on this page will not affect the name and address on your FAFSA application

#### Parent <YYYY> Federal Income 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.

The information below is your tax information that will help you answer some of the questions on the FAF SA.

	My Tax Information	FAFSA Question Numbers 🕜				
TaxYear						
Name (s)	≺Joe & Jane					
So-cial Security Number	≪***.**- 6789>					
Filing Status	<married-filed joint="" return=""></married-filed>					
Type of Tax Return Filed	<1040>	Question I PAFSA				
Adjusted Gross Income	<\$126,721>	Question ##> on the FAFSA				
Income Tax	<\$31,400>	Question III> on the FAFSA				
IRS Exemptions	<>	Question ##> on the FAFSA				
Education Credits	<\$2,500>	Question A on the FAFSA				
IRA Deductions and Payments	eductions and Payments <\$2,500>					
Tax-Exempt Interest Income	<\$2,500>	Question IIII on the FAFSA				
Unitaxed IRA Distributions	<-\$2,500>	Question ##> on the FAFSA				
Unitaxed Pensions 🕢	<\$2,500>	Question <##> on the FAFSA				
Print this page for your records before choose	sing an option below.					
] The tax information provided above will p After the FAFSA is populated your IRS se Check this box if you are choosing to tran	opulate the answers to the appropria ssion will end and you will return to y sfer your information.	te FAFSA questions. (Transfer Now) your FAFSA.				
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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 selecting the "Transfer My Tax Information into the FAFSA" then clicking "Transfer Now" button.

After you have transferred your data, you will be returned to the FAFSA website to finish your application. Make sure <u>not</u> to change any of the financial data that was "transferred from the IRS". 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 <u>does not</u> fill all the financial information questions on your FAFSA application. You should:

- Click every question box, review and answer them accordingly. There are sections for income from Federal Work study, Internships, Compensatory pay, Untaxed income, money received from other sources.
- Do not enter any amounts from Public Assistance (Public assistance budget letters may be requested after the FAFSA has been processed).
- Do not skip or allow the application to skip any questions about assets.
- Use the "Helpful Hints" box to the right of the application for help.

- 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 <u>linking to the New York State application</u> (TAP).
- You will be able to view your FAFSA information (Student Aid Report /SAR) in 3-6 days by logging in to your account at <u>http://www.fafsa.ed.gov</u>.

#### 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.hesc.ny.gov**. 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 federal student aid.

After logging in to your TAP account:

- Review the pre-filled answers on your application, correct any wrong information & answer any questions that are unanswered. For dependent students, if the parent's are separated before the year 2015, only enter the personal information about the parent who is providing the student with the most support such as living and personal expenses.
- If you need to add Hostos on the school section, click on the "search" button, type in "hostos", then click on the prompted Hostos link which will add Hostos to the semester your select.
- You can check the status of your TAP application in 2-4 weeks after submitting your application by logging on to **http://www.hesc.ny.gov**, but make sure that verify on your CUNYfirst account that any approved award has been posted.

#### 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.

#### To complete a "Supplement Form":

Log on to your CUNY 1st account at www.hostos.cuny.edu/first

- --> self service --> student center
- --> (In the "Finances" section) supplement Form

Institution: For Hostos, you may enter "HOS01" in the box or

--> click on the magnifying glass

--> (under "search results") select the Academic institution you will attend.

For Aid Year: Enter the appropriate year or

--> click on the magnifying glass

--> (under "search results") select the Academic Year you will attend (2016 represents the <u>Fall 2015</u> - <u>Spring 2016</u> academic year).

Complete the displayed online form, do not leave any questions blank or unanswered and click on "submit".

#### **FOLLOW UP**

If at least two weeks have passed since you filed your Financial Aid applications or have handed in requested documentation to the Financial Aid office, you should check the status or review any updates or changes to your account by logging in to your CUNYfirst account.



#### How Can I View My Awards Using CUNYfirst?

To view your status online, you must have an application on file with the school college entered on the application. Allow 24-48 hours after you register classes for Financial Aid information to be updated on your CUNY 1<sup>st</sup> account. If you do not have a CUNY1st account or are having issues with your account, contact 718-518-6646.

#### LOG ON TO YOUR CUNYFIRST ACCOUNT (<u>WWW.HOSTOS.CUNY.EDU/FIRST</u>) CLICK ON:

- -> Self Service
- -> Student Center
- -> (To the right) View your "<u>To Do List</u>" box.

The "to do list" will show you important information that is being requested from you, including required items/steps needed to complete your Financial Aid process. If you have any items listed on your to do list, click on "more". Each to do item will have its own link which will give you further instructions.

#### IF YOU DO NOT HAVE ANY ITEMS ON YOUR "TO DO LIST", SCROLL DOWN

TO THE "FINANCES" SECTION:

--> View financial aid.

--> Select the academic year you wish to view.

**NOTE:** If you have not enrolled in classes, the awards shown represent <u>full-time</u> enrollment. To view your calculated awards as a part-time student, locate your EFC# by clicking on:

—>"Full-Yr Financial Aid Summary", view your <u>Expected Family</u> Contribution (EFC) #.

Go to the "General Information" section of the Hostos Financial Aid website and search for "Pell Award Chart AY 2015-16  $^{\prime\prime}$ 

Locate your EFC# & your Pell awards according to your enrollment status.

#### TO SEE IF YOUR FINANCIAL AID AWARDS HAVE BEEN USED TOWARDS YOUR TUITION:

In the Finances section, click on "Account Inquiry":

"Outstanding Charges" = Tuition

"Pending Financial Aid" = Awards being used towards your bal ance

"Total Due" = Your balance (a blank space or no amount indicates there is no balance)

#### 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 the federal government has selected your account for verification, the Financial Aid Office must review your Financial Aid application information and may be required to collect certain documents from you. If your application needs to be verified, you will see a message on your CUNYfirst to do list and/or be sent an email/letter either from the Federal Government, CUNY Central office or the Financial Aid Office.

Documentation that may be requested may include but are not limited to:

IRS tax transcripts, W2 forms, statement from I.R.S. showing proof non-filer of taxes, proof of U.S. citizenship, copy of permanent resident card, Social Security benefit statement, Budget letter for Public Assistance, statement of food stamp (SNAP) information, proof of registration with Selective Service, Social Security card, Birth Certificate, Marriage Certificate. The requested information varies between applicants.

#### Note:

If IRS Tax Transcripts are one of the required documents needed in order to complete verification, make sure you hand in a transcript from the IRS dept (www.irs.gov).

The Financial Aid office can no longer accept copies of tax returns that you or your tax preparer completed. See sample of IRS Transcript, W2 & Verification form on the last page of this booklet.

You can view instructions on how to order a Return transcript at our website www.hostos.cuny.edu/ofa

#### **Receiving Payment of Your 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 the 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 --> (to the left) Scholars Support
- (2) Direct deposit to the student's bank account ((Login to CUNYfirst --> (on the left) HR/Campus Solutions)) --> Self Service --> Campus Finances --> Manage My Accounts.
- (3) Check mailed to the address entered on the student's FAFSA application
- **NOTE:** <u>Federal Work study and Perkin Loans must be manually accepted via your</u> <u>online CUNYfirst account before payments can be sent to your</u> account be received. To accept the awards:

(on the student center page)

- --> Accept/Decline Awards
- --> Select Aid Year 2016 (Financial Aid Year 2015-2016)
- —> Click the "Accept" box for Federal Work Study and other awards that you wish to accept. (PELL and TAP are automatically accepted).
- —> Submit

## For questions about your CUNY 1<sup>st</sup> account, contact the help desk at 718-518-6622/718-518-6646

#### **For More Information**

Learn more about the opportunities available to finance your college education and other useful information including our office hours and **F**inancial **A**id **TV** by visiting Hostos Community College Office of Financial Aid Website at http://www.hostos.cuny.edu/ofa

#### File your Financial Aid applications early

It is always recommended that you file your Financial Aid applications as early as possible. For free assistance from our staff, visit our "Microlab" Room D-B102 during office hours", make sure to bring all the necessary information needed to apply.

#### Sample Forms



а	Control number			Th	This information is being turnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may						
			OMB No. 1545-00	108 be	imp	osed on you if this in	icome is ta	kable and you	a fail to repo	artit.	
ь	Employer identification number				1	Wages, tips, other cor	npensation	2 Fede	ral income t	ax withheld	
c	Employer's name, address, and ZIP code				3 Social security wages			4 Social security tax withheld			
L					5	Medicare wages an	d tipe	6 Medi	care tax wit	hheid	
L						7 Social security tips			8 Allocated tips		
d	Employee's social security num	ber			9	Advance EIC payme	ənt	10 Depe	ndent care	benefits	
•	Employee's first name and initia	l Last name			11	Nonqualified plans		12a 6ee i	netructione	for box 12	
L					13 8	Statulory Refirement mployee plan	Third-party sick pay	12b			
L					14 Other			12c			
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f	Employee's address and ZIP co	de									
15	State Employer's state ID nun	nber 16 St	ate wages, tips, etc.	17 State incom	e tax	16 Local wagee,	tipe, etc.	19 Local ino	ome tax	20 Locality name	
For	W-2 Wage and Tax Department of the Treasury—Internal Revenue Service										



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