










# 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" & COMPLETE THE SUPPLEMENT FORM
	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

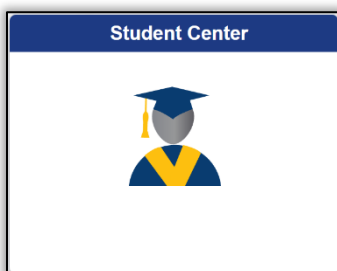


## VIEW YOUR “TASKS & HOLDS”

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.

Tasks			
To Do List			
Task	Institution	Due Date	Status
Verify My FAFSA	Hunter College	Overdue	Initiated

Task Details

Verify My FAFSA

Institution

Hunter College

Aid Year

Financial Aid Year 2022-2023

Description

Overdue

Due Date

04/27/2022

Contact Name

Hunter College

Department

Financial Aid Office - N241

Phone

212/772-4820

[finaid@hunter.cuny.edu](mailto:finaid@hunter.cuny.edu)  
[Verify My FAFSA](#)

Click here to access additional information

The results of your FAFSA have been received by the college and before your federal aid eligibility can be confirmed, you must resolve outstanding FAFSA task(s). Please review the Verify My FAFSA "To Do List" item for your college of enrollment in CUNYfirst Student Center and click the link to access the CUNY Financial Aid Student Forms Portal.

For first-time users of CUNY Financial Aid Student Forms, you will be required to add a valid email address or phone number to your CUNY Student Forms portal account for an authentication confirmation. You will also be required to complete the registration process and confirm the personal identifying information reported on your FAFSA before you can access the portal.

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.

To Do List

14

Holds

4

Holds

You can filter your to do list by type and by college

Hold

Institution

Department

Financial Aid Exit Interview

Hunter College

Financial Aid

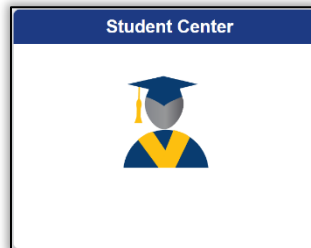


## COMPLETE THE SUPPLEMENT FORM

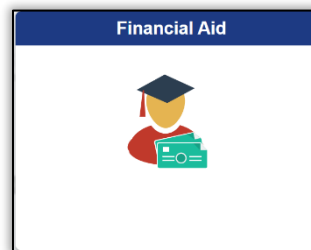
The Supplement Form is an application used by CUNY to determine potential eligibility for the New York State Aid for Part-Time Study (APTS) program. You will need your NY State Tax information to complete this form. To access the form:

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

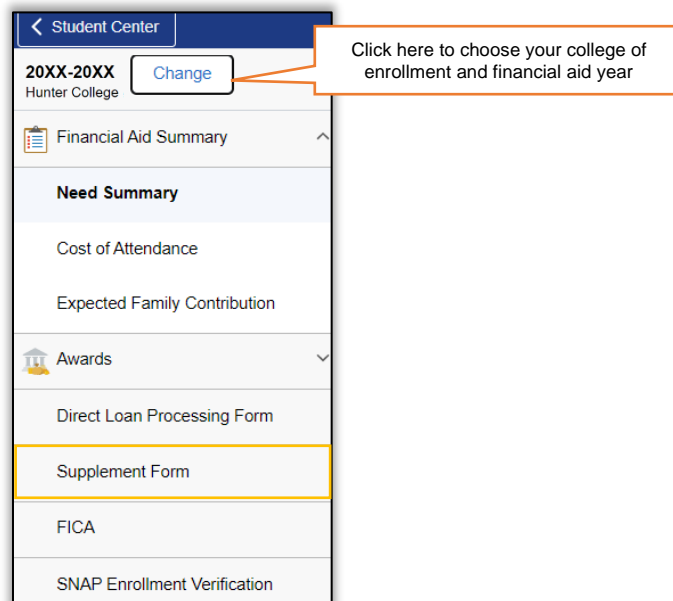
**STEP# 2:** Select **Student Center** Tile





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



**STEP# 4:** Select **Supplement Form**, from the left sidebar of the page.



**STEP# 5:** On the **Select Aid Year to View** page, you may see listings for multiple colleges and multiple aid years. Specify the college and aid year you wish to view.

Institution:	<input type="text" value="HTR01"/>		Hunter College
Aid Year:	<input type="text" value="2023"/>		Financial Aid Year 2022-2023
<input type="button" value="OK"/>		<input type="button" value="Cancel"/>	

**STEP# 6:** Follow the on-screen prompts and complete and submit the form using your NYS Tax information.

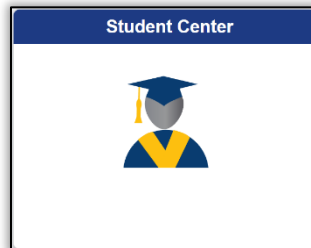


## VIEW YOUR FINANCIAL AID AWARDS & DISBURSEMENTS

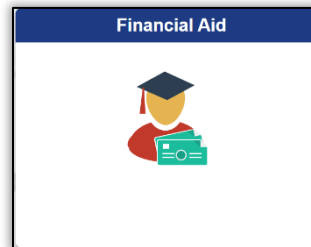
Your Student Center provides information about your financial aid package. Financial Aid offers are posted for the entire academic year by term.

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

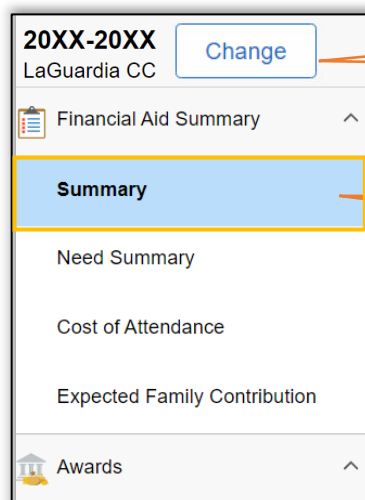
**STEP# 2:** Select the **Student Center** tile



**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.




Click here to choose your college of enrollment and financial aid year

This option will only show when your aid has been packaged at the college for the indicated



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

You can click on the filter icon to choose whether to view aid by type (i.e. grant or loan etc.). You can also search by the status of the award (accepted, offered etc.)

Award Summary				8 rows
	Display	Summary		
Award Description/Category	Award Status	Net Award	Disbursed	
<b>Federal PELL Grant Fall</b> Grant	Accepted	1,172.50	1,172.50	>
<b>Federal PELL Grant Spring</b> Grant	Accepted	1,172.50	0.00	>
<b>ASAP Scholarship Spring</b> Scholarship	Accepted	1,436.50	0.00	>
<b>ASAP Scholarship Fall</b> Scholarship	Accepted	1,435.95	1,435.95	>
<b>ASAP Books Fall</b> Scholarship	Accepted	365.00	365.00	>
<b>Outside Scholarship 1</b> Scholarship	Accepted	2,608.45	2,608.45	>
<b>Federal SEOG Fall</b> Grant	Accepted	500.00	0.00	>
<b>Federal SEOG Spring</b> Grant	Accepted	400.00	0.00	>

Use the dropdown menu to view information by term or 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.

<b>20XX-20XX</b>	
LaGuardia CC	
	Financial Aid Summary ^
<b>Summary</b>	
Need Summary	
Cost of Attendance	
Expected Family Contribution	
	Awards ^
Accept/Decline	
Disbursements	
College Financing Plan	

The **Disbursements** page, under the **Disbursements/Disbursement Status/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.

Disbursements						6 rows
Display	2022 Fall Term	Use the drop-down menu to view information by term				↑↓
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.





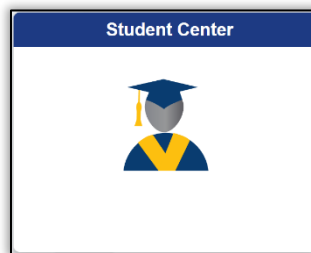
## COMPLETE THE DIRECT LOAN PROCESSING FORM

If you 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.

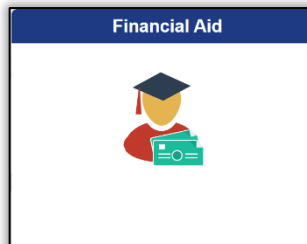
**Note:** You must complete the FAFSA and resolve your To Do list items before you can submit a loan request.

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

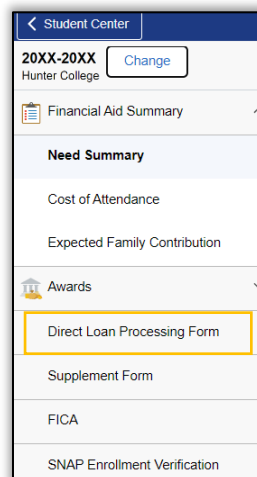
**STEP# 2:** Student Center Tile



**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.

**2022-2023 CUNYFIRST DIRECT LOAN REQUEST INSTRUCTIONS**

1. Federal Direct Loan (FDL) applicants must have a **completed FAFSA on file** with their CUNY College of attendance **before** applying for a student loan. *If you have any questions, please contact a financial aid representative at your college.*
2. Please check your CUNY To-Do List in Student Self-Service. Some outstanding items may prevent the processing of your loan request. If you have been selected for verification you need to complete this process prior to the processing of your loan.
3. At the time of submission of your loan request, you are admitted to a **degree granting** program and are/or will be **registered for a minimum of 6 credits/units**.

**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.

<b>Institution:</b>	<input type="text" value="HTR01"/>		Hunter College
<b>Aid Year:</b>	<input type="text" value="2023"/>		
<input type="button" value="Next"/>		<input type="button" value="Cancel"/>	

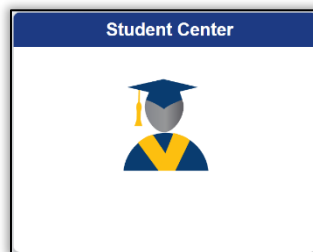
**STEP# 7:** Follow the on-screen prompts and complete and submit the form.



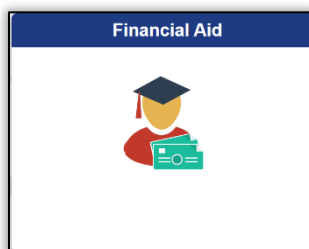
## ACCEPT, REDUCE, OR DECLINE YOUR OFFERED FEDERAL WORK-STUDY OR OFFERED FEDERAL DIRECT LOANS

**STEP# 1:** Login to CUNYfirst 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 year that you wish to review at the top left section of the page. Students will only have the option to accept and decline direct loan and federal work-study offers. All grant aid and scholarships are automatically packaged as offered and accepted and do not require action on this page.


**STEP# 5:** Navigate to **Awards** on the left sidebar to open the dropdown menu, click on **Accept/Decline**

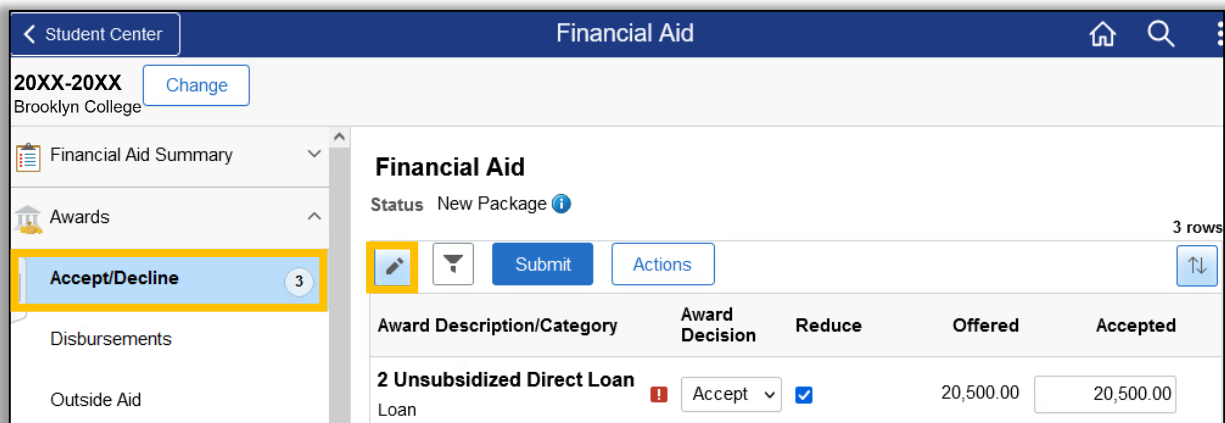
**Financial Aid**

Status New Package ⓘ

3 rows

Award Description/Category	Award Decision	Reduce	Offered	Accepted
<b>2 Unsubsidized Direct Loan</b>	Accept ▼	<input checked="" type="checkbox"/>	20,500.00	20,500.00
Loan				

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



The screenshot shows the 'Financial Aid' interface for the 20XX-20XX academic year at Brooklyn College. The left sidebar contains a menu with 'Financial Aid Summary', 'Awards', 'Accept/Decline' (highlighted with a yellow box and a '3' badge), 'Disbursements', and 'Outside Aid'. The main content area is titled 'Financial Aid' and shows a 'Status: New Package' with an information icon. Below this, there are buttons for a pencil icon (highlighted with a yellow box), a funnel icon, 'Submit', and 'Actions'. A table with 5 columns is displayed: 'Award Description/Category', 'Award Decision', 'Reduce', 'Offered', and 'Accepted'. The table has 3 rows. The first row is '2 Unsubsidized Direct Loan' with a red warning icon, a dropdown menu set to 'Accept', a checked 'Reduce' checkbox, an 'Offered' amount of 20,500.00, and an 'Accepted' amount of 20,500.00.

Award Description/Category	Award Decision	Reduce	Offered	Accepted
2 Unsubsidized Direct Loan	Accept	<input checked="" type="checkbox"/>	20,500.00	20,500.00
Loan				

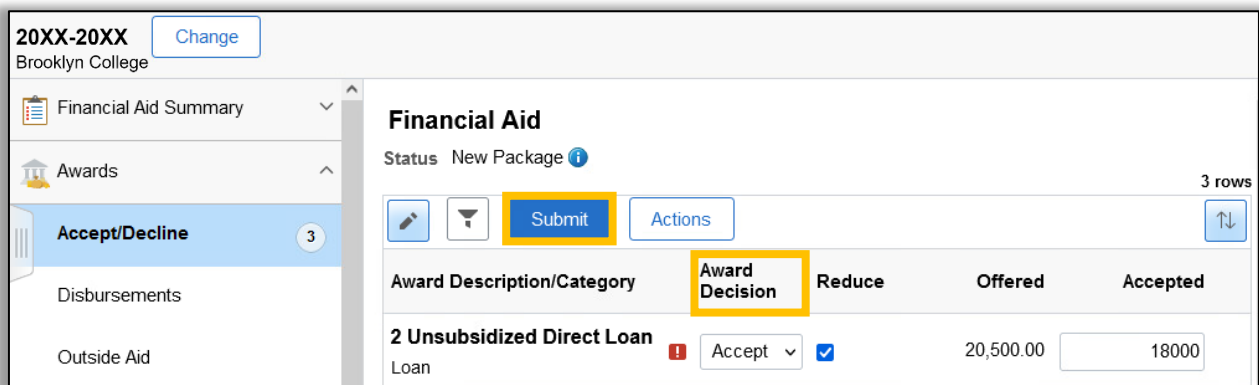
**STEP# 7:** Click on the dropdown option under the **Award Decision** column.

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.



The screenshot shows the 'Financial Aid' interface for the 20XX-20XX academic year at Brooklyn College. The left sidebar contains a menu with 'Financial Aid Summary', 'Awards', 'Accept/Decline' (highlighted with a yellow box and a '3' badge), 'Disbursements', and 'Outside Aid'. The main content area is titled 'Financial Aid' and shows a 'Status: New Package' with an information icon. Below this, there are buttons for a pencil icon, a funnel icon, 'Submit' (highlighted with a yellow box), and 'Actions'. A table with 5 columns is displayed: 'Award Description/Category', 'Award Decision' (highlighted with a yellow box), 'Reduce', 'Offered', and 'Accepted'. The table has 3 rows. The first row is '2 Unsubsidized Direct Loan' with a red warning icon, a dropdown menu set to 'Accept', a checked 'Reduce' checkbox, an 'Offered' amount of 20,500.00, and an 'Accepted' amount of 18000.

Award Description/Category	Award Decision	Reduce	Offered	Accepted
2 Unsubsidized Direct Loan	Accept	<input checked="" type="checkbox"/>	20,500.00	18000
Loan				

**STEP# 8:** Click the **Submit** button to finalize your decision.



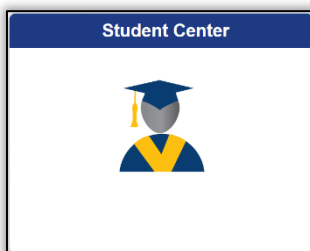
## VIEW YOUR BALANCE, PENDING FINANCIAL AID & REFUNDS

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

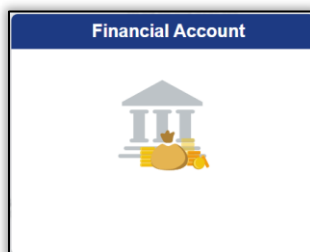
**Note:** Financial aid that is "**pending**" means that you have been awarded the aid, and it is being used as a credit towards your tuition bill but has not yet been disbursed.

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

**STEP# 2:** Select the **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

The screenshot shows the 'Account Balance' page for Kingsborough Community College. The left sidebar contains navigation options: 'Account Balance Due Now 208.56', 'Make a Payment', 'Payment Plan', 'Charges Due', 'Payment History', and 'Direct Deposit'. The main content area displays a table titled 'What I Owe' with columns for Term, Charges & Deposits, Pending Financial Aid, and Total Due. The table shows data for the 2021 Fall Term and 2022 Spring Term, with a total due of 1,061.88. A 'Make a Payment' button is located below the table.

Term	Charges & Deposits	Pending Financial Aid	Total Due
2021 Fall Term	208.56	811.88	0.00
2022 Spring Term	0.00	250.00	0.00
<b>Total</b>	<b>208.56</b>	<b>1,061.88</b>	<b>0.00</b>

**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.

You can view refunds by the processed date in the **Refunds** column on the right.

The screenshot shows the 'SF Account Activity' page for a user named Bruce Wayne. The left sidebar contains links to Account Balance, Make a Payment, Payment Plan, Charges Due, Payment History, Direct Deposit, and Account Activity (which is highlighted). The main content area has tabs for Account Inquiry, Electronic Payments/Purchases, and Account Services. Below these is a link for Activity, which is highlighted. The Account Activity section includes a 'View by' filter with date ranges and a 'go' button. A table titled 'Transactions' displays the following data:

Posted Date	Item	Term	Charge	Payment	Refund
08/31/20XX	Refund of Financial Aid	20XX Fall Term			\$\$\$.
08/30/20XX	Book Advance Charge	20XX Fall Term	\$\$\$.		
08/30/20XX	Book Advance Payment	20XX Fall Term		\$\$\$.	
08/30/20XX	Federal Pell Fall	20XX Fall Term		\$\$\$.	

**STEP# 6:** Click the **Pending Aid** link to see the specific type of aid and amount that is currently pending to disburse.

This screenshot shows the 'Pending Financial Aid' section. A callout box points to the 'View By' dropdown menu, stating: 'Choose the term you wish to view then click the go button to view.' The table below shows the following data:

Award	Term	Amount
Federal Pell Fall	2021 Fall Term	811.88
Initial TAP- Spring	2022 Spring Term	250.00
<b>Total Pending Financial Aid for this view</b>		<b>1,061.88</b>



## 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 incentives, access IRS Publication 970, Tax Benefits for Higher Education, visit [www.cuny.edu/1098tfag](http://www.cuny.edu/1098tfag).

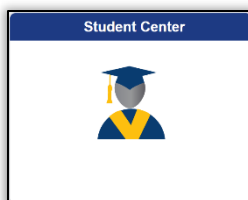
**Note:** A Form 1098-T statement will not be issued to you if you received federal grants, scholarships or third-party payments that met or exceeded your total tuition charges for the entire calendar year.

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.

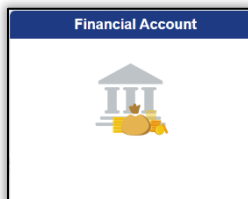
The following steps provide instructions on how to view your 1098-T form in CUNYfirst.

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

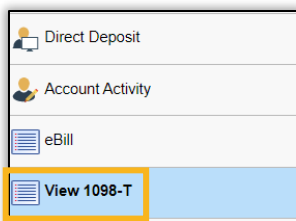
**STEP# 2:** Click on the **Student Center** tile:



**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.

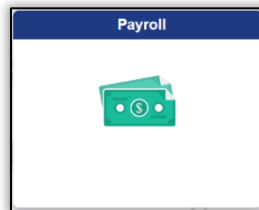
The following steps provide instructions on how to view your Federal Work-Study W-2 forms in CUNYfirst Student Center.

**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:

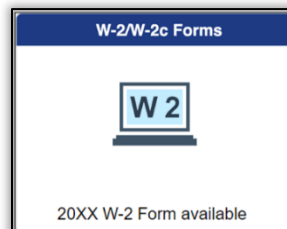


**STEP# 4:** You will have an option to consent to receiving your W-2 or W-2C electronically by checking the off the “*I consent...*” box:



☐ I consent to receive W-2 or W-2c forms electronically

You can view your W-2 / W-2C by clicking on the W-2/W-2C Forms Tile:





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

**View W-2/W-2c Forms**

Tax Year: ✓ 2021  
2020

**Work Study - Federal**

Tax Form	Issue Date	Year End Form	Filing Instructions
W-2	01/26/2022	<a href="#">View Form</a>	<a href="#">i</a>

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

Form **W-2 Wage and Tax Statement** **20XX**

**a** Employer's name, address, and ZIP code  
KINGSBOROUGH CC  
2001 ORIENTAL BOULEVARD  
FIN. AID OFFICE ROOM U 201  
BROOKLYN NY 11235

**e** Employee's name, address, and ZIP code  
Bruce Wayne  
1007 Mountain Drive, Gotham

<b>7</b> Social security tips	<b>1</b> Wages, tips, other comp.	<b>2</b> Federal income tax withheld
<b>8</b> Allocated tips	<b>3</b> Social security wages	<b>4</b> Social security tax withheld
<b>9</b>	<b>5</b> Medicare wages and tips	<b>6</b> Medicare tax withheld
<b>10</b> Dependent care benefits	<b>11</b> Nonqualified plans	<b>12a</b> See instructions for box 12
<b>13</b> <small>Statutory employee Retirement plan Third-party sick pay</small>	<b>14</b> Other	<b>12b</b>
<b>b</b> Employer identification number (EIN)		<b>12c</b>
<b>a</b> Employee's social security no.		<b>12d</b>
<b>15</b> State NY	<b>16</b> State wages, tips, etc.	<b>17</b> State income tax
<b>18</b> Local wages, tips, etc.	<b>19</b> Local income tax	<b>20</b> Locality name NEW YO

**Copy B To Be Filed With Employee's FEDERAL Tax Return**

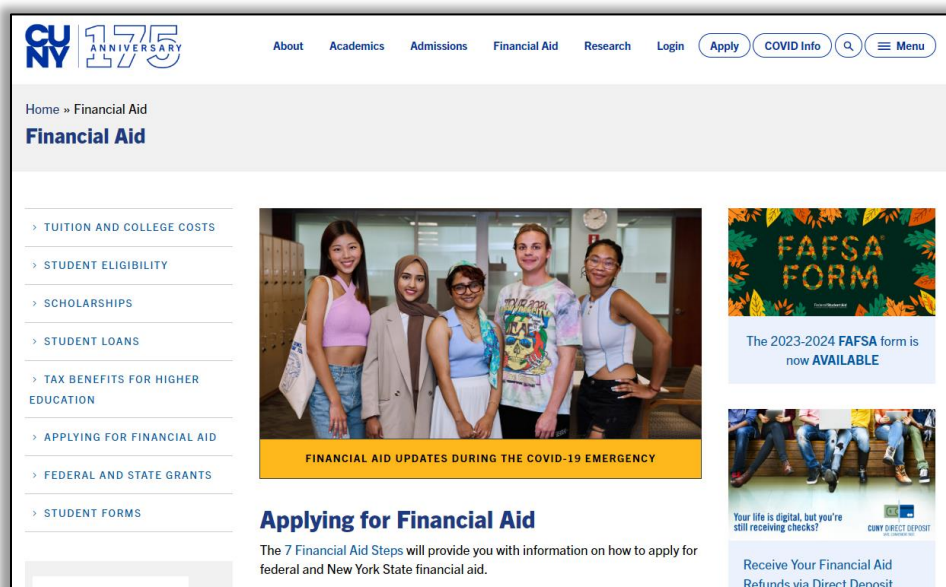
This information is being furnished to the Internal Revenue Service.  
OMB No. 1545-0008

**Dept. of the Treasury - IRS**  
Visit the IRS Web Site at [www.irs.gov/efile](http://www.irs.gov/efile)

## 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 CUNY's Financial Aid Website at: [cuny.edu/financialaid](https://www.cuny.edu/financialaid)



**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>

**Baruch**  
COLLEGE

**BHCC**  
BOROUGH OF MANHATTAN  
COMMUNITY COLLEGE

**BRONX**  
COMMUNITY  
COLLEGE

**Brooklyn**  
College

**College of**  
**Staten Island**  
The City University of New York

**CRAIG NEWMARK GRADUATE**  
SCHOOL OF JOURNALISM

**GRADUATE**  
CENTER

**CUNY**  
SPH  
GRADUATE SCHOOL OF  
PUBLIC HEALTH & HEALTH POLICY

**CUNY SCHOOL**  
OF LABOR AND  
URBAN STUDIES

**CUNY SCHOOL OF LAW**

**School of**  
Professional Studies

**STELLA AND CHARLES**  
**GUTTMAN**  
COMMUNITY COLLEGE

**Hostos**  
Community College

**HUNTER**  
The City University of New York

**JOHN**  
**JAY**

**KINGSBOROUGH**  
COMMUNITY COLLEGE

**LaGuardia**  
Community College

**LEHMAN**  
COLLEGE

**MACAULAY**  
HONORS COLLEGE

**MEDGAR**  
**EVERS**  
COLLEGE

**CITY TECH**

**QUEENS**  
COLLEGE

**QUEENSBOROUGH**  
COMMUNITY COLLEGE

**The City College**  
of New York

**YORK** College