










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

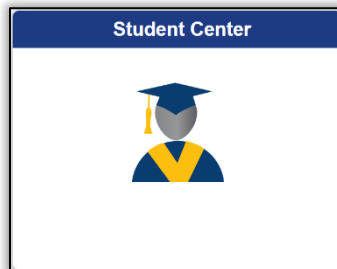


VIEW YOUR “TASKS & HOLDS”

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
[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

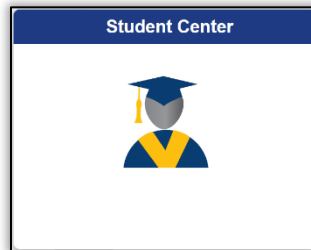


VIEW YOUR FINANCIAL AID AWARDS & DISBURSEMENTS

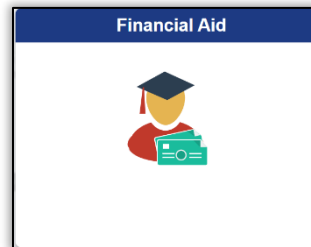
Your Student Center provides information about your financial aid package. Financial Aid offers are posted for the entire academic year by term.

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

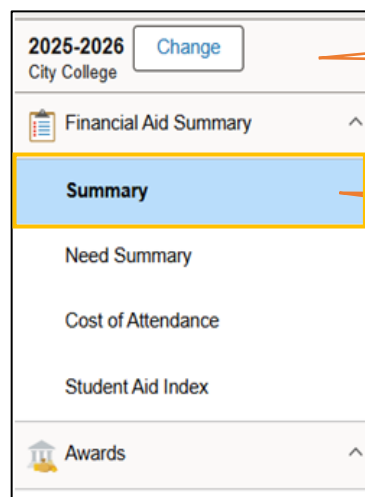
STEP# 2: Select the **Student Center** tile



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	
Federal PELL Grant Fall Grant	Accepted	1,172.50	1,172.50	>
Federal PELL Grant Spring Grant	Accepted	1,172.50	0.00	>
ASAP Scholarship Spring Scholarship	Accepted	1,436.50	0.00	>
ASAP Scholarship Fall Scholarship	Accepted	1,435.95	1,435.95	>
ASAP Books Fall Scholarship	Accepted	365.00	365.00	>
Outside Scholarship 1 Scholarship	Accepted	2,608.45	2,608.45	>
Federal SEOG Fall Grant	Accepted	500.00	0.00	>
Federal SEOG Spring 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.

20XX-20XX	
LaGuardia CC	
	Financial Aid Summary ^
Summary	
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.



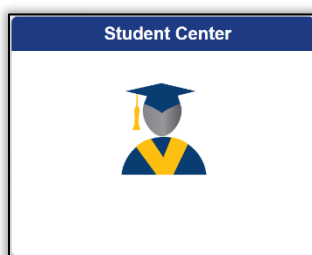
COMPLETE THE DIRECT LOAN PROCESSING FORM

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.

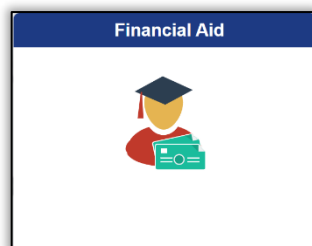
Note: You must complete the FAFSA and resolve your To Do list items before you can submit a loan request.

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

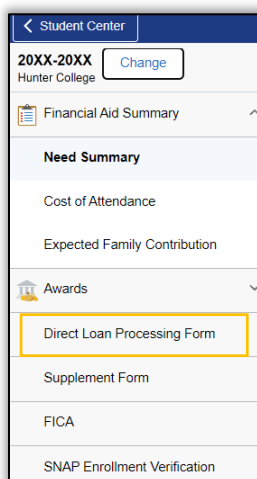
STEP# 2: Student Center Tile





STEP# 3: Select the Financial Aid Tile



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



STEP# 5: 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.

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

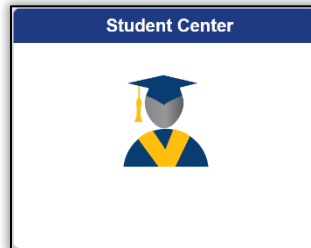
STEP# 6: Follow the on-screen prompts and complete and submit the form.



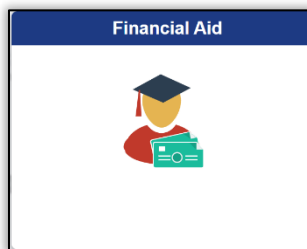
ACCEPT, REDUCE, OR DECLINE YOUR OFFERED FEDERAL WORK-STUDY OR OFFERED FEDERAL DIRECT LOANS

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

STEP# 2: Student Center Tile



STEP# 3: Click on the Financial Aid Tile



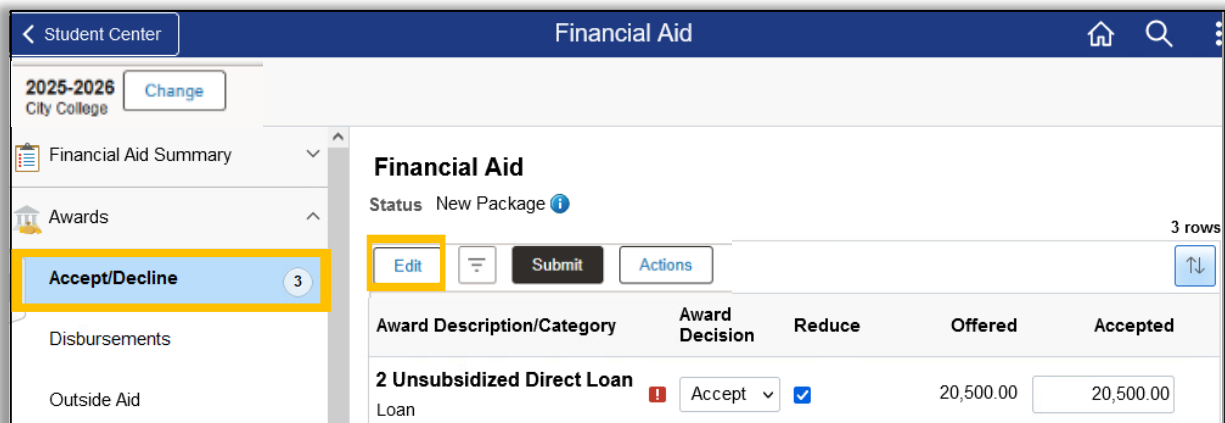
STEP# 4: Confirm the financial aid year that you wish to review at the top left section of the page. Students will only have the option to accept and decline direct loan and federal work-study offers. All grant aid and scholarships are automatically packaged as offered and accepted and do not require action on this page.

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

The screenshot displays the CUNYfirst Financial Aid interface. The left sidebar contains a dropdown menu for the academic year '2025-2026 City College' and a list of options: '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 table of financial aid offers. The table has columns for 'Award Description/Category', 'Award Decision', 'Reduce', 'Offered', and 'Accepted'. The first row shows '2 Unsubsidized Direct Loan' with an 'Accept' button and a '20,500.00' amount.

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

STEP# 6: Click on the **Edit Button**  to activate the **Submit** and **Actions** buttons.



The screenshot shows the 'Financial Aid' page for the 2025-2026 academic year at City College. The left sidebar has 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 are buttons for 'Edit' (highlighted with a yellow box), a filter icon, 'Submit', and 'Actions'. A table with 3 rows is displayed. The table has columns: 'Award Description/Category', 'Award Decision', 'Reduce', 'Offered', and 'Accepted'. The first row shows '2 Unsubsidized Direct Loan' with an 'Accept' dropdown menu (highlighted with a yellow box) and a checked 'Reduce' checkbox. The 'Offered' amount is 20,500.00 and the 'Accepted' amount is 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

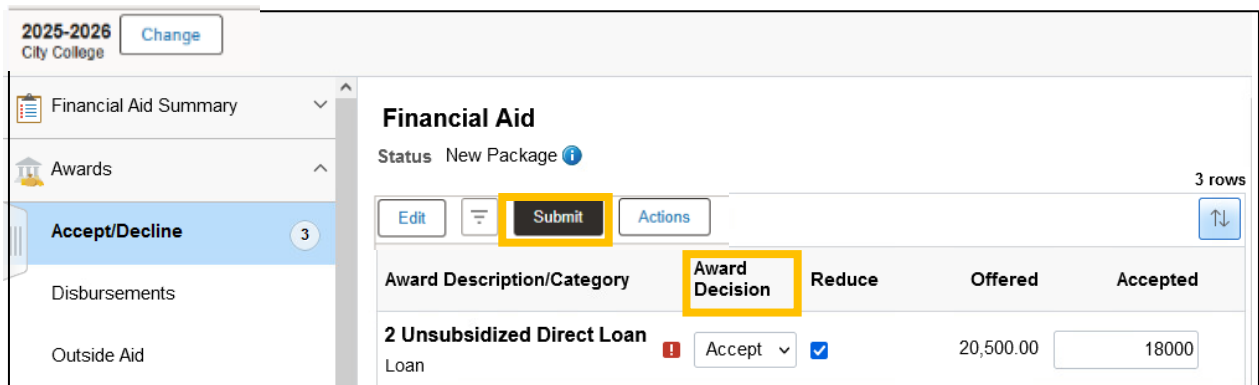
STEP# 7: Click on the dropdown option under the **Award Decision** column.

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 same 'Financial Aid' page. The 'Accept/Decline' button in the sidebar is still highlighted. In the main content area, the 'Submit' button is now highlighted with a yellow box. The table shows the 'Award Decision' dropdown menu (highlighted with a yellow box) set to 'Accept'. The 'Reduce' checkbox is checked. The 'Offered' amount is 20,500.00 and the 'Accepted' amount is 18000.

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

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



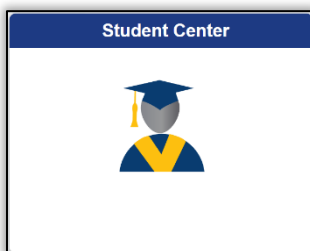
VIEW YOUR BALANCE, PENDING FINANCIAL AID & REFUNDS

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

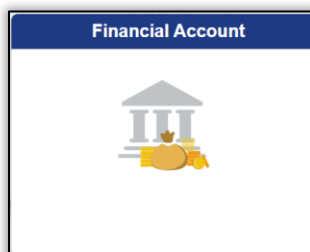
Note: Financial aid that is "**pending**" means that you have been awarded the aid, and it is being used as a credit towards your tuition bill but has not yet been disbursed.

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

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
Total	208.56	1,061.88	0.00

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.

Student Center

SF Account Activity

Bruce Wayne

Account Inquiry | Electronic Payments/Purchases | Account Services

Activity | Pending Aid

Account Activity

View by

From 04/07/20XX To 10/07/20XX All Terms go

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		\$\$\$\$	

First 1-9 of 9 Last

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

Account Inquiry | Electronic Payments/Purchases | Account Services

Activity | Pending Aid

Choose the term you wish to view then click the go button to view.

View By All Terms go

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

First 1-3 of 3 Last

Currency used is US Dollar



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.

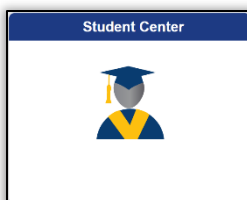
Note: A Form 1098-T statement will not be issued to you if you received federal grants, scholarships or third-party payments that met or exceeded your total tuition charges for the entire calendar year.

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.

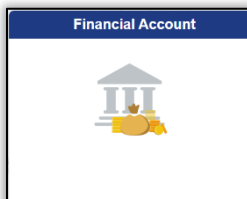
The following steps provide instructions on how to view your 1098-T form in CUNYfirst.

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

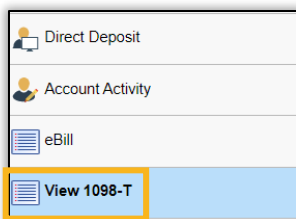
STEP# 2: Click on the **Student Center** tile:



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.

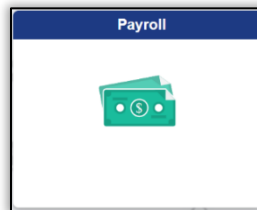
The following steps provide instructions on how to view your Federal Work-Study W-2 forms in CUNYfirst Student Center.

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:

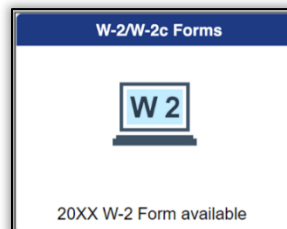


STEP# 4: You will have an option to consent to receiving your W-2 or W-2C electronically by checking the off the “*I consent...*” box:



☐ 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.

Payroll
View W-2/W-2c Forms

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	View Form	i

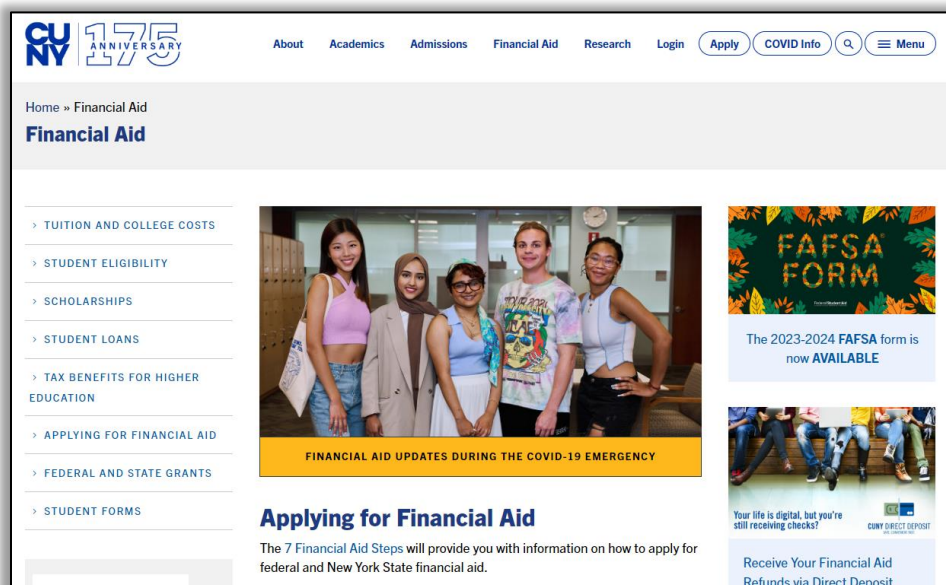
Select: **View Form** to access your W-2/ W-2C

Form W-2 Wage and Tax Statement 20XX		7 Social security tips		1 Wages, tips, other comp.		2 Federal income tax withheld		
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		8 Allocated tips		3 Social security wages		4 Social security tax withheld		
		9		5 Medicare wages and tips		6 Medicare tax withheld		
		10 Dependent care benefits		11 Nonqualified plans		12a See instructions for box 12		
		13 <table border="1"> <tr> <td>Statutory employee</td> <td>Retirement plan</td> <td>Third-party sick pay</td> </tr> </table>		Statutory employee	Retirement plan	Third-party sick pay	14 Other	
Statutory employee	Retirement plan	Third-party sick pay						
		b Employer identification number (EIN)				12c		
		a Employee's social security no.				12d		
15 State NY		Employer's state I.D. no.		16 State wages, tips, etc.		17 State income tax		
						18 Local wages, tips, etc.		
						19 Local income tax		
						20 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				

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

SU 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