STUDENT USER GUIDE

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GETTING STARTED...

The student portal is an easy and organized way for you to navigate through the application process, an important step to become eligible for financial aid. The student portal will take you step-by-step through the process to ensure you provide all the required documentation necessary to be verified.

The Student Portal is broken into 4 sections:

1. **Verify Information**

2. **Required Documents List**

3. **Submit Packet for Review**

4. **Packet Submission Successful**

Ensure your computer is running **Windows XP Service Pack 2 or higher** and the latest version of **Internet Explorer 7 or higher** is installed on your computer and set to be your default browser (Google Chrome, Mozilla Firefox, or Safari are also alternative browsers). If you need to stop at any time during the process (but not if you are in the middle of completing a document requirement), the program auto saves your progress.

STEP ONE: VERIFYING YOUR ACCOUNT INFORMATION

After clicking on the hyperlink provided to you in the e-mail from your college, you will see the below screen asking you to verify your account information. The screen will also have your college's banner and logo across the top. This first step is to verify your identity and ensure your information is secure. You will need the **Email Address** where you received your notification, your **Social Security Number**, and your **Date of Birth.**

1. **Verify your Name:** Make sure the welcome prompt addresses you by your name. If the name displayed is not yours, click the underlined hyperlink next to the name box.

2. **Enter Email Address**: Type in the email address you received your notification. Make sure you enter a valid email address that includes an "@" symbol followed by a domain address (example: student@school.edu).

3. **Enter your Social Security Number**: You will need to enter your Social Security Number in the **SSN** field. Enter the SSN either with or without dashes - the program will accept both formats.

4. **Enter your Date of Birth:** You can use the drop down calendar by clicking the arrow in the field, or you can type your date of birth manually in the field with the month, day, and year separated by a backslash (ex: 10/21/1990).

5. **Click** [Next >] **to continue.**

STEP ONE: VERIFYING YOUR ACCOUNT INFORMATION (CONT)

Verify Information

6. **Your personal Information:** Fill in any information missing and verify that anything that was auto-filled is correct. Some information may already be entered based on your FAFSA such as your name and address.

7. **Contact Information:** Some information may already be auto-filled such as your phone number and default email address.

   *Note: <u>Notification Email</u> - Only enter if you want to receive notifications at a different email address. All emails will be sent to this address only **IF** the student/parent indicates one.

   Select the **Email Format** you want your notifications to be viewed as - Text or HTML.

Security

8. **Create your Username:** Enter an easy to remember user name in the Username box. An example would be "JohnSmith87 or "JSmith1987".

9. **Creating your password:** Enter your password in the Password field, then re-enter the password in the field below. A strong password is recommended, although a weak password will still be accepted.

   *Note: Passwords must be a minimum of six (6) characters with at least one (1) non-alpha character.

Tip: To make a stronger password, use letters of different case and numbers.

Answering your security questions: There are three drop- down boxes for you to choose security questions. You may be asked these questions when logging in for security purposes.

10. Click the drop-down arrow in the **Security Question** box and select a question.

11. Enter the answer to the question in the **Answer** box below it.

Be sure to pick three (3) security questions you will be able to remember the answer to.

STEP ONE: VERIFYING YOUR ACCOUNT INFORMATION (CONT)

Parent Information

12. **Parent Information:** If you are a dependent student, then the Parent Information box will appear. Enter your parent's last name, first initial, Social Security number, date of birth, and e-mail address.

    If you listed an email address for your parent on the FAFSA, it may already be entered. If so, please verify it is correct. Should your parent have to provide any verification documents, they will receive an email notification.

    Note: The parent Email address <u>must</u> be a different Email address than the student.
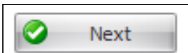
13. Click [⊘ Next] to continue.

   Note: When student creates a username (step 8) and if that username is already in use, you will be prompted (example below) to create a different username after you click <**Next**>.

   The username 'v4test' already exists. Please choose another one and try again.

   Please annotate your Security information (user name, password, security answers) and your parents information and store in a safe place.

SITE LOGIN

After you have created an account, enter your Username / Password.

After login, some students will be prompted with the next screen below:

➢ Returning student

➢ New student if first time logging in and Global has ISIRs for more than 1 award year (2011-12, 2012-13, 2013-14).

➲ Student selects the award year they are submitting documentation for.

If a student has been disabled by the school and tries to log in, they will be prompted that their account has been disabled and to contact their Financial Aid Office it they believe this is in error.

*Note: This prompt will only appear if the student has no active award years.
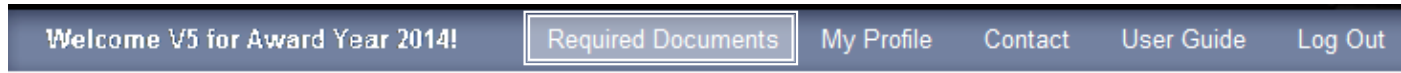
Required Document(s) Process

STEP TWO: PROVIDE YOUR REQUIRED DOCUMENTS

Welcome V5 for Award Year 2014!	Required Documents	My Profile	Contact	User Guide	Log Out

You are now on the Required Document List (RDL) step. In this step, you will provide any necessary documentation that your school requires you to provide for your application for financial aid. The main RDL dashboard below features three (3) helpful windows to aid you in the RDL process.

*Note: If you need to stop at any time during the process (but not if you are in the middle of completing a document requirement), the program auto saves your progress.

REQUIRED DOCUMENTS

The following documents must be completed in order to be considered for financial aid.

Document Name	Status
Tax Return Information	✅
High School Completion Status	✅
Identity/Statement of Educational Purpose	✅
Parent Supplemental Nutrition Assistance Program (SNAP)	⛔
Parent Child Support Paid	
Parent Household Size	
Parent Tax Return Information	

MY DOCUMENTS

File Name	Document Type	Document Name
1184019_74463336.jpg	Student Tax Return..	Tax Return Information
1184019_74463336.jpg	High School Diploma	High School Completi..
Benefits & Bottles.jpg	Identity/Statement..	Identity/Statement o..

MY REJECTIONS

Document Name	Failure Message
Parent Supplementa..	test

The Document Window

This section is the **Document Window**. This window shows all of the documents required to determine your eligibility and finalize your financial aid package.

When the requirements for the document are satisfied, a **Paper with a Green Check Mark** appears under Status for that document.

When a **Warning Sign** appears, a document submitted was put in a reject status. This indicates either conflicting information that requires additional documentation or a correction request be submitted. You can click on the Warning Sign or see "My Rejections" window for explanation and resolution steps required for resubmission.

My Documents

This section is the **My Documents** window. This reflects documents that have been uploaded. The File Name is the name the student saved it under. Document Type is the requested form/document. Document Name is the required document header that the document was submitted under. You may view the document by selecting the linked (underlined) document.

REQUIRED DOCUMENTS

The following documents must be completed in order to determine your eligibility and finalize your financial aid package.

After your parent has submitted his or her information into their portion of the site, you will be required to return to the site and submit your financial aid package for review

Note: A Dependent can not submit their package until a parent completes their portion of the verification process. If a Dependent student, highlighted verbiage will be shown to notify the student.

My Rejections

This section is the **My Rejections** window. This is a log that shows the students the reject comments dealing with any discrepancies found in document submission and providing further instructions.

If a document has been submitted and subsequently rejected, the following window will be viewed with a short explanation of the reject reason and any actions that need to be done to successfully complete the application process.

Document Name	Status
Tax Return Information	
High School Completion Status	
Identity/Statement of Educational Purpose	
Parent Supplemental Nutrition Assistance Program (SNAP)	

MY REJECTIONS

Document Name	Failure Message
Parent Supplementa..	test

UPLOADING DOCUMENTS
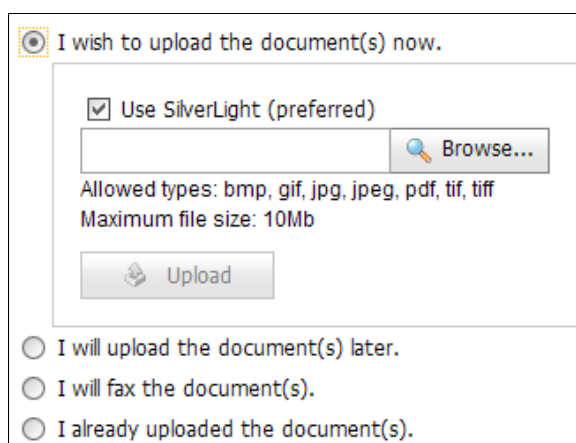
Take a look in the **Document Window** at which documents do not have green checkmarks next to them. These are the documents you will need to provide additional information for. Click the **blue hyperlink** with the document's name to view the required information.

You may be asked specific questions about the document, and you may also be asked to provide the document itself. Please have your documents available before getting started. If you need to stop, you can always come back and finish the section at a later time.

The Student Portal will guide you through any steps you need to follow to complete your application; just follow the user-friendly instructions and you should finish in **less than an hour.**

To upload a document, you can send it from your computer, send from your camera phone, or use a fax barcode coversheet. These methods will be explained in further detail over the next pages.

>> *When the application requires a document(s) to be submitted, an upload box will appear providing you four (4) options* <<.

➲ **I wish to upload the document(s) now** is the most expedient means if you have electronic versions of your documents.

➲ You can choose to skip a section with **I will upload the document(s) later** but you will need to finish it later.

➲ **I will fax the document(s)** will prompt you to create a fax coversheet to prepare your documents to send.

➲ **I already uploaded the document(s)** will allow you to move to the next requirement, but your file cannot be submitted until all necessary documents are uploaded.

*Note: You are required to upload a document for each required item in the Required Documents, even if you already uploaded the same document to satisfy a different requirement.

Ex: You have 2 document requirements; Citizenship and SSN DOB. You uploaded a Birth Certificate to fulfill the Citizenship requirement -- also upload the Birth Certificate in the SSN DOB requirement field. Same document, but needs to be uploaded in each category.

Importing a Document from a Computer

You can upload a document stored on your computer into the Student Portal by navigating to it when prompted to. Please read the instructions below:

Step 1. Click the **"I wish to upload the document now"** button. Click the **<Browse>** button.

Step 2. Browse to your saved scanned document. Highlight the document and click **<Open>**.

* Note: The student portal will only accept high quality JPEG, Bitmap, TIF, GIG, or PDF file formats.
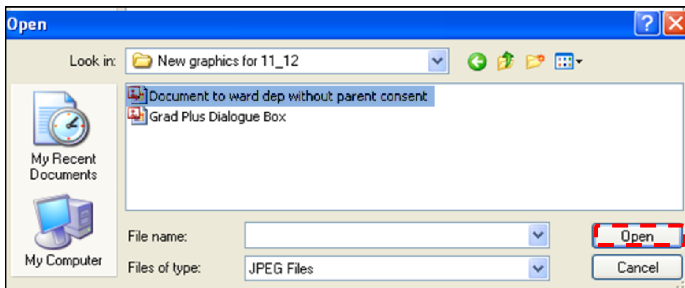
Step 3. You should see the file name of the document you selected. Click the **<Upload>** button.

*Note: If you want to delete the document before you upload, select the red "**X**".

Step 4. Check the "My Documents" area to ensure the document was acknowledged as uploaded.

File	Document	Type	Delete
1040.pdf	Verification Worksheet	Student Income Tax Return	✖
2011 8880 Tax credit.pdf	Citizenship/Eligible Alien Proof	Birth Certificate	✖
rick head.jpg	Citizenship/Eligible Alien Proof	Birth Certificate	✖

Importing a Document with the Barcode Scanner Service

You can fax a document using our state-of-the-art fax upload service to submit for review. Follow these instructions:

When you'd like to fax a required document, click the "**I will fax the document(s)"** option when you're prompted to provide a document.

> ○ I will upload the document(s) later.
> ◉ I will fax the document(s).
> ○ I already uploaded the document(s).
>
> You have indicated that you want to send the document by fax. Since there may be several documents that need to be faxed, we will provide instructions once you have completed the rest of the information.

A message prompt will appear advising that attaching documents is quicker. Scanning or digitally uploaded document(s) is the more efficient option for the review process. To continue, click **<OK>**.

> **Message from webpage**
>
> ? You may get faster results if you attach your documentation. Faxed documents can take as long as 24 hours to update. Would you still like to proceed?
>
> [OK]   [Cancel]
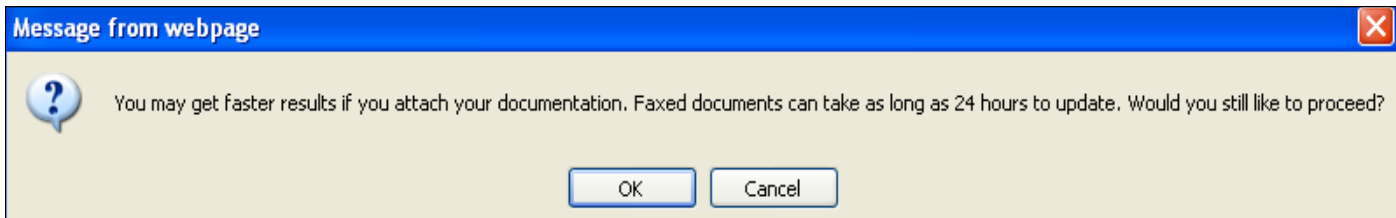
You may select the **Print Coversheet** link at the bottom of the screen if you want to create the coversheet now.

The program will create a document-specific coversheet to print for your requirement.

> You have indicated that you want to send the document(s) by fax. Since there may be several documents that need to be faxed, we will provide instructions once you have completed all of the information.
>
> 🅐 Print Fax Coversheet (.pdf)

A document specific fax cover sheet will be presented that you can print. Next, click **<Finish>** at the bottom of the screen to return to the main dashboard screen of the student portal.

* Note: Please follow the information/steps described on the coversheet to properly fax your documents with the co-versheet. An example of a coversheet is found in the "*Document / Form / Website Example*" section.

➲ If you elect to print coversheets (if more than one) after completion of the document process, select **Fax-Coversheets** at the bottom of the main dashboard screen. Fax-Coversheets

DOCUMENTS TO FAX

Document Type	Document Name	
Birth Certificate	Citizenship/Eligible..	Print
Status Information..	Selective Service	Print
SSN/Last Name match	NSLDS Default/Overpa..	Print

Fax Cover Sheet

Number of Pages (including cover):

Student Name: **Student Fax Test**   Printed Date: **07/06/2011**

School: **Global University**   Required Document: **SSN DOB Proof**

During the course of entering your documents online, it has been determined that you need to provide additional documents. By faxing this coversheet along with your additional documents, we will be able to expedite the review of your request for aid.

Please place the supporting documentation behind this cover sheet and fax to **(555) 555-5555**

To ensure that your electronic financial aid file is properly updated with the necessary documents, please do the following:

1. Please make sure your barcodes are legible and clear to ensure your documents being received;
2. Attach the required documents; and
3. Ensure that documents are placed correctly on the fax machine. Some machines require the document to be FACE UP and some machines require the documents to be placed FACE DOWN. If you place these documents in the incorrect position, the documents will come through as blank pages and not be associated with your electronic financial aid file.

Your time and consideration in this important matter is appreciated.

Please allow 24 hours for system to reflect receipt of your documents.

---

* Important *

You may send multiple documents with multiple cover sheets in one (1) fax ***provided*** that each cover sheet comes immediately before each document e.g. the cover sheets separate each document you send.

Documents Already Uploaded

"I already uploaded the document(s)" will allow you to move to the next requirement, but your file cannot be submitted until all necessary documents are uploaded.

You are required to upload a document for each required item in the RDL, even if you already up-loaded the same document to satisfy a different requirement.

○ I will upload the document(s) later.
○ I will fax the document(s).
◉ I already uploaded the document(s).

The documents that you have sent will be reviewed. You will not be eligible for financial aid until you have submitted all documents.

S TEP T HREE : S UBMIT YOUR P ACKET FOR R EVIEW

When all required documents have been uploaded satisfactorily and status(es) shows the checkmark, select the **"Submit Package for Review"** link.

REQUIRED DOCUMENTS

The following documents must be completed in order to determine your eligibility and finalize your financial aid package.

Document Name	Status
Citizenship/Eligible Alien Proof	✅
NSLDS Default/Overpayment	✅
Verification Worksheet	✅
Submit Package for Review	

Note: If a student used the ISR Date Retrieval with no additional document requirements, the student will just select "Submit Package for Review". See screen below for example.

REQUIRED DOCUMENTS

There is no documentation required from you at this time. Please click the Submit Package For Review below to finalize your financial aid package. You should received notification of your results shortly.

Submit Package for Review

MY DOCUMENTS

File Name	Document Type	Document Name

MY REJECTIONS

After you selected the "**Submit Package for Review** " link, the following screen appears below.

SUBMIT PACKAGE FOR REVIEW

Now that you have completed all of your required documents it is necessary to submit your electronic file.   **Student screen**

When you click the "I Attest" button at the bottom of this screen your electronic file will be submitted. Please click the "I Attest" button now so your file can be submitted for review.

[< Prev]   [I Attest]

If the student is a dependent, the parent will have to complete their portion of the verification process and after completed, they will be prompted with this screen:

Now that you have completed all of your required documents it is necessary to submit your child's electronic file.   **Parent screen**

When you click the "I Attest" button at the bottom of this screen your electronic file will be submitted. Please click the "I Attest" button now so your child's file can be submitted for review.

[< Prev]   [I Attest]

By selecting the **<I Attest>** button you are agreeing the information you have provided is accurate to the best of your knowledge. Select the button to submit your packet.

STEP FOUR: PACKET SUBMISSION

Congratulations, you have completed your electronic application in the **Student Portal.**

You should receive an email within 1-10 business days with information regarding the next step of your application process.

Select <**Finish**>.

Your File Has Been Submitted for Review

Thank you for submitting your file.   **Student screen**

We will review your file, and you will receive an email in 1-10 business days with the results:

- If more information is needed, you will receive instructions to return to this site.
- If your file is complete, your application will continue in the financial aid process.

< Prev   Finish

Your File Has Been Submitted for Review

Thank you for submitting your child's file.   **Parent screen**

We will review your child's file, and you will receive an email in 1-10 business days with the results:

- If more information is needed, you will receive instructions to return to this site.
- If your child's file is complete, your child's application will continue in the financial aid process.

< Prev   Finish

MY PROFILE

Under the "**My Profile**" tab, students can view and update their personal account information. If changes are made, please remember to select the **<Update>** button.

➲ Updating the Notification Email: Changing this information will send all subsequent Email correspondence to the new Email inbox.

Helpful Reminder: If updating information in the "Security" section, recommend annotating the information and retaining in a safe place for reference.
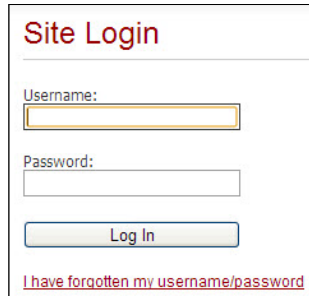
Reset Student/Parent Username/Password

Students and/or parents that have forgotten their username/password can have it reset by following the steps below.

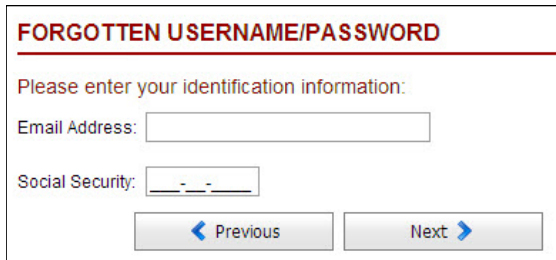**Step 1.** Select the "I have forgotten my username/password" link in the site login screen.

Site Login

Username:

Password:

Log In

I have forgotten my username/password

Step 2. Student (or parent) will be prompted to enter their user identification information (Email and SSN). Select **<Next>**.
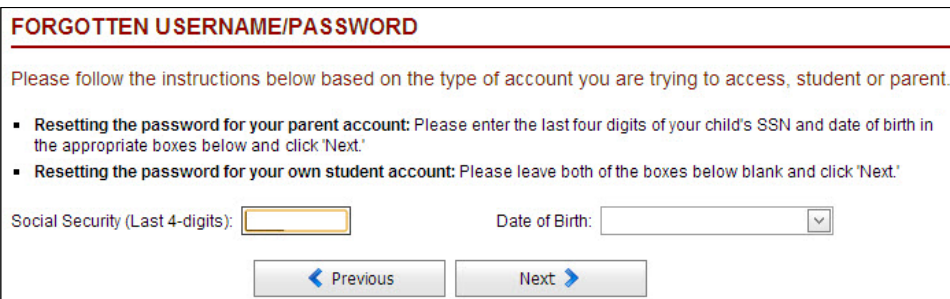
Student: The email address used must match the email address provided on the FAFSA.

Parent: The email address used must match the email address where the parent received their initial login notification. This is also the email address they would have used when registering their account.
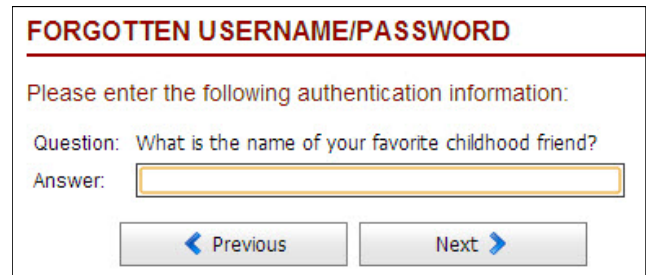
FORGOTTEN USERNAME/PASSWORD

Please enter your identification information:

Email Address:

Social Security: ___-__-____

< Previous   Next >

Step 3. If multiple accounts were found with the entered email address and SSN, then the section below will appear. This helps identify the specific account that the user is requesting a password reset for. If only one account was found, they will go straight to the security question page.
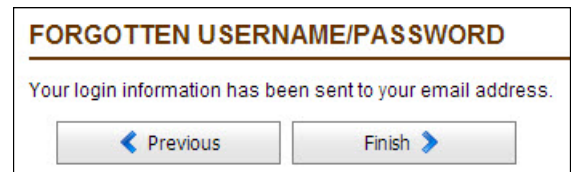
FORGOTTEN USERNAME/PASSWORD

Please follow the instructions below based on the type of account you are trying to access, student or parent.

- **Resetting the password for your parent account:** Please enter the last four digits of your child's SSN and date of birth in the appropriate boxes below and click 'Next.'
- **Resetting the password for your own student account:** Please leave both of the boxes below blank and click 'Next.'

Social Security (Last 4-digits): [____]   Date of Birth: [____ ▾]

< Previous   Next >

Step 4. The next screen prompts student to answer the security question. Select **<Next>**.

FORGOTTEN USERNAME/PASSWORD

Please enter the following authentication information:

Question: What is the name of your favorite childhood friend?
Answer:

< Previous   Next >

Step 5. If student/parent entered correct information, they will be prompted that login information re-set instructions will be emailed to them (at the email address provided). Please note that the information provided in the e-mail is temporary and only valid for **30 minutes**.

FORGOTTEN USERNAME/PASSWORD

Your login information has been sent to your email address.

< Previous   Finish >

The student will be provided their same username but the password provided will be temporary. Upon logging back in, you will be prompted to change the temporary password that was provided.

Note: If the user responses do not match their account or an account cannot be found using the information provided, the user will be prompted to contact a representative at their college for further assistance.

Additional Resources

Helpful Websites

Check out the list of websites below that may come in handy as you complete your requirements for financial aid. You can find great information pertaining to many different topics on these sites, and you can also use them to obtain important forms you may need to complete the financial aid process.

- ✔ **http://www.fafsa.ed.gov/** **The Free Application for Federal Student Aid (FAFSA)** is the cornerstone for any student's financial aid process if you want to receive Federal Student Aid. Federal Student Aid includes everything from Stafford and PLUS Loans, to Federal Work Study and Pell Grants. The website allows you to start, continue, or make corrections to your FAFSA online.

- ✔ **http://studentaid.ed.gov/** Your source for free information from the **U.S. Department of Education** on preparing for and funding your education beyond high school.

- ✔ **http://www.uscis.gov/** **The U.S. Citizenship and Immigration Services website**. You can get copies of useful forms related to proof of citizenship status which may be necessary in order to receive Federal Student aid.

- ✔ **http://www.irs.gov/** **The Internal Revenue Service (IRS)** website allows you to review filing requirements for each year and also request copies of your tax documents for current or previous tax years. If you are selected for verification and filed taxes you will need to be able to provide a signed copy of your tax return or tax return transcript.

- ✔ **https://www.sss.gov/** Through the **Selective Service System (SSS)** website males can check the status of their registration and also retrieve their SSS registration confirmation number. The Free Application for Federal Student Aid requires that all men that meet requirements be registered with Selective Service. Those men under the age of 26 can also complete their registration online.

- ✔ **https://www.nslds.ed.gov/** **The National Student Loan Data System (NSLDS)** is the U.S. Department of Education's (ED's) central database for student aid. NSLDS receives data from schools, guaranty agencies, the Direct Loan program, and other Department of ED programs. NSLDS Student Access provides a centralized, integrated view of Title IV loans and grants so that recipients of Title IV Aid can access and inquire about their Title IV loans and/or grant data.

- ✔ **https://studentloans.gov/** The source for information from the Department of Education about managing your **Student Loans** including signing a Master Promissory Note (MPN) or completing your Entrance Counseling. To be used for both independent and dependent students and their parents.