**These videos are designed to walk you through different processes that may need to be completed in order for you to receive financial aid. If you find that you do not want to watch the videos all the way through, there are also step by step instructions underneath the video for your convenience.**

**“How to Submit Documents”**

**Documents can be submitted to our office by any of the following methods.**

**All documents need your I number written on them.**

* Bring documents into our office personally which is located in Kimball 100
* Fax them into our office at (208) 496-6711. Please make sure you fax both front and back pages of documents.
* Attach the documents to an email and send it to [financialaid@byui.edu](mailto:financialaid@byui.edu)
* Mail your documents to:

100 Kimball Building 1610

Rexburg, ID 83460

**“How to Accept Loans”**

**LOANS are awarded at full time, assuming that students will be taking at least 12 credits. If you will be taking less than 12 credits they can be prorated down to six credits. The amount of loan you accept will be split and disbursed to you over two semesters.**

* Log into your MyBYUI account, click on the Finances Tab and then click on the link that says “View Financial Aid Awards”
* Make sure you are in the correct Academic year. (i.e. 12/13)
* Click on the link that says Accept/Decline Loans
* If you want to accept one or both loans, select the ‘Accept’ bubble
* If you want to accept only part of your loan, select the ‘Accept Lesser Amount’ bubble and specify how much you want to take out.
* If you do not want any loans at all, select the ‘Decline’ bubble
* Once you have made your decision, click Next and review the confirmation page
* If it is all correct, click ‘submit’
* If you declined your loan that is all you need to do.
* If you accepted loans and it was your first time doing so, you will need to complete Master Promissory Note and Entrance Counseling which can be found at [www.studentloans.gov](http://www.studentloans.gov)
* After you complete and submit those documents, our office will receive them in 4-5 business days.

**“How to Locate Your Document Tracker & How to Know if You Have Been Selected for Verification”**

* When you log into your MyBYUI account, click on the Finances Tab
* Click on the link that says “View Financial Aid Document Tracker”
* Make sure you are in the correct Academic year. (i.e. 12/13)
* This link will show you what documents we have received from you as well as anything you may be missing
* If you see that your FAFSA has been received and there are also documents under the ‘Missing Documents’ click on the title and follow the instructions.
* You will need to make sure you turn those documents into our office
* Keep in mind after submitting a document, it will take 2-4 weeks to show up as received on your Document Tracking
* Make sure you frequently check this page; we may request something new at any time.
* Your financial aid award cannot be processed until all documents have been completed and submitted

**“How to Locate Financial Aid Documents”**

* Log into your MyBYUI account, click on the Finances Tab then on ‘View Financial Aid Document Tracking’.
* Click on the title of the document for a PDF version. You will need to print this document out to complete.
* Documents can also be found on our website.
* Go to [www.byui.edu/financailaid](http://www.byui.edu/financailaid) , click on either ‘New Freshman’ ‘Transfer Students’ or ‘Continuing Students’ whichever applies to you.
* Click on the link that says ‘Federal Aid’, then ‘Verification’, then ‘Submitting Documents, then ‘Financial Aid Forms’.
* Here is listed all the 2012-2013 Verification Forms, Acceptance and Permission Forms, and Petitions.
* Each document is in PDF form so once you find the one you need to submit, print it off, fill it out and submit it to our office.
* If you are unsure of what specific document you need to turn in, please go to your document tracking page to find out.

**“How to Know if Your Financial Aid Has Been Disbursed”**

* Log into your MyBYUI account and click on the Finances Tab; then ‘View Detailed Personal Account Summary’.
* Click on the link that says This will show you a detailed screen of any charges you may have and/or any available money you may have on your account.
* There is a section called ‘Available and Disbursed Financial Aid/Scholarships. If you have university aid or financial aid, there will be the award name listed (such as Pell Grant) and a ‘details’ link which you can click on to see what day it has been disbursed and if it went towards any specific fees on your account.
* If you have any credits on your account and would either like to transfer it to your personal bank account or use it to pay other fees on your account, you will need to contact Accounting Office for instruction on this process.
* If you see that your aid has been disbursed and have questions about it or have questions regarding any fees on your account, you will also need to contact Accounting Office for more information.

**“How to Fill out the FAFSA, Sign and Submit it”**

* The FAFSA is a Free Application for Federal Student Aid and can be found by going to [www.fafsa.ed.gov/](http://www.fafsa.ed.gov/).
* If you have never filled out the FAFSA before, you will want to start a new FAFSA application. If you have filled one out before in a different academic year, you can login and proceed with filling out the new application.
* Please make sure you know your social security number and birthday as you will need these to log in.
* If you have never filled out a FAFSA before, you will also need to apply for a pin. This is something you will need to remember as you will use it every time you log in to your FAFSA as well as every time you sign and submit your FAFSA.
* You can proceed by answering the questions throughout the application. If you are filling out the application for the 2012-2013 Academic Year, you will need to provide income information from 2011. (Attend school anytime during Summer Session 2012, Fall 2012, Winter 2013, and Spring 2013.) For the 2013-2014 Academic Year, you will need to provide income information from 2012. (Attend school anytime during Summer Session 2013, Fall 2013, Winter 2014, and Spring 2014.)
* If you are independent, you will only need your income information and your spouse (if applicable). If you are dependent, you will need your income information as well as your parent(s) income information.
* After you have completely filled out the FAFSA, you will need to sign it electronically with the pin you applied for and submit it.
* If you are a dependent student, your parent will also need to apply for a pin and sign the FAFSA electronically before it can be submitted. They will need to remember this pin as well so that if you ever go back in to make corrections or to fill out a new FAFSA for a new academic year, that parent will need to use that pin to sign your FAFSA.
* After you sign and submit it, it will take 4-5 business days for our office to receive it.
* You will see that we have received your FAFSA on your Document Tracking page as well as any documents you need to turn in to our office.

**“How to Use the Data Retrieval Option”**

* If you were selected for verification and need to submit IRS Tax Return Transcripts for yourself or your parents, you can log back into your FAFSA and use the Data Retrieval Tool.
* This option automatically links taxes from the IRS to the FAFSA and if it works successfully, you will not have to turn in physical tax return transcripts to our office.
* To do this, you will need to log back into your FAFSA and click on the link that says ‘Make FAFSA Corrections’.
* You will then want to click on the tab that says ‘Financial Information’.
* If you provided parent income information, you will see this first.
* Your parent (s) will only be able to complete the data retrieval option if they have already filed their taxes for 2011 and if they do not apply to any of the option listed (filed an amended tax return, filed separately, recently filed, etc.)
* If your parent (s) can select ‘None of the Above’ on this list, then they should be able to complete the Data Retrieval option by clicking on that link. This will open up a new window linking to the IRS website where the parent will need to enter the address that was reported on their taxes and answer any other question needed on this page.
* Please note, if your address is 123 N, do not spell out North. Simply put the letter N. This goes for any direction in your address.
* After you have entered the correction information, your parent will need to click the ‘Link’ button. If it brings you directly back to the FAFSA page and says it was successful, then you have done it correctly.
* If you need to link your own taxes, you can click ‘Next’ on your FAFSA application which will bring you to Student Financial Information and follow the same steps as above.
* If linked successfully, you will need to resign and resubmit the application. Simply saving it will not resubmit it.
* To resign and resubmit it, click on the tab ‘Sign & Submit’ at the top. You will need to sign it electronically with your pin, and if you are a dependent student your parent will need to sign it electronically with their pin as well. The FAFSA can then be resubmitted.
* Our office will receive the corrections in 4-5 business days. This will also show up on your document tracking, and if done successfully, we will no longer be requesting you to turn in Return Transcripts to our office.

**“How To Order an IRS Return Transcript”**

* If for any reason you cannot complete the Data Retrieval Option on the FAFSA, you will need to contact the IRS directly to order one from them.
* Keep in mind, if you recently filed, a return transcript will not be available to you for 6-8 weeks if you paper filed and 2-3 weeks if you filed electronically.
* To order the Return Transcript, you can go to [www.irs.gov](http://www.irs.gov)
* Under the Tools bar, click on the link that says ‘Order a Return or Account Transcript’.
* Under step three, you can click on ‘Order a Transcript’ to order one online or you can call the number listed to order one over the phone.
* If you click on the link to order one online, you will need to enter your social security number, your date of birth, and the street address that matches the exact address reported on your taxes. Please make sure you enter it exactly as it appears on your taxes.
* After you click continue, you will need to select which transcript to order and for which year. Please make sure you order the **TAX RETURN TRANSCRIPT**! You will also need to select the 2011 Tax Year if you are applying for 2012/2013 Financial Aid.
* After you have done this and submitted your order, you will receive the Tax Return Transcript through the mail to the address you provided in 7-10 business days.
* Once you receive the Return Transcript, you will need to submit a copy to our office so we can process the document. Please make sure that your name and I # is written on the top of the page.

**“How to Fix a Rejected Signature”**

* If you pull up your document tracking and see that you are missing any of the following: Rejected Missing Signature, Estimated Student Taxes, and/or Estimated Parent Taxes, you will need to make corrections on your FAFSA.
* If you see Rejected Missing Signature, this means that either you and/or your parent did not sign the FAFSA with your pin before submitting it. (A “Signature” for the FAFSA is done using your 4 digit PIN that you should have already applied for and received.)
* To fix this, you will need to log back into your FAFSA application. After you have done this, it should bring you right to a page saying that you did not sign the FAFSA and there should be a link that says ‘Provide Signatures’.
* When you click on this, it will automatically bring you to a page for you to provide a signature for yourself and / or your parent to sign for themselves.
* Enter the appropriate information needed, sign it electronically with your pin, and resubmit the FAFSA.
* Keep checking your document tracking over the next 4-5 business days to make sure it was submitted properly and that you are no longer missing ‘Rejected Missing Signature’. Keep checking this as well to see if you have any further documents to submit to our office.

**“How to Fix Estimated Taxes”**

* If you see under missing documents that you have ‘Parent Estimated Tax’ and/or ‘Student Estimated Tax’, this means you need to update the financial information you provided on your FAFSA
* Log back in to the FAFSA and click on the link that says ‘Make Corrections to FAFSA’ and then click on the tab at the top that says ‘Financial Information’
* The first question on this page asks if you (or your parent if you provided parent information) filed taxes in 2011. Your answer to this question was that either you or your parent ‘will file’ and needs to be updated to ‘already filed’ or ‘will not file’, whichever is applicable.
* If you update it and put that you already filed your taxes, you will either need to complete the Data Retrieval Option to pull in your taxes automatically from the IRS or you will need to enter the income information exactly as it appears on your taxes (or your parent taxes if you are updating parent income).
* Once you have completed this, you will need to sign and resubmit the FAFSA, not just save the corrections. Click on the ‘Sign & Submit’ tab at the top and sign electronically with your pin. If you are a dependent student and provided parent information, your parent will need to sign electronically with their pin as well. You can then resubmit the FAFSA.
* This will show up on your document tracking within 4-5 business days. Once it does, you should see that you are no longer missing Parent and/or Student Estimated Taxes. Keep checking this as well to see if you have any further documents to submit to our office.

**“How to Fill out the Dependent Verification Worksheet”**

* The first thing needed on this document is your name and your I-number and a current phone number for yourself and your parent so that if we can contact you if we have any questions regarding this document.
* Question number one is asking about parent income information for 2011.
  + If your parents filed taxes in 2011, you can mark yes on this question and move on to number two.
  + If your parents did not file taxes in 2011, you will need to mark no and complete the table below.
    - This cannot be left blank so you will either need to enter their employer(s), the amount(s) they made and submit w2(s) matching these amounts. OR
    - If they were unemployed you will need to state that in the box.
* If your parents did not file and you leave this box blank, it will be an incomplete document and we will ask you to make corrections to it.
* Question number two asks if you, as the student, filed taxes in 2011.
  + If you did, simply mark yes and move on to question three
    - If you did not file taxes in 2011, you will need to mark no and complete the table below. This cannot be left blank so you will either need to enter your employer(s), the amount(s) you made, and submit w2(s) matching those amount(s).
    - If you were unemployed you will need to state that in the box.
* If you did not file taxes and you leave this box blank, it will be an incomplete document and we will ask you to make corrections to it.
* Question number three asks for other sources of income both for the parent and the student.
  + Each box needs to have a value in it, even if it is zero. If any boxes are left blank, the worksheet will be incomplete and you will be asked to make corrections to it.
  + If you list an amount under untaxed income, you must also list the source of that amount. Failing to do this will make the document incomplete and you will be asked to make corrections to it
* Question number four only has to be answered if all three apply:
* Your parents did not file taxes and were unemployed
* You did not file taxes and were also unemployed
* Every box in question three is zero.
* This tells us that if there is absolutely no income for you and your family during 2011 how your family support themselves.
* The backside of the verification worksheet asks for household information. Please read the instructions carefully on who you can and cannot include.
  + Keep in mind for anyone you list in the household you must also list their age, the relationship to you, the university/college they are attending (if applicable to them) and if they will be enrolled in 6 or more credits or not at that university/college.
* If you fail to list your parent(s) or anything else listed in the bullet point above, the document will be incorrect and you will be asked to make corrections to it.
* Finally, you, the student, and your parent must sign the document physically. This cannot be a computer generated signature; it must be a physical signature.
* You can then submit the document to our office and expect it to show up on your document tracking as received within 2-4 weeks.
* Please continue watching your document tracking to make sure we are not requesting you to make a correction to the document or requesting you to turn in any other documents.

**“How To Fill out the Independent Verification Worksheet”**

* The first thing needed on this document is your name and I-number. If you have a spouse, please list their name and their I-Number (if applicable). We also need a current phone number so that if we have any questions regarding the worksheet, we can contact you.
* Question number one asks if you as the student filed taxes in 2011.
  + If you did, simply mark yes and move on to number two.
  + If you did not file taxes, please complete the table below the question.
    - If you worked in 2011, report your employer(s), the amount(s) you made, and also submit w2(s) matching these amounts.
    - If you were unemployed, please state that in the box
* If you did not file taxes and leave this box blank, it will be an incomplete document and you will be asked to make corrections.
* Question number two asks if your spouse filed taxes in 2011.
  + If you do not have a spouse or if you do have a spouse and they filed taxes in 2011, mark yes and move onto number three.
  + If your spouse did not file taxes in 2011, mark no and complete the table below the question.
    - If they were employed, report their employer(s), the amount(s) they made, and submit w2(s) matching these amounts.
    - If your spouse was not employed, indicate this in the box.
* If your spouse did not file taxes in 2011 and this box is left blank, it will be an incomplete document and you will be asked to make corrections to it.
* Question number three asks for other sources of income.
  + Each box needs to have a value in it, even if it is zero. If any boxes are left blank, the worksheet will be incomplete and you will be asked to make corrections.
  + If you list an amount under untaxed income, you must also list the source of that amount. Failing to do this will make the document incomplete and you will be asked to make corrections.
* Question number four only needs to be answered if the following apply to you
* You did not file taxes in 2011 and were not employed
* Your spouse did not file taxes in 2011 and was not employed
* Every box in number three was a zero.
* This tells us that if there is absolutely no income for you and your family during 2011 how your family support themselves.
* The backside of the verification worksheet asks for household information. Please read the instructions carefully on who you can and cannot include
  + Keep in mind for anyone you list in the household you must also list their age, the relationship to you, the university/college they are attending (if applicable to them) and if they will be enrolled in 6 or more credits or not at that university/college
* If you fail to list your spouse (if applicable) or anything else listed in the above bullet point, the document will be incomplete and you will be asked to make corrections to it
* Finally, you must sign the document physically. This cannot be a computer generated signature; it must be a physical signature.
* You can then submit the document to our office and expect to show up on your document tracking as received within 2-4 weeks .
* Please continue watching your document tracking to make sure we are not requesting you to make a correction to the document or requesting you to turn in any other documents .