Announcements

❖ Please do NOT put any sensitive information in the Chat or Q&A. Any questions that contain personal information should be sent directly to sfs@temple.edu with your 9 digit TU ID.
❖ This webinar will be recorded and available on our website, https://sfs.temple.edu/about/sfs-webinars, shortly after the presentation.
❖ Question and Answer session after the presentation - please type your question into the Q&A feature.
What We Will Cover

❖ What is Verification and Notifications
❖ Required Documentation
❖ How to Submit
❖ Process Overview
❖ Common Issues & Troubleshooting
❖ Professional Judgement Appeals
❖ How to Initiate an Appeal through the Temple Dashboard
❖ Q&A
What Is It and How Do You Know You’ve Been Selected?

❖ US Department of Education selects students randomly
❖ Three types
  ➢ V1 - Tax Information (only required in select situations for 2022-23)
  ➢ V4 - Identity and High School Completion
  ➢ V5 - All of the Above
❖ Students are notified via:
  ➢ Student Aid Report (SAR)
  ➢ TUPortal (Costs & Aid - SFS Channel - Need to Submit/Resubmit)
  ➢ Email alerts from Temple
Documentation - Identity and High School Graduation

❖ Statement of Educational Purpose
  ➢ Downloaded from the Dashboard
  ➢ Completed by the student and uploaded through Dashboard

❖ Identification
  ➢ Submit with Statement of Educational Purpose
  ➢ Government-issued Photo ID

❖ High School Graduation
  ➢ Diploma
  ➢ Transcript
Documentation – Only Submit If Needed! Tax Information

❖ Dependent Verification Form
  ➢ List all members of the Household supported more than 50% by the custodial parent(s)
  ➢ Form must be signed by hand or through our electronic e-signature process
  ➢ Report current marital status and 2020 tax status for parents
    ■ Independent students also report current marital and 2020 tax status
  ➢ All subsequent requests come from the form

❖ Tax Data
  ➢ Data Retrieval Tool (DRT) on FAFSA
  ➢ 2020 IRS Tax Return Transcript (www.irs.gov)
  ➢ 2020 IRS Tax Form 1040 with all pages, schedules, and signatures

❖ W-2s may be requested
❖ Based on recent updates by the Department of Education for the 2022-23 aid year, federal verification may be waived in some circumstances.
❖ If you are unsure whether you need to complete federal verification or not, please contact Student Financial Services.
A Note about Documentation

- Document requests stem from the verification form
  - What you enter on the verification form tells the system what to request
  - Conflicts will result in additional requests

- Common conflicts between the Verification Form:
  - The FAFSA is filed with 2 parents but only one is reported in the Household
  - Student reports income on the FAFSA and none on the Verification form
  - Parent tax status and options

- There is a difference between filing taxes and earning income
  - We may have to verify both
How to Submit Your Documentation

TUPortal → Costs & Aid → SFS Channel → Need to Submit/Resubmit

**Need to Submit / Resubmit**
You have 4 requirement(s) that have not been submitted or have been deemed incomplete.

**Satisfied**
You have satisfied 2 requirement(s).

**FINANCIAL AID OFFER**
- View your current financial aid offer

**SELF SERVICE BANNER**
- Financial Aid Package
- College Financing Plan

**Need Help?**
How to Submit Your Documentation

Selected for Federal Verification

Instructions:
Your FAFSA has been selected for a process called federal verification. Please complete all verification requirements as soon as possible. Note: the first time you access the requirements you will need to confirm your identify. Be sure to input your first name, last name, date of birth and social security number as it appears on your FAFSA application. If you have difficulty logging in to review the requirements please call SFS, 215-204-2244.

Grant permission to pay any and all University charges

Instructions:
Clicking this link will take you to Self Service Banner. Under the Additional Information section, please use the drop down box to select an answer and submit the information. The requirement will be updated within 24 hours.

Grant permission to pay previous balance up to $200, if owed

Instructions:
Clicking this link will take you to Self Service Banner. Under the Additional Information section, please use the drop down box to select an answer and submit the information. The requirement will be updated within 24 hours.

Please accept your awards on Self Service

LEGEND: Upload, Website, Follow Instructions, Not Eligible Yet.
How to Submit Your Documentation

Dependent Verification Form

You were selected for a process called verification. You will need to verify certain information you reported on your application. In order to do so, you will need to complete this web form. Depending on your responses, you may see additional steps added to complete this section.

- 2022-2023 Dependent Verification Web Form

  Download          Date Filled Out
  2022-2023 Dependent Verification Web Form.pdf  03/28/2022

- You have E-Signed this form. A parent E-Signature is also required. Click the “Request” button to the right to request the E-Signature. This form will no longer be editable while awaiting the parent E-Signature. Otherwise, return to the form by clicking the “Fill Out” button to the right and select “Opt out of E-Sign” in the Review & Sign section to download the form, complete all signatures, and upload the signed form.

- Log into studentaid.gov and transfer student tax data to the FAFSA

Submit
Student E-Signature

Student E-Signature (PIN)

❖ Click on Create my E-Sign PIN
❖ Provide the following:
  ➢ First Name
  ➢ Last Name
  ➢ Date of Birth
  ➢ Social Security Number
  ➢ 5 Digit PIN number
❖ Specific to the student
Parent E-Signature

- Student chooses which parent to email
  - Parent 1 is the first parent entered on the FAFSA
  - Parent 2 is the second parent
  - The chosen parent must be the one who logs in
- Parent receives emailed link
- Parent login must match the FAFSA - First, Last, Date of Birth, Social Security Number
  - Legal Names, not nicknames
- E-sign Password is Account Password
Parent E-Signature

Form Not Approved Button provides information if a correction to the form is required, the student must:
1) Cancel e-sign request
2) Edit webform
3) Student e-signs
4) Then resend for parent signature

Opt Out of E-Sign Button provides information if a parent does not want to e-sign, the student may not e-sign and requires the student to:
1) Cancel e-sign request
2) Edit webform to opt out of e-sign
3) Student follows opt out of e-sign steps
Process Overview

1. Student is notified and logs into Dashboard

2. Complete the verification form and submit any requested documents
   a. Emails and texts sent weekly to remind of outstanding tasks

3. Each file is reviewed in order received
   a. Students receive emails and/or texts when a document is requested or returned
   b. The Dashboard will specify why the document was reopened (missing signature, pages, etc.)
   c. Processing times vary based on the volume of files submitted

4. Verification completed by staff
   a. Student receives email and/or text confirmation
   b. If changes are submitted to the Department of Education, the financial aid offer is updated the following week
Common Issues & Troubleshooting

❖ Signatures must match
  ➢ All e-sign, or all hand-sign - cannot use Microsoft Paint or DocuSign

❖ Page Doesn’t Load
  ➢ Use Google Chrome and clear cache

❖ Can’t find applicable tax and marital status combination
  ➢ Scroll down - use Google Chrome in order to access scroll function

❖ Difficulty obtaining Tax Documents
  ➢ Tax Transcript unavailable: Provide complete 1040 (with signature)
  ➢ IRS Verification of Non-Filing can’t be obtained from IRS
    ■ Submit a written statement explaining attempts to retrieve from IRS and confirming tax status for 2020
Common Issues

❖ Student is unable to submit
  ➢ Are all tasks satisfied?
  ➢ DRT tasks will prevent submission until received
  ➢ Did you click “Submit”?

❖ Parent account is locked
  ➢ Email sfs@temple.edu or make an appointment at sfs.temple.edu/about/appointments
  ➢ Instructions on how to e-sign are at sfs.temple.edu/forms

❖ Problems with Data Retrieval Tool
  ➢ Contact 1-800-4FED-AID for assistance
Professional Judgement Appeals

● Family Contribution Appeal
  ○ Significant change in financial circumstances listed on the FAFSA
  ○ Deadline to submit an appeal is March 23, 2023 for the 2022-23 academic year.

● Cost of Attendance (Budget) Appeal
  ○ Educational related expenses exceed a student’s current Cost of Attendance budget.
  ○ Does not result in additional non-loan funding.
  ○ 2022-23 Cost of Attendance appeals will open July 1st, 2022.

● Dependency Appeal
  ○ Students who do not meet the criteria to be considered an Independent student on the FAFSA but are experiencing unusual or extenuating circumstances that prevent them from listing parental information.
  ○ Dependency appeals must be submitted for each academic year applicable.
Satisfactory Academic Progress Appeals

- Satisfactory Academic Progress Appeal
  - Students who are not meeting the minimum 67% earned versus attempted credits can appeal their status.
  - Note: If a student re-enrolls under Academic Recovery, they cannot appeal their status their first semester re-enrolled.

- Maximum Timeframe Appeal
  - Students exceeding 150% of published length of their academic program.
  - The deadline to appeal for the Fall 2022 semester is September 1st, 2022.
  - The deadline to appeal for the Spring 2023 semester is January 15th, 2023.
Initiating An Appeal

- Student logs into temple.studentforms.com
- Click on the 'Manage Requests' button in the upper right hand corner.
- Select the type of appeal.
Family Contribution Appeal -- 2022-2023

You are opening a financial aid appeal on the basis of a special circumstance and/or reduction in family resources. Please continue forward to complete the appeal form and provide any requested documentation. Appeals can only be submitted for review by a counselor once all requested documents have been submitted. Due to funding limitations, we only review appeals if the outcome will result in the student becoming eligible for a federal Pell Grant or subsidized loan funding. Please also be advised that appeals will not result in enough to cover your balance in full, as Pell offers a maximum grant of $6,845 for 2022-2023. Please continue to consider all of your options for financing your education.

Every effort is being made to review appeals in a timely manner; however, due to the volume of appeals submitted, please allow 1-3 weeks for a response. Information on our process and policy is located at sfs.temple.edu/policies, under "Change of Financial Circumstances."

Information on additional financial aid types is available at sfs.temple.edu, and students can apply for outside scholarships using the iGrad link located on the Costs & Aid tab of TUPortal.

Please explain your reason for this request.

Enter your comments...

Submit  Go Back
SAP Appeal -- 2022-2023

You are requesting a Satisfactory Academic Progress (SAP) Appeal. This appeal is for students who have not passed at least 67% of their overall credits (including credits transferred in). You will need to complete the appeal form, sign it, and provide supporting documentation before your appeal can be submitted for review. Your appeal statement must outline two important factors:

1. What happened to impede your progress
2. What has changed so that you will succeed in the future.

If approved, you will be required to complete and submit a Financial Aid Academic Plan (FAPLAN). We recommend making an appointment with your academic adviser now to review the form.

The deadline for submitting an appeal is September 1 for the Fall semesters and January 15 for the Spring semesters. If you have any questions regarding this process, please make an appointment to speak with our office via the free Qless app.

Please explain your reason for this request.

Enter your comments...

Submit  Go Back

2022 - 2023 SAP Appeal

Below is the list of items the Office of Financial Aid needs you to complete for the satisfactory academic progress appeal process. Click on any section to view the detailed list of requirements.

Satisfactory Academic Progress Appeal - Temple

You have been identified as having failed to meet Satisfactory Academic Progress. To continue with your SAP appeal you must complete the SAP Appeal web form. When completing the web form you must provide the following in your signed statement:

- Extenuating circumstances that caused you to fail to meet Satisfactory Academic Progress
- What has changed that will enable you to meet Satisfactory Academic Progress at the next evaluation
- The steps you will take to ensure you continue to meet Satisfactory Academic Progress in the future

Fall Deadline: September 1
Spring Deadline: January 15

You may be required to provide supporting documentation of your extenuating circumstances.
Example: Satisfactory Academic Progress Appeal
Example: Satisfactory Academic Progress Appeal
Certification and Signatures

Each person signing this worksheet certifies that all of the information reported on it is complete and correct.

WARNING: If you purposely give false or misleading information on this worksheet, you may be fined, be sentenced to jail, or both.

The student must sign and date this form.

Student’s Signature

Date

Spouse’s Signature (optional)

Date

E-Sign PIN

Forgot your E-Sign PIN?

Satisfactory Academic Progress Appeal

Appeal Status: Open

Satisfactory Academic Progress Appeal - Temple

Date Filled Out

06/10/2022

Download

Satisfactory Academic Progress Appeal - Temple.pdf

Upload SAP Medical Form - Temple

Upload SAP Medical Form - Temple

Upload Supporting Documentation

Submit
Resources

● **SFS Forms site**
  ○ Federal Verification Frequently Asked Questions
  ○ Troubleshooting Verification Requests
  ○ Family Contribution Suggested Documentation

● **SFS Policies Site**
  ○ Satisfactory Academic Progress
  ○ Change to Financial Circumstances
  ○ Dependency Status

● **Academic Standards site**

● **SFS Financial Aid Requirements site**
  ○ E-signature instructions for both the student and parent
Questions?

Contact SFS

- Email: sfs@temple.edu
- Please include your 9 digit TU ID on any email correspondence.
- We utilize a ticketing system when you contact us and will create a ticket at the time of your call or email. We will then have a professional staff member get back in touch.

Join our virtual line:

- QLESS
  - Download the QLESS app.
  - Available on both iPhone and Android devices.
  - Enter through the link listed on https://sfs.temple.edu/about/appointments.

- Family Education Rights and Protection Act Waiver
  - In order to provide a waiver of FERPA rights to a specific person, students should follow instructions listed on https://sfs.temple.edu/policies/family-educational-rights-and-privacy-act.