WASHINGTON & JEFFERSON COLLEGE

Office of Financial Aid

Financial Aid Self-Service
Student Manual

(April, 2021)
Financial Aid Self-Service Student Manual

Financial Aid Self-Service

Login to https://jaysource.washjeff.edu/Student.
You will use the same username and password as your college E-mail account.
Financial Aid Self-Service Student Manual

Financial Aid Self-Service Home Page

Click on "Financial Aid" to get started.

<table>
<thead>
<tr>
<th>Hello, Welcome to Colleague Self-Service!</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose a category to get started.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Student Finance</th>
<th>Financial Aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Here you can view your latest statement and make a payment online.</td>
<td>Here you can access financial aid data, forms, etc.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tax Information</th>
<th>Student Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Here you can change your consent for e-delivery of tax information.</td>
<td>Here you can search for courses, plan your terms, and schedule &amp; register your course sections.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Grades</th>
<th>Graduation Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>Here you can view your grades by term.</td>
<td>Here you can view and submit a graduation application.</td>
</tr>
</tbody>
</table>
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Financial Aid Menu
You can also access the financial aid tabs under the “Financial Aid” header.

- The FA Menu Includes:
  - Financial Aid Home
  - Required Documents
  - My Awards
  - Report/View Outside Awards
  - Request a New Loan
  - Award Letter
  - College Financing Plan (Federal Shopping Sheet)
  - Correspondence Option
  - Satisfactory Academic Progress
Select the academic year to review.
Complete Checklist Items

Click on the “Action Needed” items highlighted in yellow.

<table>
<thead>
<tr>
<th>Checklist</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed</td>
<td>Submit a Free Application for Federal Student Aid (FAFSA)</td>
</tr>
<tr>
<td>Action Needed</td>
<td>Complete required documents</td>
</tr>
<tr>
<td>Not Available</td>
<td>Your application is being reviewed by the Financial Aid Office</td>
</tr>
<tr>
<td>Not Available</td>
<td>Review and accept your Financial Aid Award Package</td>
</tr>
<tr>
<td>Not Available</td>
<td>Review and sign your Financial Aid Award Letter</td>
</tr>
</tbody>
</table>

**Student Finance Account Summary**

- Amount Due 7/18/2018: $0.00
- Amount Overdue: $0.00
- Total Amount Due: $0.00

Go to Account Summary

**Resources**

- FAFSA Application
- Entrance Counseling
- Master Promissory Note
- PLUS Loan Application
- NSLDS Information
Complete Required Documents

Here you will be able to see the received and incomplete documents to be submitted. To submit a document please click on the “manage” button under the column titled “attachments”. You will then be able to upload an attachment.

<table>
<thead>
<tr>
<th>Document</th>
<th>Explanation</th>
<th>Due Date</th>
<th>Status</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verification Worksheet</td>
<td>Your Free Application for Federal Student Aid (FAFSA) has been selected for a process called verification. Please submit a copy... more</td>
<td></td>
<td>Incomplete</td>
<td></td>
</tr>
<tr>
<td>2018 Parent Tax Transcript</td>
<td>Please submit a copy of your parent’s 2018 IRS tax return transcript to the Financial Aid Office. Internal Revenue Service</td>
<td></td>
<td>Incomplete</td>
<td></td>
</tr>
<tr>
<td>2018 Parent W2’s</td>
<td>Please submit a copy of your parent’s 2018 W2s to the Financial Aid Office. Internal Revenue Service</td>
<td></td>
<td>Incomplete</td>
<td></td>
</tr>
<tr>
<td>2018 Student W2’s</td>
<td>Please submit a copy of your 2018 W2s to the Financial Aid Office. Internal Revenue Service</td>
<td></td>
<td>Incomplete</td>
<td></td>
</tr>
<tr>
<td>20/21 Electronic Isir</td>
<td>The Financial Aid Office has received your 2020-2021 Free Application for Federal Student Aid (FAFSA). FAFSA</td>
<td>11/15/2019</td>
<td>Received</td>
<td></td>
</tr>
</tbody>
</table>
Your Financial Aid Package is now ready!
Your financial aid award package is now ready for your review and acceptance.
Review and accept your Financial Aid Award Package

Student Finance Account Summary
- Amount Due 7/18/2018: $0.00
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Checklist
- Completed: Submit a Free Application for Federal Student Aid (FAFSA)
- Completed: Complete required documents
- Completed: Your application is being reviewed by the Financial Aid Office
- Action Needed: Review and accept your Financial Aid Award Package
- Action Needed: Complete Direct Loan Entrance Counseling
- Action Needed: Sign a Direct Loan Master Promissory Note
- Action Needed: Review and sign your Financial Aid Award Letter

Resources
Helpful Links
- FAFSA Application
- Entrance Counseling
- Master Promissory Note
- PLUS Loan Application
- NSLDS Information
- PHEAA
- Satisfactory Academic Progress
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My Awards

Click “Accept or Decline” under the award name.
You only accept or decline awards in an “Offered” status.

<table>
<thead>
<tr>
<th>Award</th>
<th>Status</th>
<th>Total Awarded Amount</th>
<th>2018 Fall</th>
<th>2019 Spring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Work Study</td>
<td>Offered</td>
<td>$2,000.00</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
</tr>
</tbody>
</table>

Check the terms you will be attending.

- **2018 Fall**
  - $1,000.00

- **2019 Spring**
  - $1,000.00

Total
- $2,000.00
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**Award Total**

You can accept or decline any remaining awards that are pending by clicking “Accept or Decline All” under “Total Awards.”

<table>
<thead>
<tr>
<th>Award</th>
<th>Total Awarded Amount</th>
<th>2018 Fall</th>
<th>2019 Spring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Awards</td>
<td>$2,000.00</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
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This allows you to accept or decline any awards that are still Pending. Please review your awards package before accepting or declining all your pending awards.
Report / View Outside Awards

Here you can notify the office of financial aid of any outside scholarship(s) you have received. You must also submit a paper copy of the award letter / notification from the scholarship organization.

Outside Awards

You can report new or view existing awards received from outside sources

Select an Award Year: 2019/2020 Academic Year

If you have received Financial Aid from any other sources please enter the awards below.

Add an award
Request a New Loan

Students will not be permitted to submit a new loan request using Financial Aid Self-Service.

The Office of Financial Aid will automatically award you any Federal Direct Loans you are eligible to receive.

You are required to accept or decline your loans using Financial Aid Self-Service.

If you are requesting a private loan, your lender will notify the Office of Financial Aid of your loan request.

For more information please visit our website.
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**Award Letter**
You can review and electronically sign your award letter.

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Your Financial Aid Package is now ready!
Your financial aid award package is now ready for your review and acceptance.

- Review and accept your Financial Aid Award Package

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**Student Finance Account Summary**

- Amount Due 7/18/2018
  - $0.00
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  - $0.00
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  - $0.00

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**Checklist**

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**Resources**

**Helpful Links**

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![Image of Financial Aid Self-Service Student Manual page]

**Award Letter**
Please review your award letter and contact the Financial Aid office for any questions.

Select an Award Year: 2019/2020 Academic Year

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**2019/2020 Academic Year**

Total: $2,000.00

### Award Letter

This is your Financial Aid letter for the above award year. Your budget and awards are based on our review of your completed financial aid application. Awards are made based on full-time enrollment. If you are enrolled in less than 12 units, your award will be less than the amount shown.

FOR PAYMENT DATES AND ADDITIONAL FINANCIAL AID INFORMATION, PLEASE READ THE ENCLOSED MATERIALS.

<table>
<thead>
<tr>
<th>Award</th>
<th>Total</th>
<th>Fall</th>
<th>Spring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self Help</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Work Study</td>
<td>$2,000.00</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
</tr>
</tbody>
</table>

Total: $2,000.00

Your total award is subject to the availability of funds from the appropriate agencies and the laws and regulations which govern these programs, and is thus subject to change.

*ALL AWARDS ARE CONTINGENT ON BOTH YOUR ENROLLMENT AND YOUR SATISFACTORY ACADEMIC PROGRESS STATUS.*

- [ ] I verify that I accept the award package and electronically sign my award letter.
- [ ] Accept
- [ ] Cancel and Return Home

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Resources & Helpful Links

Financial Aid Self-Service provides helpful links about different types of aid. You can also see the contact information for the Office of Financial Aid.

<table>
<thead>
<tr>
<th>Financial Aid Counselor</th>
</tr>
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<tr>
<td>Satisfactory Academic Progress</td>
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The College Financing Plan is a consumer tool that is designed to simplify the information that prospective students receive about costs and financial aid so that they can easily compare institutions and make informed decisions about where to attend school.
Correspondence Option

Here you can choose to receive paper copies of correspondence from the Office of Financial Aid.
You can view your Satisfactory Academic Progress for an evaluation period.

<table>
<thead>
<tr>
<th>SAP Status</th>
<th>Date Reviewed: 5/30/2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evaluation Period:</td>
<td>2016FAL - 2017SPG</td>
</tr>
<tr>
<td>Program:</td>
<td>Open/Undecided</td>
</tr>
<tr>
<td>SAP Status:</td>
<td>✔ Satisfactory</td>
</tr>
</tbody>
</table>

*What does Satisfactory Academic Progress mean?*
Questions

Contact the Office of Financial Aid
Phone: 724-223-6019
Email: finaid@washjeff.edu
Website: http://www.washjeff.edu/financial-aid