

Student Verification Student Portal Guide

Version 25.2.0

February 2025

Anthology Inc.

5201 Congress Avenue Boca Raton, FL 33487 Main: +1.561.923.2500 Support: +1.800.483.9106 www.anthologyinc.com

© 2025 Anthology Inc. and its affiliates. All rights reserved.

ANTHOLOGY and the Anthology logo are exclusive trademarks of Anthology Inc. Microsoft and Microsoft Dynamics are trademarks of Microsoft Corporation. Other third-party trademarks or service marks are property of their respective owners. Information is subject to change.

CONFIDENTIALITY NOTICE:

The information contained in this document is confidential. It is the property of Anthology Inc. and shall not be used, disclosed, or reproduced without the express written consent of Anthology Inc.

Revision History

| Rev. | Date | Description | |
|------|-----------|--|--|
| 01 | Oct. 2020 | Updates for version 20.11 | |
| 02 | May 2021 | Updates for version 21.5 | |
| 03 | June 2021 | Anthology product renaming/rebranding | |
| 04 | Jan. 2022 | Updates for version 22.1. See <u>Submit Documents from a Mobile Device</u> . | |

Contents

| Student Verification | 4 |
|--|------|
| Student Portal | 4 |
| Sign In | 5 |
| Sign Out | 7 |
| Password Reset | 8 |
| Electronic Signature and Consent | 10 |
| Student Portal Site | . 11 |
| Header | 11 |
| Home | . 12 |
| Menu | 15 |
| Profile | 15 |
| Form Center | . 15 |
| Contact | 16 |
| Main Content | . 16 |
| Footer | 17 |
| Verification Process | 18 |
| Required Documents | 19 |
| Submit Documents from a Mobile Device | 19 |
| Submit Documents from a Desktop Device | . 21 |
| Special Circumstance Request | 27 |
| Completed Documents | 31 |
| Useful Links | 32 |

Student Verification

Within the financial aid world for higher education institutions, "verification" is a confirmation process through which institutions request additional information and/or supplemental documentation from students based on their Free Application for Federal Student Aid (FAFSA) responses. After initial processing and data checks, the U. S. Department of Education flags some student applications for verification by the target institution. In these cases, the target institutions will request additional information, documents, or corrections from students to continue processing their applications for financial assistance.

To help alleviate the task-intensive student verification process, Anthology Inc. has automated, streamlined, and simplified the verification process with its Student Verification solution. This solution provides a Student Portal for students to review and submit documentation to complete the verification process.

Student Portal

The Student Portal is designed to interact with students and provide a streamlined verification experience. The Student Portal is branded with the color scheme and logo from the target institution.

A student can access the Student Portal in several ways. Please see Sign In to find out more about logging in to the Student Portal.

Sign In

The Student Portal offers the ability to log in through Single Sign-On (SSO) or with a username/email address and password. A student logging in with a username and password will receive the "New ISIR Documents Notification" email. This email is managed by the institution and includes information to log in to the Student Portal.

Important: For first time users logging in to the Student Portal.

The account name is the email address at which the email is received, example john.doe@testschool.com. The initial password is the first letter of the last name capitalized, the second letter of the last name in lowercase, the last 4 digits of the social security number, and an exclamation point and @ symbol, example Test Student would be St8787!@.

Important: If the user account is managed by SSO, the username and password is configured in an external system. The user would need to authenticate in the external (institution) system. The normal username and password process is not applicable to SSO users.

To sign in to the Student Portal:

1. Navigate to the Student Verification Portal using the URL provided by the institution.

Note: The styling (colors, logo, etc.) of the Student Verification Portal will be different for each institution.

2. Enter your **Email** and **Password**.



3. Select the **LOGIN** button.

Sign Out

When you no longer need to access the Student Portal, you should sign out. Student Verification manages personal identifiable information for students and parents (where applicable). It is important that you do not leave an access point open that could be a potential security risk.

To sign out of the Student Portal, select **Logout** at the top-right corner of the page.

| | WELCOME | LOGOUT |
|---------|-------------|---------|
| PROFILE | FORM CENTER | CONTACT |

Password Reset

If you forget your password, you can submit a password reset request. You must have access to the email address associated with your user account. After a successful password reset, you can log in to the Student Portal.

Important: If the user account is managed by SSO, username and password are configured in an external system. The user would need to authenticate in the external (institution) system. If the Forgot Password function is implemented within the SSO configuration, this link is directed to your institutional authentication system for password and user account support.

To reset your password:

1. Navigate to the Student Portal and select the **Forgot Password** link.

| Login |
|-----------------------|
| Email |
| Email is required |
| Password |
| |
| LOGIN FORGOT PASSWORD |

2. Enter your email address in the **Email** field.

| Forgot Password |
|------------------------------|
| Email * |
| C Enter the code shown: * |
| SEND CANCEL |

3. Enter the code shown in the provided field.

If you cannot read the code, select **Refresh** to generate another code.

4. Select the **Send** button.

Important: The system sends an email with instructions for resetting the password. The email will include a link. Please select the link immediately as it will expire in a certain time frame.

Electronic Signature and Consent

The electronic signature and consent process is optional and configured by the institution. Upon successful log in, the E-Sign and Consent page will be displayed and require the student to opt in or opt out.

The OPT-IN selection consents to the use of electronic records in accordance with the terms of the E-Sign Form and confirms the student can access disclosures, records, and other information from the institution in electronic form.

The OPT-OUT selection declines the use of electronic consent and informs the student and institution that transactions will occur through a manual paper process.

To opt in or opt out of the electronic signature and consent process:

- 1. Log in to the Student Portal.
- 2. Review the E-Sign and Consent page.

| E-Sign and Consent |
|---|
| You must review the E-Signature and Consent Disclosure before proceeding to the Student Portal. Please take a moment to review and confirm your option for E-Consent. |
| This E-Sign Disclosure asks for your consent to have Sandbox University provide you with electronic records and transact with you in electronic form. Please read this E-Sign document before consenting to receive this and other communications electronically rather than in paper. This E-Sign Disclosure contains important information that we are required by law to provide. You should keep a copy of this document for your records. Additionally, it will be stored in Completed Documents on your Student Portal and with the school. |
| By providing your consent, you are accepting to have transactions conducted and records maintained in electronic form related to your application for Federal Student Aid. |
| Should you opt-in, you have the right to withdraw your consent for electronic records and transactions at any time. Once you remove your consent, we will stop providing records and conducting transactions with you electronically. Future notices will be mailed to the last address on file. |
| You may opt-out through your Student Portal on the Completed Documents Page. If you withdraw your consent, the terms of this E-Consent document will continue to apply to all your electronic records furnished or transactions conducted prior to the school?s receipt of the withdrawal. |
| OPT-IN You consent to the use of Electronic Records in accordance with the terms of this E-Sign Form and confirm that you can access all the disclosures, records, and other information provided to you in electronic form. OPT-OUT You decline the use of Electronic Records in accordance with the terms of this E-Sign Form. The school will not provide documents or transact with you electronically. Instead, you will be provided |
| paper documents. |

- 3. Select either the **OPT-IN** or **OPT-OUT** option.
- 4. Select Save.

Important: The system will automatically log the student out of the Student Portal if the OPT-OUT selection is saved.

Student Portal Site

Every page in the Student Portal site consist of three parts: Header, Main Content, and Footer. The header and footer are the same on every page. The main content varies from page to page based on the user's navigation selections.



Header



The top right section of the header displays the name of the logged in user and the log out option.

The banner section displays the institution's logo and portal name and the following navigation options:

- Home
- Menu
- Profile Form Center
- Contact

Home

The Home option provides easy navigation to any area of the Student Portal. The Home page displays the Get Started button and the Required Documents, Completed Documents, and Useful Links tiles.

Get Started Button



The Get Started button enables the student to navigate to the Required Documents page to begin the verification process.

| Requi | red Docu | ments — | | |
|---|---|--|---------------------------------------|-----------|
| The document(s) below are required to complete your to The documents are separated by award year on each to Click on each button in the Action column and follow th Documents will not be considered as complete until a c | financial aid process. ab. You must complete e process steps until co theck mark is located in | the documents for eac mpletion. the Submitted columr | h award year. h (with no pending c | omments). |
| SPECIAL CIRCUMSTANCE REQUEST | | | | |
| 2019 - 2020 2020 - 2021 | | | | |
| My Progress: | | | | |
| 67% | | | | |
| All required documents must be submitted and approved before | the verification process ca | n be completed. | | |
| Document | Classification | Action | Submitted | Approved |
| 2018 Student Tax Return | Verification | EDIT | ~ | |
| 2018 Parent Tax Return | Verification | SUBMIT | | |
| 2020-2021 Verification Worksheet V1 Dependent 2021 | Verification | FILL OUT | ~ | |

• Required Documents Tile



Like the Get Started button, the Required Documents tile links to the Required Documents page which lists the documents required for Verification, Comment Code, and Professional Judgment.

| Require | d Docu | ments — | | | |
|---|---|---|--------------------------------------|-----------|--|
| The document(s) below are required to complete your finan. The documents are separated by award year on each tab. Yo Click on each button in the Action column and follow the pro Documents will not be considered as complete until a check SPECIAL CIRCUMSTANCE REQUEST | cial aid process. ou must complete ocess steps until co mark is located in | the documents for eac ompletion. the Submitted column | h award year. (with no pending co | omments). | |
| 2019 - 2020 2020 - 2021 My Progress: | | | | | |
| 67% | | | | | |
| All required documents must be submitted and approved before the v | erification process ca | n be completed. | | | |
| Document | Classification | Action | Submitted | Approved | |
| 2018 Student Tax Return | Verification | EDIT | ~ | | |
| 2018 Parent Tax Return | Verification | SUBMIT | | | |
| 2020-2021 Verification Worksheet V1 Dependent 2021 | Verification | FILL OUT | ~ | | |

• Completed Documents Tile



The Completed Documents tile links to the Completed Documents page which list the documents completed by the student and/or uploaded by the staff. The student can review and download PDF versions of

| | Completed Documents | | | | | |
|------------------|---|-------------|-----------|---------------------|--|--|
| Below | Below are the required documents that have been completed. Click on the name of the file to review and/or print. Save them too. | | | | | |
| You wil image | You will need a program on your computer that will allow you to view PDF files in order to view your documents. One such program is Adobe Reader ®. Click the image below to download and install Adobe Reader ®. | | | | | |
| 人 | | | | | | |
| To subm | it a document via FAX please use fax number: | | | | | |
| | File Name | Institution | File Size | Last Updated | | |
| æ | 2019-2020 Dependent Verification Worksheet V1 (2019 - 2020 Award Year) | | 264 KB | 03/24/2021 11:33 AM | | |
| Æ | 2020-2021 Dependent Verification Worksheet V1 (2020 - 2021 Award Year) 27 KB 05/08/2020 3:58 PM | | | | | |
| Æ | 2020-2021 Dependent Verification Worksheet V1 (2020 - 2021 Award Year) | | 27 KB | 05/08/2020 3:59 PM | | |
| Þ | Electronic Signature Consent | Oct-Out | 93 KB | 07/02/2020 3:53 AM | | |
| æ | Student / Spouse Joint Return (2020 - 2021 Award Year) | | 33 KB | 04/14/2020 1:40 PM | | |

• Useful Links Tile



The Useful Links tile links to the Useful Links page which present URLs configured by the institution for the student to review as helpful resources. The links can also be accessed from the page footer.

| Useful Links | | | | |
|--|--------------------------------|--|--|--|
| FAFSA Use the Free Application for Federal Student Aid (FAFSA®) form to apply for financial aid for college or graduate school. | IRS Module 5: Filing Status | | | |
| | | | | |

Menu



The Menu option provides navigation to the Required Documents, Completed Documents, and Useful Links pages.

Profile

The Profile option links to the My Profile page which lists the student's demographic information. The Profile is configured by the institution. The student can edit any information that is not grayed out. The Profile enables the student to opt in or out of SMS text messaging and add social media links. The Profile also enables the student to reset the password.



Form Center

The Form Center option displays Verification, Comment Code, Professional Judgment, and General forms for the student to review and download. The Form Center is configured by the institution.

| Form | Center | | | |
|---|---|--|--|--|
| These are blank forms that you can print and fill in by hand. | | | | |
| You will need a program on your computer that will allow you to Adobe Reader ®. Click the image below to download and install <i>i</i> | view PDF files in order to view your documents. One such program is Adobe Reader ®. | | | |
| Get adobe: reader: | | | | |
| Verification Forms Student Forms | | | | |
| Verification Forms Student Forms | | | | |
| Rew Static Document | E Scholarship Fact Sheet | | | |
| | TEST Document | | | |
| | | | | |

Contact

The Contact option displays the Contact Us page with information about the institution and the reviewer assigned to the student. If the student is not assigned a reviewer, the page will only list the institution. Refer to the Contact Us tile in the footer for additional information on the institution.

| Contact Us Ways To Get In Touch | | | | | |
|------------------------------------|-------------------------|---|--|--|--|
| Florida | % (205) 555-5121 | | | | |
| • (M) === | L (123) 456-7890 | 5 | | | |

Main Content

The main content varies from page to page based on the user's navigation selections.

Footer



The footer of every page in the Student Portal displays the logo/name of the institution and the Contact Us and Useful Links tiles.

The bottom section is collapsible. When expanded, it shows the institution's portal name as well as copyright and version details of the Student Verification application.

Verification Process

When the Department of Education selects a student for verification, the process can require documents to verify income and household related information. The Student Verification incorporates a rules engine to review the student ISIR and demographic information to trigger a list of required documents. These required documents can be found in the Student Portal.

To access and review required documents:

- 1. Log in to the Student Portal.
- 2. On the Home page, select the **Get Started** button or the **Required Documents** tile.

Required Documents

The Required Documents page is multi-award year. If a student is selected for verification for a specific award year, the appropriate award year is populated. The student will need to select the award year to view required documents.

The My Progress bar provides a percentage of documents completed. The Classification column identifies documents based on the categories of Verification, Comment Code, and Professional Judgment. The Action column enables students to fill out, edit, and submit required documents.

Important: The Submitted column indicates a check mark when a document is successfully submitted by the student and/or staff member. The Approved column indicates a check mark when a document has been approved by a staff member.

| Requir | ed Docu | ments — | | |
|--|--|--|-------------------------------------|-----------|
| The document(s) below are required to complete your fin The documents are separated by award year on each tab Click on each button in the Action column and follow the Documents will not be considered as complete until a che | ancial aid process. . You must complete : process steps until co :ck mark is located in | the documents for eac mpletion. the Submitted column | h award year. (with no pending c | omments). |
| 2019 - 2020 2020 - 2021 My Progress: | | | | |
| 67% | -16 | | | |
| Document | Classification | Action | Submitted | Approved |
| 2018 Student Tax Return | Verification | EDIT | ~ | |
| 2018 Parent Tax Return | Verification | SUBMIT | | |
| 2020-2021 Verification Worksheet V1 Dependent 2021 | Verification | FILL OUT | ~ | |

Students can fill out, edit, and submit required documents from a mobile device or from a desktop device.

Submit Documents from a Mobile Device

Students can take an image of a document on a mobile device and submit the image to the Student Verification portal. The application will convert the image to a PDF file.

In the case of multi-page documents, students upload images of each page in sequential or chronological order. The application will combine the images into one PDF file hat will be saved under one document version and document type.

The following steps provide an example of a student submitting a multi-page document from a mobile device.

- 1. Log in to the Student Portal.
- 2. On the Home page, select the **Required Documents** tile or select the **Get Started** button.
- 3. Select a document to **Submit**.
 - a. Select I am ready to Upload.
 - b. Take a photo of the document and upload it. For multi-page documents, select the page images in correct order.

Note: PDF, JPG and TIFF files are accepted

Upload multi-page documents in sequential or chronological order, for example, page 1, followed by page 2, etc.

4. In our example, we uploaded a birth certificate. See that the document shows submitted status and the Edit option is available.

| ail Sprint V Bi verif | 1046 AM III III y-cmc-intg.educationpartners.com |
|--|--|
| | in. |
| All required approved b completed. | documents must be submitted and efore the verification process can be |
| Document | 2019-2020 Verification Worksheet V1 Independent: 1920 |
| Action | FILL OUT |
| Submitted | |
| Approved | |
| | |
| Document | 2019-2020 Birth Certificate - School of Arts |
| Action | EDIT |
| Submitted | v~ |
| Approved | |
| | |
| | |
| | |
| | · · |

5. If it necessary to upload a new version of the document, select **Edit**.

- a. Select I am ready to Upload.
- b. Take a photo of the document and upload it.

Submit Documents from a Desktop Device

The Verification Worksheet is the most common required document for a student selected for verification.

The following steps provide an example of a student filling out a Verification Worksheet from a desktop device.

- 1. Log in to the Student Portal.
- 2. On the Home page, select the **Required Documents** tile or select the **Get Started** button.
- 3. Select the **Fill Out** button for the Verification Worksheet.
- 4. A modal window provides the following options:
 - Download a blank Verification Worksheet from the link at the top.
 - Fill out the form electronically.
 - Upload a filled out document.

| Parent Documents |
|--|
| Download 2020-2021 Dependent Verification Worksheet V1 Form |
| Please select one of the following submission methods for the Verification Worksheet V1 Dependent 2021: |
| OI would like to electronically fill out the form |
| OI would like to upload the document |
| |
| |

5. Choose the upload option if you have downloaded and filled out the blank PDF form and saved it on your device.

Select the **Browse** button and navigate to the file and select the **Upload** button.

| Parant Desuments |
|---|
| Parent Documents |
| Download 2020-2021 Dependent Verification Worksheet V1 Form |
| Please select one of the following submission methods for the Verification Worksheet V1 Dependent 2021: |
| I would like to electronically fill out the form I would like to upload the document |
| Please select the type of document you are uploading: |
| 2020-2021 Dependent Verification Worksheet V1 |
| Please browse for files to upload: |
| BROWSE |
| PDF, JPG and TIFF files are accepted |
| UPLOAD CANCEL |

6. If you choose to fill out the form electronically, the Verification Worksheet wizard is displayed. The wizard divides the Verification Worksheet into multiple sections.

| Verification Worksheet |
|--|
| Your 2019-2020 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called verification. The law says that before awarding Federal Student Aid, we may ask you to confirm the information you and your parents reported on your FAFSA. To verify that you provided correct information, the financial aid administrator at your school will compare your FAFSA with the information on this worksheet and with any other required documents. If there are differences, your FAFSA information may need to be corrected. You and at least one parent must complete and sign this worksheet. Attach any required documents and submit the form to the financial aid administrator at your school. Your school may ask for additional information. If you have questions about verification, contact your financial aid administrator as soon as possible so that your financial aid will not be delayed. Please click "Next" to get started. |
| CANCEL NEXT |

7. Select **Next**. Section B of the Verification Worksheet appears.

| | | | — Verification V | Norksheet ———— |
|--|---|---|--|--|
| B. Student's I List below the people • Yourseif an • Your parent they were c • Other peop | Family I in your pare d your pare (s)' other cl ompleting a le if they no the college | Information rent(s)' household. Include nt(s) (including a steppare hildren if your parent(s) wi a FAFSA for 2019-2020. In w live with your parent(s) for any household membe | I: int) even if you don't live with your parent(s). Il provide more than half of their support from July 1, 2 iclude children who meet either of these standards, ev and your parent(s) provide more than half of their sup it, excluding your parent(s), who will be enrolled at lea | 1019, through June 30, 2020, or if the other children would be required to provide parental information if en if they do not live with your parent(s). port and will continue to provide more than half of their support through June 30, 2020. st half time, in a degree, diploma, or certificate program at a postsecondary educational institution any |
| time between July 1, Full Name | 2019, and Age | June 30, 2020. If more spi Relationship | ace is needed, attach a separate page with your name College | e and Student ID Number at the top. Enrolled at Least Half Time |
| Joni Hope | 18 | Self | wanyoo manayaman maaaa | Yes EDIT DELETE |
| Note: We may requir | e additional OLD MEN NEX | I documentation if we have | e reason to believe that the information regarding the t | nousehold members enrolled in eligible postsecondary educational institutions is inaccurate. |

- 8. Select **Edit** to update the household member or **Delete** to remove the household member.
- 9. (Optional) Select Add Household Member, complete the form, and select Save.

Household Member

| Age | | | | |
|--|--|---|-----------------------------------|--|
| 0 | | | | |
| | | | | |
| Relationship | | | | |
| Please Select | | | ~ | |
| | | | | |
| In College* | | | | |
| Yes ON | lo | | | |
| College | | | | |
| | | | | |
| *Choose Yes for any attending at least ha enrolled in a degree | household member, ex If time between July 1, 2 , diploma, or certificate p | cluding your parent(s 2019 and June 30, 20 program. |), who will be 20, and will be | |
| | | | | |

10. Confirm, **Yes**, **I** am the only person in my household. (This is displayed only for 1 in household and 1 in college.)



11. Review and complete **Student Income Information to be Verified** in section C of the Verification Worksheet. This page expands based on the selections.

| Verification Worksheet |
|---|
| C. Student Income Information to be Verified |
| I (and spouse, if married) filed a 2017 IRS tax return I (and spouse, if married) will not file and are not required to file a 2017 income tax return with the IRS. TAX RETURN NONELLERS. |
| Complete this section if you, the student (and, if married, your spouse) will not file and <u>are not required</u> to file a 2017 income tax return with the IRS. |
| I, the student (and/or spouse if married) was not employed and had no income earned from work in 2017. |
| I, the student (and/or spouse if married) was employed in 2017 and has listed below the names of all employers, the amount earned from each employer in 2017, and whether an IRS W-2 form is attached. Attach copies of all 2017 W-2 forms issued to you by employers. List every employer even if the employer did not issue an IRS W-2 form. If more space is needed, attach a separate page with your name and Student ID Number at the top. |
| Provide documentation from the IRS or other relevant tax authority dated on or after October 1, 2017 that indicates a 2017 IRS income tax return was not filed with the IRS or other relevant tax authority. Check here if a 2017 Verification of Non-filing Letter(s) is provided. |
| Check here if a 2017 Verification of Non-filing Letter(s) will be provided later. |
| CANCEL NEXT |

- 12. Review and complete **Parent Income Information to be Verified**. (Only visible for dependent students)
- 13. Review and certify the Verification Worksheet.
- 14. Select the check box to certify that all of the information reported on this worksheet is complete and correct.
- 15. Select **Submit** and review section D of the Verification Worksheet.

| 20 | 019-2020 V-1 Ver Independe | ification We ent Student | orksheet | |
|---|--|--|---|--|
| Your 2019-2020 Free Applicat before awarding Federal Stude correct information, the financ any other required documents. worksheet, attach any required additional information. If you financial aid will not be delay. | tion for Federal Student Aid (FAFSA) w ent Aid, we may ask you to confirm the i cial aid administrator at your school will . If there are differences, your FAFSA in d documents, and submit the form to the have questions about verification, conta ed. Information | as selected for review in a information you reported or compare your FAFSA with formation may need to be or financial aid administrator ct your financial aid admin | process called verification. The law says that a your FAFSA. To verify that you provided the information on this worksheet and with corrected. You must complete and sign this at your school. Your school may ask for istrator as soon as possible so that your | |
| | | | | |
| DEM00005 | DEM00005 | | 2987993 | |
| DEMO0005 Student's Last Name | DEMO0005 Student's First Name | Student's M.I. | 2987993 Student ID (or Portal ID, school use) | |
| DEMO0005 Student's Last Name Fest Address Line 2 | DEMO0005 Student's First Name | Student's M.I. | 2987993 Student ID (or Portal ID, school use) {StudentBirthDate} | |
| DEMO0005 Student's Last Name Fest Address Line 2 Student's Street Address (inclu | DEMO0005 Student's First Name ide apt. no.) | Student's M.I. | 2987993 Student ID (or Portal ID, school use) <u>{StudentBirthDate}</u> Student's Date of Birth | |
| DEMO0005 Student's Last Name Fest Address Line 2 Student's Street Address (inclu 2A | DEMO0005 Student's First Name ide apt. no.) CA | Student's M.I. 12342 | 2987993 Student ID (or Portal ID, school use) {StudentBirthDate} Student's Date of Birth DEMO0005@yopmail.com | |
| DEMO0005 Student's Last Name Test Address Line 2 Student's Street Address (inclu CA Dity | DEMO0005 Student's First Name ide apt. no.) CA State | Student's M.I. 12342 Zip Code | 2987993 Student ID (or Portal ID, school use) {StudentBirthDate} Student's Date of Birth <u>DEMO0005@yopmail.com</u> Student's Email Address | |
| DEMO0005 Student's Last Name Fest Address Line 2 Student's Street Address (inclu 2A Dity \$55) \$55-5555 | DEMO0005 Student's First Name ide apt. no.) CA State | Student's M.I. 12342 Zip Code | 2987993 Student ID (or Portal ID, school use) {StudentBirthDate} Student's Date of Birth <u>DEMO0005@yopmail.com</u> Student's Email Address | |

Important: Subsequent documents may be added to the required documents list based on answers to the Verification Worksheet.

Special Circumstance Request

The Special Circumstance Request button is optional and configured by the institution. The Special Circumstance button enables a student to initiate a Professional Judgment (PJ) review based on unusual circumstances. The institution must enable the PJ feature.

SPECIAL CIRCUMSTANCE REQUEST

The Special Circumstance Request can be initiated for any award year where the student has an active ISIR. The form can be a PDF or an interactive form wizard.

Complete a Special Circumstance Request:

- 1. Select the **Special Circumstance Request** button located on the Required Documents page.
- 2. Select the appropriate Award Year and Current Dependency Status.
- 3. Select Next.

| Special circuitistance Request |
|---|
| This web form allows you to request a review of your special circumstance by your institution. The Office of Financial Aid shall review request upon successful completion and require additional documentation to support your selection(s). |
| Instructions: Please select the appropriate answers below to proceed and begin the request process. |
| Award Year: 2019 - 2020 2020 - 2021 |
| Current Dependency Status |
| Please Note: Your institution may request for additional documentation to be uploaded in your required documents list to support your request. |
| Please click "Next" to get starled. |
| CANCEL |

- 4. Review the **Special Circumstance Questions** and select, where applicable.
- 5. Select Next.

| opecial circumstance request |
|---|
| B. Special Circumstance Questions |
| 1. Have you (or your parent(s)) experienced a recent change or loss in income? |
| Ves 💿 No |
| 2. Have you (or your parent(s)) experienced a recent life changing event? |
| Ves 💿 No |
| 3. Have you (or your parent(s)) experienced recent unexpected expense(s)? |
| Ves 💿 No |
| 4. Are you considered an unaccompanied youth who is homeless (lacks fixed, regular, and adequate housing) or self-supporting and at risk of being homeless? |
| Yes 💿 No |
| 5. Are you considered a dependent student on your Free Application for Federal Student Aid (FAFSA), but one or more of the following aligns closely with your special circumstance? |
| Ves 💿 No |
| CANCEL |

- 6. Provide a Student Statement.
- 7. Select **Next**.

| Special Offcullistance Request |
|---|
| |
| C. Student Statement |
| Please provide detailed statement regarding your special circumstance for your financial aid administrator to review. |
| |
| Student Statement " |
| |
| |
| CANCEL NEXT |

8. Review and certify the Special Circumstance Request.

| an succession compretion and require at | wareness and amountained to arbbo | PERSONAL PROPERTY PROPERTY PRO | | |
|--|---|---------------------------------------|---------------------------------------|--|
| it to Expect: Based on your selection yo | our required document list will b | e populated with the follow | ving documents for completion. | |
| student Information | | | | |
| DEM00005 | DEM00005 | | 2987003 | |
| Student's Last Name | Student's First Name | Student's MI. | Student ID (or Portal ID, school use) | |
| Test Address Line 2 | | | 1/1/1975 | |
| Student's Street Address (include apt. no.) |) | | Student's Date of Birth | |
| CA | CA | 12342 | DEMO0005@vopmail.com | |
| City | State | Zip Code | Student's Email Address | |
| (555) 555-5555 | | | | |
| Student's Home Phone Number (include a | area code) | | Student's Alternate Phone Number | |
| ipecial Circumstance Questions 1. Have you (or your spouse) experier Yes. Loss of Employment 2. Have you (or your spouse) experier | nced a recent change or loss in in nced a recent life changing event | scome? that aligns closely with on | e or more of the following? | |

9. Select Submit.

Important: Subsequent documents may be added to the required documents list for the PJ request.

The Professional Judgment document will be marked submitted in the required documents list.

- Required Documents -The document(s) below are required to complete your financial aid process. The documents are separated by award year on each tab. You must complete the documents for each award year. Click on each button in the Action column and follow the process steps until completion. Documents will not be considered as complete until a check mark is located in the Submitted column (with no pending comments). SPECIAL CIRCUMSTANCE REQUEST 2019 - 2020 My Progress: All required documents must be submitted and approved before the verification process can be completed. Action Document Classification Submitted Approved 2018-2019 Verification Worksheet V1 Independent 1819 Verification FILL OUT 2016 Student Tax Return Verification SUBMIT 2018-2019 Professional Judgment/Special Circumstance Form Professional Judgment \checkmark

Completed Documents

The Completed Documents page lists required documents that have been completed by the student and/or staff. A student can select to review and download a document. The Completed Documents page also enables a student to opt-in or out of the electronic process. Please see the Electronic Signature and Consent.

Review and download a document:

- 1. Log in to the Student Portal.
- 2. Select Completed Documents.
- 3. Select the blue hyperlink for any document in the list.
- 4. **Save** the PDF document.

| Completed Documents | | | | | | | | |
|---|---|----------------|-----------|--------------------|--|--|--|--|
| Below an | Below are the required documents that have been completed. Click on the name of the file to review and/or print. Save them too. | | | | | | | |
| You will need a program on your computer that will allow you to view PDF files in order to view your documents. One such program is Adobe Reader ©. Click the image below to download and install Adobe Reader ©. | | | | | | | | |
| Get ADOBE' READER' | | | | | | | | |
| | File Name | Institution | File Size | Last Updated | | | | |
| Æ | 2020-2021 Dependent Verification Worksheet V1 (2020 - 2021 Award Year) | | 27 KB | 05/08/2020 3:58 PM | | | | |
| æ | 2020-2021 Dependent Verification Worksheet V1 (2020 - 2021 Award Year) | | 27 KB | 05/08/2020 3:59 PM | | | | |
| Æ | Electronic Signature Consent | <u>Opt-Out</u> | 93 KB | 07/02/2020 3:53 AM | | | | |
| æ | Student / Spouse Joint Return (2020 - 2021 Award Year) | | 33 KB | 04/14/2020 1:40 PM | | | | |

Important: The latest version of the document will be available in Completed Documents. Be sure to pay close attention to the last uploaded date.

Useful Links

The Useful Links page provides helpful resources to the student. This page is configured by the institution.

Review and download a document:

- 1. Log in to the Student Portal.
- 2. Select Useful Links.
- 3. Select one of the available links.
- 4. Review separate tab with information.

| Useful Links | | | | |
|--------------------------------|--|--|--|--|
| IRS Module 5: Filing Status | | | | |
| | | | | |
| | Useful Links - IRS Module S: Filing Status | | | |

This concludes the Verification Process in the Student Verification Portal. Please contact your institution should you have any additional questions.