



STUDENT FINANCIAL AID PORTAL HANDBOOK

Training & Organizational Development

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Versions

Version	Date	Author	Details
1.0	Feb. 25, 2025	Brittany Rindone	Initial document.
1.1	October 21, 2025	Brittany Rindone	Updating Log In instructions with Single Sign On and removal of old system references.

Disclaimer

This Knowledge Pack (KP) may contain minor variances of screen captures but the steps are the same.

Learning Objectives

By the end of this training, a Bellevue University student should be able to...

- Access the Financial Aid Portal
- Navigate the Dashboard
- View and Accept/Decline Awards
- View and Upload Documents

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Financial Aid Portal

Student Experience

As of March 3 2025, Bellevue University's new, automated financial aid system went live and here is what you can expect:

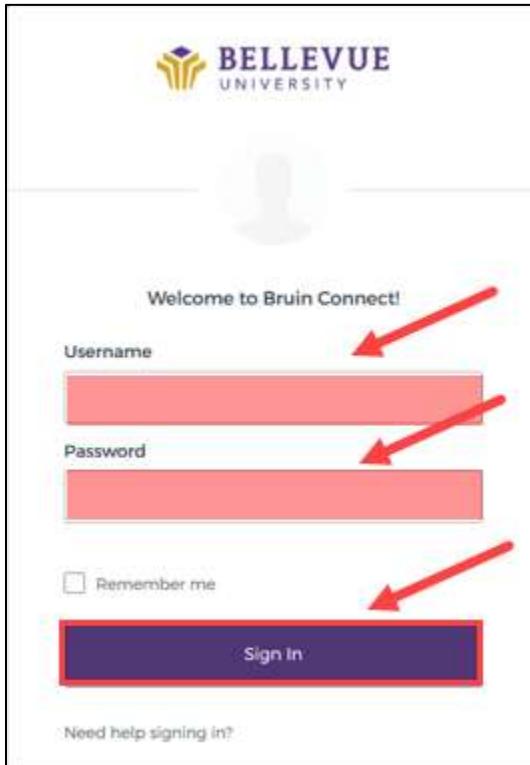
- All digital, mobile-friendly solution that lets you upload documents directly from your phone or tablet.
- Automatic, immediate verifications so you know your documents were received.
- Real-time status updates so you know where you are at in the process.
- Ability to provide e-signatures on some forms.

Accessing Financial Aid Portal

You can access the automated system, in three ways, via BRUIN Connect, the BRUIN Student Portal, or the Financial Aid Portal's URL, using your existing credentials.

Logging into Portal

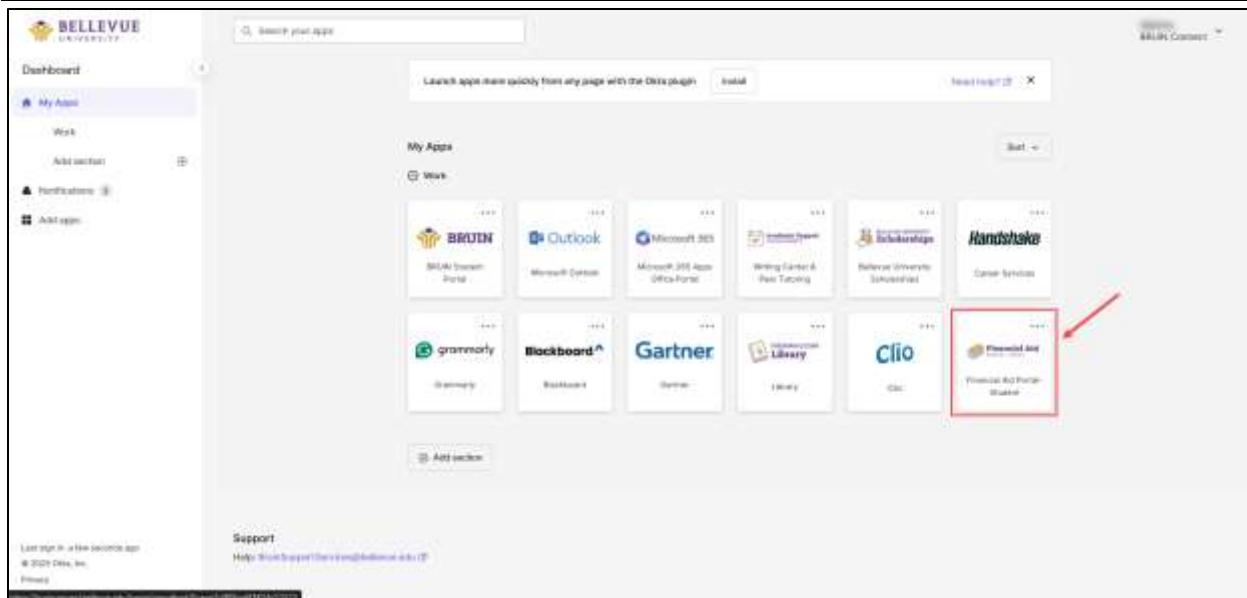
BRUIN Connect



The image shows the Bruin Connect login page. At the top is the Bellevue University logo. Below it, the text "Welcome to Bruin Connect!" is displayed. There are two red rectangular boxes: one for "Username" and one for "Password". A red arrow points to the "Username" box. Another red arrow points to the "Password" box. Below these boxes is a checkbox labeled "Remember me" with a red arrow pointing to it. At the bottom is a dark blue rectangular button labeled "Sign In" in white text, with a red arrow pointing to it. At the very bottom of the page, there is a small link "Need help signing in?".

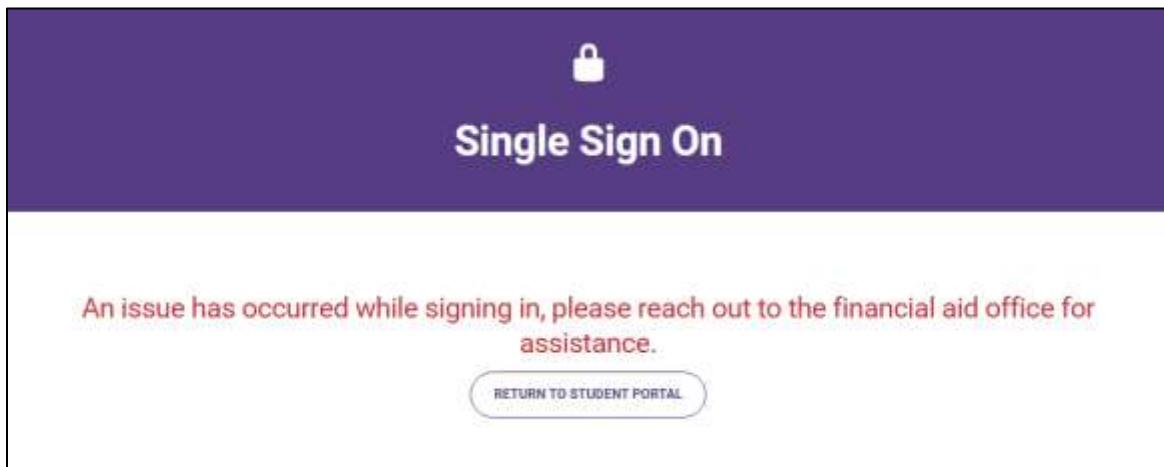
Step	Action
1.	Open a browser and go to BRUIN Connect (www.bruinconnect.bellevue.edu).
2.	Enter your Student ID # in the USERNAME field.
3.	Enter your Password in the PASSWORD field.
4.	Click on the SIGN IN button.

Operational Training

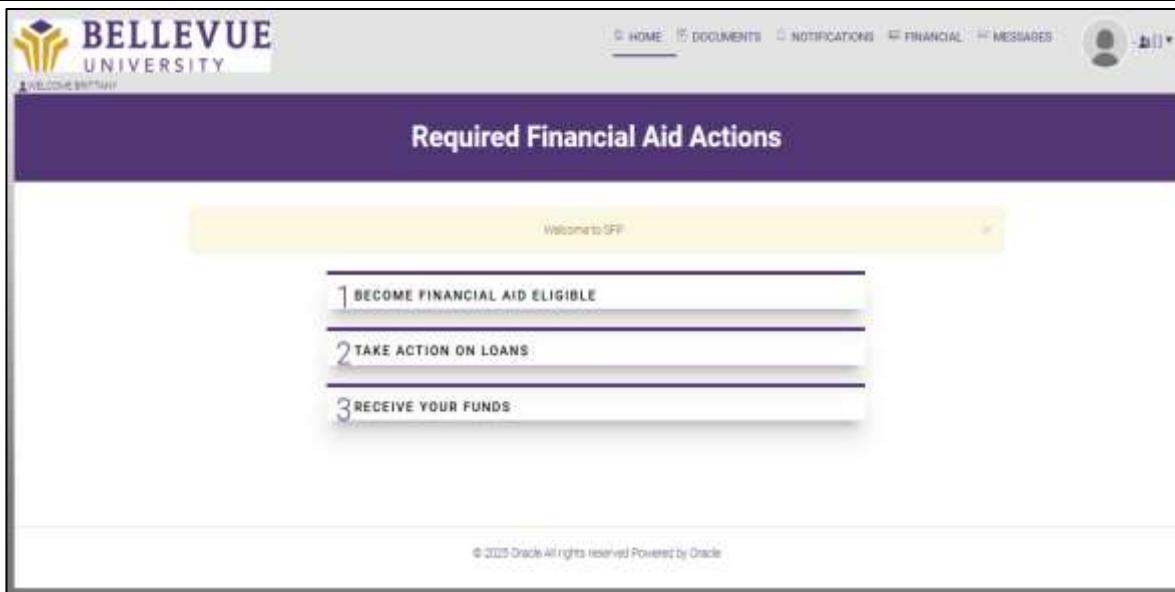


The screenshot shows the Bellevue University dashboard with the 'My Apps' section selected. The 'Financial Aid Portal - Student' chicklet is highlighted with a red box and a red arrow pointing to it from the right side of the screen.

Step	Action
5.	Click on the FINANCIAL AID PORTAL - STUDENT chicklet.



Step	Action
	NOTE: If you are unable to access the portal, please reach out to BRUIN Support Services or your Admissions Counselor/Student Coach to troubleshoot.



Welcome to SFF

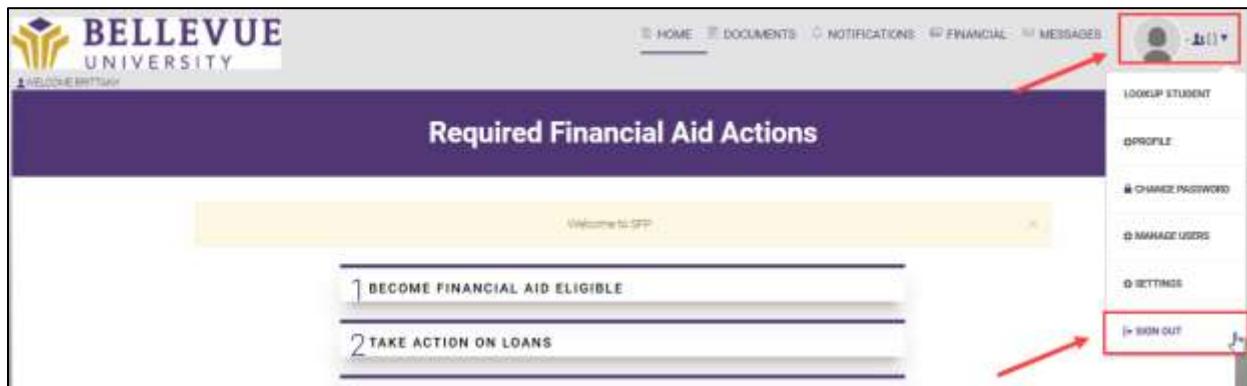
1 BECOME FINANCIAL AID ELIGIBLE

2 TAKE ACTION ON LOANS

3 RECEIVE YOUR FUNDS

Step	Action
	The Financial Aid Portal will display will appear.
	NOTE: The Dashboard displays condensed section of the menu items.
	End of Procedure

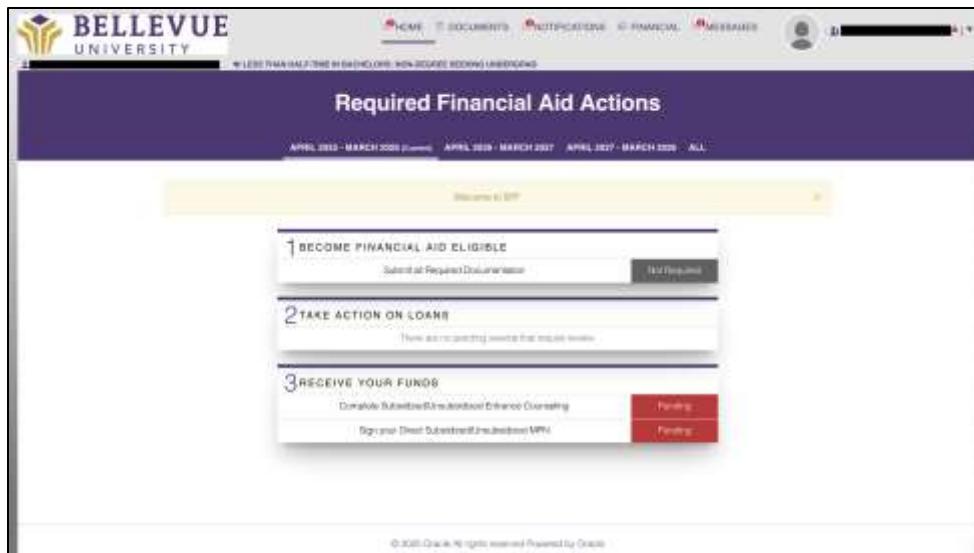
Log Out



Step	Action
1.	Click on the PROFILE icon.
2.	Click on the SIGN OUT option.
	End of Procedure

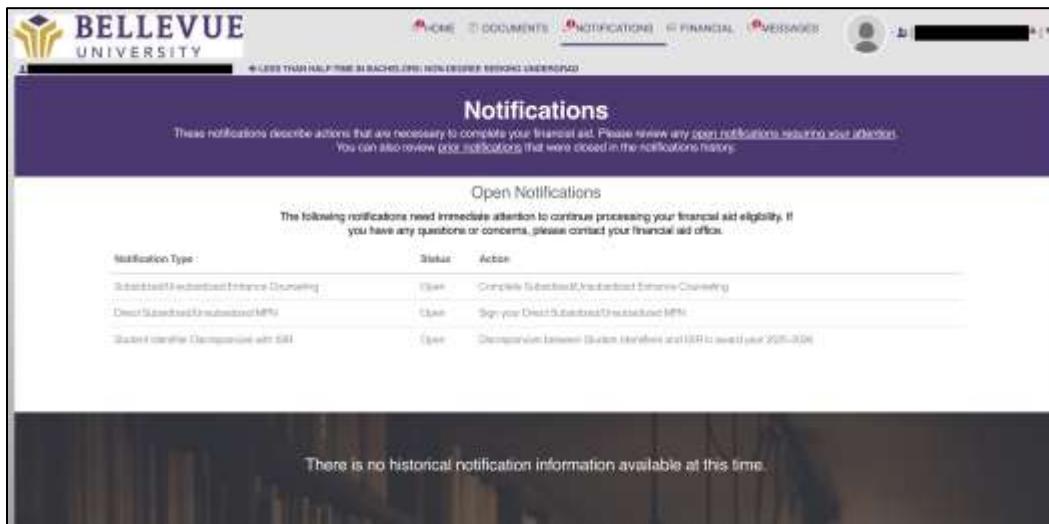
Navigating the Student Portal

Home



Step	Action
	The Home page will show any completed actions, or actions required for the student to become financial aid eligible, review their funds, or receive their funds.

Notifications



The following notifications need immediate attention to continue processing your financial aid eligibility. If you have any questions or concerns, please contact your financial aid office.

Notification Type	Status	Action
Student must attend/submit Entrance Counseling	Open	Complete Student/Unsubsidized Entrance Counseling
Direct Subsidized/Unsubsidized MPN	Open	Sign your Direct Subsidized/Unsubsidized MPN
Student Financial Disbursement with SSI	Open	Disbursement between Student/Office and FAFR is issued year 2015-2016

There is no historical notification information available at this time.

Step	Action
	The Notifications tab will show open notifications that require your attention and action. It will also display a thread of notifications history that are already completed.
	NOTE: Notifications in this tab are not email communications. These are the notification types that the system tracks and checks off (like a to-do list) for you to receive funds.

Financial

Financial Information

APR 2025 - MAR 2026 APR 2026 - MAR 2027 APR 2027 - MAR 2028

Your financial aid summary for Academic Year Apr 1, 2025 - Mar 31, 2026

1. How much does my education cost? 2. How much Financial Aid can I receive?

Cost of Attendance	\$11,164.00	Award Name	Award Status	Offered to You	Amount you'll receive	Update/Edit
Tuition and Fees	\$11,154.00	Federal Direct Subsidized Stafford Loan	Projected	\$1,897.00	\$1,897.00	
Estimated Living and Other Expenses	\$0.00	Federal Direct Unsubsidized Stafford Loan	Projected	\$8,650.00	\$8,653.00	
				\$10,500.00	\$10,500.00	

You are under-funded for Academic Year Apr 1, 2025 - Mar 31, 2026. You need \$654.00, which amounts to about \$54.68 per month, to cover your remaining tuition and fees.

You can accept more funds to cover these costs. If you have already accepted the maximum awarded amounts available, you should reach out to the Financial Aid office to explore additional means to cover these expenses.

[► ADJUST MY FUNDING](#) [► COMPLETE LOAN ENTRANCE COUNSELING](#)

3. When am I scheduled to receive my financial aid?

Future Disbursements

Your Disbursements are currently being evaluated. Please check back later.

Award Name	Disbursement Date	Amount
No Disbursement Information Available		

Step	Action
	The Financial tab will show your cost of attendance (COA), financial aid award package, and the disbursement schedule for available funds. To view fund specific information, click the ▼ next to the fund.

Messages

Step	Action
	<p>The Messages tab will show email communications from the Financial Aid Office, highlighting any communications regarding their financial aid action items.</p>
	<p>NOTE: You can click on the envelope icon to view the email. You will also receive these email communications in your Bellevue University student email.</p>

Documents

Documents

Documents that have been requested or required to process your financial aid are listed in this page. Please review any documents requiring your attention. You can also upload a non requested document.

Documents Requiring Attention

The following documents need immediate attention to continue processing your financial aid eligibility. If you have any questions or concerns, please contact your financial aid office.

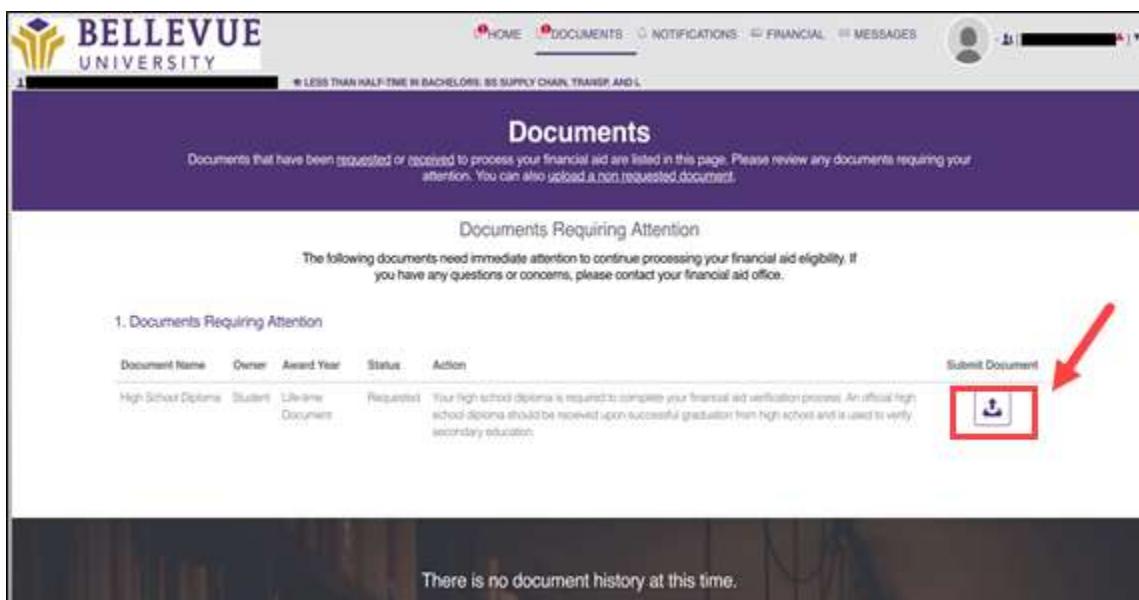
1. Documents Requiring Attention

Document Name	Owner	Award Year	Status	Action
High School Diploma	Student	14-15	Requested	Your high school diploma is required to complete your financial aid verification process. An official high school diploma should be received upon successful graduation from high school and is used to verify secondary education. Submit Document

There is no document history at this time.

Step	Action
	The Documents tab will show documents required for you to upload to continue processing financial aid eligibility. You will be notified by the Office of Financial Aid if, when, and what documents to upload to the Financial Aid Portal.
	NOTE: The Owner column will indicate whether the information requested is yours or parent(s)/guardian(s) depending on whose information is on the FAFSA.

Upload Student Documents



The screenshot shows the 'Documents' page of the Bellevue University financial aid portal. The page title is 'Documents' and a sub-section title is 'Documents Requiring Attention'. A note below states: 'The following documents need immediate attention to continue processing your financial aid eligibility. If you have any questions or concerns, please contact your financial aid office.' A table lists one document: 'High School Diploma' (Owner: Student, Award Year: Lifetime Document, Status: Requested). A note next to it says: 'Your high school diploma is required to complete your financial aid verification process. An official high school diploma should be received upon successful graduation from high school and is used to verify secondary education.' To the right of the table is a 'Submit Document' button with a file icon, which is highlighted with a red box and a red arrow pointing to it. Below the table, a message says: 'There is no document history at this time.'

Step	Action
1.	To upload a file, click the  icon to upload documents to the financial aid portal.
	NOTE: The file type used for uploading documents is PDF.

Upload Documents
Upload a Requested Document

Your 2023 1099-G is required to complete your financial aid verification process. Form 1099-G is requested to report unemployment compensation as well as any state or local income tax refunds you received that year.

Document Name	Current	Award Year	Status	File
1099G	Student	2023-2026	Requested	✓ 1099_TBT1_JACOB.PDF 1099_TBT1_JACOB.PDF (307 KB) 1099_TBT1_JACOB.PDF (307 KB)

Financial Aid Process Information

Student Aid Report Document: Unissued
Code: Receivable for all documents not associated with an IRS code
Student Aid Report Description: Receivable for all documents not associated with an IRS code
Status: Clearance: Not Required

Enter Document Data

Social Security Number * 

Parent's Federal Identification Number *

Step	Action
2.	Once the file is selected to upload, the file name will appear in the first box and a preview of the file will appear in the box below. Required fields will appear to the left of the document.
	NOTE: A confirmation of submission pop-up will appear. Click OK and be redirected back to the Documents tab.

Documents

Documents that have been requested or received to process your financial aid are listed in this page. Please review any documents requiring your attention. You can also upload a non requested document!

There are no pending document requests at this time.

Document History

Document Name	Owner	Status	Received Date	Comments	Update Document
1099G	Student	Received	Feb 16, 2025	Your 2023 1099-G is required to complete your financial aid verification process. Form 1099-G is requested to report unemployment compensation as well as any state or local income tax refunds you received that year.	

Step	Action
	The document submitted will then appear in the Documents History section of the Documents tab.

Upload Documents
Upload a Requested Document

Your 2023 1099-G is required to complete your financial aid verification process. Form 1099-G is requested to report unemployment compensation as well as any state or local income tax refunds you received that year.

Document Name	Owner(s)	Award Year	Status	File
1099G	Student	2025-2026	Unacceptable	<div style="border: 2px solid yellow; padding: 5px; text-align: center;"> REPLACE DOCUMENT FILE <small>Only PDF, JPEG, GIF and PNG files with max size of 5MB.</small> ADD ADDITIONAL PAGES </div>

Financial Aid Process Information

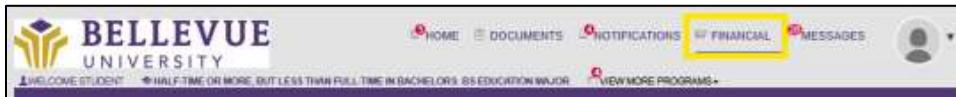
Student Aid Report Comment Code	Unknown
Student Aid Report Description Status	Placeholder for at-will documents not associated with an ISIR code Clearance Not Required

Financial Aid Advisor Comments

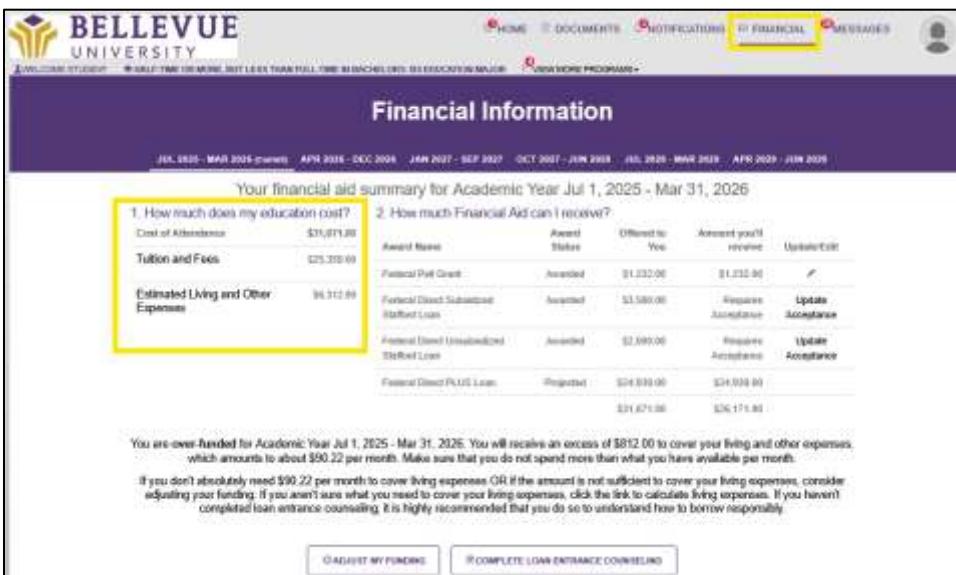
Document Comment(s)	Comment Date
Need to update amount of earnings.	3/18/25, 10:53 PM

Step	Action
	If you need to re-submit a document, the document request will appear in the Documents Requiring Attention section and you can upload a document to replace the one previously uploaded.
	NOTE: If there are additional instructions, those will appear in the Financial Aid Advisor Comments section. This can occur when the reviewer has deemed the document as unacceptable or has set it to rejected status.
	End of Procedure

Viewing Financial Aid Awards



Step	Action
1.	Click on the FINANCIAL tab.



Step	Action
2.	Item 1 will show estimated cost of attendance calculated by your selection of campus, housing preference, textbooks, as well as additional fees.

Financial Information

Your financial aid summary for Academic Year Jul 1, 2025 - Mar 31, 2026

1. How much does my education cost?						2. How much Financial Aid can I receive?							
Cost of Attendance	\$31,671.00	Award Name	Award Status	Offered to Year	Amount you'll receive	Update/Info	Cost of Attendance	\$31,671.00	Award Name	Award Status	Offered to Year	Amount you'll receive	Update/Info
Tuition and Fees	\$25,388.00	Federal Pell Grant	Granted	2023-2024	\$1,232.00	✓	Tuition and Fees	\$25,388.00	Federal Pell Grant	Granted	2023-2024	\$1,232.00	✓
Estimated Living and Other Expenses	\$6,312.00	Federal Direct Subsidized Stafford Loan	Accepted	2023-2024	\$5,500.00	Requires Acceptance	Estimated Living and Other Expenses	\$6,312.00	Federal Direct Subsidized Stafford Loan	Accepted	2023-2024	\$5,500.00	Requires Acceptance
		Federal Direct Unsubsidized Stafford Loan	Granted	2023-2024	\$2,900.00	Requires Acceptance			Federal Direct Unsubsidized Stafford Loan	Granted	2023-2024	\$2,900.00	Requires Acceptance
		Federal Direct PLUS Loan	Projected	2023-2024	\$24,039.00	\$24,039.00			Federal Direct PLUS Loan	Projected	2023-2024	\$24,039.00	\$24,039.00
					\$31,671.00	\$31,671.00							

You are over-funded for Academic Year Jul 1, 2025 - Mar 31, 2026. You will receive an excess of \$812.00 to cover your living and other expenses, which amounts to about \$90.22 per month. Make sure that you do not spend more than what you have available per month.

If you don't absolutely need \$90.22 per month to cover living expenses OR if the amount is not sufficient to cover your living expenses, consider adjusting your funding. If you aren't sure what you need to cover your living expenses, click the link to calculate living expenses. If you haven't completed loan entrance counseling, it is highly recommended that you do so to understand how to borrow responsibly.

Step	Action
3.	Item 2 will show financial aid awards. These awards can include federal loans and grants, state and institutional grants, merit scholarships, and federal work study if applicable. It will also indicate if you will owe anything additional beyond what is included in their financial aid package.
	<p>NOTE:</p> <ul style="list-style-type: none"> • Award information is estimated based on currently available data. These amounts, dates and acceptance criteria may change in the future based on updated data. You will be notified of any changes via email. • Grants and scholarships can be awarded based on need and/or academic merit. They do not need to be repaid but are subject to specific renewal and eligibility criteria from year to year. • If you received a merit-based scholarship, it is your obligation to review, understand, and meet the renewal and eligibility criteria standards associated with the merit-based scholarship awards.

Operational Training

You are over-funded for Academic Year Jul 1, 2025 - Mar 31, 2026. You will receive an excess of \$812.00 to cover your living and other expenses, which amounts to about \$90.22 per month. Make sure that you do not spend more than what you have available per month.

If you don't absolutely need \$90.22 per month to cover living expenses OR if the amount is not sufficient to cover your living expenses, consider adjusting your funding. If you aren't sure what you need to cover your living expenses, click the link to calculate living expenses. If you haven't completed loan entrance counseling, it is highly recommended that you do so to understand how to borrow responsibly.

[ADJUST MY FUNDING](#)

[COMPLETE LOAN ENTRANCE COUNSELING](#)

Step	Action
4.	The buttons in the center of the screen will allow students to accept/adjust/reject items in your financial aid package, calculate their living expenses, and complete loan entrance counseling with the US Department of Education.

3. When am I scheduled to receive my financial aid?		
Financial Disbursement		
Award Name	Scheduled Disbursement Date	Amount
• Federal Pell Grant	Jul 1, 2025	\$1,250
• Federal Direct Subsidized Stafford Loan	Jul 11, 2025	Requires Accept
• Federal Direct Unsubsidized Stafford Loan	Oct 1, 2025	Requires Accept
• Federal Direct Subsidized Stafford Loan	Jan 1, 2026	Requires Accept
• Federal Direct Unsubsidized Stafford Loan	Jul 1, 2025	Requires Accept
• Federal Direct Unsubsidized Stafford Loan	Oct 1, 2025	Requires Accept
• Federal Direct Unsubsidized Stafford Loan	Jan 1, 2026	Requires Accept
• Federal Direct PLUS Loan	Jul 1, 2025	\$7,490
• Federal Direct PLUS Loan	Oct 1, 2025	\$3,720
• Federal Direct PLUS Loan	Jan 1, 2026	\$3,720

Step	Action
5.	Item 3 will show the disbursement schedule of funds. <i>Disbursement dates are traditionally the beginning of the term.</i>

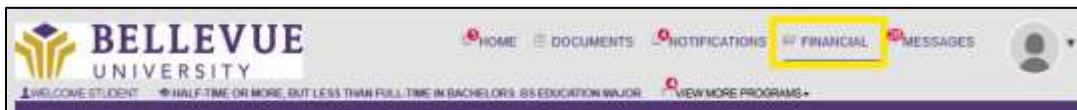
Operational Training

ADJUST MY FUNDING			COMPLETE LOAN ENTRANCE COUNSELING		
3. When am I scheduled to receive my financial aid?					
Future Disbursement			Received Disbursements		
Award Name	Scheduled Disbursement Date	Amount	Award Name	Disbursement Date	Amount
► Federal Pell Grant	Jul 1, 2025	\$1,232.00	No Disbursement Information Available		
▼ Federal Direct Subsidized Stafford Loan	Jul 31, 2025	Requires Acceptance			
	Fee Amount	\$12.00			
	Payment Net Amount	\$1,154.00			
▼ Federal Direct Subsidized Stafford Loan	Oct 1, 2025	Requires Acceptance			
	Fee Amount	\$12.00			
	Payment Net Amount	\$1,155.00			
► Federal Direct Subsidized Stafford	Jan 1, 2026	Requires Acceptance			

Step	Action
6.	To view net amounts and loan fees associated with each fund, click the ► next to the fund in Item 3.
	End of Procedure

Accepting/Rejecting Loans

Accepting awards is only for Federal loans in the financial aid package. If these awards display in a 'projected' status in the financial tab, you should not go through the loan acceptance process. The awards should be accepted once they are in an 'awarded' status.



Step	Action
1.	Once in the financial aid portal, open the FINANCIAL tab.

Financial Information

JUL 2025 - MAR 2026 (Current) APR 2026 - DEC 2026 JAN 2027 - SEP 2027 OCT 2027 - JUN 2028 JUL 2028 - MAR 2029 APR 2029 - JUN 2029

Your financial aid summary for Academic Year Jul 1, 2025 - Mar 31, 2026

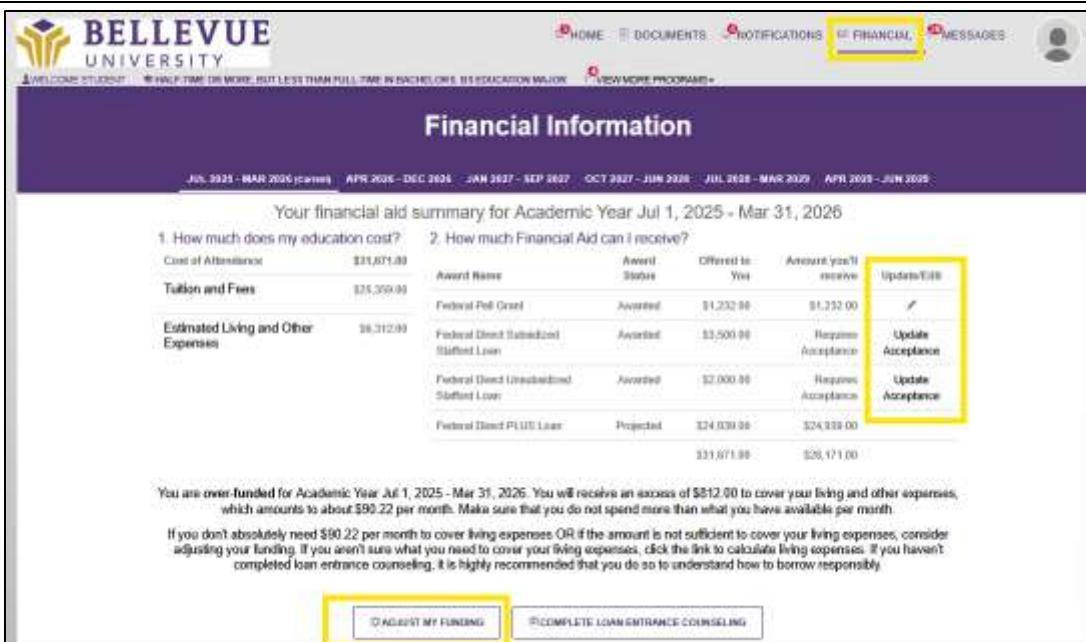
1. How much does my education cost? 2. How much Financial Aid can I receive?

Cost of Attendance	\$31,671.00	Award Name	Award Status	Offered to You	Amount you'll receive	Update/Edit
Tuition and Fees	\$25,350.00	Federal Pell Grant	Awarded	\$1,232.00	\$1,232.00	
Estimated Living and Other Expenses	\$6,312.00	Federal Direct Subsidized Stafford Loan	Awarded	\$3,500.00	Requires Acceptance	Update Acceptance
		Federal Direct Unsubsidized Stafford Loan	Awarded	\$2,000.00	Requires Acceptance	Update Acceptance
		Federal Direct PLUS Loan	Projected	\$24,939.00	\$24,939.00	
				\$31,671.00	\$31,671.00	

You are over-funded for Academic Year Jul 1, 2025 - Mar 31, 2026. You will receive an excess of \$812.00 to cover your living and other expenses, which amounts to about \$90.22 per month. Make sure that you do not spend more than what you have available per month.

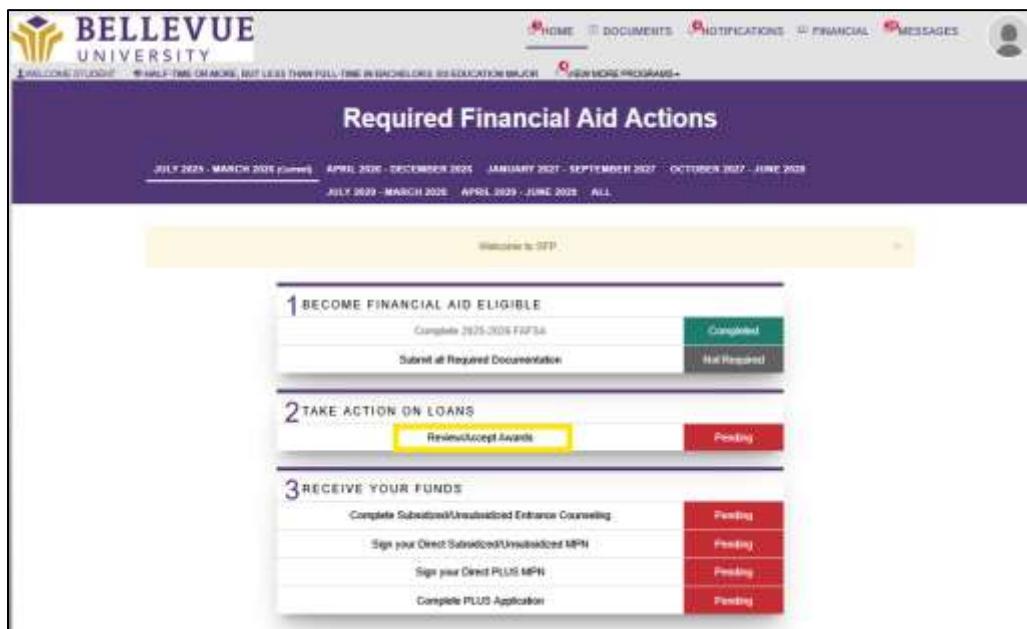
Step	Action
2.	Check the award status column to verify that the awards are in an 'awarded' status.

Operational Training



The screenshot shows the 'Financial Information' section of the Bellevue University portal. At the top, there are tabs for 'HOME', 'DOCUMENTS', 'NOTIFICATIONS', 'FINANCIAL' (which is highlighted with a yellow box), and 'MESSAGES'. Below the tabs, the title 'Financial Information' is displayed. A sub-header reads 'Your financial aid summary for Academic Year Jul 1, 2025 - Mar 31, 2026'. The page displays a table of financial aid awards and their status. The 'Update/Edit' column for each row contains three buttons: 'Update', 'Acceptance', and 'Update Acceptance'. The 'Update' button is highlighted with a yellow box. Below the table, a message states: 'You are over-funded for Academic Year Jul 1, 2025 - Mar 31, 2026. You will receive an excess of \$812.00 to cover your living and other expenses, which amounts to about \$90.22 per month. Make sure that you do not spend more than what you have available per month.' It also notes: 'If you don't absolutely need \$90.22 per month to cover living expenses OR if the amount is not sufficient to cover your living expenses, consider adjusting your funding. If you aren't sure what you need to cover your living expenses, click the link to calculate living expenses. If you haven't completed loan entrance counseling, it is highly recommended that you do so to understand how to borrow responsibly.' At the bottom, there are two buttons: 'ADJUST MY FUNDING' and 'COMPLETE LOAN ENTRANCE COUNSELING'.

Step	Action
3.	To begin the award acceptance process, click 'Update Acceptance' or 'Adjust my Funding.'



The screenshot shows the 'Required Financial Aid Actions' section of the Bellevue University portal. At the top, there are tabs for 'HOME', 'DOCUMENTS', 'NOTIFICATIONS', 'FINANCIAL' (highlighted with a yellow box), and 'MESSAGES'. Below the tabs, the title 'Required Financial Aid Actions' is displayed. A sub-header reads 'Welcome to SFP'. The page lists three steps: 1. BECOME FINANCIAL AID ELIGIBLE (status: Completed), 2. TAKE ACTION ON LOANS (status: Pending, with a yellow box around 'Review/Accept Awards'), and 3. RECEIVE YOUR FUNDS (status: Pending for all three sub-tasks: Complete Subsidized/Unsubsidized Entrance Counseling, Sign your Direct Subsidized/Unsubsidized MPN, and Complete PLUS Application). The 'Review/Accept Awards' button is highlighted with a yellow box.

Step	Action
	This can also be initiated from the Home page by clicking 'Review/Accept Awards' under the TAKE ACTION ON LOANS section.

Operational Training

Accept Your Funds

Step 1 - Select Term(s)

Congratulations! You have been determined eligible for financial aid. Please review your awards and go through the fund acceptance process to select the amount of financial aid required to cover your costs of education at the university. The following awards apply to your Academic Year, which begins July 1, 2025 - Mar 31, 2026. To remain eligible for the awards that require your confirmation, you must accept these funds by Feb 7, 2026.

Fall 2025 Awards

Fund	Awarded	Actions	Accepted
Federal Pell Grant	\$1,332.00		
Federal Direct Subsidized Stafford Loan	\$1,060.00	Pending Acceptance	
Federal Direct Unsubsidized Stafford Loan	3880.00	Pending Acceptance	

Winter 2026 Awards

Fund	Awarded	Actions	Accepted
Federal Direct Subsidized Stafford Loan	\$1,167.00	Pending Acceptance	
Federal Direct Unsubsidized Stafford Loan	3887.00	Pending Acceptance	

Spring 2026 Awards

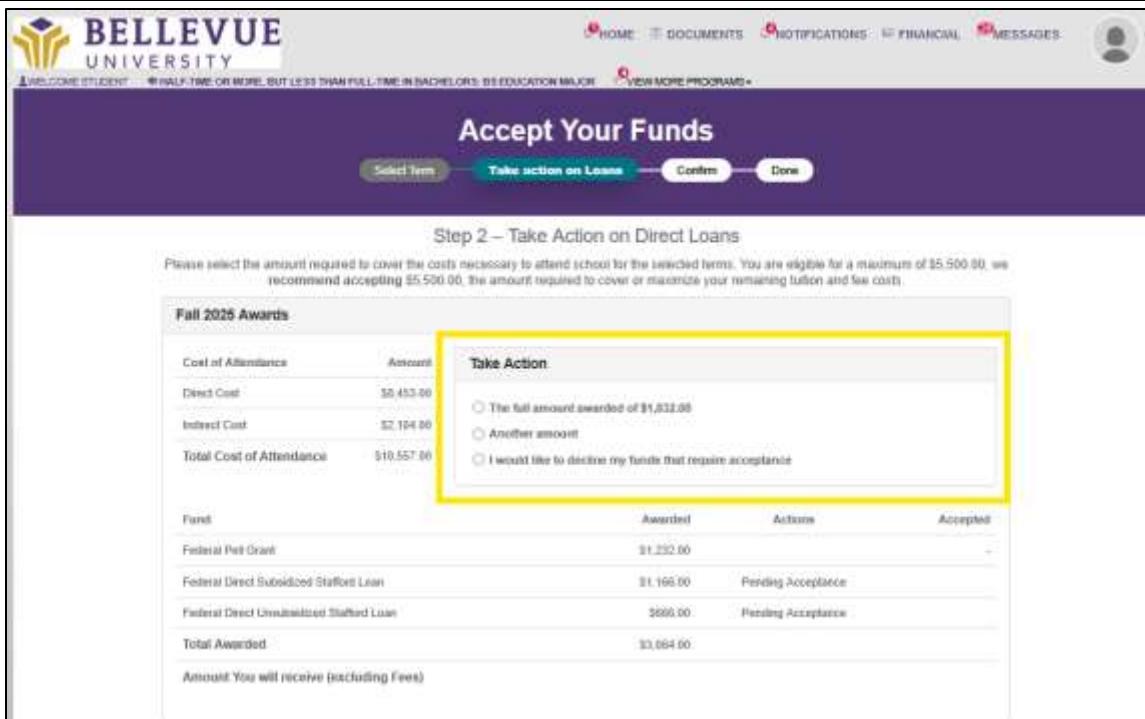
Fund	Awarded	Actions	Accepted
Federal Direct Subsidized Stafford Loan	\$1,167.00	Pending Acceptance	
Federal Direct Unsubsidized Stafford Loan	3887.00	Pending Acceptance	

Selected Term to Take Action

TAKE ACTION ON LOANS

Step	Action
4.	Once in the Accept Your Funds Page, click on the ' Take Action on Loans ' button.

Operational Training



The screenshot shows the 'Accept Your Funds' page on the Bellevue University portal. At the top, there are navigation links for HOME, DOCUMENTS, NOTIFICATIONS, FINANCIAL, and MESSAGES, along with a user profile icon. The main title 'Accept Your Funds' is centered above a progress bar with steps: 'Selected Term' (gray), 'Take action on Loans' (green, currently active), 'Confirm' (gray), and 'Done' (gray). Below the title, a sub-header 'Step 2 – Take Action on Direct Loans' is followed by a note: 'Please select the amount required to cover the costs necessary to attend school for the selected terms. You are eligible for a maximum of \$5,500.00, we recommend accepting \$5,500.00, the amount required to cover or maximize your remaining tuition and fee costs.' A table titled 'Fall 2025 Awards' shows the cost of attendance: Direct Cost (\$5,453.00), Indirect Cost (\$2,104.00), and Total Cost of Attendance (\$10,557.00). To the right, a 'Take Action' box contains three radio buttons: 'The full amount awarded of \$1,832.00', 'Another amount', and 'I would like to decline my funds that require acceptance'. A yellow box highlights this 'Take Action' section. Below the awards table is a table of funds: Federal Pell Grant (\$1,232.00), Federal Direct Subsidized Stafford Loan (\$1,166.00, status: Pending Acceptance), Federal Direct Unsubsidized Stafford Loan (\$699.00, status: Pending Acceptance), and a Total Awarded of \$3,094.00. A note at the bottom states: 'Amount You will receive (excluding fees)'.

Step	Action
5.	You can then review the amounts of each loan and decide what option would be best.

Operational Training

Accept Your Funds

Step 2 – Take Action on Direct Loans

Please select the amount required to cover the costs necessary to attend school for the selected term. You are eligible for a maximum of \$5,500.00, and recommend accepting \$1,500.00, the amount required to cover or minimize your remaining tuition and fee costs.

Fall 2025 Awards

Cost of Attendance	Amount
Direct Cost	\$8,450.00
Indirect Cost	\$2,104.00
Total Cost of Attendance	\$10,554.00

Take Action

The full amount awarded of \$1,832.00
 Another amount
 I would like to decline my funds that require acceptance

Fund	Awarded	Actions	Accepted
Federal Pell Grant	\$1,737.00		
Federal Direct Subsidized Stafford Loan	\$1,166.00	Accepting	\$1,166.00
Federal Direct Unsubsidized Stafford Loan	\$866.00	Accepting	\$866.00
Total Awarded	\$3,769.00		
Amount You will receive (excluding Fees)	\$3,094.00		

Step	Action
	Option 1- You will see a suggested amount that may be sufficient to cover their budgeted tuition and fees. <i>This may not reflect actual charges, or other outstanding balances, such as housing and transportation.</i>

Accept Your Funds

Step 2 – Take Action on Direct Loans

Please select the amount required to cover the costs necessary to attend school for the selected term. You are eligible for a maximum of \$5,500.00, and recommend accepting \$1,500.00, the amount required to cover or minimize your remaining tuition and fee costs.

Fall 2025 Awards

Cost of Attendance	Amount
Direct Cost	\$8,450.00
Indirect Cost	\$2,104.00
Total Cost of Attendance	\$10,554.00

Take Action

The full amount awarded of \$1,832.00
 Another amount - \$1,832.00 AMOUNT - \$1,832.00
 I would like to decline my funds that require acceptance

Fund	Awarded	Actions	Accepted
Federal Pell Grant	\$1,737.00		
Federal Direct Subsidized Stafford Loan	\$1,166.00	Accepting	\$1,166.00
Federal Direct Unsubsidized Stafford Loan	\$866.00	Accepting	\$866.00
Total Awarded	\$3,769.00		
Amount You will receive (excluding Fees)	\$3,094.00		

Step	Action
	Option 2- Allows you to adjust the specific amount of the loan you receive. Enter the preferred amount, up to the full amount of the loan, and then click 'Continue'.

Accept Your Funds

Step 2 – Take Action on Direct Loans

Please select the amount required to cover the costs necessary to attend school for the selected terms. You are eligible for a maximum of \$5,580.00, we recommend accepting \$5,500.00. The amount required to cover or minimize your remaining tuition and fee costs.

Fall 2025 Awards

Cost of Attendance	Amount	Take Action
Direct Cost	\$2,413.00	<input type="radio"/> The full amount awarded of \$1,612.00
Indirect Cost	\$2,154.00	<input type="radio"/> Another amount:
Total Cost of Attendance	\$4,567.00	<input checked="" type="radio"/> I would like to decline my funds that require acceptance

Fees

Fees	Awarded	Actions	Accepted
Federal Perkins Loan	\$1,212.00		
Federal Direct Subsidized Stafford Loan	\$1,688.00	Declining	\$0.00
Federal Direct Unsubsidized Stafford Loan	\$880.00	Declining	\$0.00
Total Awarded	\$3,684.00		
Amount You will receive (excluding Fees)	\$1,212.00		

Step	Action
	Option 3- You can decline your loans, then click 'Continue'.
6.	You will then need to confirm the loan/award amounts in their package. <i>To adjust the funding further (the amounts per term), you will select the pencil icon to make these adjustments.</i>
	NOTE: <ul style="list-style-type: none"> The totals must add up to the total award amount that was indicated. <i>For example, if they accepted \$3,000 in a loan, the term amounts should add up to \$3,000.</i> Once these terms totals have been adjusted, just click 'continue'. If you would like to make any adjustments to the amounts you have accepted/declined up to this point; you can navigate to Option 2 'Accept Loans' at the top of the screen.

Operational Training

Accept Your Funds

Select Term Take action on Loans **Confirm** Done

Step 3 – Confirm your Awards

Congratulations! Below are the actions you have taken on your awards.

Cost of Attendance	Fall 2025	Winter 2026	Spring 2026
Direct Cost	\$8,453.00	\$8,453.00	\$8,453.00
Indirect Cost	\$2,104.00	\$2,104.00	\$2,104.00
Total Cost of Attendance	\$10,557.00	\$10,557.00	\$10,557.00

Fund	Fall 2025	Acceptance	Winter 2025	Acceptance	Spring 2026	Acceptance	Change in Acceptance
Federal Pell Grant	\$1,232.00		\$0.00		\$0.00		\$0.00
Federal Direct Subsidized Stafford Loan	\$1,166.00	\$1,166.00	\$1,167.00	\$1,167.00	\$1,167.00	\$1,167.00	\$3,500.00
Federal Direct Unsubsidized Stafford Loan	\$666.00	\$666.00	\$667.00	\$667.00	\$667.00	\$667.00	\$2,000.00

Summary of Award Acceptance

	Fall 2025	Winter 2025	Spring 2026			
Amount you will receive (excluding fees)	\$3,064.00	\$1,834.00	\$1,834.00			
Direct Cost	\$8,453.00	\$8,453.00	\$8,453.00			
Estimated Payment to School	\$5,389.00	(Estimated Payment to School)	\$6,619.00	(Estimated Payment to School)	\$6,619.00	(Estimated Payment to School)

You are under-funded. You need \$10,557.00, to cover your remaining tuition and fees. You can accept more funds to cover these costs. If you have already accepted the maximum awarded amounts available, you should reach out to the Financial Aid office to explore additional means to cover these expenses.

Electronic Signature Consent

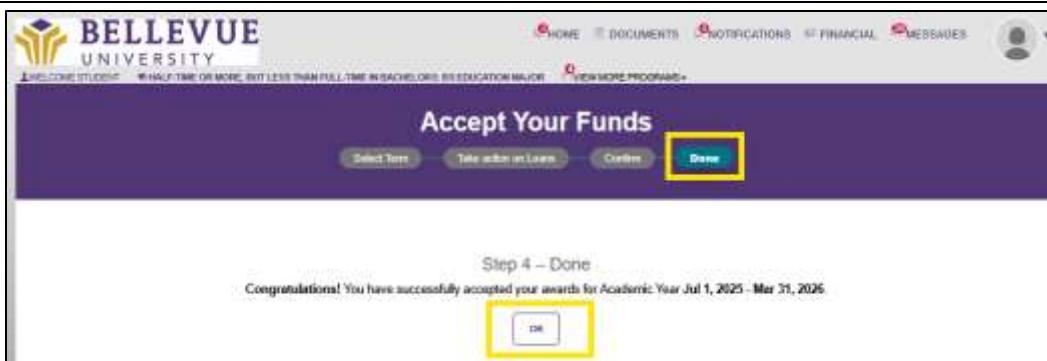
By selecting the "I Accept" button, you are signing this document electronically. You agree your electronic signature is the legal equivalent of your manual/handwritten signature on this document. You further agree that your signature on this document (hereafter referred to as your "E-Signature") is as valid as if you signed the document in writing. You also agree that no certification authority or other third party verification is necessary to validate your E-Signature, and that the lack of such certification or third party verification will not in any way affect the enforceability of your E-Signature or any resulting agreement between you and the Financial Aid Office. You are also confirming that you are the student authorized to provide the data in this document. By electronically signing documents, you agree to all the terms and conditions of such documents as they exist on the date of your E-Signature.

I ACCEPT

← BACK Enter Student ID Enter Last Name **SIGN & FINISH**

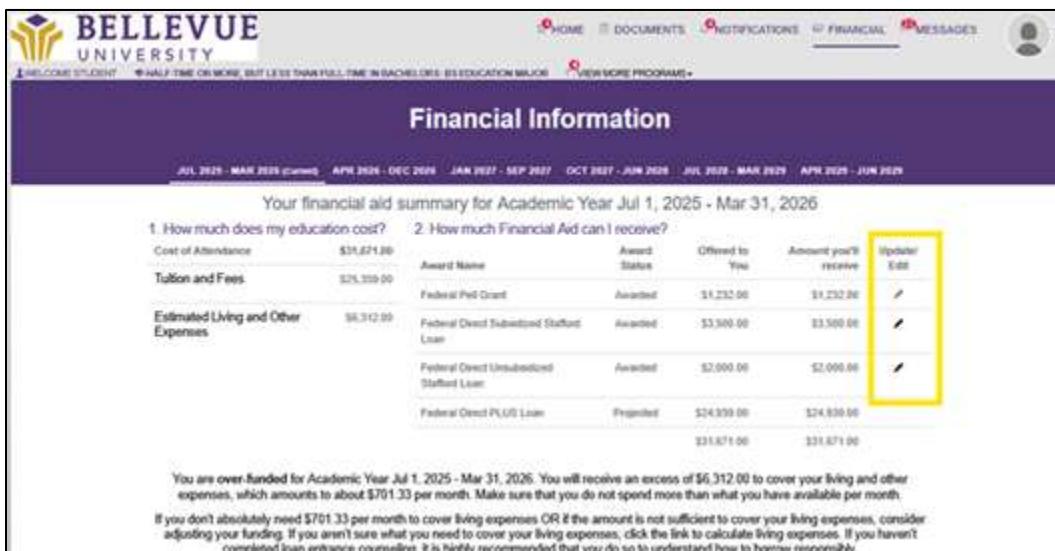
Step	Action
7.	Once you have selected the loan action, you will be moved on to the E-signature page. You need to read through the Electronic Signature Consent message and click 'I Accept'. You will enter your Student ID and last name to sign. Finally, click 'Sign and Finish'.
	NOTE: The 'Sign and Finish' button will remain ghosted until the 'I Accept' button is clicked and the required information is entered.

Operational Training



The screenshot shows the 'Accept Your Funds' step in the portal. At the top, there are buttons for 'Select Term', 'Take action on Loans', 'Continue', and 'Done'. The 'Done' button is highlighted with a yellow box. Below the buttons, it says 'Step 4 – Done' and 'Congratulations! You have successfully accepted your awards for Academic Year Jul 1, 2025 – Mar 31, 2026.' There is a yellow box around the 'OK' button in a modal window.

Step	Action
8.	Once you click 'Sign & Finish', you'll be shown a confirmation message that indicates they've successfully accepted/adjusted/declined awards for the academic year. Click 'OK' to be redirected back to the Financial Tab.

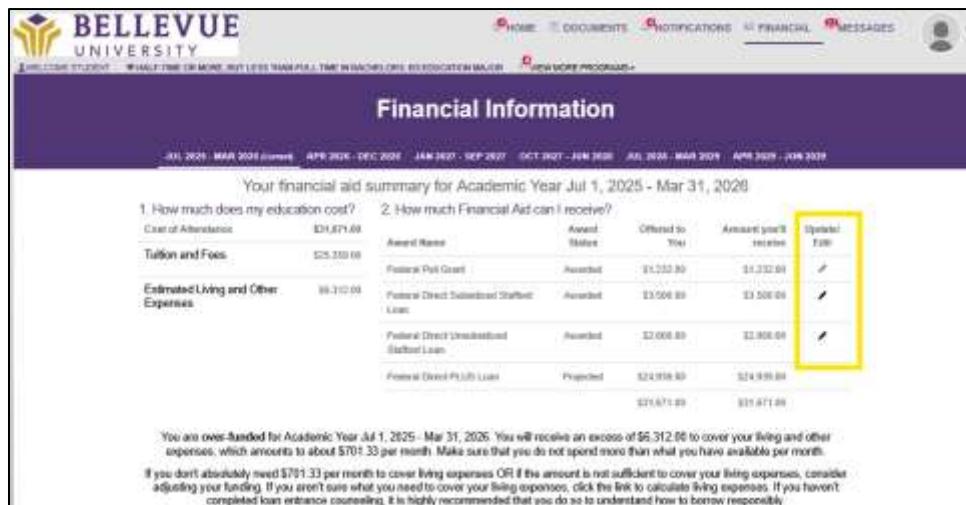


The screenshot shows the 'Financial Information' page. It displays a table with two columns: '1. How much does my education cost?' and '2. How much Financial Aid can I receive?'. The '2. How much Financial Aid can I receive?' section shows awards for various grants and loans. A yellow box highlights the 'Edit' link for the 'Federal Direct Unsubsidized Stafford Loan' row. Below the table, a message states: 'You are over-funded for Academic Year Jul 1, 2025 - Mar 31, 2026. You will receive an excess of \$6,312.00 to cover your living and other expenses, which amounts to about \$701.33 per month. Make sure that you do not spend more than what you have available per month. If you don't absolutely need \$701.33 per month to cover living expenses OR if the amount is not sufficient to cover your living expenses, consider adjusting your funding. If you aren't sure what you need to cover your living expenses, click the link to calculate living expenses. If you haven't completed loan entrance counseling, it is highly recommended that you do so to understand how to borrow responsibly.'

Step	Action
9.	Once back in the Financial Tab, you'll be able to view your adjusted funds.
	End of Procedure

Adjusting Loans

After you have accepted the Federal loans in your financial aid package, you can adjust them up to the date of their second disbursement (meaning their second term's disbursement).



Your financial aid summary for Academic Year Jul 1, 2025 - Mar 31, 2026

Cost of Attendance	1. How much does my education cost?	2. How much Financial Aid can I receive?
Tuition and Fees	\$25,330.00	Award Status Offered to Amount you'll receive Updated TAB
Estimated Living and Other Expenses	\$8,312.00	Federal Pell Grant Accepted \$1,232.00 \$1,232.00 ✓
		Federal Direct Subsidized Stafford Loan Accepted \$3,500.00 \$3,500.00 ✓
		Federal Direct Unsubsidized Stafford Loan Accepted \$2,000.00 \$2,000.00 ✓
		Federal Direct PLUS Loan Projected \$24,938.00 \$24,938.00
		Total \$21,671.00 \$21,671.00

You are over-funded for Academic Year Jul 1, 2025 - Mar 31, 2026. You will receive an excess of \$6,312.00 to cover your living and other expenses, which amounts to about \$704.33 per month. Make sure that you do not spend more than what you have available per month.

If you don't absolutely need \$704.33 per month to cover living expenses OR if the amount is not sufficient to cover your living expenses, consider adjusting your funding. If you aren't sure what you need to cover your living expenses, click the link to calculate living expenses. If you haven't completed loan entrance counseling, it is highly recommended that you do so to understand how to borrow responsibly.

Step	Action
1.	Once in the financial aid portal, open the FINANCIAL tab.
2.	You will then click the pencil icon next to the fund they wish to adjust.

Accept Your Funds

Select Term **Take action on Loans** **Custom** **Done**

Step 1 - Select Term(s)

Congratulations! You have been determined eligible for financial aid! Please review your awards and go through the fund acceptance process to select the amount of financial aid required to cover your costs of education at the university. The following awards apply to your Academic Year, which begins Jul 1, 2025 - Mar 31, 2026. To remain eligible for the awards that require your confirmation, you must accept these funds by Feb 7, 2026.

Fall 2025 Awards			
Fund	Awarded	Actions	Accepted
Federal Pell Grant	\$1,232.00		
Federal Direct Subsidized Stafford Loan	\$1,186.00	Accepted	\$1,186.00
Federal Direct Unsubsidized Stafford Loan	\$696.00	Accepted	\$646.00

Winter 2025 Awards			
Fund	Awarded	Actions	Accepted
Federal Direct Subsidized Stafford Loan	\$1,167.00	Accepted	\$1,167.00
Federal Direct Unsubsidized Stafford Loan	\$667.00	Accepted	\$667.00

Spring 2026 Awards			
Fund	Awarded	Actions	Accepted
Federal Direct Subsidized Stafford Loan	\$1,167.00	Accepted	\$1,167.00
Federal Direct Unsubsidized Stafford Loan	\$667.00	Accepted	\$667.00

Select Term to Take Action

TAKE ACTION ON LOANS

Step	Action
3.	Once in the Accept Your Funds page, you should click ' Select Term to Take Action ' to begin.
	NOTE: The amount you previously selected will appear in the accepted amount column on the initial page only. Going forward, you will only see the full amount of the award you are eligible for. If you need to accept more or less than what you previously accepted, you should double check the amount previously accepted and make a mental note for adjustments going forward.

Accept Your Funds

Select Term: **Take action on Loans** Confirm Done

Step 2 – Take Action on Direct Loans

Please select the amount required to cover the costs necessary to attend school for the selected terms. You are eligible for a maximum of \$1,832.00, we recommend accepting \$1,832.00, the amount required to cover or maximize your remaining tuition and fee costs.

[Winter 2025 Awards](#)

[Spring 2026 Awards](#)

[Fall 2025 Awards](#)

Cost of Attendance	Amount
Direct Cost	\$8,453.00
Indirect Cost	\$2,104.00
Total Cost of Attendance	\$10,557.00

Take Action

The full amount awarded of \$1,832.00

Another amount: MIN \$0 - MAX \$1,832.00

I would like to decline my funds that require acceptance

Fund	Awarded	Actions	Accepted
Federal Pell Grant	\$1,232.00	-	-
Federal Direct Subsidized Stafford Loan	\$1,166.00	Accepting	\$0.00
Federal Direct Unsubsidized Stafford Loan	\$666.00	Accepting	\$0.00
Total Awarded	\$3,064.00		
Amount You will receive (excluding Fees)	\$1,232.00		

[« BACK](#)

SAVE

Step	Action
4.	On Step 2 (Accept Loans), you can either accept the full amount offered, accept a lower amount, or decline loans altogether.

Step	Action
	<p>NOTE:</p> <ul style="list-style-type: none"> • If you'd like to accept the full amount of the award, you're eligible for, you should select the first option, and then click "Save." • If you'd like to make an adjustment to the award (adding or reducing the amount previously accepted), you should select the second option. Then, enter the total amount you'd prefer, up to the full amount of both loans, and finally click, "Save." <ul style="list-style-type: none"> ○ Example A: You were awarded \$20,500 in Loan A and \$26,667 in Loan B. If you previously accepted the full \$20,500 for Loan A and \$20,000 for Loan B, but want to increase Loan B by \$5,000, you should enter \$45,500. Then you should double check their loan amounts are correct and click 'continue.' ○ Example B: You were awarded \$20,500 in Loan A and \$26,667 in Loan B. If you previously accepted the full \$20,500 for Loan A and \$20,000 for Loan B, but want to decrease Loan B by \$5,000, you should enter \$35,500. Then you should double check their loan amounts are correct and click 'continue.' • If you would like to decline the loans entirely, you should select the third option, and then click 'continue.'
5.	<p>You will then be brought to Step 3 where you will confirm the loan/award amounts in your package. You can use the pencil icon to adjust funding further, such as how much you want disbursed per term. The totals should add up to the award amount they've selected in Step 2.</p> <ul style="list-style-type: none"> • For example, if you accept \$20,500 for their award, term 11 and term 12 together should add up to \$20,500. • Once you've adjusted the term funds, you should click 'continue.' • If you accepted the wrong amount, accidentally declined the loans, or want to start the process over again, you can navigate back to Step 2 'Accept Loans' at the top of the screen to readjust the amount of the loans you're accepting.

Accept Your Funds

Select Term Take action on Loans **Confirm** Done

Step 3 – Confirm your Awards

Congratulations! Below are the actions you have taken on your awards.

Cost of Attendance	Fall 2025
Direct Cost	\$2,453.00
Indirect Cost	\$2,104.00
Total Cost of Attendance	\$10,567.00

Fund	Fall 2025	Acceptance	Change in Acceptance
Federal Pell Grant	\$1,232.00		\$0.00
Federal Direct Subsidized Stafford Loan	\$1,460.00	\$1,000.00	\$1,000.00
Federal Direct Unsubsidized Stafford Loan	\$880.00	\$0.00	\$0.00

Summary of Award Acceptance:

Fall 2025	
Amount you will receive (excluding Fees)	\$2,702.00
Direct Cost	\$8,453.00
Estimated Payment to School	\$6,221.00
(Estimated Payment to School)	

You are under-funded. You need -\$0,221.00. To cover your remaining tuition and fees, you can accept more funds to cover these costs. If you have already accepted the maximum awarded amounts available, you should reach out to the Financial Aid office to explore additional means to cover these expenses.

Electronic Signature Consent:

By selecting the "I Accept" button, you are signing this document electronically. You agree your electronic signature is the legal equivalent of your manual/handwritten signature on this document. You further agree that your signature on this document (hereafter referred to as your "E-Signature") is as valid as if you signed the document in writing. You also agree that no certification authority or other third party verification is necessary to validate your E-Signature, and that the lack of such certification or third party verification will not in any way affect the enforceability of your E-Signature or any resulting agreement between you and the Financial Aid Office. You are also confirming that you are the student authorized to provide the data in this document. By electronically signing documents, you agree to all the terms and conditions of such documents as they relate on the date of your E-Signature.

I ACCEPT

I BACK

Enter Student ID: Enter Last Name: **Sign & Finish**

Enter Student ID: Enter Last Name:

Step	Action
6.	You'll then be prompted to read through the Electronic Signature Consent message and click 'I Accept.' Then you should enter their Student ID and last name to sign. Finally, they can click 'Sign & Finish' to complete.
	NOTE: The 'Sign & Finish' button will remain ghosted until you've clicked 'I Accept' and entered the required information.

Step	Action
7.	Once you click 'Sign & Finish,' you'll be shown a confirmation message that indicates you've successfully completed the adjustment process for the academic year. You can click 'OK.'

Step	Action
8.	You'll then be brought back to the Financial Tab which will show the accepted, adjusted, or rejected awards in their package.
9.	After accepting/adjusting/rejecting loans, you can make further adjustments to the funds up to the date of the second disbursement by clicking the pencil icon next to the fund you wish to adjust. This will take you through the acceptance process all over again.
	NOTE: After the date of their second disbursement, the pencil icon will be greyed out. You will need to contact an Office of the Financial Aid administrator to adjust beyond this point.
	End of Procedure

Accepting/Adjusting PLUS Loans

For students with PLUS loans, you can accept a lower the amount offered. But before the PLUS loan can be process, you will need to complete the PLUS loan application process via the US Department of Education Federal Student Aid page.

NOTE: Parents cannot adjust loans in the student portal per FERPA guidelines; however, students can grant parent/guardian proxy access. [Here is how to grant proxy access.](#)

Parent PLUS Loans

1. Click the pencil icon next to the PLUS loan.
2. A verification pop-up will appear requesting the last 4 digits of SSN and Date of Birth of the borrower (parent). Enter the requested information and click *validate*.
3. Enter the total amounts per term you would like to accept in the boxes provided.
4. Read through the *Electronic Signature Consent Message* and click 'I Accept.' Enter your Student ID and last name to sign. Finally, click 'Sign & Finish.'
 - a. The 'Sign & Finish' button will remain ghosted until you've clicked 'I Accept' and entered the required information.
5. The adjusted amount will reflect in the financial tab after completing adjustments.

Graduate PLUS Loans

1. Open the Financial tab & click the pencil icon next to the PLUS loan.
2. Enter 50% of the total loan amount they wish to accept per term. For example, if they decided to accept \$20,000, they would enter \$10,000 per term. Then they would read/accept the electronic signature consent message, enter their Student ID & last name to sign, and then click 'sign & finish.'
3. The updated amount will reflect in the student portal and the admin portal on the packaging page.

Granting Parent/Guest Access

Students can grant access to parents and guests. Only students can grant access to parents/guests. The parent/guest will need to have a valid email address where they will receive the email link once the access has been granted.



Step	Action
1.	Click on the Profile link in the dropdown menu.

Step	Action
2.	Complete the FERPA consent task.

Profile Information

Manage User Information

USER INFORMATION

First Name * Testing
Last Name * Student
External Student ID * 21000409
Email * BVstudentOne@outlook.com
Phone Number * -

Manage Proxy Access

1 PROVIDE CONSENT

Action	Status	Release Directory Info?	Date Signed
Sign FERPA Form & Provide Consent	Completed	Yes	Sep 20, 2024

2 ADD/EDIT PROXY PORTAL ACCESS

Guest Email Address	Guest Roles	Status	Edit	Action
BVparentOne@outlook.com	<input checked="" type="checkbox"/> Default Proxy	Enabled		

Step	Action
3.	To grant delegated access, click the ADD USER link in section 2, ADD/EDIT PROXY PORTAL ACCESS .

Profile Information

Manage User Information

USER INFORMATION

First Name * TestingA
Last Name * Student
External Student ID * 21000409
Email * BVstudentOne@outlook.com
Phone Number * -

Manage Proxy Access

1 PROVIDE CONSENT

Action	Status	Release Directory Info?	Date Signed
Sign FERPA Form & Provide Consent	Completed	Yes	Sep 20, 2024

2 ADD/EDIT PROXY PORTAL ACCESS

Guest Email Address	Guest Roles	Status	Edit	Action
BVparentOne@outlook.com	<input checked="" type="checkbox"/> Default Proxy	Enabled		

Step	Action
4.	Enter the parent/guest email and select the role, then click Save.

Operational Training

A new Oracle Student Financial Planning Self Service user account has been created for you with following credentials.
Please activate immediately.

Username: [REDACTED]

Activation Link: [https://\[REDACTED\]](https://[REDACTED])

Thank you,
Account Administration

Activate Your Account

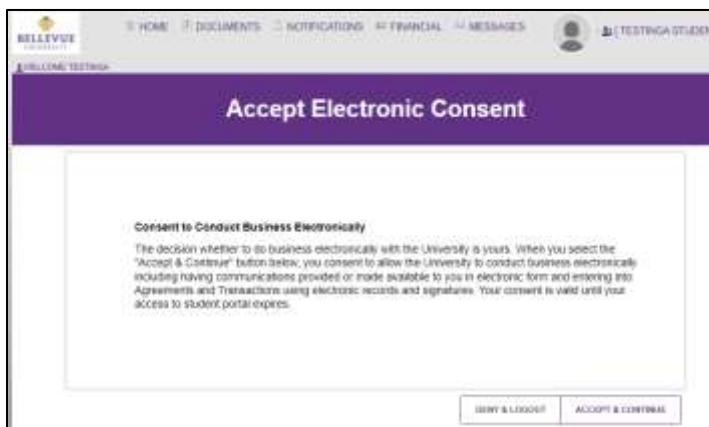
Please set and save a new password to continue.

Username* BVparentone@outlook.com

New Password*

Confirm Password*

Step	Action
5.	Parent(s)/Guardian(s) will receive link to set password.



The decision whether to do business electronically with the University is yours. When you select the "Accept & Continue" button below, you consent to allow the University to conduct business electronically including having communications provided or made available to you in electronic form and entering into Agreements and Transactions using electronic records and signatures. Your consent is valid until your access to student portal expires.

Step	Action
6.	Once they log on, they will get the electronic consent agreement.

Operational Training



Step	Action
7.	The Parent/Guest portal page has less action items and is limited on what they can view based on the security role that has been assigned.
	End of Procedure

Stakeholders/Owners

Academic Affairs

Administration

- *Buildings & Grounds*
- *Regulatory Compliance*
- *Safety*

Brittany Rindone

Advancement

Colleges/Institutions

- *CAS*
- *COB*
- *CPE*
- *CST*

Mike Cizek

Faculty

Finance

- *Student Accounts*
- *Veteran Affairs*
- *Financial Aid*

IT

MESA

- *Advising*
- *Admissions*
- *Community & Student Affairs*
- *Marketing*
- *Military Programs*
- *Premier Partnerships*
- *Student Financial Services*
- *Workforce Learning Solutions*

Office of the President

PMO

Strategic Initiatives

Other Ashlea Buntin & Sam Stepanek

