



UNIVERSITY OF SAN FRANCISCO  
CHANGE THE WORLD FROM HERE

---

# Navigating the Student Self-Service Financial Aid Portal



UNIVERSITY OF SAN FRANCISCO  
CHANGE THE WORLD FROM HERE

---

# Go To: [myUSF.usfca.edu](https://myUSF.usfca.edu)

- 1) Login to myUSF
- 2) Go to your dashboard
- 3) Click into “**Banner Self-Service (Student)**”

# 1) Login to myUSF



# 2) Go to your dashboard



### 3) Click “Banner Self Service (Student)”

#### Top Apps

FAC/STAFF EMAIL

VIEW & PAY

BANNER SELF-  
SERVICE  
(STUDENT)

STUDENT EMAIL

VIEW ALL APPS



Canvas

USF Support

One Card Online Account Balance

Personal Software Purchases

USF Rooms

Library Study Rooms

Zoom

If you are unable to locate “**Banner Self-Service (Student)**” app on your dashboard, click on “**View All Apps**”



# Navigating your Financial Aid

To view/accept your Financial Aid award:

- 1) Click on **“Financial Aid”**
- 2) Click on **“Financial Aid Information”**
- 3) Click on **“Awards”**
- 4) Select current Aid Year

# 1) Click on “Financial Aid”



Personal Information

Student

Financial Aid

## Student

### Registration

Check your registration status, class schedule and add or drop classes

### Student Records

View your holds, grades and transcripts

### Student Account

View your account summaries, statement/payment history and tax information

### Preferred First Name Option

Add/Change/Delete preferred first name.

### Teaching Effectiveness Survey

RELEASE: 8.8.4.1USF

## 2) Click on “Financial Aid Information”



Personal Information Student **Financial Aid**

### Financial Aid

**Financial Aid Information**

[Complete Verification/Upload Documents](#)

Complete financial aid verification, upload documents, and submit financial aid revision request

[Contact Us- Financialaid@usfca.edu](mailto:Financialaid@usfca.edu)

[Federal Shopping Sheet](#)

RELEASE: 8.8.4.1USF

### 3) Click on “Awards”



Personal Information Student **Financial Aid**

## Financial Aid Information

**Awards**

Financial Aid Status

Award History

RELEASE: 8.8.4.1USF



## 4) Select your current Aid Year

### Aid Year

Some financial aid information is determined by Aid Year (the academic year for which you are receiving financial aid). For financial aid purposes, the "aid year" usually refers to the FAFSA that you most recently completed, which was used to offer you financial aid for the current semester and/or academic year. Please select the appropriate year below from the pull down menu.

Select Aid Year

Submit

RELEASE: 8.21

Not Applicable/No Value Found ▼

Not Applicable/No Value Found

Award Year 2020 - 2021

Award Year 2019 - 2020

Award Year 2018 - 2019

Award Year 2017 - 2018

Award Year 2016 - 2017

Award Year 2015 - 2016

Award Year 2014 - 2015

Award Year 2013 - 2014

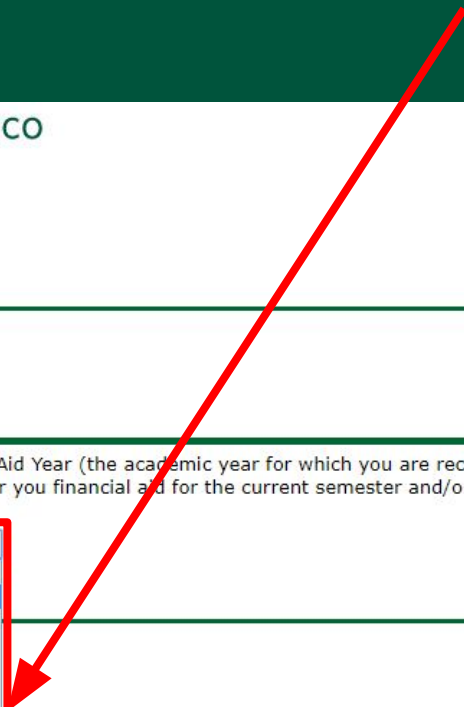
Award Year 2012 - 2013

Award Year 2011 - 2012

Award Year 2010 - 2011

Award Year 2009 - 2010

Award Year 2008 - 2009



# You should be led to your “Award Package”

Personal Information Student **Financial Aid**

[RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

## Award Package for Award Year 2019 - 2020

**General Information** Award Overview Resources/Additional Information Terms and Conditions Accept Award Offer

### Financial Aid Enrollment Freeze

The last day to add a course for Spring 2020 term is January 27th, and the last day to drop a course is February 7th. The Financial Aid Office will lock your enrollment status on February 8th, and your financial aid award will not be adjusted when your enrollment status is increased after the enrollment freeze date unless the enrollment adjustment appeal is approved by the Financial Aid Appeals Committee. Please visit <https://myusf.usfca.edu/financial-aid/forms> to find the enrollment adjustment appeal form.



Click on each tab displayed on this page to view your financial aid award details for this aid year. If you have not yet received an official financial aid award notice either by mail or email, or if you have unsatisfied requirements, then the types of aid awarded and the amounts listed here may be incomplete or only estimates. You will be notified by our office when we have completed your award offer or revision. You may also click on the Overall Financial Aid Status link below for more information.

By accepting this financial aid offer, I affirm that I have read and agree to the terms and provisions of the offer as detailed in the **FA brochure** and the Financial Aid Handbook. **USF** may reduce, withdraw or require repayment of aid that exceeds my financial need. **USF** may revise this offer at any time according to availability of funds, including government appropriations. I understand all Federal Title IV funds (except Federal Work Study) will be credited directly to my student account. In addition, I consent to the release of my grade report and extracurricular activities to donors of my scholarship and grant award(s). I certify that I will use all Federal Title IV money received only for expenses related to study at **USF**. I certify that I do not owe a refund on any grant or loan, am not in default on any loan, and have made satisfactory arrangements to repay any defaulted loan, and have not borrowed in excess of the loan limits, under Federal Title IV programs, at any institution.

Please note that your “**General Information**” may look different

[Select Another Aid Year](#)

[\[ Overall Financial Aid Status | Account Summary By Term | Award Payment Schedule | Award History \]](#)

Here you can browse through:

- 1) “**General Information**”
- 2) “**Award Overview**”
- 3) “**Resources/Additional Info**”
- 4) “**Terms and Conditions**” of your Award(s)
- 5) “**Accept Award Offer**”

## Award Package for Award Year 2019 - 2020

General Information **Award Overview** Resources/Additional Information Terms and Conditions Accept Award Offer

[Print](#)

### Housing Status

Campus Housing

### Expected Enrollment Status

Unknown

## 2) “Award Overview”

Please note that this is only an example, your  
“Award Overview” may look different

### Cost of Attendance

|                    |                    |
|--------------------|--------------------|
| Tuition and Fees   | \$50,282.00        |
| Room and Board     | \$15,410.00        |
| Books and Supplies | \$1,600.00         |
| Transportation     | \$1,200.00         |
| Personal Expenses  | \$2,600.00         |
| <b>Total:</b>      | <b>\$71,092.00</b> |

### Cumulative Loan Information as of 10-OCT-2018

| Loan Type    | Amount     |
|--------------|------------|
| Subsidized   | \$3,500.00 |
| Unsubsidized | \$2,000.00 |

### Financial Aid Award for the Award Year 2019 - 2020

| Fund                           | Status | Total              |
|--------------------------------|--------|--------------------|
| University Tuition Grant       |        | \$24,800.00        |
| President's Academic Scholars  |        | \$19,000.00        |
| Federal Pell Grant             |        | \$6,195.00         |
| Federal Work Study             |        | \$6,000.00         |
| Federal Direct Subsidized Loan |        | \$0.00             |
| Fed Direct Unsubsidized Loan   |        | \$0.00             |
| <b>Total</b>                   |        | <b>\$55,995.00</b> |

### Financial Aid Award for Fall 2019

| Fund                           | Status               | Total              |
|--------------------------------|----------------------|--------------------|
| University Tuition Grant       | Accepted             | \$12,400.00        |
| President's Academic Scholars  | Accepted             | \$9,500.00         |
| Federal Pell Grant             | Accepted             | \$3,098.00         |
| Federal Work Study             | Accepted via the Web | \$3,000.00         |
| Federal Direct Subsidized Loan | Cancelled            | \$0.00             |
| Fed Direct Unsubsidized Loan   | Cancelled            | \$0.00             |
| <b>Total</b>                   |                      | <b>\$27,998.00</b> |

### Financial Aid Award for Spring 2020

| Fund                           | Status               | Total              |
|--------------------------------|----------------------|--------------------|
| University Tuition Grant       | Accepted             | \$12,400.00        |
| President's Academic Scholars  | Accepted             | \$9,500.00         |
| Federal Pell Grant             | Accepted             | \$3,097.00         |
| Federal Work Study             | Accepted via the Web | \$3,000.00         |
| Federal Direct Subsidized Loan | Cancelled            | \$0.00             |
| Fed Direct Unsubsidized Loan   | Cancelled            | \$0.00             |
| <b>Total</b>                   |                      | <b>\$27,997.00</b> |

If you have questions regarding the above information, please use the [HELP](#) link above.



### 3) “Resources/Additional Information”

Award Package for Award Year 2020 - 2021

Cassandra R. Bell  
Jul 15, 2020 10:29 am

General Information | Award Overview | **Resources/Additional Information** | Accept Award Offer

No outside resource information is available for you at this time, please contact your financial aid office if you have questions.

#### Unreviewed Information Previously Submitted

Information you have submitted to the financial aid office that has not been reviewed is displayed below.

#### Questions

Under federal law, the University must receive your "authorization" to cover fees other than tuition, registration, student service, fitness center and contracted University room and board fees. These other fees are called "authorized allowable charges" and can include, but are not limited to short-term loans, interest, open registration, orientation, lab, and course material fees. **To authorize payment of these fees, indicate your approval by making your selection below.**

- If you do not complete this Authorization Form, the University must assume that you wish to "restrict" use of your financial aid funds. Restricted funds only cover tuition, registration, student service, and contracted University room and board fees.
- If you "restrict" use of your financial aid funds, you assume responsibility for paying any account balance not covered by restricted financial aid by the specified due date. Fees not paid by the due date are subject to late fees.

You will be asked for your consent annually. If you wish to make to your selection the Office of Student Financial Assistance, please provide written notice of the change. This is a voluntary authorization. You may withdraw this authorization by visiting the USF Office of Student Financial Assistance, Lone Mountain, 2130 Fulton Street, San Francisco, CA 94117-1080.

Under federal law, the University must receive your "authorization" to apply Federal financial assistance to a prior year I balance to cover charges such as tuition, registration, student service, and contracted University room and board fees. **To authorize payment of these charges for a prior balance up to \$200, indicate your approval by making**

#### Answers

I authorize.

Please note that this is only an example,  
your “**Resources/Additional  
Information**” page may look differently.

You must to carefully read and submit your desired responses to these authorizations every Aid Year before accessing your “Accept Award Offer” tab.

## 4) “Terms and Conditions” of your Award(s)

Personal Information Student **Financial Aid**

[RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

Award Package for Award Year 2019 - 2020

General Information Award Overview Resources/Additional Information **Terms and Conditions** Accept Award Offer

### Terms and Conditions

| Fund                                                                                                                                                                                                                | Message                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| University Tuition Grant                                                                                                                                                                                            | The University provides need-based tuition assistance to undergraduate students through its Tuition Grant Program and named scholarship programs. In addition to the requirement of demonstrated need, these grants require a minimum admitted GPA that is determined after our review of the academic transcripts of the applicant pool. For new freshmen, the University Tuition Grant is available for up to 8 semesters of undergraduate study as long as the student reapplies for aid each year by the continuing student priority deadline of March 2nd, continues to demonstrate need, and makes satisfactory academic progress.                                                                                                                                                                                                                                                                                                                                           |
| President's Academic Scholars                                                                                                                                                                                       | New Freshmen applicants for timely admission may be eligible for this USF merit tuition award. The tuition award is for up to eight semesters of full-time undergraduate study at USF and renewal is automatic as long as recipients continue to meet the Satisfactory Academic Progress standards for financial aid.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Federal Pell Grant                                                                                                                                                                                                  | This Federally funded program provides grant assistance to needy undergraduates pursuing a first undergraduate degree. The maximum lifetime eligibility for a Pell grant is the equivalent of 12 full-time semesters, roughly the equivalent of six years. A Pell Grant offer may be reduced or cancelled at any time if we are notified by the Department of Education that a student has reached or exceeded the lifetime award limit. For more detailed information on this grant, please visit Federal Student Aid On The Web by clicking <a href="#">here</a> . Please note: Your Federal Pell Grant eligibility is determined by both the EFC from your FAFSA application as well as your enrollment status. We will award your Pell grant at full-time enrollment eligibility, but the grant will pay to your student account according to your actual enrollment. Example: If you are enrolled half-time, you will receive one-half of the awarded Pell grant eligibility. |
| Federal Work Study                                                                                                                                                                                                  | You have been offered a Federal Work-Study (FWS) award. Unlike most types of financial aid, such as grants and student loans, Federal Work-Study does not apply as a credit toward your University tuition and fees bill. Instead, the Work-Study award is paid in the form of employment compensation (semi-monthly paychecks) to students who work in a student employment position for the University. Students are not assigned to a FWS job; rather, students must seek employment by applying for individual jobs. Student employment opportunities are listed on an ongoing basis on the <a href="#">Student Employment job board</a> . Most jobs for the academic year are posted between mid-July and mid-September. Participation in this program is optional. If the award is declined, the maximum loan eligibility for PLUS or private loans will increase.                                                                                                           |
| Prerequisites for Federal Work-Study Employment:                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <ol style="list-style-type: none"><li>1. Accept your Federal Work-Study award</li><li>2. Register full time</li><li>3. Apply for and receive a job offer</li></ol>                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Upon receiving a job offer, work with your supervisor to complete additional paperwork required prior to beginning employment. For more information, please review the <a href="#">Student Employment website</a> . |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

Please note that this is only an example, your “**Terms and Conditions**” page may look differently.

 You have accepted the Terms and Conditions.

Activate Windows  
Go to Settings to activate Windows

Here you will see the Terms and Conditions required to maintain any Academic Awards.  
Please read carefully.

## 5) “Accept Award Offer”

Personal Information Student **Financial Aid**

[RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

### Award Package for Award Year 2019 - 2020

General Information Award Overview Resources/Additional Information Terms and Conditions **Accept Award Offer**

Print

Options for Accept Award Offers include:

1. Review the **semester by semester** award offer. If you anticipate needing financial aid in an additional semester not listed (e.g. Summer), or if you do not need financial aid in a semester listed (e.g. graduating early), please contact the Financial Aid office before accepting or declining your offer.
2. If you would like to accept the full award amount, you may use the **Accept Full Amount of All Awards** button under your award offer.
3. If you would like to accept certain funds and decline others, you may choose Accept or Decline for each fund using the pull down window options next to the corresponding fund. Be sure to then click the **Submit Decision** button to complete the process.
4. If you would like to accept a partial amount of a fund, you may do so by selecting the **Accept** option in the corresponding pull down window and then entering the numerical dollar amount in the **Accept Partial Amount** field. Be sure to then click the **Submit Decision** button to complete the process.
5. Please use the **Print** link above to print this award information for your records and refer to the Help link above if you have additional questions.
6. By accepting any financial aid award you agree that you are accepting the terms and conditions listed for that fund.
7. I consent to the release of my grade report and extracurricular activities to donors of my scholarship and grant award(s).

#### Award Decision

| Fund                           | Status               | Term        | Amount      |
|--------------------------------|----------------------|-------------|-------------|
| University Tuition Grant       | Accepted             | Fall 2019   | \$12,400.00 |
|                                | Accepted             | Spring 2020 | \$12,400.00 |
|                                |                      | Fund Total: | \$24,800.00 |
| President's Academic Scholars  | Accepted             | Fall 2019   | \$9,500.00  |
|                                | Accepted             | Spring 2020 | \$9,500.00  |
|                                |                      | Fund Total: | \$19,000.00 |
| Federal Pell Grant             | Accepted             | Fall 2019   | \$3,098.00  |
|                                | Accepted             | Spring 2020 | \$3,097.00  |
|                                |                      | Fund Total: | \$6,195.00  |
| Federal Work Study             | Accepted via the Web | Fall 2019   | \$3,000.00  |
|                                | Accepted via the Web | Spring 2020 | \$3,000.00  |
|                                |                      | Fund Total: | \$6,000.00  |
| Federal Direct Subsidized Loan | Cancelled            | Fall 2019   | \$0.00      |
|                                | Cancelled            | Spring 2020 | \$0.00      |
|                                |                      | Fund Total: | \$0.00      |
| Fed Direct Unsubsidized Loan   | Cancelled            | Fall 2019   | \$0.00      |
|                                | Cancelled            | Spring 2020 | \$0.00      |
|                                |                      | Fund Total: | \$0.00      |

Please note that this is only an example, your “**Accept Award Offer**” page may look differently.

Here you can **accept** or **decline** any Academic Awards or Loans you may have.

[ [Overall Financial Aid Status](#) | [Account Summary By Term](#) | [Award Payment Schedule](#) | [Award History](#) ]

RELEASE: 8.23.1

You may accept the **full** amount of each award, or you can accept a **partial** amount.

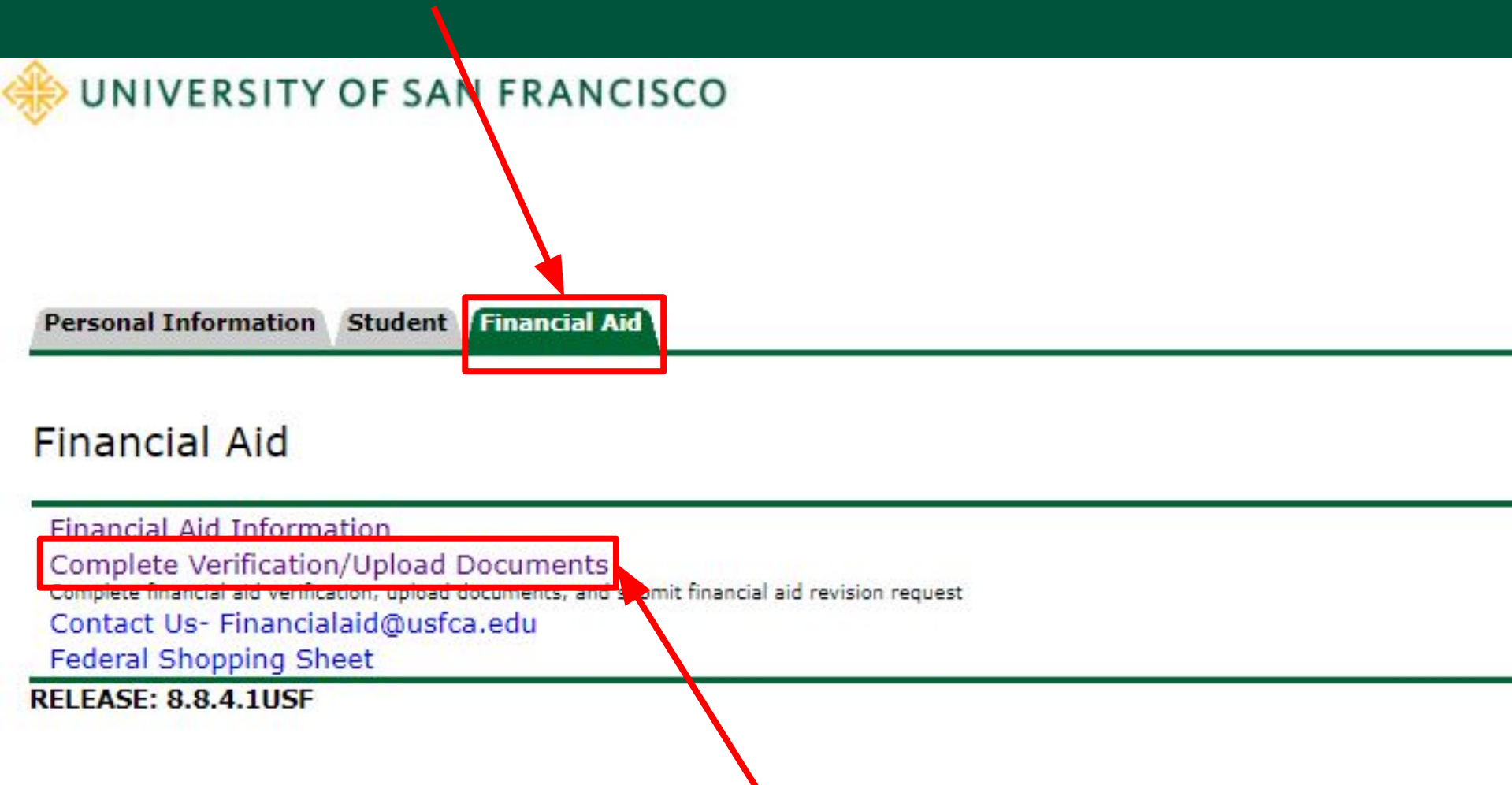


# Submitting Documents

- 1) Click on “**Financial Aid**” tab
- 2) Click “**Complete Verification/Upload Documents**”
- 3) Register or login to “**Student Forms**”



1) Click on “**Financial Aid**” tab



The screenshot shows the University of San Francisco Financial Aid portal. At the top, the University of San Francisco logo and name are visible. Below the header, there are three tabs: "Personal Information", "Student", and "Financial Aid". The "Financial Aid" tab is highlighted with a red box, and a red arrow points to it from the instruction above. Below the tabs, the "Financial Aid" section is displayed. Under the "Financial Aid Information" heading, the link "Complete Verification/Upload Documents" is highlighted with a red box, and a red arrow points to it from the instruction below. Other links in the section include "Contact Us- Financialaid@usfca.edu" and "Federal Shopping Sheet". At the bottom of the page, the text "RELEASE: 8.8.4.1USF" is visible.

UNIVERSITY OF SAN FRANCISCO

Personal Information Student **Financial Aid**

Financial Aid

Financial Aid Information

**Complete Verification/Upload Documents**

Complete financial aid verification, upload documents, and submit financial aid revision request

Contact Us- Financialaid@usfca.edu

Federal Shopping Sheet

RELEASE: 8.8.4.1USF

2) Click “**Complete Verification/Upload Documents**”



### 3) Register or login to “Student Forms”



2019-2020  
Verification

2019-2020  
Other Documents

2020-2021  
Verification

1

## Welcome!

Below is the list of items the Financial Aid Office needs you to complete for the financial aid verification process. Click on any section for a detailed list of requirements.

Contact the Financial Aid Office with any questions.



Dependent Verification Form

Register Account

#### Confirm Student Information

\* Required  
Information provided in the fields below must match information provided on the Free Application for Federal Student Aid (FAFSA). Please make any necessary corrections to ensure an exact match to the FAFSA.

[Why do I have to provide this?](#)

\* First name

\* Last name

\* Date of birth

\* Social security number

Preferred email

Confirm email

Phone Number

Provide a phone number to subscribe to mobile phone text messages for account updates.  
(Standard text message charges apply)

Activate

Go to Settings

Register Account

Here you will submit **verification documents** to complete any Financial Aid requirements.

Please note that this is only an example, your “Student Forms” page may look differently.

2019-2020  
Verification

2019-2020  
Other Documents

2020-2021  
Verification

# Congratulations!

No action is required while the Financial Aid Office is reviewing your file. You may view documents that have been submitted by clicking on the links below.

Contact the Financial Aid Office with any questions.



## Dependent Verification Form



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

✓ 2020-2021 Dependent Verification Web Form ⓘ

✓ Fill Out

Download

Date Filled Out

[2020-2021 Dependent Verification Web Form.pdf](#)

04/05/2020

✓ Congratulations! This form has been E-Signed and may now be submitted for review.

✓ Upload Student's 2018 Federal W-2 Form(s) ⓘ

+ Add Page(s)

Filename

Date Uploaded

[2018 W2.pdf](#)

04/30/2020

Edit

Here you will submit **supporting documentation** for any Outstanding requirements, this includes:

- Federal Verification
- Family Contribution Appeals
- SAP Appeals
- etc.

Please note that this is an example of a verification transaction. Your “**Verify My FAFSA**” transactions may look differently and require different documents.