Financial Aid Quick Reference Guide

As a student, you can view, accept, and print your financial aid awards in Workday. This guide will review the following actions to take in Workday:

- View Financial Aid Awards
- Print a Financial Aid Award Letter
- Accept/Decline Financial Aid Awards
- Complete Financial Aid Action Items
- Apply for a Financial Aid Scholarship

HELPFUL TIP: Open the **Finances** application (app) by selecting it from the list of YOUR TOP APPS located on your Workday home page.

View Financial Aid Awards

1. Navigate to the Financial Aid Resources application by using the Workday Search Bar or your Menu. Select the **Financial Aid Resource** application.
2. Click on **View Financial Aid** in the Financial Aid section of the dashboard.
   a. **NOTE**: You can also type *"view financial aid"* in the Workday Search Bar and select **View Financial Aid**.
3. Enter the **Academic Unit** and **Award Year**.
4. Click **OK**.
5. The top section displays a summary of your **Estimated Financial Aid** including a bar graph.
6. The **Financial Aid Overview** tab displays your **Award Year Summary** and **Awards Breakdown** for the selected award year.
7. The **Estimated Costs** tab displays your **Estimated Cost Summary** and **Estimated Cost Breakdown** for the selected award year.

Print Financial Aid Award Letter

Refer to the **View Financial Aid** page and select the **Financial Aid Overview** tab. Then, click **Print Award Letter**. This will generate a PDF that you can print or save.

Accept/Decline Financial Aid Awards

You can accept or decline your financial aid awards while viewing your financial aid or in the Finances application on your Workday home page.

OPTION 1: While viewing your financial aid, click on the **Financial Aid Overview** tab > click **Accept/Decline Awards**.

OPTION 2: On the Workday home page, select the **Finances** application > click on **Accept/Decline Awards** > select **Academic Unit** and **Award Year**. Then, click **OK**.

On the **Accept/Decline Awards** page, click in the Decision field and select the appropriate option for each award. Then, click **OK**.

Complete Financial Aid Action Items

You can view and complete financial aid action items that have been assigned to you in Workday Inbox.

1. Your most recent inbox items will be displayed on your Workday home page.
2. To open your inbox, click **Go to Inbox** in the preview window or **click the inbox icon** located in the top right corner of your navigation bar.
3. The current action items will be listed on the left. Select an item to view details and instructions.
4. To upload required documents, either drag and drop the file(s) or click **Select Files** and select the saved file(s).
5. Enter comments if needed.
6. Once you have completed the instructions for the item and uploaded any required documents, click **Submit**.

Apply for a Financial Aid Scholarship

A Workday request must be submitted to apply for designated scholarships.

1. Type *"Create Request"* in the Workday Search Bar and select the task link.
2. In the **Request Type** field, select the appropriate scholarship and click **OK**.
3. Complete the questionnaire, attach any supporting documents, and click **Submit**.
4. Once you submit the scholarship request, it will route to the appropriate staff for review and approval.

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