

Online Financial Aid Document Submissions with Electronic Signatures Using Next Gen's Dynamic Forms

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Georgia Southern University

Agenda

1. Georgia Southern Financial Aid Environment
2. Our Need within Financial Aid
3. Procurement Process
4. Monitoring
5. Demo
 - a. Student perspective
 - b. Parent perspective
 - c. Administrative tasks
6. Lessons Learned

Georgia Southern's Financial Aid Environment

- **20,212 enrolled students for 2011-2012:**
 - 17,525 undergraduates
 - 2,687 graduates
- **Financial Aid statistics for 11-12 aid year:**
 - Over 33,000 FAFSAs
 - \$70.9 million in disbursed aid to 15,000 students
- **History with Ellucian:**
 - Banner institution since 1995
 - BDMS client since 2001 (document imaging since 1999)
- **Quality Assurance**
 - Participant of Department of Education Quality Assurance Program

Need Within Financial Aid

Electronic Signatures

- E-signature that indicates that a person adopts the contents of an electronic form

Authentication

- Ability to perform Single-Sign-On through Banner Self-Service

Workflow

- Multiple electronic signatures with user-interface for form management

Imaging Interface

- Ability to download images for indexing in Banner Document Management System

Security

- Next Gen undergoes annual SAS-70 Type II audit
- Contracts with 3rd party vendors to evaluate apps & network

Procurement

- Next Gen Web Solutions' Dynamic Forms
- Summer 2011 purchase
- Fall 2011 implementation
- No competitor in Higher Education at that time
- Inexpensive; therefore, no bidding process



Monitoring

- **Piloting verification forms:**

- Verification forms - may be required before financial aid can be awarded & are specific to dependency status
- Our published verification forms:
 - Tax Worksheet for Dependent Students, Tax Worksheet for Independent Students, Additional Financial Information for Dependent Students, Dependent Household Size Certification, Independent Household Size Certification, FAFSA Signature Page, Parental Income Statement

- **Currently identifying other (non-verification) forms to publish in Dynamic Forms:**

- Financial Aid staff: *"I wish that all of our signature forms came through Dynamic Forms so that imaging would be as simple."*

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Student Perspective

Starting Workflow

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Dynamic Forms

Additional Financial Information-Dependent Student 2012 - 2013 Demo

Instructions

This form requires information from more than just one person. Each person that completes a section of the form will need to sign the form electronically.

In order to continue on to the form, you will need to enter contact information for all of the people requested in the participant table below. Once you have entered contact information for all participants, the Continue button will appear and allow you to go on and submit your section of the form.

Opt-out Information

If you would like to opt out, please contact the Georgia Southern University Financial Aid Office. **This form requires that you provide your parents information below. Please make sure that their information is accurate! If it is not, your form will not be able to be processed.**

Form Participants

	Relationship	Contact Information		
--	--------------	---------------------	--	--

Enter contact information ->

Parent

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Student Signature

Financial Aid Office

* = required field

2012 - 2013
GEORGIA SOUTHERN UNIVERSITY
DEPARTMENT OF FINANCIAL AID
ADDITIONAL FINANCIAL INFORMATION-DEPENDENT STUDENT

Your FAFSA indicated that you have additional financial information that requires review. Before any financial aid can be processed, we must verify this additional financial information. Please provide the requested information. Write in "0" if the worksheet item does not apply to you and/or your parent(s). Do not leave any section blank. Incomplete, or unsigned forms, cannot be processed.

Please note, this form has student and parent sections. A student will not be able to click on/complete a parent section, and likewise, a parent cannot click on/complete a student section

Last First Middle Student Eagle ID#

(Note: On this worksheet, use amounts received during the calendar year from January 1, 2011, to December 31, 2011)

a. Education credits (Hope and Lifetime Learning Tax Credits) from IRS form 1040-line 49; or 1040A-line 31.

STUDENT	PARENT(S)
+ <input type="text"/>	+ <input type="text"/>

b. Child Support paid because of divorce or separation or as a result of legal requirement. Don't include support for children in your parents' household, as reported in question 72.

+ <input type="text"/>	+ <input type="text"/>
------------------------	------------------------

c. Your parents' taxable earnings from need-based employment programs, such as Federal Work-Study and need based employment portions of fellowships and assistantships.

d. Student grant and scholarship aid reported to the IRS in your parents' adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.

e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your parents' adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).

f. Earnings from work under a cooperative education program offered by a college.

TOTAL

By electronically signing your name to the next page as an authorized official, I/we agree to give proof of information on this form may result in a \$10,000 suspected

Electronic signature

Please read the [Disclosure / Consent](#) before you sign your form electronically.

Typing your name exactly as it appears below signifies you are completing this form using an electronic signature. By signing electronically, you are certifying that you have read and understand the Disclosure/Consent and agree to electronically sign. You also agree to receive required disclosures or other communications related to this transaction electronically.

To continue with the electronic signature process, please enter your name and click the "Sign Electronically" button to save your information and submit your electronic signature.

Robin Mock

If you would like to [opt out](#) of electronic signature, please click the "Save and print" button below to save your information and print a local copy for your signature.

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Parent Guardian Perspective

Parent Receives Email

Dynamic Forms: Additional Financial Information-Dependent Student 2012 - 2013 Demo - Signature Request



Inbox x

notify@ngwebsolutions.com

to me

You are receiving this e-mail because Robin Mock is your parent. Please click the link below to complete your section of the form.

You will be asked to electronically sign the form.

If you already have a Dynamic Forms account, please click on the **Get Started** link.

You can use the **Forgot your username and password** link.

[Click here to complete your section of the form.](#)

Click here to [Reply](#) or [Forward](#)



[Home](#) [Pending Forms](#) [Forms History](#) [Manage Account](#) [Logout](#)

Pending Forms

The two lists below represent all pending forms. These include:

- Forms you need to complete
- Forms requiring the signature of a co-signer

The forms are sorted, by date with the most recent at the top. To view a printable form via [Adobe Acrobat](#), click the PDF symbol to the left of the form name. To view the form as a web page, click the HTML link.

Forms you need to complete:

PDF	HTML	Form Name	Form Started By	Date Signature Requested	Action
		Additional Financial Information-Dependent Student 2012 - 2013 Demo	Robin Mock	9/12/2012 4:54:17 PM	Complete Form

Forms requiring the signature of a co-signer:

There are no forms requiring the signature of a co-signer at this time.

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Parent Signature

Financial Aid Office

* = required field

2012 - 2013
GEORGIA SOUTHERN UNIVERSITY
DEPARTMENT OF FINANCIAL AID
ADDITIONAL FINANCIAL INFORMATION-DEPENDENT STUDENT

Your FAFSA indicated that you have additional financial information that requires review. Before any financial aid can be processed, we must verify this additional financial information. Please provide the requested information. Write in "0" if the worksheet item does not apply to you and/or your parent(s). Do not leave any section blank. Incomplete, or unsigned forms, cannot be processed.

Please note, this form has student and parent sections. A student will not be able to click on/complete a parent section, and likewise, a parent cannot click on/complete a student section

Last First Middle Student Eagle ID#

(Note: On this worksheet, use amounts received during the calendar year from January 1, 2011, to December 31, 2011)

	STUDENT	PARENT(S)
a. Education credits (Hope and Lifetime Learning Tax Credits) from IRS form 1040-line 49; or 1040A-line 31.	+ <input type="text" value="0"/>	+* <input type="text"/>
b. Child Support paid because of divorce or separation or as a result of legal requirement. Don't include support for children in your parents' household, as reported in question 72.	+ <input type="text" value="0"/>	-* <input type="text"/>
c. Your parents' taxable earnings from need-based employment programs, such as Federal Work-Study and need based employment portions of fellowships and assistantships.	+ <input type="text" value="0"/>	
d. Student grant and scholarship aid reported to the IRS in your parents' adjusted gross income. Includes AmeriCorps benefits (awards, living allowances, and interest accrual payments), as well as grant and scholarship portions of fellowships and assistantships.	+ <input type="text" value="0"/>	
e. Combat pay or special combat pay. Only enter the amount that was taxable and included in your parents' adjusted gross income. Do not enter untaxed combat pay reported on the W-2 (Box 12, Code Q).	+ <input type="text" value="0"/>	
f. Earnings from work under a cooperative education program offered by a college.	+ <input type="text" value="0"/>	
TOTAL	\$ <input type="text" value="0"/>	

Electronic signature

Please read the [Disclosure / Consent](#) before you sign your form electronically.

Typing your name exactly as it appears below signifies you are completing this form using an electronic signature. By signing electronically, you are certifying that you have read and understand the Disclosure/Consent and agree to electronically sign. You also agree to receive required disclosures or other communications related to this transaction electronically.

To continue with the electronic signature process, please enter your name and click the "Sign Electronically" button to save your information and submit your electronic signature.

Margaret

Mock

By electronically signing your name to the next page, you certify that all information on this form may result in a \$10,000 fine, a prison sentence or other appropriate action if you are suspected fraud to appropriate

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Administrative Tasks

Tracking & Form URLs

The screenshot displays two overlapping Oracle Fusion Middleware Forms Services windows. The background window shows the 'Applicant Requirements' page for RRAAREQ 8.10 (UPGR0725), with fields for Aid Year (1213) and ID (900). The foreground window, titled 'Requirements Tracking Validation RTVTREQ 8.9 (UPGR0725)', shows a detailed view for requirement DAF111. The requirement is active and has a message number of 3616. The short description is 'Add'l Fa Wksht Dep' and the long description is 'Additional FA Information Worksheet-Dependent 2012-2013'. The URL is 'https://wings.georgiasouthern.edu/pls/WWWINGS-PROD/ywsklogn.p_dynamic_forms_sso?frmid=6'. The activity date is 15-MAR-2012. The right-hand side of the foreground window contains a list of checkboxes for various tracking options, with 'Memo', 'Access Indicator', and 'Information Access' checked. The bottom status bar of the foreground window shows 'Tracking Requirement Code Record: 1/1'.

MIDDLEWARE

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Admin Interface - Pending



Home Search User Admin System Admin Reports Help

My Forms Update Profile Logout

Georgia Southern - Financial Aid Forms [\(See Page Help\)](#)

MOVE SELECTED TO FOLDER MANAGE FOLDERS ADD A NEW FORM

Forms/Folders	Multi	Pend	Prccd	Arch	
2010 Tax Worksheet for Dependent Students (fill out form)	19	0	19	0	URL
2010 Tax Worksheet for Independent Students (fill out form)	0	0	15	0	URL
2011 Tax Worksheet for Dependent Students (fill out form)	84	0	84	0	URL
2011 Tax Worksheet for Independent Students (fill out form)	0	0	55	0	URL
Additional Financial Information-Dependent Student 2011 - 2012 (fill out form)	0	0	19	0	URL
Additional Financial Information-Dependent Student 2012 - 2013 (fill out form)	40	0	136	0	URL
Additional Financial Information-Dependent Student 2012 - 2013 Demo (fill out form)	0	1	0	0	URL
Dependent Household Size Certification (fill out form)	27	0	31	0	URL
Dependent Household Size Certification 2012-2013 (fill out form)	37	0	53	0	URL
FAFSA Signature Page for Dependent Students (fill out form)	0	0	0	0	URL
FAFSA Signature Page for Independent Students (fill out form)	0	0	0	0	URL
Independent Household Size Certification (fill out form)	0	0	48	0	URL
Independent Household Size Certification 2012-2013 (fill out form)	0	0	50	0	URL
Independent Student Income Statement 2011 - 2012 (fill out form)	0	0	0	0	URL
Parental Income Statement 2011 - 2012 (fill out form)	0	0	0	0	URL
Parental Income Statement 2011 - 2012_Copy (fill out form)	0	0	0	0	URL

Recent Updates

2,902,333 Dynamic Forms submitted

- 1049 Trees saved and counting!
- 09/07/2012 - Release 6.2 - This is a mini-release to add some Multiple Signature functionality and to clear the way for the next Release "Save As Draft"!!! Here is what we added now: 1. Co-signer Choice Lists. 2. Prefill fields for Co-signers - see more details.
- 07/19/2012 - Release 6.1 - Prefill Forms and more! This enables form designers to identify specific fields on the form which can be prefilled with the user's profile information. Click here to find out more about prefill and other enhancements in this release.
- 03/28/2012 - Release 6.0 - Preview and Summary! There are too many features to list on this page, please click here to see more.
- 12/12/2011 - New date picker, minimum value, e-mail edit and other cool new designer enhancements! Click here to see these release notes.
- 10/19/2011 - Two great new enhancements!! "Export to Excel" on queues and single login to multiple organizations - Click here to see details.

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Admin Interface - Processed



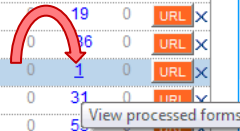
Home Search User Admin System Admin Reports Help

My Forms Update Profile Logout

Georgia Southern - Financial Aid Forms [\(See Page Help\)](#)

MOVE SELECTED TO FOLDER MANAGE FOLDERS ADD A NEW FORM

Forms/Folders	Multi	Pend	Prccd	Arch	
2010 Tax Worksheet for Dependent Students (fill out form)	19	0	19	0	URL
2010 Tax Worksheet for Independent Students (fill out form)	0	0	15	0	URL
2011 Tax Worksheet for Dependent Students (fill out form)	84	0	84	0	URL
2011 Tax Worksheet for Independent Students (fill out form)	0	0	55	0	URL
Additional Financial Information-Dependent Student 2011 - 2012 (fill out form)	6	0	19	0	URL
Additional Financial Information-Dependent Student 2012 - 2013 (fill out form)	40	0	36	0	URL
Additional Financial Information-Dependent Student 2012 - 2013 Demo (fill out form)	0	0	1	0	URL
Dependent Household Size Certification (fill out form)	27	0	31	0	URL
Dependent Household Size Certification 2012-2013 (fill out form)	37	0	50	0	URL
FAFSA Signature Page for Dependent Students (fill out form)	0	0	0	0	URL
FAFSA Signature Page for Independent Students (fill out form)	0	0	0	0	URL
Independent Household Size Certification (fill out form)	0	0	48	0	URL
Independent Household Size Certification 2012-2013 (fill out form)	0	0	50	0	URL
Independent Student Income Statement 2011 - 2012 (fill out form)	0	0	0	0	URL
Parental Income Statement 2011 - 2012 (fill out form)	0	0	0	0	URL
Parental Income Statement 2011 - 2012_Copy (fill out form)	0	0	0	0	URL



Recent Updates

2,903,176 Dynamic Forms submitted

1049 Trees saved and counting!

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Image Indexing

The screenshot shows a Windows file explorer window with a directory listing. The files listed are:

Name	Date modified	Type	Size
xslt	3/30/2012 3:21 PM	File folder	
FAD_1112_Add_Dependent.bat	3/15/2012 1:46 PM	Windows Batch File	1 KB
FAD_1213_Add_Dependent.bat	3/30/2012 3:16 PM	Windows Batch File	1 KB
FAD_1213_HH_Size_Dependent.bat	3/30/2012 3:17 PM	Windows Batch File	1 KB
FAD_1213_HH_Size_Independent.bat	3/30/2012 2:48 PM	Windows Batch File	1 KB
FAD_2010_Tax_Dependent.bat	3/15/2012 1:49 PM	Windows Batch File	1 KB
FAD_2010_Tax_Independent.bat	3/30/2012 3:10 PM	Windows Batch File	1 KB
FAD_2011_Tax_Dependent.bat	3/30/2012 3:07 PM	Windows Batch File	1 KB
		Windows Batch File	1 KB
		Windows Batch File	1 KB

Overlaid on the file explorer is a command prompt window with the following text:

```
C:\Windows\system32\cmd.exe
\\Gluster1_apps_server\apps\Depts\UPS\FAD\apps\Dynamic Forms\Form Config'
CMD_EXE was started with the above path as the current directory.
UNC paths are not supported. Defaulting
C:\Windows>"C:\Program Files\NextGen\Dynamic Forms\Data Exchange\change.exe" /i c26631c0-bb3d-494b-8dc2-c88e-000000000000 /s1 "\\Gluster1_apps_server\apps\Depts\UPS\FAD\apps\Dynamic Forms\Form Images\FRPSA_Sig_Independent" /update
NextGen Dynamic Forms Data Exchange
Beginning data download...
Getting unprocessed images from database
START: 10/3/2011 2:03:08 PM
Creating image file: 1
```

Below the command prompt, another file explorer window shows a list of .tif files:

Name	Date modified	Type	Size
0da5f2b0-a553-4568-b735-4aab06809b1a.tif	7/9/2012 9:57 AM	TIF File	713 KB
0ddd0666-780b-4c8d-8c54-4175fa1afd77.tif	6/29/2012 8:35 AM	TIF File	710 KB
0e826936-7f54-4af5-8bc7-fcb74cc9107f.tif	5/30/2012 9:17 AM	TIF File	713 KB
0ef9441b-b626-4a77-b99f-b6587e699ad5.tif	8/15/2012 8:33 AM	TIF File	713 KB
0f8e79ee-c7f4-4646-87c0-6925004d3ef7.tif	6/11/2012 3:31 PM	TIF File	713 KB
1a370bcf-1267-4117-ab4e-81342c7eeae4.tif	6/11/2012 3:31 PM	TIF File	711 KB
2bc65b88-7d1b-42bc-9cef-24083af0de1a.tif	8/2/2012 11:47 AM	TIF File	711 KB
2da3dd7b-5e76-4405-9436-31d09f22a335.tif	6/27/2012 2:32 PM	TIF File	710 KB
2f4af8e6-c75a-4d3f-bf15-e339360725a5.tif	6/27/2012 2:32 PM	TIF File	712 KB
03bd7291-b507-412b-b24f-136d903f5de2.tif	7/19/2012 1:18 PM	TIF File	713 KB
3bcc2d20-6350-4787-9b6c-9e95deb776f3.tif	8/21/2012 12:28 PM	TIF File	712 KB
3e9c2eec-31ee-4682-baa6-180ad6d8acad.tif	8/8/2012 1:49 PM	TIF File	712 KB
3f9e2db2-6ee6-40e8-9e62-79da8d8612e5.tif	8/27/2012 3:15 PM	TIF File	711 KB
4a3ef804-fdf8-4fa4-9ab1-f8f5ebbcbe1.tif	7/30/2012 11:33 AM	TIF File	711 KB
4e7db4f5-5e01-4e46-8810-62d001f4f6.tif	6/20/2012 10:02 AM	TIF File	714 KB



row's Aspirations

ApplicationXtender Document Manager - [BXS_PROD - B-R-TREQ - <Not Indexed> (Page 1 of ...)]

File Edit View Document Page Scan Annotate Utilities Window Help

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20

- [-] B-G-ID - BANNER COMMON
- [-] B-R-ID - BANNER FINANCIAL AID COMMON
- [-] B-R-TREQ - BANNER FINANCIAL AID TRACKING REQ
- [-] B-S-ADMN - BANNER STUDENT ADMISSIONS
- [-] B-S-CRSE - BANNER STUDENT COURSE / ID
- [-] B-S-DGRE - BANNER STUDENT DEGREE
- [-] B-S-GFAP - GRADUATE FACULTY APPOINTMENTS
- [-] B-S-GRAD - GRADUATE ADMISSIONS
- [-] B-S-GSO - GRADUATE STUDENT ORGANIZATION
- [-] B-S-HOUSE - HOUSING
- [-] B-S-ID - BANNER STUDENT COMMON
- [-] B-S-PROVB - OFFICE OF THE PROVOST - FROM BANNER
- [-] B-S-SDRC - STUDENT DISABILITY RESOURCE CENTER
- [-] B-S-SECT - BANNER CATALOG / COURSE SECTION
- [-] CAREER_SERVICES_OFFICE_DOCUMENTS - APPLICATION FOR CAREER SER...
- [-] COGS-GRAD-COMMITTEE - GRADUATE COMMITTEE
- [-] CRI_OFFICE_DOCUMENTS - OFFICE/ADMINISTRATION DOCUMENTS
- [-] DOS_OFFICE_DOCUMENTS - DEAN OF STUDENTS - OFFICE DOCUMENTS
- [-] EOP_DOCUMENTS - EDUCATIONAL OPPORTUNITY PROGRAMS DOCUMENT
- [-] FAD-HOLD - FILES THAT CANNOT BE LINKED TO A CURRENT STUDENT
- [-] FAD-OTHER - FAD NON STUDENT DOCUMENTS
- [-] FRAT_SOROR_RELATIONS - FRATERNITY AND SORORITY RELATIONS DOCI...
- [-] GSU_HOUSING_AUTHORITY
- [-] HOUSING-NS - NON-STUDENT HOUSING INFORMATION
- [-] ITS-SOFTWARE_LICENSES - ITS SOFTWARE LICENSES
- [-] ITS-TECHNOLOGY_REQUESTS - INFORMATION TECHNOLOGY HW/SW REQ...
- [-] JUDICIAL - JUDICIAL AFFAIRS
- [-] LEGAL - LEGAL AFFAIRS
- [-] MC_REQUISITIONS - MARKETING & COMMUNICATIONS REQUISITIONS
- [-] NETTEL-TECHNOLOGY_REQUESTS - NETTEL TECHNOLOGY REQUESTS
- [-] OFFICE_OF_STUDENT_ACTIVITIES - OFFICE OF STUDENT ACTIVITIES DOCUM...
- [-] ORSSP_AND_FOUNDATION - ORSSP AND FOUNDATION
- [-] ORSSP_COMPLIANCE - ORSSP - COMPLIANCE
- [-] ORSSP_PROTOCOL - ORSSP - PROTOCOL
- [-] ORSSP_RESIDUAL-AND-ROYALTY - ORSSP - RESIDUAL AND ROYALTY
- [-] OSLCE_OFFICE_DOCUMENTS - STUDENT LEADERSHIP & CIVIC ENGAGEMENT
- [-] OVP-SAEM - SAEM OFFICE OF THE VICE PRESIDENT
- [-] REG-OTHER - NON-STUDENT SPECIFIC DOCUMENTS FOR REGISTRAR

Fields	Values
ID	900 [REDACTED]
PIDM	[REDACTED]
DOCUMENT TYPE	TRACKING REQUIREMENT
LAST NAME	Z [REDACTED]
FIRST NAME	ALBERT
SSN	000000000
BIRTH DATE	[REDACTED]
AID YEAR	{Null}
TRACKING REQUIREMENT	{Null}
TRACKING STATUS	ZELLFR SALOAN
FUND	FALL11
SOURCE/INST CODE	ZELLB
PERIOD	ZELLC
ROUTING STATUS	SUMR12
ACTIVITY DATE	DAF11
	PTAX11
	STAX11
	DPHH13
	INH13
	DWILF1
	IWILF1
	SIGN13
	PELL4
	PELL5
	PELL6
	DEP13
	SUM12
	GCERT
	GR-ERP
	CERT
	FALL12

Save Cancel

Financial Aid Office

2012 - 2013
GEORGIA SOUTHERN UNIVERSITY
DEPARTMENT OF FINANCIAL AID
ADDITIONAL FINANCIAL INFORMATION-DEPENDENT STUDENT

Your SASFAA indicated that you have additional financial information that requires review. Before any financial aid can be processed we must verify this additional financial information. Please provide the requested information. Verify "0" if the requested item does not apply to you and/or your parent(s). Do not leave any section blank. Incomplete, or unsigned forms, cannot be processed.

Please note, this form has student and parent sections. A student will not be able to click on/complete a parent section, and likewise, a parent cannot click on/complete a student section.

First Name: [REDACTED] Last Name: [REDACTED] M-F: [REDACTED] Student Page for Parents: [REDACTED]

Student: [REDACTED] Parent(s): [REDACTED]

1. Education credit (Household Income Exemption for dependent students) from 105 form 1041-1042 or 1050-1051

2. Child Support and/or spousal or dependent student support (Federal Income Tax) (Do not include support for children in your parents' household, as reported on line 7c)

3. Your parent's income earned from non-based employment programs, such as Federal Work-Study and non-employment programs of fellowships and assistantships.

4. Student credit and additional aid reported on it is 1050 or 1051 form and additional programs (Federal American Benefits Payments, Long Term Care, and Federal Social Security) do not include a student's portion of fellowships and assistantships.

5. Do not pay or special contract pay. Only enter the amount that was actually paid. Do not include adjusted gross income. Do not enter unearned contract pay received on the 1042-ES form.

6. Exchange fees paid under independent education program offered by a college.

	STUDENT	PARENT(S)
1.	0	0
2.	0	0
3.	0	0
4.	0	0
5.	0	0
6.	0	0
TOTAL	\$0	\$0

CERTIFICATION

By electronically signing your name to the next page, you certify that all of the information on this form is true and correct to the best of your knowledge. If asked by an authorized official, you agree to give proof of the information on this form. You also agree to realize that any false or misleading information on this form may result in a \$10,000 fine, a prison sentence, or both. The Department of Financial Aid is required by federal law to report cases of suspected fraud to appropriate law enforcement agencies for investigation.

Student Signature: [REDACTED] Date: [REDACTED]

Parent Signature: [REDACTED] Date: [REDACTED]

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Form Creation



Home Search User Admin Sys

Edit Form - Additional Fields

[+Add New Item](#) [Hide Item Details](#)

Click the Add New Item button to get started.

© 2008 NGWeb Solutions, LLC. | System Requirements

The screenshot shows a web browser window with the URL <https://dynamicforms.ngwebsolutions.com/Designer/FormWizardSave.aspx?item=7c8f28a9-dc38-4e5e-bb5f-e5647210b1e6>. The page title is "Save your form item".

Save your form item

Enter name for your form item:

Keeping names consistent across forms helps when doing searches. So, for example, always use "LName" to represent Last Name on any form. Therefore, when searching for a student's form, if you select LName that ensures all forms submitted for student's with that Last Name will be picked up by the search. The list of controls below contains all of the names you have used so far to help you name this one.

Existing form item names:

(Check this list for existing names) *+* Indicates form fields already on this form.

Require this item?

[<< Back](#) [Save](#)

The left sidebar shows a list of form controls: Table, Long Answer, Short Answer, Date Picker, Choice List, Check Box, Text & HTML, Image, and Master Items. The "Image" control is currently selected.

SASFAA 2013 Annual Conference

Celebrating Yesterday's Achievements, Shaping Tomorrow's Aspirations



Form Editing



schoolnamebt2 X

Edit Form - Additional Financial Information-Dependent Student 2012 - 2013 Demo (See Page Help)

[Go Back to Form Basics](#)

This form can not be modified

Data has been submitted for this form. If you would like to change this form you can either:

- 1) Make a copy of the form
- 2) Delete all form data

Form Designer

Financial Aid Office



2012 - 2013 GEORGIA SOUTHERN UNIVERSITY DEPARTMENT OF FINANCIAL AID ADDITIONAL FINANCIAL INFORMATION-DEPENDENT STUDENT

Your FAFSA indicated that you have additional financial information that requires review. Before any financial aid can be processed, we must verify this additional financial information. Please provide the requested information. Write in "0" if the worksheet item does not apply to you and/or your parent(s). Do not leave any section blank. Incomplete, or unsigned forms, cannot be processed.

Please note, this form has student and parent sections. A student will not be able to click on/complete a parent section, and likewise, a parent cannot click on/complete a student section

Last * First * Middle Student Eagle ID#

(Note: On this worksheet, use amounts received during the calendar year from January 1, 2011, to December 31, 2011)

STUDENT PARENT(S)

a. Education credits (Hope and Lifetime Learning Tax) +* +*

New Features

base military housing or a military housing allowance, combat pay (if you and/or your spouse are not tax filers), benefits from flexible spending arrangements (e.g., cafeteria plans), foreign income exclusion or credit for federal tax on special fuels.

Total 2011 Untaxed Student/Spouse Income

Instructions

Please attach
You can upload



- IRS Form 1041
- Schedule E
- Schedule F
- All W-2s
- All 1099s

2011 Tax Worksheet for Dependent Students Supplemental Income Information

Please note, this form has student and parent sections. A student will not be able to click on/complete a parent section, and likewise, a parent cannot click on/complete a student section.

Upload #1:

No

Upload #2:

No

Student Name

First

Middle

Last

Student Eagle ID#:

Student E-Mail Address:

DEPENDENT STUDENTS

Did your parent(s) file a 2011 Federal Tax Return?

By electronically
authorizing
information

YES: You must submit a signed copy of your parent(s) 2011 Federal Tax Return (and parent's spouse, if filing separately) along with schedules, W-2s, 1099s and supporting documentation to the financial aid office. If your parent(s) received income that is not tax-qualified, please complete this form as well.

NO: You must complete this form and submit all required documentation listed below, including any 2011 W-2s, to the financial aid office.

Georgia Southern University

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Lessons Learned

THE ILLEGIB

GEORGIA SOUTHERN UNIVERSITY
 Department of Financial Aid
 P.O. Box 8065
 Statesboro, GA 30460
 (912) 478-5411
 Fax (912) 478-7418

FAT SA Signature Page

Student Name: Alison Noyes Academic Year: 2012-2013
 Student Address: 161 Lincoln Ave
 Eagle ID #: 102422

PLEASE READ AND SIGN:

By signing below, you agree, if asked, to provide information and to certify the accuracy of your completed Free Application for Federal Student Aid (FAFSA) form. This information may include your U.S. or state income tax return. Also, you certify that you:

- (1) Will use federal and/or state student loans only to pay the cost of attending an institution of higher education.
- (2) Are not in default on a federal student loan or have made satisfactory arrangements to repay it.
- (3) Do not owe money back on a federal student grant or have made satisfactory arrangements to repay it.
- (4) Will notify your school if you default on a federal student loan, and
- (5) Will not receive a Federal Pell Grant from more than one school for the same period of time.

Finally, you certify that you understand that the Secretary of Education has the authority to verify information reported on this application with the Internal Revenue Service and other federal agencies. If you intentionally give false or misleading information, you may be fined \$25,000, sent to prison, or both.

Student Signature: [Signature] Date Signed: 6/16/12
 Parent Signature: [Signature]

If faxing your information, please allow 1 to 3 working days for our department to process your paperwork by fax before calling to inquire if it was received.

2011-2012 FEDERAL DIRECT PARENT PLUS/FORD LOAN INFORMATION SHEET
 GEORGIA SOUTHERN UNIVERSITY
 DEPARTMENT OF FINANCIAL AID
 P.O. BOX 8065
 STATESBORO, GA 30460
 PHONE (912) 478-5413
 FAX (912) 478-7418

The following information must be completed to authorize the servicer to perform the required CREDIT CHECK and to generate an application/promissory note for the Federal Direct PLUS Loan. Please type or write clearly. Do NOT complete this application unless you wish to take out a loan in your own name. This loan supplements the aid offered to your student.

STUDENT SECTION

Students Name (Last, First, Middle Initial) _____ Student's EAGLE ID Number _____
 Are you (the student) currently in default on an educational loan? _____ Yes ___ No ___
 Do you owe a repayment on a federal student grant? (Ex. SEOG or PELL grant) _____ Yes ___ No ___
 *Parents/Stepparents are the ONLY eligible borrowers for this loan.
 PARENT BORROWER SECTION (Only One Applicant)*

Borrower's Social Security Number _____
 Borrower's Name (Last, First, Middle Initial) _____
 Permanent Home Address (Street and/or PO Box, City, State, ZIP) _____

***Please attach a legible copy of the borrower's signed social security card.
 Parent Borrower's
 Date of Birth _____ (MM/DD/YY) _____ Permanent Area Code/Telephone Number _____
 Are you a U.S. citizen? _____ Yes ___ No ___, but I am an eligible non-citizen A # _____

What is your relationship to the student? _____
 Driver's License Number _____ State _____ Borrower E-mail Address _____
 Amount Requested for Loan Period (Term):***
 \$ _____ Summer

Are you (the parent borrower) currently in default on an educational loan? _____ Yes ___ No ___
 Do you owe a repayment on a federal student grant? (Ex. SEOG or PELL grant) _____ Yes ___ No ___

I understand that my PLUS loan proceeds will be credited to the student's account to pay his/her registration invoice charges. Any net proceeds will be refunded to the student UNLESS I contact Office of Student Accounts at (912) 478-8999 to request the refund of net proceeds to be forwarded to me. I also understand that the loan will not apply towards the student's account until after attendance verification of at least 6 credit hours per semester. For loan eligibility, I understand that my student must be enrolled in at least 6 credit hours per semester.

"DID YOU REMEMBER TO ATTACH A COPY OF THE BORROWER'S SIGNED SOCIAL SECURITY CARD FOR YOUR PROTECTION AGAINST IDENTITY THEFT? WE NEED THIS DOCUMENTATION BEFORE WE CAN PROCESS THE APPLICATION."

PARENT BORROWER'S SIGNATURE _____ DATE 6/26/2012
 Important Note: Return this information sheet to Financial Aid; please allow four to six weeks for processing. Faxing Your Information? Please allow 3 to 5 working days for our department to process your paperwork by fax before calling to inquire if it was received.
 Georgia's large-scale, small-feel research university!

THE UNIDENTIFIED

Challenges

- Some cases of notification email going to spam
- All other complications derive from student/parent misuse
 - Over-looking directions
 - Attempting to complete both sections of multi-signature forms

In Summary

- **Hosted solution & inexpensive to implement**
- **Authentication:**
 - Single-Sign-On through Banner Self-Service or other portals
- **Integration:**
 - Financial Aid requirement tracking
 - Banner Document Management System (BDMS)
- **Minimal IT knowledge required for form development**
- **Keep it Simple!**
 - Ensure short & precise directions from the inception
- **Jim Grace, Next Gen Chief Executive Officer**

ONLINE FINANCIAL AID DOCUMENTS SUBMISSION WITH ELECTRONIC SIGNATURES

Evaluation System APP or Web

Enter Poll ID **102725**

Enter Password **sasfaa**

<https://answerqwik.com/login.html>

