

Bureau of Jewish Education Online Financial Aid Application – Tip Sheet

**Welcome to the Bureau of Jewish Education's Online Financial Aid Application website!
Please read the following important notes BEFORE beginning your application.**

To apply online go to <http://www.bjesf.org/financialaid.htm>

- ▶ **PLEASE NOTE:** All Users must tie their account to a parent name – not the applicant name.
- ▶ **Returning Users**=any member of a family who has received financial assistance through the BJE in a prior year. (This family received a user name and password in the mail).
- ▶ **New Users**= no one in the family has received financial assistance from the BJE before.

Button Definitions:

- ▶ **Continue:** Takes you to the next page
- ▶ **Save for later:** Allows you to exit and saves all information with the exception of Step 3*

When does my application appear on the “personal account page” in the status area?

▶ Our website toolbar lying horizontally across and on top of the page allows users to come and go in steps 2, 4, 5, and 6 and should be used only for updating, editing, or reviewing data!

***Step 3 (Specific program application for individual applicants) is not accessible through the toolbar! Editing of program application is only through the Status section.**

NAVIGATION EASE:

Start all new financial aid applications at Step 1:

Go to: Personal Account Page

Cursor to dropdown arrow on right ▼ of “Select an action”
Select program type choice.

The user/family will be automatically navigated through the application process and must complete steps 1-3 using this method before exiting. If the user exits prior to completing the specific applicant program application, (only their parent and applicant information will be saved. A program specific application will not have been saved and the user will need to once again pre-qualify until a specific program application is completed.

*Please allow **at least 45 minutes** to begin the forms process. It is important to complete steps 1-3 (“Prequalify,” “Personal Info,” and “Program Info”) **before** exiting the website or saving for later in order to avoid losing data you have entered. Please be aware that if you do not input data for 15 minutes, the server will time out and any data on the page on which you were working will be lost.*

Please note: your child must be registered in a summer program in order to apply for BJE financial aid.

Keep these tips in mind as you fill out your forms:

- ◆ *Fill out all fields in grammatically correct English.*
- ◆ *When you have entered information into a field, use the TAB key to move to the next field.*

- ◆ *When navigating through steps 1-3, use the “CONTINUE” button at the bottom of the page only, **DO NOT** move to other sections using the numbered buttons at the top of the page or your browser’s “BACK” button.*
- ◆ *Please make sure to complete all fields marked by an orange asterisk.*
- ◆ *When entering numbers use the following formats:*
 - *Dates: ##/##/####*
 - *Social security number: ###-##-####*
 - *Phone number: ###-###-####*
 - *Dollar amounts: use whole dollars only, no cents. Do not use commas- numbers should look like this ####, not this \$#,###.##*

Please gather the following items before you begin, as you will need them to complete the application:

- ◆ *The 2007 federal income tax return.*
- ◆ *Parent and child(ren)'s social security numbers.*
- ◆ *If you are affiliated with a synagogue, the phone number and formal name.*
- ◆ *Your 12/31/07 bank and mortgage statements and/or loan statements for cars purchased or leased.*
- ◆ *Name of the program provider, the dates of program, the # of days, the program cost, and all financial aid grants received or pending.*
- ◆ *If your child is attending a private school: actual cost for 2007-08 academic year and total financial aid award received from school or outside sources.*
- ◆ *Other out of pocket expenses, such as day care, elder care, or college tuition paid for other members of the immediate household who are listed as an exemption on your tax return.*
- ◆ *The name and email of the financial assistance administrator at the camp you will be attending.*

If you find an error that you can't solve, contact the Financial Aid Director, Janet Rothman, at (415) 751-6983 ext. 107, or jrothman@bjesf.org.

Step 1: Prequalify

Welcome

- ◆ **Create your account with personal login information. Please create only one user name and password per family. Make sure all adults in your household are aware of this fact.**
- ◆ **Passwords must be 8 or more characters long and must include at least 1 numeric character, 1 symbol (such as # @ +) and both upper and lowercase letters.**
- ◆ **Before you click “CONTINUE,” remember to print this page with your completed information and write down your user password as it is encrypted and won't appear on the printout. You will need this information to access your account later on.**
- ◆ **If there are repeated unsuccessful attempts to enter your account, you may be blocked from continuing. In this case contact Janet Rothman (information above).**

How Did You Hear About Us?

- ◆ **Please let us know how you found out about our financial aid program.**

Personal Account

- ◆ This page is the starting point for all of your applications. It lists the status of your current applications in process, allows you to begin a new application, upload files, and add, edit, or review information. You will return to this page often as you continue to complete and update your application.
- ◆ If this is your first time on this page, please select “**Start a new program application**” from the drop-down menu at the top of the screen. When the next page loads, select the program for which you need financial aid. This will bring you to a page specific to the program you chose.

Program Specific Page: Summer Camps / Israel Programs / Specialty Camps

- ◆ Answer these 4 questions to see if you qualify for our aid programs. If you receive a message saying you do not qualify that you believe is in error, please contact Janet Rothman (information above).
- ◆ If you do qualify, you will be brought to a page titled “Program Application Deadlines and Attachments.”

Program Application Deadlines and Attachments

- ◆ Please note the deadlines listed. You can download and print a PDF of this page by clicking the green link at the top of the page.
- ◆ When you’ve reviewed the information on this page, click the “CONTINUE” button at the bottom right.

Step 2: Personal Information

Steps of the Application Process

- ◆ When you have reviewed the info on this page click “CONTINUE.” This will take you to a 3-part section where you will enter information about the parent, applicant, and parent-applicant relationship.

Parent/Guardian Information

- ◆ From the drop-down menu select a parent already listed or “Add a new parent” to enter information about that individual.
- ◆ If divorced or separated, you must include the official date of separation or divorce.
- ◆ When entering numbers, dates, etc., please use the formats specified above.
- ◆ Click “CONTINUE” to save the information you have entered. If you have not entered information in all necessary fields you will not be able to move forward- you will see red error messages on your screen. If you have successfully entered all necessary information you will receive a pop-up message telling you your record has been updated.
- ◆ Please follow steps above to add information for any and all parents and guardians.
- ◆ Please note: if you are divorced or separated please include information for **both** parents. If you are not in contact with your child’s other parent please enter the most recent information you have for that person.

Student Information

- ◆ To add an applicant to your account, click the “Add an applicant” link in the upper left of the “Names” field.
 - ◆ Fill in required fields and click “INSERT.” **Do not click “SAVE FOR LATER” or “CONTINUE.”**
 - ◆ Please **do not** add additional children at this time. Once you have completed all information for this first child, you will return to this page to add information for the next child.
 - ◆ Please select the first child by clicking on the blue “SELECT” link to the left of their name. You can now edit the information relevant to this child.
 - ◆ Define the parent-child relationship for the highlighted child by clicking “EDIT” to the left of each parent name. Save info by clicking “UPDATE” after each relationship is defined. **Do not click “SAVE FOR LATER” or “CONTINUE.”**
 - ◆ Next you will define program information for this child. Hit the blue “SELECT” button to the left of the child’s name. When the child’s name is highlighted in yellow, click the “CONTINUE” button at the bottom right of the page to move onto program information for that child.
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Step 3: Program Information

Select the Program

- ◆ From the drop-down menu select the program for which you are registered. Note that programs are not in alphabetical order. Click “CONTINUE.”
- ◆ Remember to use TAB to move between fields.
- ◆ You can enter the start and end dates manually or click the calendar icon to the right of the date field to select dates.

Program Details and Cost

- ◆ Remember to enter dollar amounts as specified above.
- ◆ Click “CONTINUE” to save this information. You will then be taken to “Step 4: Financial Information.” However, **if you have more than one child**, you must go back and enter program information for that child. To do this, click the “YOUR ACCOUNT” button on the left top side of the screen, which will take you back to your personal account. You should see your first child’s application under the “Your Financial Aid Application Status” section. To add another child, select “Start a new program application” from the drop-down menu at the top of the page.
- ◆ Repeat steps listed above for your second child. You will need to prequalify, review parental information (to move forward, select a parent from the drop-down menu, then hit “CONTINUE” at the bottom of the page), and add another applicant on the “Student Information” page. Please remember to define parent-child relationships for the second child.
- ◆ To fill in program information for the second child, make sure that they are selected (highlighted in yellow) by clicking the blue “SELECT” button to the right of their name. Once their name is highlighted, you can click “CONTINUE.”
- ◆ Complete all program information for second child.
- ◆ Repeat the above steps for any additional children.

Step 4: Financial Information

- ◆ Once you have entered all program information for any children, you can enter financial information for the whole family. **Note: at this point in time, all information you have entered so far has been permanently saved to our system- you can now leave the application without risk of losing info you have entered.** If you do leave the application, you will be able to complete financial information from the “Your Account” page by selecting “Add, edit, or review financial information” from the drop-down menu at the top of the page.
- ◆ The “Financial Information” section has four steps: “Income,” “Expense,” “Asset/Liability,” and “Questionnaire.” Again, remember to enter dollar amounts as specified above.
- ◆ Please note the following regarding expenses:
 - Include property tax in “household expenses.”
 - Include homeowner or renter’s insurance in “other insurance.”
 - Synagogue dues, day care, private school, and college, etc. can all be entered in the education expense grid.
- ◆ Please note that income should be entered as **yearly** amounts, expenses as **monthly** amounts.
- ◆ You may leave blank fields for which the value is zero.

Step 5: Authorization

- ◆ When you have completed all financial information for your family you will be taken to the “Authorization” page. Please read this page. To agree to the terms and authorize your application, click the box at the bottom of the page, making a green checkmark appear, and then click “CONTINUE.”

Completing your application

- ◆ Return to the “Your Account” page by clicking the “Your Account” button on the top left side of the screen. All applications in process will be listed under the following four headings: “Incomplete,” “Complete and In Review,” “Award Processed,” or “Award Processed, Check Sent.”
- ◆ If you have an application in the “Incomplete” section you can find out what information is missing by clicking on the “+” to the left of the applicant’s name. This will expand a window that lists areas of your application that are incomplete or missing. Once you find out what is missing you can complete that section by selecting it in the drop-down menu at the top of the page.
- ◆ Once all necessary parts of your application have been completed and the application appears in the “Complete and In Review” section, your work is done!

Uploading your tax return

- ◆ To upload your tax return, select “Upload Tax Return” from the drop-down menu at the top of the “Your Personal Account” page.
- ◆ This will take you to the “Program Application Deadlines and Attachments” page. There are 3 ways to send in your tax returns.
 - You can upload an electronic file from your computer by clicking the “SELECT” button on the middle right of this page, choosing the file from your computer, and clicking the “Attach and Submit” button below.
 - You can send your tax return by mail. Please see address listed on this webpage.
 - You can fax you tax return to fax to 415 668 1816 Attn: Financial Aid Director.
- ◆ If you mail or fax your tax return, please allow 2-3 days for your application to move into the “Complete and In Review” section.

Thank you for your time and effort in completing this process. If you have any further questions, please contact the Financial Aid Director, Janet Rothman, at (415) 751-6983 ext. 107, or jrothman@bjesf.org.