

FINANCIAL AID DOCUMENTS

If you have documents listed as “Not Received”, “Not Signed”, or “Incomplete” on the “**Financial**” link of your AU Self-Service account, click on the appropriate document name below for a description and further information on what you may need complete or submit. Those documents are needed in order to complete your financial aid process. Once you’ve reviewed the documents, if you do have further questions, feel free to email finaid@andersonuniversity.edu.

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- **12-13 TEACH Agreement to Serve** – *The Agreement to Serve is required for each year a student receives a Federal TEACH Grant. The TEACH Grant Agreement to Serve specifies the conditions under which the grant will be awarded, the teaching service requirements, and includes an acknowledgment by you that you understand that if you do not meet the teaching service requirements you must repay the grant as a Federal Direct Unsubsidized Loan, with interest accrued from the date the grant funds were disbursed. If you wish to apply for the TEACH Grant, complete the TEACH Agreement to Serve online at <https://teach-ats.ed.gov/ats/index.action> . For more details on the TEACH Grant contact the Financial Aid Planning Office or go to <http://studentaid.ed.gov/PORTALSWebApp/students/english/TEACH.jsp> .*

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- **12-13 Verification Worksheet** – *The Verification Worksheet is required for any student who has been selected for verification based on their FAFSA results received by the university. You will need to print and complete this document ([here](#)) with your signature as well as your parent signature (if you are a dependent) to be turned in to the Office of Financial Aid Planning in order for your verification to be completed and your financial aid application to be processed. You may mail, email, or fax this document to our office.*

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- **12-13 Special Circumstances** –*In certain cases there may be special circumstances that could change your eligibility for financial aid, such as a divorce, death in the family, loss of income, loss of employment, etc. When this happens, Financial Aid Administrators have the ability to review and perform a Professional Judgment with proper documentation and after review and approval by committee. If you are interested in a Special Circumstances review, please read the information on the Special Circumstances document ([here](#)) and/or contact a Financial Aid Counselor to discuss if this is something that would be in your best interest to proceed with. The requirements and details are all listed on the Special Circumstances document. Please note, in order to review your account for a Special Circumstance situation, Anderson University requires that we will first perform a verification of your FAFSA information prior to review. Contact the Office of Financial Aid Planning if you have any further questions.*

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- **12-13 SC State Cert Form** – *The state of South Carolina requires by law that if you receive South Carolina Tuition Grant, South Carolina LIFE, South Carolina HOPE, or Palmetto Fellows that you complete, sign, and return the State Certification form ([here](#)) to the Office of Financial Aid Planning annually. Funds for the above referenced grants/scholarships will not disburse until this document is received. You may also review the renewal requirements for each award on the 2nd page of the document.*

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- **12-13 Verify SC Residency - Dependent** - *In order to be eligible for SC State funding you must be classified as a South Carolina resident. We will need for you to complete this residency confirmation form ([here](#)) in order for us to determine your residency status for awarding state aid.*

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- **12-13 Verify SC Residency - Independent** - *In order to be eligible for SC State funding you must be classified as a South Carolina resident. We will need for you to complete this residency confirmation form ([here](#)) in order for us to determine your residency status for awarding state aid.*

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- **Birth Certificate/Naturalization Papers** - *The Social Security Administration did not confirm that you are a U.S. citizen. Please provide the Office of Financial Aid Planning with documentation of your U.S. citizenship (such as your U.S. Passport, Certificate of Naturalization or Birth Certificate). If the documents support your status as a U.S. citizen, our office will make a copy of your documentation and can continue to process your federal student aid. If you are an eligible noncitizen, you must submit a correction to Item 14 on your FAFSA to indicate that you are an eligible noncitizen and also provide your Alien Registration Number in Item 15. You and your school will receive a new SAR/ISIR within three processing days with results from the Department of Homeland Security about your eligible noncitizen status.*

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- **Copy of Father's Social Security Card** - *The name you reported for your father on your FAFSA doesn't match the Social Security Administration's (SSA) records. If the last name and first initial you reported in Items 61 and 62 on the FAFSA are correct, contact the SSA. If they are incorrect, you need to make the necessary corrections. The SSA can be contacted by calling 1-800-772-1213 or by visiting www.socialsecurity.gov. You do not need to turn in a copy of this document to our office, instead this is to notify you that this correction needs to be made.*

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- **Copy of I-551 or I-151 (Green Card)** - *The United States Citizenship and Immigration Services (USCIS) of the Department of Homeland Security did not have enough information to confirm that you are a noncitizen (Item 14) in an immigration status associated with the requirements of eligibility for the financial assistance for which you have applied. You must contact the Office of Financial Aid Planning to find out what information is needed. If you do not submit the required information within 30 days, you may not be eligible for federal student aid.*

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- **Copy of Marriage Certificate** - *You reported a Social Security Number (SSN) for both your father and mother on your FAFSA but also reported that their marital status is not married. You should only report the SSN for the parent or stepparent whose financial information is reported on your FAFSA. Please log back on to your FAFSA and make a correction to your application to resolve this document being listed as needed.*

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- **Copy of Mother's Social Security Card** - *The Social Security Administration (SSA) confirmed the Social Security Number (SSN) you reported for your father on your FAFSA, but did not confirm the SSN you reported for your mother. If you believe that the SSN you reported for your mother is correct, your mother should contact the SSA. The SSA can be contacted by calling 1-800-772-1213 or by visiting www.socialsecurity.gov. If the SSN is incorrect, you need to make the necessary correction. You do not need to turn in a copy of this document to our office; instead this is to notify you that this correction needs to be made.*

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- **Copy of Selective Service Registration** - *The Selective Service reported that you have not registered with them. If you are female or were born before 1960, registration is not required. Otherwise, if you are not yet registered, are male, and are 18 through 25 years of age, to receive aid you must do one of the following: (1) answer "Male" to Item 21 and "Register Me" to Item 22 on this SAR, (2) complete a Selective Service registration form at your local post office, or (3) register online at www.sss.gov. If you believe you have already registered or are exempt, please contact the Selective Service at 847-688-6888. You do not need to turn in a copy of this document to our office; instead this is to notify you that this correction needs to be made.*

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- **Copy of Student Social Security Card** - *The Social Security Administration did not confirm that you are a U.S. citizen. Please provide the Office of Financial Aid Planning with documentation of your U.S. citizenship (such as your U.S. Passport, Certificate of Naturalization or Birth Certificate). If the documents support your status as a U.S. citizen, we will make a copy of your documentation and can continue to process your federal student aid. If you are an eligible noncitizen, you must submit a correction to Item 14 to indicate that you are an eligible noncitizen and also provide your Alien Registration Number in Item 15. You and AU will receive a new SAR/ISIR within three processing days with results from the Department of Homeland Security about your eligible noncitizen status. You do not need to turn in a copy of this document to our office; instead this is to notify you that this correction needs to be made.*

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- **Dependency Override** – *The Dependency Override form ([here](#)) is required if you have indicated that you wish to be reviewed for a dependency override situation. For financial aid purposes, a student is not considered independent unless they are 24 by July 1, in a Graduate program, married, has children, are in the military, is homeless, emancipated minor, orphan, in legal*

guardianship, or ward of the court. If you do not meet 1 or more of these requirements but feel that you have special circumstance that would warrant a dependency override, you would need to complete contact the Office of Financial Aid Planning to determine if you should complete this document and process. Please read the document carefully. Dependency Override's require review and approval on an annual basis.

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- **Free Application for Federal Student Aid (FAFSA)** – *The FAFSA is a required document to be completed for all Federal funds as well as some state and institutional scholarships and grants. Anderson University highly encourages all students to complete the FAFSA annually after January 1st of the new year for the upcoming year. You may complete this online at www.fafsa.ed.gov. Please note, this is a FREE application and you should never pay to complete your FAFSA. If you need assistance completing the FAFSA, you may call 1-800-4-FED-AID or contact the Office of Financial Aid Planning. Anderson University's school code is **003418**.*

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- **Homeless Verification** – *You answered "Yes" to the question on the FAFSA regarding being homeless, at risk of being homeless, or an unaccompanied youth. Please provide the Office of Financial Aid Planning with documentation ([here](#)) verifying that you are considered homeless by HUD. This documentation must be received and verified before we can complete your awarding process.*

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- **Loan_Alternative MPN** – *You have applied for an alternative credit based loan through a lender of your choice. However, we have not yet received confirmation that this loan is fully approved, and/or the lender is awaiting further documentation from you to fully approve this loan for disbursement to the school. Please contact your lender for an updated status of your alternative loan.*

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- **Loan_DL PLUS APP** – *Indicates the status of a Federal Parent PLUS Loan application for you.*

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- **Loan_DL PLUS MPN** - *Indicates that we have a Federal Parent PLUS loan application on file for you and tells the status of the Master Promissory Note (MPN) that is required to be completed by the parent in order for a PLUS loan to be disbursed. You may complete the PLUS MPN and/or application on line at www.studentloans.gov . For more information on PLUS loans and other student loans you may visit the AU Website under Admission/Financial Aid/Loans.*

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- **Loan_DL Entrance Counseling** – *Loan Entrance Counseling is a lifetime document required to be completed online prior to disbursement of your first Federal Direct student loan(s) (subsidized or unsubsidized). You may complete your Loan Entrance Counseling online at www.studentloans.gov. More information on the Federal Direct student loans and the process can be found on the AU website under Admission/Financial Aid/Loans. If you do not wish to borrow any student loans, please email finaid@andersonuniversity.edu or call the Office of Financial Aid Planning at 864-231-2070.*

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- **Loan_DL MPN** - *Indicates that you have been awarded a Federal Direct Stafford loan(s) and tells the status of the Master Promissory Note (MPN) that is required to be completed by the student in order for a Federal Direct loan to be disbursed. You may complete the MPN and/or Entrance Counseling on line at www.studentloans.gov . For more information on loans and you may visit the AU Website under Admission/Financial Aid/Loans. If you do not wish to borrow any student loans, please email finaid@andersonuniversity.edu or call the Office of Financial Aid Planning at 864-231-2070.*

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- **Military Copy DD Form 214** - *The Department of Veterans Affairs did not confirm that you are or will be a qualifying veteran for purposes of receiving federal student aid for the 2011-2012 school year. If you believe you are or will be a qualifying veteran, contact the Office of Financial Aid Planning and provide a copy of your DD214 (military separation form). If you are currently serving on active duty in the U.S. Armed Forces for purposes other than training, change your answer to Item 49 from "Yes" to "No" and answer "Yes" to Item 48. If you are not and will not be a veteran, you must change the answer to Item 49 from "Yes" to "No" and provide parental information, including the signature of at least one of your parents.*

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- **Military Orders** – *You have indicated on your FAFSA that you are on active duty in the military at this time. In order to verify this please provide the Office of Financial Aid Planning with a copy of your Military Orders for your account to be updated and eligibility determined.*

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- **NSLDS reported active bankruptcy** - *The National Student Loan Data System (NSLDS) indicates you have one or more student loans in an active bankruptcy status. Before you can receive additional federal student loans, you must provide the Office of Financial Aid Planning with documentation from the holder of the debt stating it is dischargeable.*

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- **NSLDS reported loans discharged** - *The National Student Loan Data System (NSLDS) indicates that one or more of your federal student loans have been discharged. In order to be eligible for any further Federal student loans you must provide to the Office of Financial Aid Planning a copy of a physician's notice stating that you are able to engage in substantial gainful activity, and must also sign a statement stating that you are aware that any new loans may not be discharged later for any present impairment unless it deteriorates so that you are totally disabled. This must only be provided once and will be kept on file.*

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- **Parent 2011 Schedule C** – *You indicated on your FAFSA that your tax return has business income listed that needs to be verified as part of your verification process. In order for the business income to be verified, the Office of Financial Aid Planning will need a copy of your tax Schedule C.*

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- **Parent FAFSA Signature** – *We have received your FAFSA application, however it is missing your Parent's electronic signature (PIN) on the application. Your FAFSA will not be considered valid until we have both the parent and student PIN for dependent students. Please go back on to www.fafsa.ed.gov and add the Parent's PIN to the current FAFSA application. If your parent does not yet have a PIN, you may apply for one at www.pin.ed.gov.*

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- **Parent(s) 2011 IRS tax transcript** – *You have been selected for verification and in order to complete your verification the Office of Financial Aid Planning will need a copy of your parent(s) 2011 Federal tax transcript (NOT A COPY OF THEIR TAX RETURN). Instructions for requesting a tax transcript can be found by clicking on this link. ([here](#))*

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- **Parent(s) 2011 IRS form W-2** - *You have been selected for verification and in order to complete your verification the Office of Financial Aid Planning will need a copy of all parent(s) 2011 W-2's for review.*

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- **Perkins Loan Master Promissory Note (MPN)** – *You have a Federal Perkins loan that requires a Perkins MPN be completed before the first disbursement of this loan. The Perkins MPN is a lifetime document and may be completed in Anderson Central with a financial aid counselor or student services representative. For more information on loans and you may visit the AU Website under Admission/Financial Aid/Loans. If you do not wish to borrow a Perkins loan, please email finaid@andersonuniversity.edu or call the Office of Financial Aid Planning at 864-231-2070.*

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- **Previous BA Degree was checked on FAFSA** - *You reported that you will either have a bachelor's degree by July 1, 2011 or will be working on a degree beyond a bachelor's degree. Graduate students are eligible for most types of federal aid, but generally not the Federal Pell Grant or AU institutional scholarships. If this is NOT accurate and you are NOT going to be in a graduate course of study for this coming year, please go back to www.fafsa.ed.gov and make a correction to indicate this.*

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- **Proof Emancipated Minor** – *You reported on the FAFSA that you are an emancipated minor, making you an independent student. In order to verify this, you will need to provide the Office of Financial Aid Planning with court documentation stating that you are an emancipated minor in order for us to continue the awarding process. If this is NOT accurate, please go back on www.fafsa.ed.gov and make a correction to answer 'no' to the emancipated minor question.*

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- **Proof of Father's DOB to Social Security** - *The date of birth you reported for your mother on your FAFSA matches the Social Security Administration's (SSA) records, but the date of birth you reported for your father does not match the SSA's records. Your father should review the date of birth and either confirm the date you have reported or make the necessary correction.*

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- **Proof of Legal Guardianship Court Docs** - *You reported on the FAFSA that you are an in legal guardianship, making you an independent student. In order to verify this, you will need to provide the Office of Financial Aid Planning with court documentation stating that you are in legal guardianship in order for us to continue the awarding process. If this is NOT accurate, please go back on www.fafsa.ed.gov and make a correction to answer 'no' to the emancipated minor question.*

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- **Proof of Loan Default Resolution** – *The National Student Loan Data System (NSLDS) indicates that you are in DEFAULT on one or more federal student loans. You are not eligible to receive any federal student aid until you resolve any loan default(s). Please contact the Office of Financial Aid Planning for any contact information we may have for you to contact your lender regarding resolution of this default(s) before you may receive any further federal aid.*

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- **Proof of Mother's DOB to Social Security** - *The date of birth you reported for your father on your FAFSA matches the Social Security Administration's (SSA) records, but the date of birth you reported for your mother does not match the SSA's records. Your mother should review the date of birth in Item and either confirm the date you have reported or make the necessary correction.*

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- **Proof of Qualifying Veteran Status** - *The Department of Veterans Affairs did not confirm that you are or will be a qualifying veteran for purposes of receiving federal student aid for the upcoming school year. If you believe you are or will be a qualifying veteran, contact the Office of Financial Aid Planning and provide a copy of your DD214 (military separation form). If you are currently serving on active duty in the U.S. Armed Forces for purposes other than training, change your answer to Item 50 from "Yes" to "No" and answer "Yes" to Item 49. If you are not and will not be a veteran, you must change the answer to Item 50 from "Yes" to "No" and provide parental information, including the signature of at least one of your parents.*

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- **Proof Eligible Non-Citizen** - *The United States Citizenship and Immigration Services (USCIS) of the Department of Homeland Security did not have enough information to confirm that you are a noncitizen in an immigration status associated with the requirements of eligibility for the financial assistance for which you have applied. You must contact the Office of Financial Aid Planning to find out what information is needed. If you do not submit the required information within 30 days, you may not be eligible for federal student aid.*

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- **Resolve Exceeds Loan Limit** - *Based upon data provided by the National Student Loan Data System (NSLDS) and your grade level, we have determined that you may have received a total amount of undergraduate student loans that exceeds the loan limits established for the federal loan programs. Please contact the Office of Financial Aid Planning to follow up and resolve.*

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- **Resolve FAFSA Drug Question** – *You may have answered questions on the FAFSA regarding previous drug related offenses that will not enable you to be eligible for Federal aid. Please contact the Office of Financial Aid Planning.*

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- **Resolve Overpayment** - *The National Student Loan Data System (NSLDS) indicates that you have received one or more overpayments of federal student aid funds. You are required by law to repay any federal student aid funds received for which you were not entitled. You are not eligible to receive any federal student aid until you resolve your over-payment(s). To resolve your Federal Pell Grant overpayment, your Financial Aid Administrator must contact the school associated with the Pell overpayment. Please contact the Office of Financial Aid Planning to resolve this overpayment issue.*

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- **Resolve Taxes Paid** - The amount you reported for your parents' income tax is equal to or greater than the amount you reported for their adjusted gross income. Please review Items 83 and 84 on your FAFSA and make the necessary corrections.

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- **Resolve Income tax** - The amount you reported for your income tax is equal to or greater than the amount you reported for your adjusted gross income. Review Items 35 and 36 from your FAFSA and make the necessary corrections.

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- **Spouse 2011 IRS tax transcript** - *You have been selected for verification and in order to complete your verification the Office of Financial Aid Planning will need a copy of your spouse's 2011 Federal tax transcript (NOT A COPY OF THEIR TAX RETURN). Instructions for requesting a tax transcript can be found by clicking on this link. ([here](#))*

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- **Student 2011 IRS tax transcript** - *You have been selected for verification and in order to complete your verification the Office of Financial Aid Planning will need a copy of your 2011 Federal tax transcript (NOT A COPY OF YOUR TAX RETURN). Instructions for requesting a tax transcript can be found by clicking on this link. ([here](#))*

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- **Student 2011 IRS Form W-2** – *You have been selected for verification and in order to complete your verification the Office of Financial Aid Planning will need a copy of all of your 2011 W-2's for review.*

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- **Student Court Order Ward of Court** – *You indicated on the FAFSA that you are an orphan or ward of the court. Based on this information you will be considered independent, however the Office of Financial Aid Planning will need court documentation to be provided to show that you are an orphan or ward of the court before your awarding process can be completed.*

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- **Student Signature Page** - *We have **not** received the signature page (PIN) from your FAFSA on the Web application or correction. You must sign and return this SAR before we can determine your eligibility for federal student aid. You may do this by adding your 4 digit PIN to the current FAFSA application on www.fafsa.ed.gov. If you do not have a PIN, you may apply for one at www.pin.ed.gov.*

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- **Student's Spouse 2011 IRS Form W2** - *You have been selected for verification and in order to complete your verification the Office of Financial Aid Planning will need a copy of all of your spouse's 2011 W-2's for review.*

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- **TEACH Entrance Counseling** - *The TEACH Entrance Counseling is required for a student receives a Federal TEACH Grant. The TEACH Grant Entrance Counseling specifies the conditions under which the grant will be awarded, the teaching service requirements, and details on the TEACH Grant program. You may complete the TEACH Grant Entrance Counseling online at <https://teach-ats.ed.gov/ats/index.action> . For more details on the TEACH Grant contact the Financial Aid Planning Office or go to <http://studentaid.ed.gov/PORTALSWebApp/students/english/TEACH.jsp> .*

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- **Thank You Note** – *The expression of gratitude for scholarships and grants received from the largess of donors and legislators is a basic expectation of civil and mannerly behavior and a characteristic behavior of an educated individual. Accordingly, students offered certain AU and/or state funds accept their grants and scholarships on the condition that they will write a letter of appreciation to donors who give funds and to members of the South Carolina Legislature who pass legislation and state budgets that provide financial aid to our students. Failure to write a letter of appreciation could result in the loss of AU institutional funds indefinitely. You will be contacted regarding Thank You notes and the process as the time comes.*

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- **Transfer Evaluation** – *This is an internal tracking document used by the Office of Financial Aid Planning for transfer students. If you are a transfer student and this shows as "not received" still, this means that we have not yet received and/or evaluated your FINAL transcripts from any or all of your previous institutions and as such your aid is pending until we do so. Please be sure that your FINAL transcripts have been sent to the university so that we may continue your awarding process. If you feel this is not accurate, please contact the Office of Financial Aid Planning. If you have already made arrangements for these transcripts to be sent, no further action is needed on your part.*

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- **Verification of U.S. Citizenship Status** - *The Social Security Administration did not confirm that you are a U.S. citizen. Please provide the Office of Financial Aid Planning with documentation of your U.S. citizenship (such as your U.S. Passport, Certificate of Naturalization or Birth Certificate). If the documents support your status as a U.S. citizen, we will make a copy of your documentation and can continue to process your federal student aid. If you are an eligible noncitizen, you must submit a correction to your FAFSA to indicate that you are an eligible*

noncitizen and also provide your Alien Registration Number on the FAFSA. You and your school will receive a new SAR/ISIR within three processing days with results from the Department of Homeland Security about your eligible noncitizen status.

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- **Verify Parent Marital Status** – *You indicated on the FAFSA that you had a different marital status than what is indicated on your Federal tax returns. Please contact the Office of Financial Aid Planning to determine the correct current marital status so that we may proceed with your financial aid awarding process.*

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If you have any further questions regarding any of the documents you see on your AU self-service account please contact the Office of Financial Aid Planning via email at finaid@andersonuniversity.edu, phone at 864-231-2070, or in person in Anderson Central located in the Rice building. Any paper documents may be submitted via email, fax to 864-231-2008, or mail to:

***Anderson University
Office of Financial Aid Planning
316 Boulevard
Anderson, SC 29621***