



STEP ONE: PREPARE TO APPLY

Know your school deadlines

Find out what is required, and by when for each school you're applying to. Use this list to keep track of those dates. Some schools list these dates on their own websites, but they're also available on the Dashboard page of the Family Portal.

School Name	SSS Code	Deadline to submit the PFS	Deadline to submit additional required documents

Mail or Upload Documents: You have the option to either upload required documents or mail them to SSS. Please note, uploading your documents is in your best interest—your documents will be marked as received much quicker if you upload them. It's important to note, however, a distinction between uploading your documents and fulfilling your requirements. SSS is required to review the documents, verify their authenticity, and label them for our use. This process typically takes up to 3 business days after mailed receipt or upload date.

Gather information

Types of Questions You'll Answer in the PFS	Information to have handy to answer these questions
<p>Questions about your family's income ("what you earn and receive") You will answer questions about income that is taxed and income that is not taxed. Questions about "taxable income" cover salaries/wages earned by parents and children; alimony; and taxable dividends or interest income. Ownership of a business or farm is another potential source of taxable income. Questions about "non-taxable" income cover child support, social security benefits, etc. If you do not have your current tax documentation complete, please do your best to estimate. You can always use your previous year's tax documentation assuming there has not been a great change.</p>	<ul style="list-style-type: none"> • W-2 and/or 1099 form(s) • IRS Form(s)1040 or 1040A • Social Security statements (SSA-1099 forms) • A sum of the child support you actually received
<p>Questions about the value of your assets ("what you own") Be ready to answer questions about the value of your home and what you pay. The PFS will also ask you about the vehicles you own and about investments and retirement plan accounts.</p>	<ul style="list-style-type: none"> • Mortgage principal balance statements for your home(s) • Lease or finance statements showing the amount owed on vehicles • Bank, investment, and/or mutual fund account statements • Retirement Plan account statements
<p>Questions about your debts ("what you owe") These include questions about the amount you owe on your credit cards, as well as other debt you have incurred.</p>	<ul style="list-style-type: none"> • Credit card statements • Bills/account statements showing major debt outstanding (for past educational expenses, past legal or funeral expenses, damage from natural disasters, etc.)
<p>Questions about how much you pay for educational expenses for all your children (not just the children for whom you are applying for financial aid). The PFS also asks HOW you pay for these expenses—that is, from what sources (your own funds, loan, friends/family, etc.).</p>	<ul style="list-style-type: none"> • A sum of the expenses you pay for school, college, and childcare for EACH of your children.
<p>Questions about other family expenses These will include questions about medical and dental care expenses that weren't covered by insurance; and questions about cost of camps, lessons/tutors, and vacations. Please enter annual, not monthly, amounts.</p>	<ul style="list-style-type: none"> • A sum of the expenses you paid for medical/dental premiums, as well as non-reimbursed amounts • A sum of expenses for camps/lessons/tutors • A sum of the expenses for vacations taken by all members of the family.



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Technical Considerations

- **Your Internet Browser:** Please note that the use of Google Chrome is recommended when working in the Parents' Financial Statement Online. Internet Explorer 10, Mozilla Firefox, and Safari are also supported. It's important to note that Internet Explorer 10 is the minimum required version to successfully view and work within the PFS. Internet Explorer 7, 8, 9, and Opera are not supported.
 - Since Google Chrome updates automatically, the most recent version should be supported.
 - Internet Explorer 10 is the minimum required version to successfully view and work within the Parents' Financial Statement Online. Internet Explorer 7, 8, and 9 are not supported.
 - The most recent version of Mozilla Firefox is supported.
 - Opera is also not supported.
 - Safari is now supported.
- **Choose the Correct Academic Year:** At some points during the year, SSS may have applications open for two academic years. Remember to choose the application for the academic year in which you are applying for financial aid. It's important to note that refunds are not available for applications submitted for the incorrect academic year.
 
- **How to Return to Your Application at a Later Date:** You do not have to finish your PFS in one sitting. To return to it, from the SSS Website for Families (<https://sssbynais.force.com/familyportal>), login on the right side of the page with the email and password you used to create your account. If you have forgotten your password, click on "Get help signing in."
- **"Save & Next" vs. "Save & Exit" Buttons:** At the bottom of every screen in the PFS Online, you'll see two "save" buttons. If you press "Save & Exit," you will leave the PFS Online. You should press this if you are finishing your session and wish to log out. If you have completed the page and wish to move on to the next, press "Save & Next." Note that if you haven't finished answering all the required questions on that page, you will be prompted to do so. If an answer doesn't apply to you, fill in a zero. Don't leave it blank.
- **The Back Button:** Do NOT use the back button on your Internet browser. Instead, click on the section headers in the menu on the left side of the screen to navigate to earlier sections of the PFS. Data may be lost if you use the browser back button.

Help Along the Way

You'll see Help Tips inline as you move through the application.

