

Office of Financial Aid

**Financial Aid JaySource  
Student Manual**



WASHINGTON  
& JEFFERSON  
COLLEGE

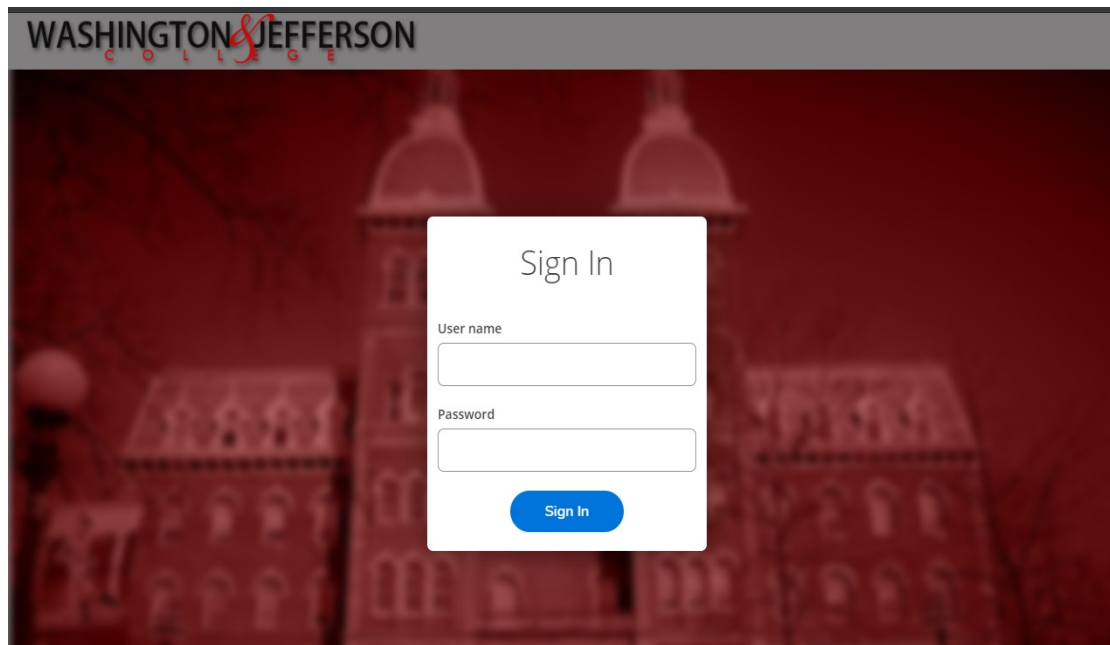


# Financial Aid JaySource Student Manual

## Financial Aid JaySource

Login to <https://jaysource.washjeff.edu/Student>.

You will use the same username and password as your college E-mail account.



The screenshot shows the login interface for JaySource. At the top, the text "WASHINGTON & JEFFERSON" is displayed in a grey bar. Below this, a white sign-in form is centered on a dark red background featuring a blurred image of a building. The form has the title "Sign In" and two input fields: "User name" and "Password". A blue "Sign In" button is located at the bottom of the form.



WASHINGTON  
& JEFFERSON  
COLLEGE

# Financial Aid JaySource Student Manual

## Financial Aid JaySource Home Page

Click on "Financial Aid" to get started.

Hello, Welcome to Colleague Self-Service!

Choose a category to get started.



### Student Finance

Here you can view your latest statement and make a payment online.



### Financial Aid

Here you can access financial aid data, forms, etc.



### Tax Information

Here you can change your consent for e-delivery of tax information.



### Student Planning

Here you can search for courses, plan your terms, and schedule & register your course sections.



### Grades

Here you can view your grades by term.



### Graduation Overview

Here you can view and submit a graduation application.



### Enrollment Verifications

Here you can view and request an enrollment verification.

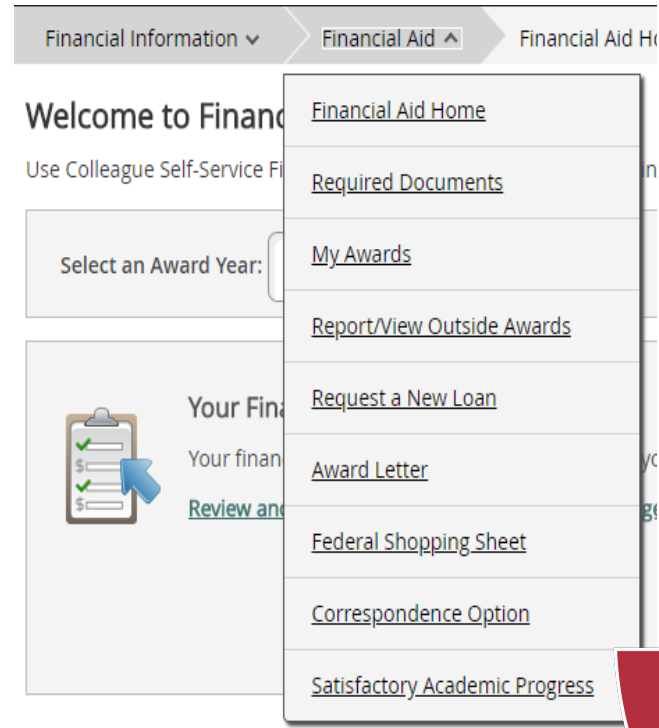


# Financial Aid JaySource Student Manual

## Financial Aid Menu

You can also access the financial aid tabs under the “Financial Aid” header.

- The FA Menu Includes:
  - Financial Aid Home
  - Required Documents
  - My Awards
  - Report/View Outside Awards
  - Request a New Loan
  - Award Letter
  - College Financing Plan (Federal Shopping Sheet)
  - Correspondence Option
  - Satisfactory Academic Progress





# Financial Aid JaySource Student Manual


## Financial Aid Home Page

Select the academic year to review.

**Welcome to Financial Aid!**  
Use Colleague Self-Service Financial Aid to assist in managing your Financial Aid package from submission to completion.

Select an Award Year:   [Contact Financial Aid Office](#)

 **Your Financial Aid Package is now ready!**  
Your financial aid award package is now ready for your review and acceptance.  
[Review and accept your Financial Aid Award Package](#)

 **Student Finance Account Summary**  
Amount Due 7/13/2018  
\$0.00  
Amount Overdue  
\$0.00  
Total Amount Due  
\$0.00  
[Go to Account Summary](#)

Checklist		
✓	Completed	<a href="#">Submit a Free Application for Federal Student Aid (FAFSA)</a>
✓	Completed	<a href="#">Complete required documents</a>
✓	Completed	<a href="#">Your application is being reviewed by the Financial Aid Office</a>
⚠	Action Needed	<a href="#">Review and accept your Financial Aid Award Package</a>
⚠	Action Needed	<a href="#">Complete Direct Loan Entrance Counseling</a>

**Resources**

**Helpful Links**


- [FAFSA Application](#)
- [Entrance Counseling](#)
- [Master Promissory Note](#)
- [PLUS Loan Application](#)
- [NSLDS Information](#)



# Financial Aid JaySource Student Manual

## Complete Checklist Items


Click on the “Action Needed” items highlighted in yellow.



**You have missing documents!**

In order to complete your financial aid application some additional documentation is required before the Financial Aid office can evaluate your information.

[Complete required documents](#)



**Student Finance Account Summary**

Amount Due 7/18/2018  
\$0.00

Amount Overdue  
**\$0.00**

Total Amount Due  
\$0.00

[Go to Account Summary](#)

Checklist	
Completed	Submit a Free Application for Federal Student Aid (FAFSA)
Action Needed	<a href="#">Complete required documents</a>
Not Available	Your application is being reviewed by the Financial Aid Office
Not Available	<a href="#">Review and accept your Financial Aid Award Package</a>
Not Available	<a href="#">Review and sign your Financial Aid Award Letter</a>

### Resources

#### Helpful Links

[FAFSA Application](#)

[Entrance Counseling](#)

[Master Promissory Note](#)

[PLUS Loan Application](#)

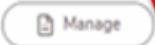



[NSLDS Information](#)



# Financial Aid JaySource Student Manual

## Complete Required Documents

Here you will be able to see the received and incomplete documents to be submitted. To submit a document please click on the “manage” button under the column titled “attachments”. You will then be able to upload an attachment.


Document	Explanation	Due Date	Status	Attachments
Verification Worksheet	Your Free Application for Federal Student Aid (FAFSA) has been selected for a process called verification. Please submit a copy ... <a href="#">more</a>		Incomplete	
2018 Parent Tax Transcript	Please submit a copy of your parent's 2018 IRS tax return transcript to the Financial Aid Office. <a href="#">Internal Revenue Service</a>		Incomplete	
2018 Parent W2's	Please submit a copy of your parent's 2018 W2s to the Financial Aid Office. <a href="#">Internal Revenue Service</a>		Incomplete	
2018 Student W2's	Please submit a copy of your 2018 W2s to the Financial Aid Office. <a href="#">Internal Revenue Service</a>		Incomplete	
20/21 Electronic Isir	The Financial Aid Office has received your 2020-2021 Free Application for Federal Student Aid (FAFSA). <a href="#">FAFSA</a>	11/15/2019	Received	




# Financial Aid JaySource Student Manual

## Review & Accept your Financial Aid Award Package

Select an Award Year  ✉ [Contact Financial Aid Office](#)



**Your Financial Aid Package is now ready!**  
Your financial aid award package is now ready for your review and acceptance.  
[Review and accept your Financial Aid Award Package](#)



**Student Finance Account Summary**  
Amount Due 7/18/2018  
\$0.00  
Amount Overdue  
\$0.00  
Total Amount Due  
\$0.00  
[Go to Account Summary](#)

Checklist	
✔	Completed Submit a Free Application for Federal Student Aid (FAFSA)
✔	Completed Complete required documents
✔	Completed Your application is being reviewed by the Financial Aid Office
⚠	Action Needed <a href="#">Review and accept your Financial Aid Award Package</a>
⚠	Action Needed <a href="#">Complete Direct Loan Entrance Counseling</a>
⚠	Action Needed <a href="#">Sign a Direct Loan Master Promissory Note</a>
⚠	Action Needed <a href="#">Review and sign your Financial Aid Award Letter</a>



Resources
<b>Helpful Links</b>
<a href="#">FAFSA Application</a>
<a href="#">Entrance Counseling</a>
<a href="#">Master Promissory Note</a>
<a href="#">PLUS Loan Application</a>
<a href="#">NSLDS Information</a>
<a href="#">PHEAA</a>
<a href="#">Satisfactory Academic Progress</a>





# Financial Aid JaySource Student Manual

## My Awards

Click “Accept or Decline” under the award name.

You only accept or decline awards in an “Offered” status.

4% Work  
Money you work for \$2,000.00

Award	Status	Total Awarded Amount	2018 Fall	2019 Spring
Federal Work Study <a href="#">Accept or Decline</a>	Offered	\$2,000.00	\$1,000.00	\$1,000.00

Check the terms you will be attending.

<input checked="" type="checkbox"/> 2018 Fall	\$1,000.00
<input checked="" type="checkbox"/> 2019 Spring	\$1,000.00
<b>Total</b>	<b>\$2,000.00</b>

**i** You may accept or decline the amount.

Reset Decline Accept



# Financial Aid JaySource Student Manual

## Award Total

You can accept or decline any remaining awards that are pending by clicking “Accept or Decline All” under “Total Awards.”

Award Total			
Award	Total Awarded Amount	2018 Fall	2019 Spring
Total Awards <a href="#">Accept or Decline All</a>	\$2,000.00	\$1,000.00	\$1,000.00

This allows you to accept or decline any awards that are still Pending. Please review your awards package before accepting or declining all your pending awards.

Decline All

Accept All



# Financial Aid JaySource Student Manual

## Report / View Outside Awards

Here you can notify the office of financial aid of any outside scholarship(s) you have received. You must also submit a paper copy of the award letter / notification from the scholarship organization.


### Outside Awards

You can report new or view existing awards received from outside sources

Select an Award Year: 2019/2020 Academic Year ▾

✉ [Contact Financial Aid Office](#)

If you have received Financial Aid from any other sources please enter the awards below.

 Add an award



**WASHINGTON  
& JEFFERSON**  
COLLEGE

# Financial Aid JaySource Student Manual

## Request a New Loan

- Students will not be permitted to submit a new loan request using Financial Aid JaySource.
- The Office of Financial Aid will automatically award you any Federal Direct Loans you are eligible to receive.
- You are required to accept or decline your loans using Financial Aid JaySource
- If you are requesting a private loan, your lender will notify the Office of Financial Aid of your loan request.
- For more information please visit [our website](#).







# Financial Aid JaySource Student Manual


## Award Letter

You can review and electronically sign your award letter.

Select an Award Year:  [✉ Contact Financial Aid Office](#)

 **Your Financial Aid Package is now ready!**  
Your financial aid award package is now ready for your review and acceptance.  
[Review and accept your Financial Aid Award Package](#)

 **Student Finance Account Summary**  
Amount Due 7/18/2018  
\$0.00  
Amount Overdue  
**\$0.00**  
Total Amount Due  
\$0.00  
[Go to Account Summary](#)

Checklist		
✓	Completed	Submit a Free Application for Federal Student Aid (FAFSA)
✓	Completed	Complete required documents
✓	Completed	Your application is being reviewed by the Financial Aid Office
⚠	Action Needed	<a href="#">Review and accept your Financial Aid Award Package</a> 
⚠	Action Needed	<a href="#">Complete Direct Loan Entrance Counseling</a>
⚠	Action Needed	<a href="#">Sign a Direct Loan Master Promissory Note</a>
⚠	Action Needed	<a href="#">Review and sign your Financial Aid Award Letter</a>

Resources
<b>Helpful Links</b>
<a href="#">FAFSA Application</a>
<a href="#">Entrance Counseling</a>
<a href="#">Master Promissory Note</a>
<a href="#">PLUS Loan Application</a>
<a href="#">NSLDS Information</a>
<a href="#">PHEAA</a>
<a href="#">Satisfactory Academic Progress</a>



# Financial Aid JaySource Student Manual

Financial Information > Financial Aid > Award Letter

## Award Letter

Please review your award letter and contact the Financial Aid office for any questions

Select an Award Year: 2019/2020 Academic Year [Contact Financial Aid Office](#)

**i** Please read through and accept your award letter below or print and deliver to the Financial Aid Office.

2019/2020 Academic Year \$2,000.00

[Award Letter](#)

This is your Financial Aid letter for the above award year. Your budget and awards are based on our review of your completed financial aid application. Awards are made based on full-time enrollment. If you are enrolled in less than 12 units, your award will be less than the amount shown.

FOR PAYMENT DATES AND ADDITIONAL FINANCIAL AID INFORMATION, PLEASE READ THE ENCLOSED MATERIALS.

Award	Total	Fall	Spring
Self Help			
Federal Work Study	\$2,000.00	\$1,000.00	\$1,000.00
Total	\$2,000.00	\$1,000.00	\$1,000.00

Your total award is subject to the availability of funds from the appropriate agencies and the laws and regulations which govern these programs, and is thus subject to change.

"ALL AWARDS ARE CONTINGENT ON BOTH YOUR ENROLLMENT AND YOUR SATISFACTORY ACADEMIC PROGRESS STATUS".

I verify that I accept the award package and electronically sign my award letter. Accept



[Cancel and Return Home](#)



# Financial Aid JaySource Student Manual

## Resources & Helpful Links

Financial Aid JaySource provides helpful links about different types of aid. You can also see the contact information for the Office of Financial Aid.

Financial Aid Counselor		
Office of Financial Aid	 <a href="tel:724-223-6019">724-223-6019</a>	 <a href="#">Contact Financial Aid Office</a>

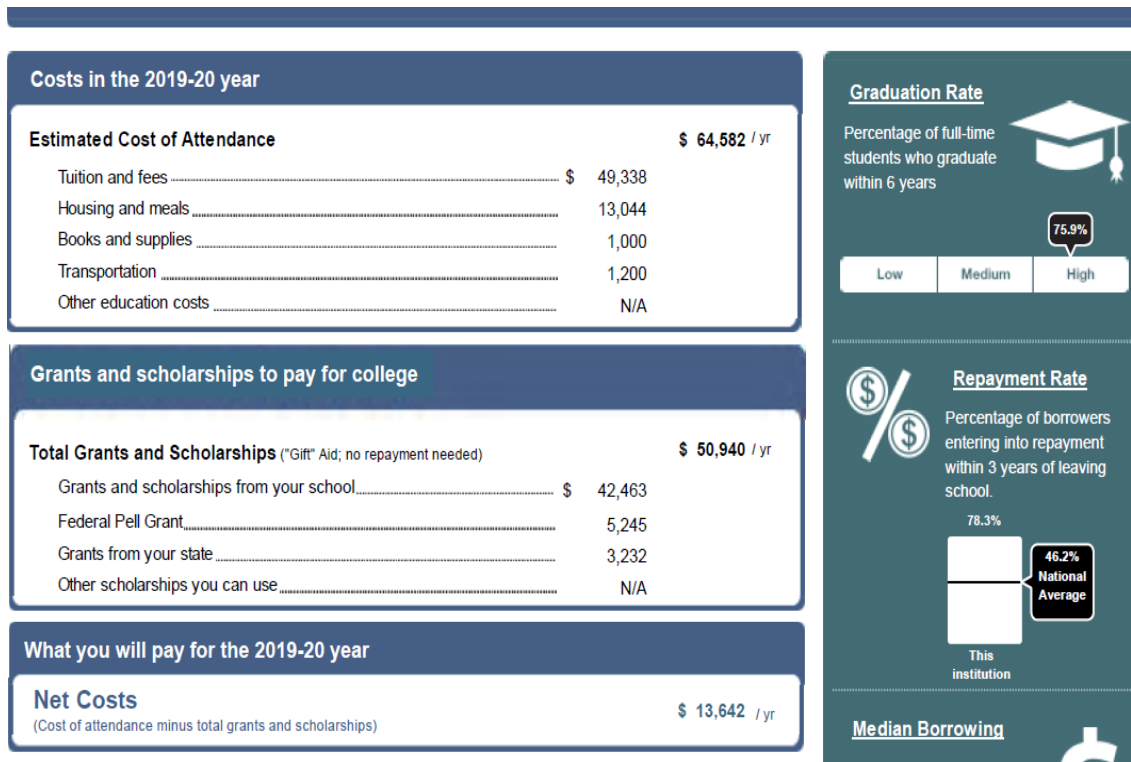
Resources
Helpful Links
<a href="#">FAFSA Application</a>
<a href="#">Entrance Counseling</a>
<a href="#">Master Promissory Note</a>
<a href="#">PLUS Loan Application</a>
<a href="#">NSLDS Information</a>
<a href="#">PHEAA</a>
<a href="#">Satisfactory Academic Progress</a>



# Financial Aid JaySource Student Manual

## College Financing Plan

The [College Financing Plan](#) is a consumer tool that is designed to simplify the information that prospective students receive about costs and financial aid so that they can easily compare institutions and make informed decisions about where to attend school.





# Financial Aid JaySource Student Manual

## Correspondence Option

Here you can choose to receive paper copies of correspondence from the Office of Financial Aid.

### Correspondence Option

You can choose to receive hard copies of your Financial Aid correspondence.

*By selecting this option, I am explicitly choosing to receive paper copies of my Financial Aid correspondence in addition to the electronic copies I currently receive. By not selecting this option, I understand that I will only receive electronic copies of my Financial Aid correspondence.*

ellucian. © 2000-2018 Ellucian Company L.P. and its affiliates. All rights reserved. [Privacy](#)



**WASHINGTON  
& JEFFERSON**  
COLLEGE

# Financial Aid JaySource Student Manual

## Satisfactory Academic Progress

You can view your Satisfactory Academic Progress for an evaluation period.

### Satisfactory Academic Progress

You can view your Satisfactory Academic Progress for an evaluation period.



You are currently making satisfactory academic progress. Please contact your Financial Aid Counselor if you need further assistance.

SAP Status

*Date Reviewed: 5/30/2017*

Evaluation Period: 2016FAL - 2017SPG

Program: Open/Undecided

SAP Status:  Satisfactory

∨ *What does Satisfactory Academic Progress mean?*

### Contact

✉ [Contact Financial Aid Office](#)

### Helpful Links

[Satisfactory Academic Progress](#)

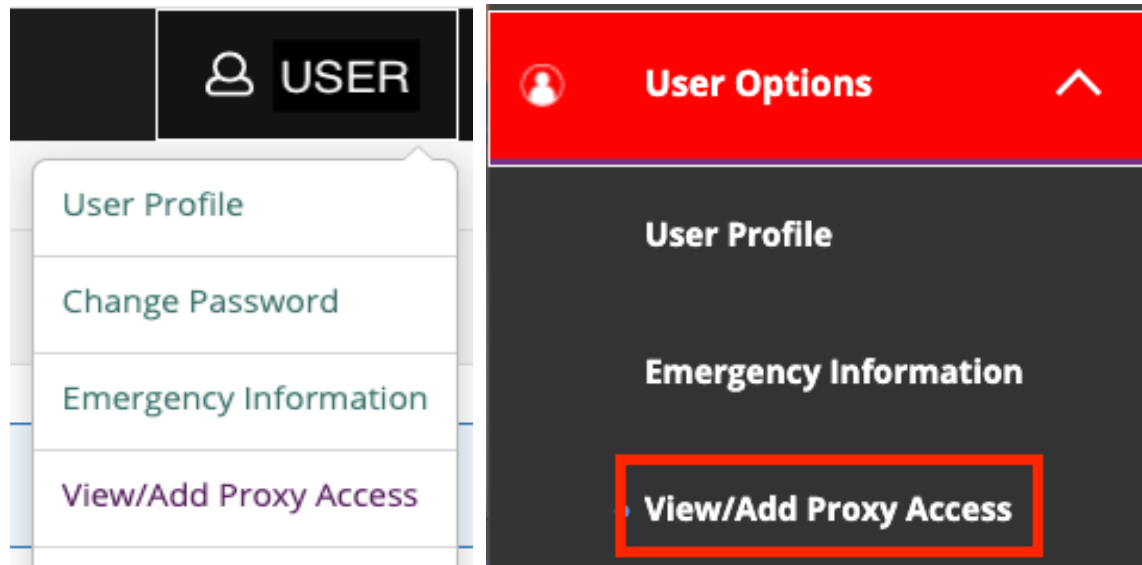


WASHINGTON  
& JEFFERSON  
COLLEGE

# Financial Aid JaySource Student Manual

## How to set-up a parent proxy

Under your user name at the top, or the “User Options” on the left, select “View/Add Proxy Access”.



A drop down list of those records that are associated with your account will be presented.



# Financial Aid JaySource Student Manual

## How to set-up a parent proxy

Select the person you wish to grant access (You can grant access to multiple people at different levels). If the person you wish to select is not listed, please contact [mydata@washjeff.edu](mailto:mydata@washjeff.edu).

Select a Proxy

✓ Please Select  
Ms. My Parent-Guardian



WASHINGTON  
& JEFFERSON  
COLLEGE



# Financial Aid JaySource Student Manual

## How to set-up a parent proxy

Once the person is selected, you can choose the proxy's access level. At any time you can log in to JaySource and change the proxy's access level. When you grant or revoke access, the proxy will receive an email notification.

The screenshot shows a web form for setting up a proxy user. It is divided into several sections:

- Email Address:** my-parent-guardian@isp.com
- Relationship:** parent, step-parent, guardian, grandparent, spouse
- Access:** Radio buttons for "Allow Complete Access" (unselected) and "Allow Select Access" (selected).
- Permissions:** A list of checkboxes for various account features:
  - Student Finance (unselected)
  - Account Activity (selected)
  - Account Summary (unselected)
  - Make a Payment (unselected)
  - General (unselected)
  - Notifications (unselected)
- Disclosure Agreement:** A paragraph of text followed by a checked checkbox: "I authorize the institution to disclose my information to this party".
- Buttons:** "Cancel" and "Save" buttons at the bottom.

Please verify the proxy's email address on the selection screen. If the proxy's email address needs to be updated, please email [mydata@washjeff.edu](mailto:mydata@washjeff.edu). Click the check box for: "I authorize" and select "Save".




# Financial Aid JaySource Student Manual

## How to set-up a parent proxy

Once the proxy has been added, you will see the proxy's name, the access level and the date it was granted. Use the pencil to edit the proxy access. 

Active Proxies

Name	Proxy Access
 Ms. My Parent-Guardian	Student Finance



# Financial Aid JaySource Student Manual

## How to set-up a parent proxy

The person that you select to receive proxy access will receive a welcome email to the email address listed. It is very important that you verify that this email address is current and correct.

First, the proxy will receive a welcome email with their username:



helpdesk@washjeff.edu

to me, I

Dear Ms. My Parent-Guardian,

You now have access to Mr. WJ Student Self Service account at Washington & Jefferson College. Please access the site by going to [Self Service](#).

The following login has been created for your use at Washington & Jefferson College. Your temporary password will arrive by a separate email.

Username:



WASHINGTON  
& JEFFERSON  
COLLEGE

# Financial Aid JaySource Student Manual

## How to set-up a parent proxy

Next, the proxy will receive an email with a temporary password:



**helpdesk@washjeff.edu**

to me ▾

Dear Ms. My Parent-Guardian,

Here is your temporary password for the login you received earlier:

Password: cF24ja4m



**WASHINGTON  
& JEFFERSON**  
COLLEGE



# Financial Aid JaySource Student Manual

## How to set-up a parent proxy

Finally, the proxy can log in with the username and password from the email to log in to JaySource and select a new password:

### Change Password

Please enter your user name, current password, and new password.

Your password has expired. Please choose a new password.

User name

Current password

New password

Confirm new password

Change Password



# Financial Aid JaySource Student Manual

## Questions

Contact the Office of Financial Aid

Phone: 724-223-6019

Email: [finaid@washjeff.edu](mailto:finaid@washjeff.edu)

Website: <http://www.washjeff.edu/financial-aid>



WASHINGTON  
& JEFFERSON  
COLLEGE