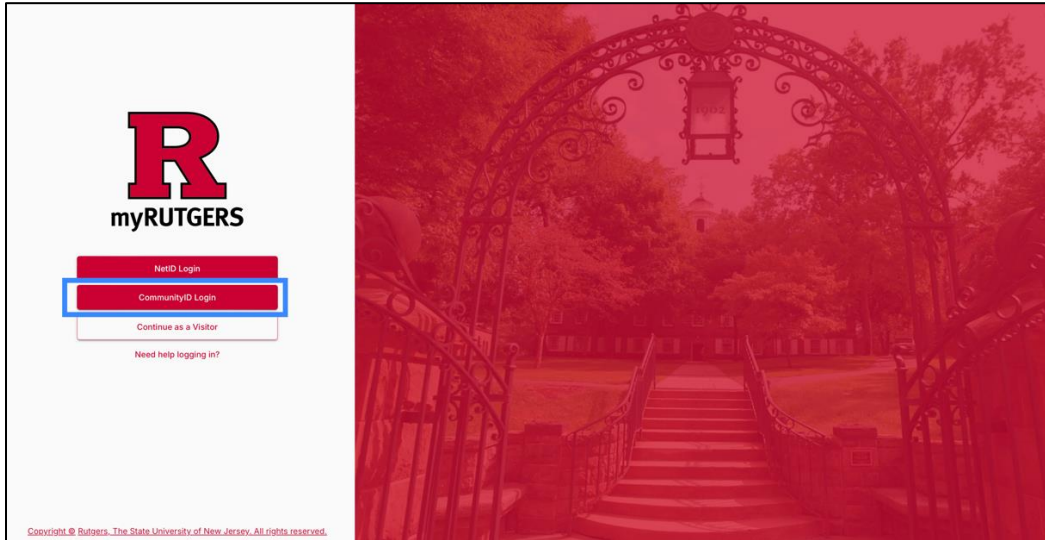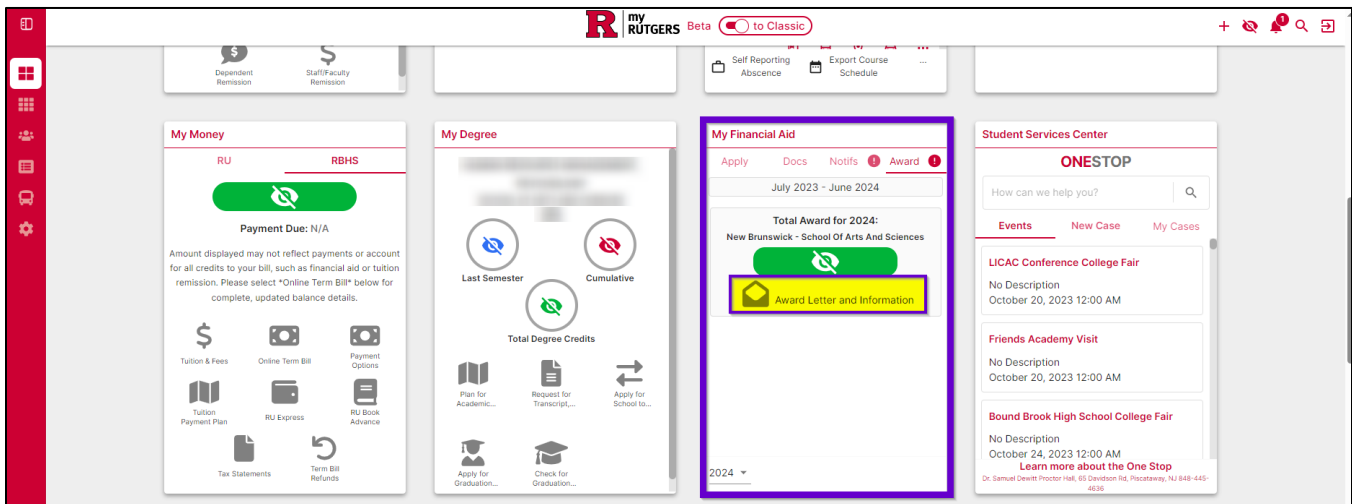# The Documents Tab

1. Once you have been granted Authorized User access by a student and created your Community ID, log in to your myGuest dashboard at my.rutgers.edu and click on the student card to launch the student dashboard.

2. Locate the financial aid widget labelled *My Financial Aid*. To view required documentation, click *Documents* (within the widget) and then click *Requested* next to any of the documents listed*. This will take you directly to the financial aid portal.

   a. Note: you will only be able to complete this step if the student granted you access to view their financial aid information

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3. Click on the *Documents* tab.

4. The documents tab will show you any documents needed to be reviewed, uploaded, or submitted.

5. The center of the screen will show any documents requiring attention.
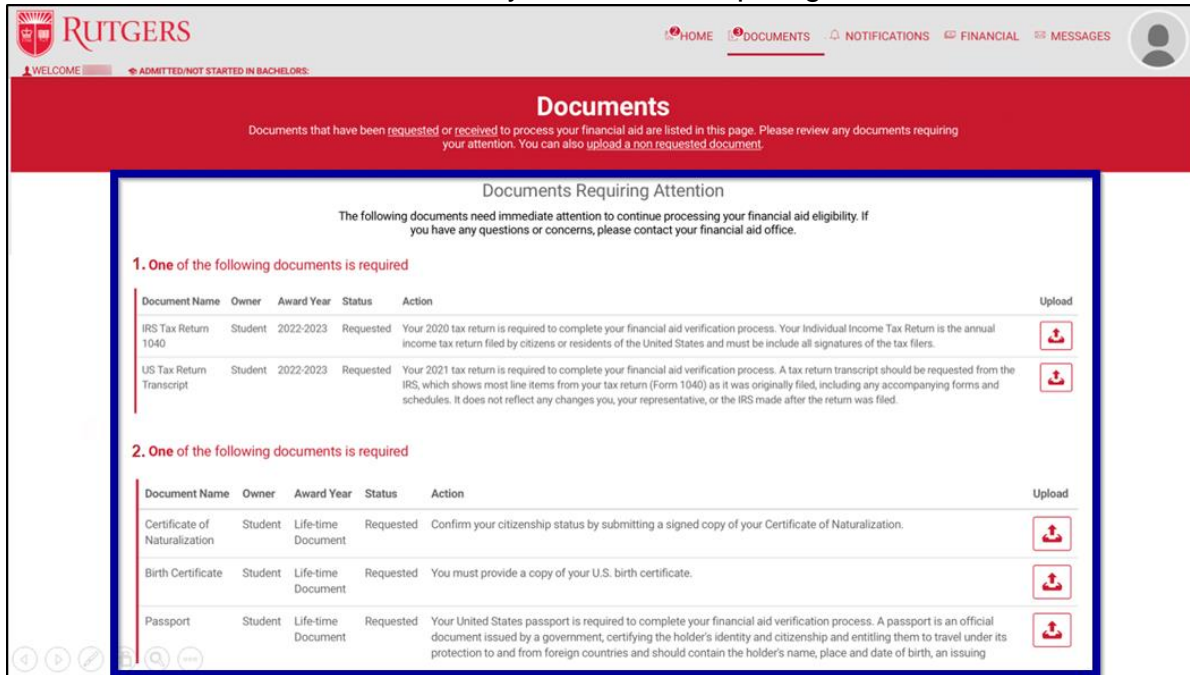
6. Pay close attention to the **Owner** column which will indicate whether the information requested is yours (the parent/guardian) or the student's.
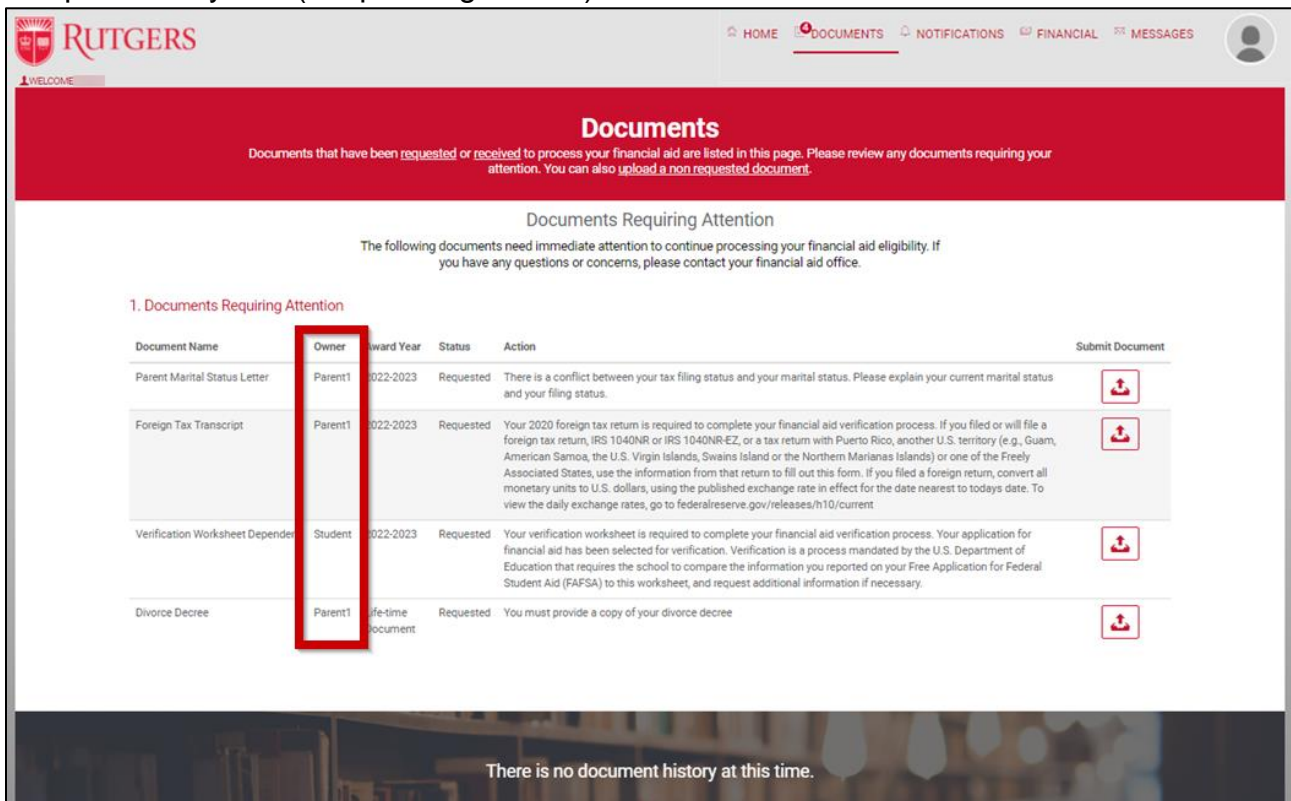
7. The bottom of the screen will display a complete log of all documents submitted through the financial aid portal.

Documents

Documents that have been requested or received to process your financial aid are listed in this page. Please review any documents requiring your attention. You can also upload a non requested document.

Documents Requiring Attention

The following documents need immediate attention to continue processing your financial aid eligibility. If you have any questions or concerns, please contact your financial aid office.

One of the following documents is required

Document Name	Owner	Award Year	Status	Action	Upload
US Tax Return Transcript	Parent1	2022-2023	Requested	Submit your parents 2020 federal tax return transcripts or a signed paper copy of the 2020 IRS tax return. For further instructions visit https://scarlethub.rutgers.edu/financial-services/tax-transcript/	🔺
IRS Tax Return 1040	Parent1	2022-2023	Requested	Your 2020 tax return is required to complete your financial aid verification process. Your Individual Income Tax Return is the annual income tax return filed and must include all schedules and signatures of the tax filers.	🔺

Document History

Document Name	Owner	Status	Received Date	Comments	Update Document
Verification Worksheet Dependent	Student	Acceptable	Mar 4, 2022	Your verification worksheet is required to complete your financial aid verification process. Your application for financial aid has been selected for verification. Verification is a process mandated by the U.S. Department of Education that requires the school to compare the information you reported on your Free Application for Federal Student Aid (FAFSA) to this worksheet, and request additional information if necessary.	↻

Documents to Upload: JPEG, PNG, or PDF files of personal documents such as tax transcripts, tax returns, non-filing statements, court orders, proof of citizenship, school transcripts, etc.

Documents to Submit: Forms to fill out for the Office of Financial Aid, such as the Verification Worksheet Dependent or the Verification Worksheet Independent.

Uploading a Document to the Financial Aid Portal

1. If you are required to upload a document, such as tax documents, click the ***Upload*** button next to the document name to upload a JPEG, PNG, or PDF copy of your document.

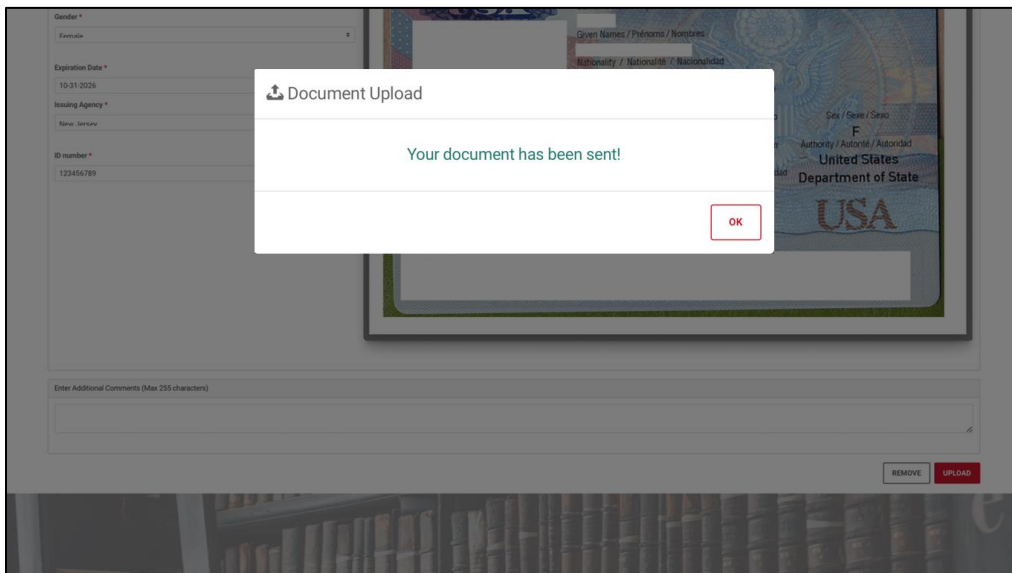2. Click the *Upload File* button and select the file from your computer you wish to upload.

3. After uploading the document, enter the document data, such as your name, date of birth, gender, expiration date, issuing agency, and ID number.
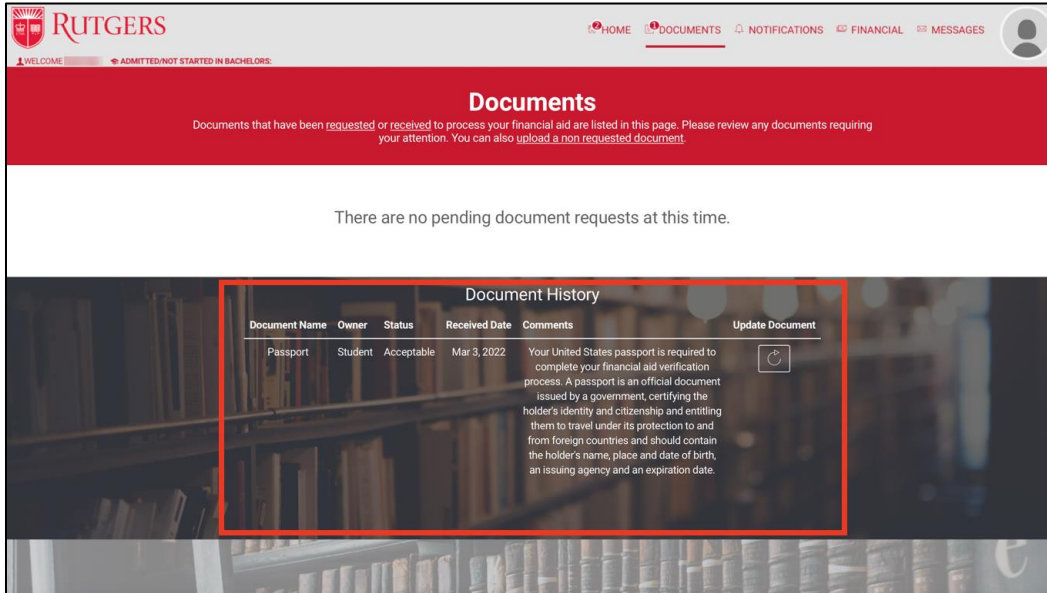

4. Click the *Upload* button.

5. A confirmation of submission pop-up will appear. Click *OK* and you'll be redirected to the documents tab.

6. The document submitted will then appear in the *Documents History* section of the documents page.

Submitting a Document to the Financial Aid Portal

1. If you are required to submit any documents, click the ***Submit Document*** button next to the document name to begin entering the requested information to complete the document. You may also be asked to upload supporting documents.

2. You will be asked for your electronic signature and electronic consent. You will need to read the consent message and select ***I Accept***. To e-sign the document, input the student's information (student ID, last name) your last name, the last four digits of your social security number and your date of birth (assuming you are the parent whose information is on the student's FAFSA).
   a. *Please Note:* If your parent does not have a social security number, click the *No SSN* button to override it.
   b. Once all information has been entered, the *Sign and Finish* button will unghost and you can submit the document.

3. A confirmation of submission pop-up will appear. Click *OK* and you'll be redirected to the documents tab.

4. The document submitted will then appear in the *Documents History* section of the documents page.