Managing Required Documents

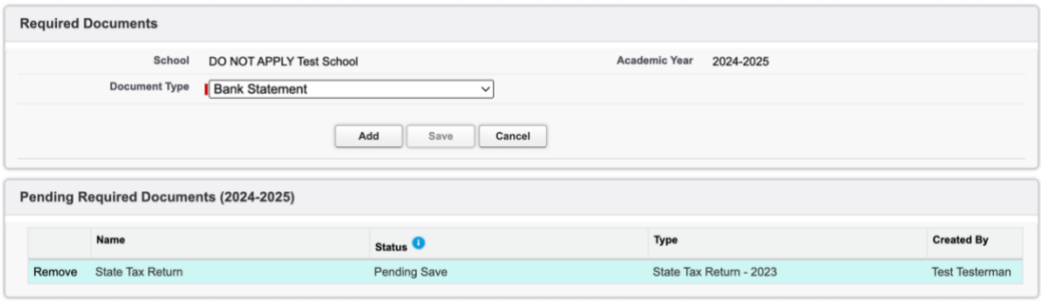
One of the most crucial parts of the financial aid process is to be able to verify the data being provided to you. As an SSS Partner, you can rest assured that you have all the tools you need to collect and manage your supporting documents. From setting your requirements to tracking their statuses, this helpful resource will ensure you have all the data you need to make an informed awarding decision.

Setting Document Requirements

Within the School Portal, you can set global document requirements or student-specific requirements. This allows you to collect basic forms such as IRS Form 1040 or W2 from all your Applicants but require additional documents from an individual family based on your Financial Aid Policy.

Global Document Requirements

To set global requirements, navigate to the **Setup** tab and locate the **Required Documents** sub-tab.



1. Select the Document Type and Year.
2. Click **Add**. This will place them in the **Pending Required Documents** box.
   *Repeat steps one and two as needed for additional documents.
3. Once all required documents have been selected, click **Save.**

Note: If adding requirements mid-season, your documents may remain in the **Pending Required Documents** box while we apply the requirements to the families who have already applied. You can navigate away from the page while this takes place.

Once you have set your document requirements, you should visit the **Annual Settings** tab to select your Document Deadlines. When setting these requirements, you will have the ability to send Document Deadline Reminders. If you choose to send reminders, families will receive a notification on the date of your choosing, and again two weeks later if they do not take action.

Student-Specific Document Requirements

While reviewing a folder, there may be times you need to request additional information. From within the Student Folder, you can request documents from an individual family by visiting the **Documents** page.

1. Click **Require Additional Document.**
2. Select the Document Type and Year.
3. Click **Save.**

When document requirements are added to a family's account, SSS will send an email notifying them of an addition to their requirements with detailed instructions of how to upload them within the Family Portal.

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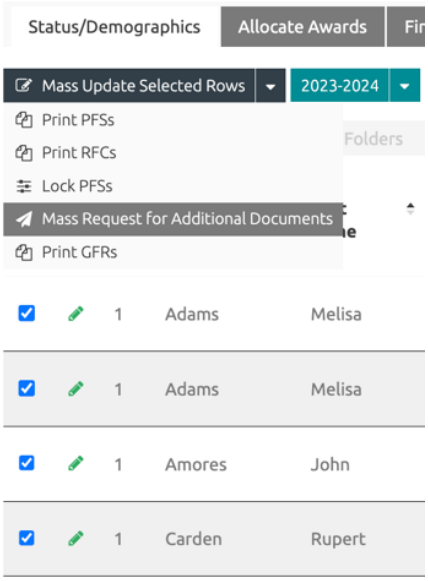
Mass Require Documents on the Applicants Page



When it comes to managing Required Documents, the Applicants tab is a great tool for our Partners. Here you can sort and filter by Document Status.

You are also able to mass-require documents for multiple families.

1. Set your filters and check the box next to the applicants you wish to add the document requirement.
2. Using the chevron next to the **Mass Update Selected Rows** button, select **Mass Request for Additional Documents** from the dropdown menu.
3. Set the Document Type and Year.
4. Click **Save.**

Understanding the Folder Document Status

To help manage documents, you will see five distinct document folder statuses within the Student Folder. These statuses can be seen and referenced throughout the School Portal.

- **No Documents Required:** Your School has not selected any required documents for the family to provide.
- **No Documents Received:** No action has been taken by the family regarding required documents.
- **Required Documents Outstanding:** Some documents have been received, but not all.
- **Required Documents Received/In Progress**: Documents have been provided and are still being verified by SSS.
- **Required Not Applicable/Waive Requested:** The family has indicated the document does/will not pertain to them. Folders in this status are waiting for your School to either approve or decline the N/A request.
- **Required Documents Complete**: All documents have been provided, and verification is complete.

Reporting on Required Documents

Your School Portal includes over 40 pre-made “canned” reports! These reports provide a real time snapshot of Family Document Statuses. You will find these by visiting the **Reports** tab and viewing the “Academic Year” folders. Some helpful reports include:

- Required Documents Status
- Required Documents: Business/Farm
- Required Documents Received – Last 7 days
- Required Documents Received – Today
- Required Documents Received – Yesterday

Questions?
Contact SSS School Support – 855.230.7850 | sss-cst@communitybrands.com | School Portal Support Ticket

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