

Colgate Financial Aid Portal Instructions

Accepting/Declining Your Aid

First, log-in to the student Financial Aid [Portal](#). Make sure the current award year is selected at the top right corner. Select “Pending Aid Offered” option from the menu at the top left of the screen:

Current Award Year: 20XX-20XX ▼ Log Out Help

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Documents & Messages
Financial Aid Summary
Pending Aid Offered
Supplemental Forms
Undergraduate College Financing Plan
NY State Supplementary Sheet

Welcome | Student

Colgate University Financial Aid Portal

New Students:

- View your financial aid offered (*Financial Aid Summary*)
- Accept or decline Federal Direct Loans and/or Work Study offered (*Pending Aid Offered*)
- Report outside scholarships (*Supplemental Forms*)
- Request to borrow Federal Direct Student Loans (*Supplemental Forms*)
- Submit documents listed as 'not received' (*Documents & Messages*)

Returning Students:

- 2X-2X financial aid offers will be emailed beginning in mid-June.
- Submit documents listed as 'not received' promptly or your aid offer will be delayed.
- If no documents are listed, [contact us](#) if you plan to apply for financial aid.

Domestic Students Applying for Federal Student Aid Only:

- The [FAFSA](#) can be submitted any time during, or in the months preceding, the 2X-2X academic year.
- After your FAFSA is received, complete the Loan Request Form (*Supplemental Forms*)
- Loans for 2X-2X will be processed beginning in late June 20XX

Residents of NY State:

- Complete the [NYS Tuition Assistance Program \(TAP\) application](#).

Returning International Students:

- Your initial application filed prior to enrolling will be used to renew 2X-2X Colgate Grant.

20XX-20XX

- **Submit your Consent to Release form** to allow Financial Aid to speak with your parent (*Supplemental Forms*)
- **Read [Financial Aid Policies](#)** for important information on eligibility, disbursements, and renewal criteria.
- **Fall 20XX billing statement** will be emailed to students from the [Office of Student Accounts](#) in early XX (payment due date Month, X Year)

Questions? [Contact Us](#)
Email: finaid@colgate.edu
Phone: 315-228-7431
Academic Year Hours: M-F, 10am-12pm and 1pm-4:30pm
Summer Hours: M-F, 10am-12pm and 1pm-4pm
Web: <https://www.colgate.edu/financialaid>

To 'Accept All' aid listed, click the 'Accept All' button and then the “Submit” button.

To 'Decline All' aid listed, click the 'Decline All' button and then the “Submit” button.

Menu

Current Award Year: 20XX-20XX Log Out Help



Pending Aid Offered

Grants and scholarships (gift aid that does not need to be earned or repaid) are the most beneficial types of financial aid. Students are not required to actively accept grants or scholarships; they are automatically offered in an 'accepted' status.

Work study and/or Federal Direct Loans offered in your initial financial aid package must be accepted or declined. Update the status of 'pending' financial aid offered, and submit your answer.

- Work study** - If you accept the amount offered, you will be given access to a listing of available jobs in your Colgate Student Portal starting in late July/early August. You may earn more or less than the amount offered, depending on the number of hours you work.
- Accepting Federal Direct Loans** - To borrow the amount offered, change the status from 'pending' to 'accepted.' First-time borrowers must complete a Master Promissory Note and Loan Entrance Counseling to finalize the loan. Go to the *Documents* section of this portal to confirm receipt of those requirements.
- Declining Federal Direct Loans** - If you do not plan to borrow, change the status from 'pending' to 'declined' (you may request loans throughout the academic year if your plans change).
- Borrowing a different amount of Federal Direct Loans** - If you plan to borrow a different amount from what is listed, change the status from 'pending' to 'declined' and then submit a Loan Request Form on the *Supplemental Forms* section of this portal.

Your Financial Aid Offer

Fund Name	Fall	Spring	Total	Message	Status
Colgate Work-Study (Self Help)	\$1,450.00	\$1,450.00	\$2,900.00		Pending
Federal Unsubsidized Loan (Self Help)	\$1,250.00	\$1,250.00	\$2,500.00		Pending
Total	\$2,700.00	\$2,700.00	\$5,400.00		

Decline All

Accept All

Submit

Aid can also be individually accepted or declined by updating the drop-down options under the Status column next to each individual aid type and clicking the “Submit” button.



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- **Accepting Federal Direct Loans** - To borrow the amount offered, change the status from 'pending' to 'accepted.' First-time borrowers must complete a Master Promissory Note and Loan Entrance Counseling to finalize the loan. Go to the *Documents* section of this portal to confirm receipt of those requirements.
- **Declining Federal Direct Loans** - If you do not plan to borrow, change the status from 'pending' to 'declined' (you may request loans throughout the academic year if your plans change).
- **Borrowing a different amount of Federal Direct Loans** - If you plan to borrow a different amount from what is listed, change the status from 'pending' to 'declined' and then submit a Loan Request Form on the *Supplemental Forms* section of this portal.

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Decline All

Accept All

Submit

To increase a loan amount, first, accept the original loans offered as part of your package, if applicable. Then, complete the Federal Direct Student Loan Request form on the Supplemental Forms page.

The Office of Financial Aid is available at finaid@colgate.edu or 315-228-7431 to help with any questions.