

SANTA BARBARA MIDDLE SCHOOL

Instructions for Families Applying for Financial Aid for the 2012-13 School Year

We partner with School and Student Services By NAIS (SSS) in our financial aid process. To begin your financial aid application, you must complete the Parents' Financial Statement (PFS) online or by mail by January 13, 2012 (returning families) and February 15, 2012 (applicant families).

Completing the PFS online will save you time and money, and will help us make our financial aid decision more quickly. For students with divorced or separated parents, BOTH parents are required to complete a PFS. We cannot process your application for financial aid until both parents have completed a PFS or we have approved a written letter of exemption.

Decisions about financial aid awards will be mailed with admission notifications.

To begin your financial aid application for the 2012-13 school year, please follow these three steps below. Please note SBMS' school code is 904267 (you may need this if you contact SSS by NAIS for assistance).

STEP 1: COMPLETE THE PARENTS' FINANCIAL STATEMENT (PFS) ONLINE

1. Starting November 1, 2011, go to the SSS website at sss.nais.org/go/parents. Click on the green "Apply Now" button to begin the PFS Online.

2. Login to the PFS Online.

Are you applying for aid for the first time? Click on the green "Create an Account" button. You'll be asked to enter your name and email address and to select a password.

Did you apply last year? Enter in your login and password from last year in the section called "Returning Families." If you have forgotten your login information, click on "forgot your password."

3. Begin a PFS for Academic Year 2012-13.

Download the PFS Online Workbook and refer to on-screen help for guidance along the way. You can log out of the PFS Online at any time -- then return later to complete your PFS.

The fee of \$37 is nonrefundable. Once you have paid for and submitted your PFS, we will receive your information at our school. About 24 hours after you submit your PFS, you can go back to the PFS Online to submit any additional documents (see next section) and to view your Family Report, which summarizes the information we will receive.

Financial Aid awards will be mailed with admission notifications.

To make our decision, we use the information from the PFS as a starting point. We also consider our school policy and practices, as well as the budget we have available.

If you wish to complete the PFS using the paper form, please contact SBMS for a form. Mail to School and Student Services, PO Box 449, Randolph, MA 02368-0449. For overnight service, use: School and Student Services, 437 Turnpike Street, Canton, MA 02021

STEP 2 –SUBMIT ADDITIONAL REQUIRED DOCUMENTS ONLINE

Approximately 24 hours after you have paid for and submitted your PFS online, you will have access to the Manage Documents section of the PFS Online, where you can upload documents.

1. Gather electronic copies of the following required documents:

- Copies of W-2s for the 2011 tax year.
- Most recent tax returns, including all schedules.

2. Prepare your documents to be uploaded.

Make sure the documents are on your computer, each saved as a separate file. They can be saved in any of the following file formats and each must be not more than 1.5 MB in size: Microsoft Word, Excel, Adobe pdf, .jpg, .gif, or .tif. Remove any security or password protection you may have on any pdfs and black out any social security numbers.

3. Go to the PFS Online and login.

4. Select the Academic Year 2012-13 button.

5. From your PFS Online Dashboard, click on the purple “Manage Documents” tab.

6. On the Manage Documents page, under “Upload Documents,” click “Browse,” then locate the place the document is on your computer.

7. Click “Upload Documents.”

Once you have uploaded a document, it will NOT appear immediately in the “Received Documents” section on this page. It can take up to 72 hours for it to be received and then validated. Once it does appear in the “Received Documents” section, that means that we, at our school, now have access to it.

If you wish to submit documents by mail, send them with a COVER SHEET (found in this packet) to School and Student Services, PO Box 449, Randolph, MA 02368-0449. For overnight service, use: School and Student Services, 437 Turnpike Street, Canton, MA 02021

STEP 3 – COMPLETE THE SBMS FORM

Please complete the SBMS Financial Aid Statement (FAS). **It is due January 13, 2012 for returning families and February 15, 2012 for applicant families.** This form is available online in the Financial Aid section of the SBMS website at www.sbms.org.

Please return this form in a sealed envelope to the SBMS Main Office or mail to:

Santa Barbara Middle School
Attn: Financial Aid
1321 Alameda Padre Serra
Santa Barbara, CA 93103

NEED HELP?

For questions regarding the financial aid program or the status of your application, please call Anne Chen, SBMS Financial Aid Administrator at 805-682-2989 or email anne@sbms.org.

For technical support regarding the SSS website and/or online PFS application, please call SSS by NAIS Customer Service at 1-800-344-8328. They are available Monday – Friday, 9am - 8pm EST and Saturdays 9am - 4pm EST. **Santa Barbara Middle School school code: 904267**