This quick reference guide (QRG) provides instructions for students on **how to complete a Financial Aid action item**, including uploading required documentation.

The Financial Aid Office must sometimes require students to submit documentation or take specific actions to determine their eligibility for Financial Aid. When this occurs, the Financial Aid Office assigns one or more Financial Aid action items to students. **Each Financial Aid action item assigned to a student represents a request for either a specific piece of documentation to be submitted or a specific action to be completed by the student**.

When a Financial Aid action item is assigned to you, you receive an automated email from Workday notifying you that a task awaits you.

To upload documentation and fulfill a Financial Aid action item request in Workday, complete the following steps.

FULFILL A FINANCIAL AID ACTION ITEM IN WORKDAY

To fulfill your Financial Aid Action Items:

1. Click the My Tasks Inbox at the top right corner of your

    Workday Home page.
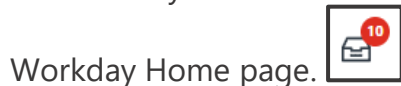
    The *My Tasks* screen displays 'All Items' awaiting completion.

2. In your 'My Tasks' screen, click on the first '**Complete Action Item**' message to view the requested action item.

3. Read the 'Description' to identify what documentation or action is needed to fulfill this item.

    Complete the action item request.

    Most, but not all, Financial Aid action items require documentation submission. If no documentation is required, it is still important to complete any directives provided, such as contacting the Financial Aid Office, so that the action item can be removed.

4. Click **Submit**.

A *Success! Event submitted* pop-up window displays.

5. Repeat the process as many times as needed to fulfill all Financial Aid action item requests.

     Note: If you are unable to fulfill the action item request or have questions, please contact your Financial Aid Office directly.

INSTRUCTIONS FOR FULFILLING ACTION ITEMS REQUIRING FILE SUBMISSIONS

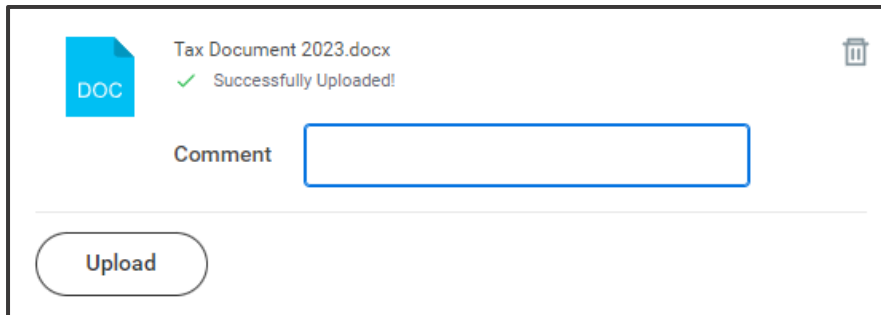If the action item assigned to you requires documentation submission, complete the following steps.

1. Upload the requested documentation by clicking **Select files**.
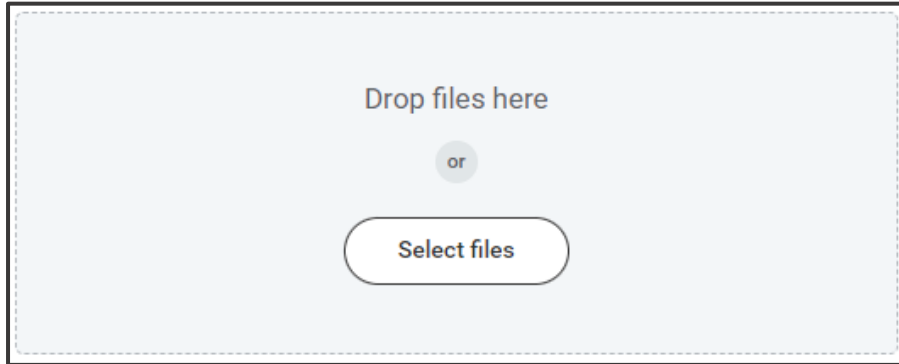
A pop-up window displays your personal file folders.

2. Click the file you want to submit, then click **Open**.

The file appears, along with a 'Comment' text box.

3. (Optional) Enter a note to the Financial Aid Office in the 'Comment' box to provide information about the attachment.

4. (Optional) Click **Upload** to attach another document. Repeat this process if you need to attach additional documents.

5. (Optional) Enter a note to the Financial Aid Office in the text box towards the bottom of the page if you need to communicate additional information prior to submitting.

6. Click **Submit**.

> Note: If the Financial Aid Office reviews your submission and determines that different documentation is needed, a Financial Aid administrator will send back your action item.
>
> The action item resubmission process is nearly identical to the submission process described above in this QRG. **The only difference is that if your submission is sent back, you will want to look at the 'Send Back Notes' section within your 'Complete Action Item' screen.** 'Send Back Notes' is located immediately below the 'Upload' button.

> Follow any instructions shared in 'Send Back Notes' to guide your next steps.