



HOW TO COMPLETE AND SUBMIT ELECTRONIC DOCUMENTS

USING ELECTRONIC SIGNATURE VERIFICATION

McMurry University has moved to a paperless documentation system that will allow students and parents to complete all of their documents online and will allow for electronic signatures. As a student needs additional documentation to complete their financial aid for the University, these documents will be available online at the McMurry University financial aid website under forms and resources, through the student's net partner account or by request from the financial aid office. In order to utilize the electronic signatures, both the student and the parent will need a unique email address in which to confirm the individual's identity. The same email should not be used for both the student and the parent.

Below are the steps and processes for the new electronic documentation issuance, completion and signature.

Step 1: All students will be required to complete a **Financial Aid Application**. This application is available through the forms and resources website at <http://financial-aid.mcm.edu/resources> . The student can click on the link for the financial aid application for the year they are applying. On this form, the student confirms the preferred contact information for them and their parent, if it is a dependent student. Once the student completes the form and signs, they will get an email to confirm their signature.

Step 2: All Texas resident students will be required to complete a **Texas Residency Form**. This form is available through the forms and resources website at <http://financial-aid.mcm.edu/resources> . The student can click on the link for the financial aid application for the year they are applying. On this form, the student confirms the preferred contact information for them and their parent, if it is a dependent student. Once the student completes the form and signs, they will get an email to confirm their signature. **NOTE:** This form only needs to be completed once for the student's time at McMurry. Also, the form is built so that if you answer the first few questions according to the required criteria, you are able to skip to the end and sign the document without completing all questions. You may not be required to answer all questions in the document.

Once the financial aid office has received the above documents from the student, additional documents may be required. See step 3.

Step 3: If the student has been selected for verification based on their FAFSA information, then verification forms and some additional documentation may be required. For all dependent students, once we have received the Financial Aid Application and the Texas Residency Form, the verification forms will be emailed directly to the student with a link to the document. The student will complete their portion and sign. Then the parent will receive an email to complete their portion, attached required documents and sign.

For independent students, you may complete your documentation by going through your net partner account and clicking on the verification worksheet.

Some verification forms require documents such as W-2's and a tax transcript. These forms must be loaded directly to the verification form. There will be a section where you can browse and upload these documents.

See below for additional detailed instructions on the completion of verification forms and the attachment of additional required documents. Not all verification forms require the same information so these are just examples of what you may see.

STUDENT

- The student will receive this document first, and will need to complete the questions that the student is prompted for, usually highlighted in yellow.

According to federal requirements, we must verify the number of people in your household. Please complete and return this form. Upon receipt of this information, we can continue processing your financial aid file.

Start →

* _____ _____ *

Student Full Name Social Security Number McMurry Student ID#

- Questions and fields will become available as the student moves through the document. Some fields may not be required even though there is a star beside of them. You can follow the prompts that say next to know which fields you are required to complete.

If more space is needed, please provide a separate page with the student's name and ID number at the top.

Next →

Employer's Name	2015 Amount Earned	IRS W-2 Provided
Suzy's Auto Body Shop (example)	\$2,000	Yes
* _____	* _____	Click to Attach Click to ...
_____	_____	Click to Attach Click to ...
_____	_____	Click to Attach Click to ...
_____	_____	Click to Attach Click to ...
_____	_____	Click to Attach Click to ...

- As you can see above, if a document is required to be attached, you will have a yellow highlighted field that says "Click to Attach". When you click on this box, it will pull up your computers' browser to look for the document that has been previously saved on your computer.
- If a required question is missed, the "Click to sign" will not be available until all of the required questions have been answered.
- You must agree to the terms and conditions prior to the "Click to sign" at the end of the document.

I agree to the [Terms of Use](#), have reviewed the [Consumer Disclosure](#) and agree to do business electronically with McMurry University

Click to sign

- Once you have completed, signed and submitted the document, the system will automatically send the document to the parent.
- You will have the option to download a copy of the document you signed. Once all participants have signed the document, you will receive another email with the complete document available.

PARENT (FOR DEPENDENT STUDENTS)

- The parent will receive this document after the student has completed their information, signed and submitted it.
- The parent will be able to see all the information the student has provided, however, you will not be able to make any changes to the student provided information.
- Complete the questions prompted, usually highlighted in yellow, if you have any. A signature may be all that is required. Students will complete the first line of the household information, but then the parent is required to finish this information.

	Full Name	Age	Relationship	College (if attending at least half-time in 2016-2017)
	Lori E Herrick	19	Self	McMurry University
	Bobby Herrick	67	Father	N/A
	Shirley Herrick	65	Mother	N/A
	Richard Herrick	22	Brother	Texas Tech
Next				

- If a required question is missed, the "Click to sign" will not be available until all of the required questions have been answered.
- You must agree to the terms and conditions prior to the "Click to sign" at the end of the document.

I agree to the [Terms of Use](#), have reviewed the [Consumer Disclosure](#) and agree to do business electronically with McMurry University

Click to sign

- Once you have completed, signed and submitted the document, the system will automatically send the completed document to McMurry.
- You will receive a final email with the completed document available to download.
- If you have your students W-2 and tax transcripts (if required), you may attach them to your Verification Worksheet.

TIPS TO UPLOADING DOCUMENTS

1. If you are required to attach you IRS tax transcript, you will need to go online to <https://www.irs.gov/Individuals/Get-Transcript> and follow the prompts to request your "Tax Return Transcript" for the tax year you used for your FAFSA. ***Please do NOT send the "Account Transcript." This is not the right information.*** Once you receive this transcript in the mail, you can scan it in and save it on your computer in place you will remember.
2. All students and parents are required to supply W-2's if they worked during the year. You may scan all student W-2's together, and then scan all parent W-2's together and save on your

computer. If you are able to receive W-2's electronically, then you can save them to your computer and upload directly to the form.