

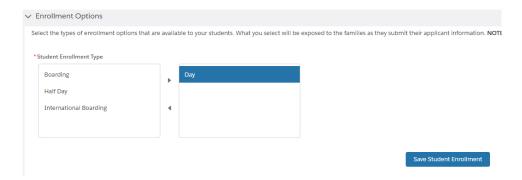
Annual Settings

Welcome! As a school using TADS Financial Aid, the first task in your School Portal is to select your Annual Settings for the upcoming processing year. As the title implies, these settings are completed on a yearly basis when the new processing year opens. As soon as Annual Settings are finished and saved, full access to the School Portal opens. You can always revisit your Annual Settings via Setup Administration on the main navigation bar.

Annual Settings must be completed before the open date of your school selection. This ensures parents in their Family Portal account can: 1) select your school, 2) see important deadlines, and 3) upload their required documents.

Enrollment Options

In this section, Select your Enrollment Type for your school. Select all that apply



Important Application Dates

Deadline Types

Select the type that fits your financial aid processing:

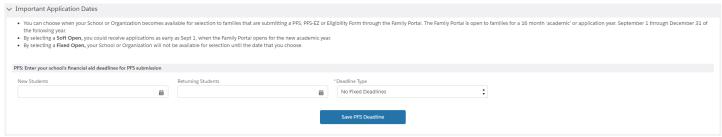
- No Fixed Deadlines: If you have a rolling financial aid season and/or deadline dates are not necessary.
- Soft Deadlines: If you have a submission deadline but accept the PFS (or documents) after the deadline date.
- Hard Deadlines*: If you have a submission deadline but do not accept the PFS (or documents) after the deadline date.

*If a family selects your TADS partner code on their PFS before your deadline date and then completes their PFS after the deadline, the system will still allow the PFS to be submitted to your school.

Deadlines & Email Reminders

In this section, enter your school's deadlines for receiving PFS submissions.

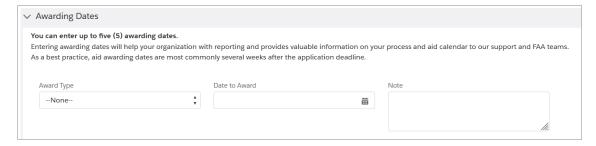
Deadline for PFS Submission



Enter the deadline date for families to submit their PFS to your school. You can enter the same or different dates for your new and returning students.

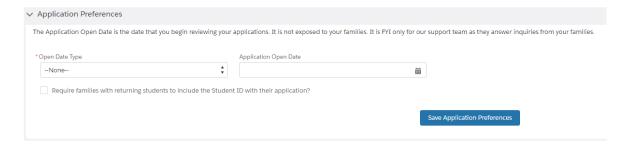
Awarding Dates

This optional setting allows up to five (5) awarding dates. Add notes and indicate if the date is for new or returning students.



Application Preferences

In this section you will choose your Open Date Type and Application Open Date.



- Fixed Open: Your application will open on this date.
- Soft Open: Your application will open on September 1.

Deadlines for Required Tax Documents

TADS allows schools to require tax documents from parents that they can upload via the Family Portal. You can require up to the two most recent consecutive years (Current Year and Prior Year). Enter your deadline dates for the tax year(s) your school requires. Current year tax forms cannot have a deadline before 2/1/XXXX.

Annual Settings does not include deadline fields for tax years that are not selected on the **Required Documents** sub-tab of Setup. If you need to update your selected documents to add the tax year, go to Required Documents. add/remove year-specific documents, then return to the Annual Settings sub-tab to enter deadline dates.

You can also set up auto-email reminders for unsubmitted PFSs and outstanding required documents. These emails are sent on your school's behalf by the TADS system. Check the box to add the date fields.

*For outstanding document reminders, the system does not allow an email reminder <u>before</u> your PFS submission deadline date. Parents cannot upload documents to an unpaid/unsubmitted PFS in the Family Portal.

PFS: Supplemental Questions

*Adding PFS supplemental questions must be done before October 2 and cannot be changed after that date.

Select up to three (3) additional questions from the bank to add to the PFS for your families to answer. Select **Yes** to view the questions and make your selections. If you do not want to add questions, select **No**. You can make your supplemental question(s) optional or required. The default is required.

After selecting your three questions. You may indicate whether a question is required by selecting the Required box next to each question. If the question is not required, it will be optional for the family to submit an answer.

Tuition and Fees

Enter your school tuition and other expenses to accurately review financial need for your applicants. You have the option enter One Schedule per Grade or One Schedule for entire School, whichever fits your tuition structure.

Questions?

School Support - 855.230.7850 | tads-fasupport@communitybrands.com | Submit a portal Support Ticket