OAKLAND COUNTY
MICHIGAN

Savi Application Job Aid

Table of Contents

- Getting Started
- How to Apply
- Savi Emails

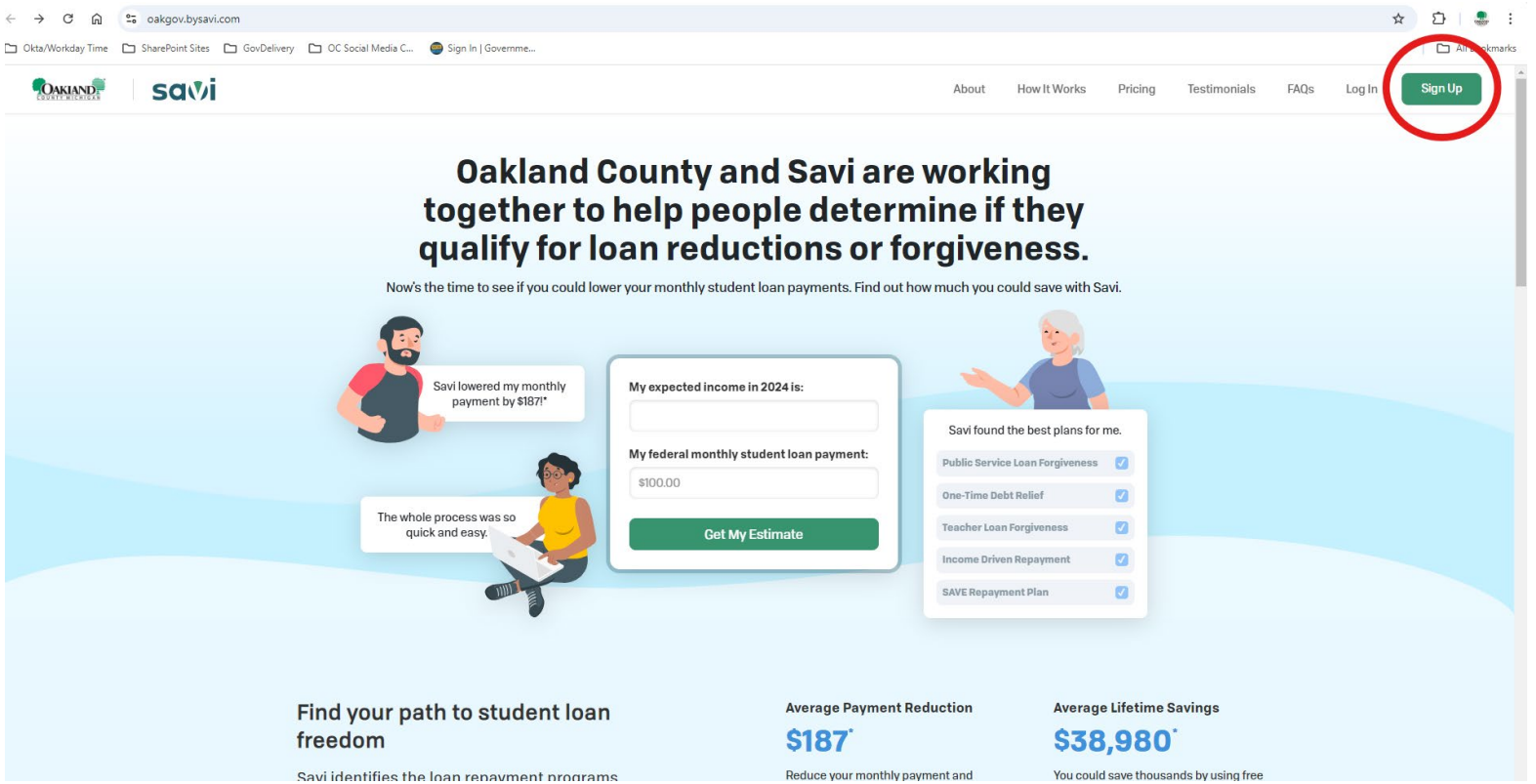
Getting Started

Before starting your application, make sure you have the following items ready:

- Your most recent tax return
- Your student loan information (Servicer, Interest Rate, Loan Type, Original Amount, Current Balance, and Disbursement Date.
- Your Social Security number

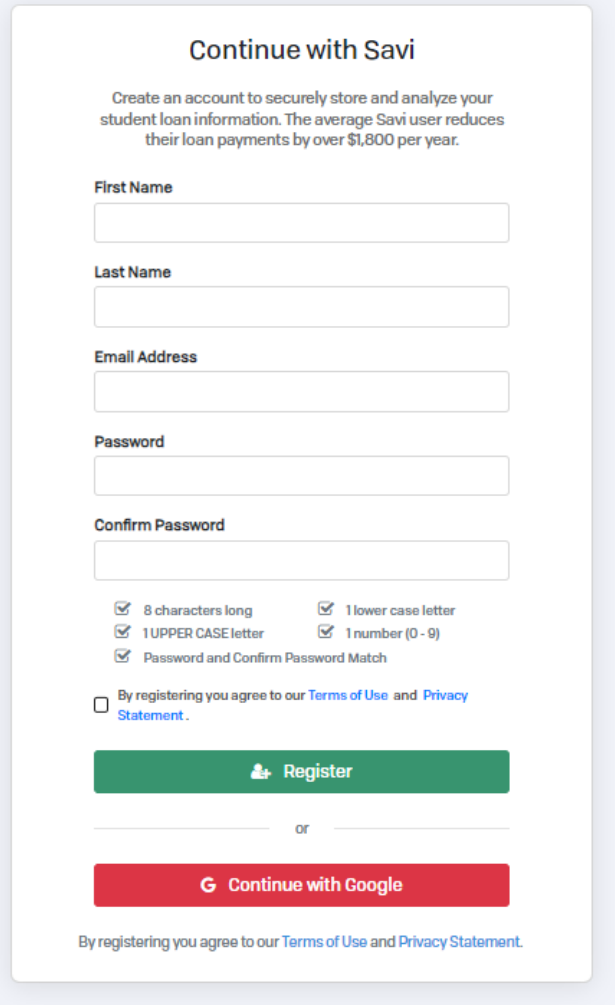
How to Apply

- Visit oakgov.bysavi.com
- Click on the Sign-Up button located in the top right corner.



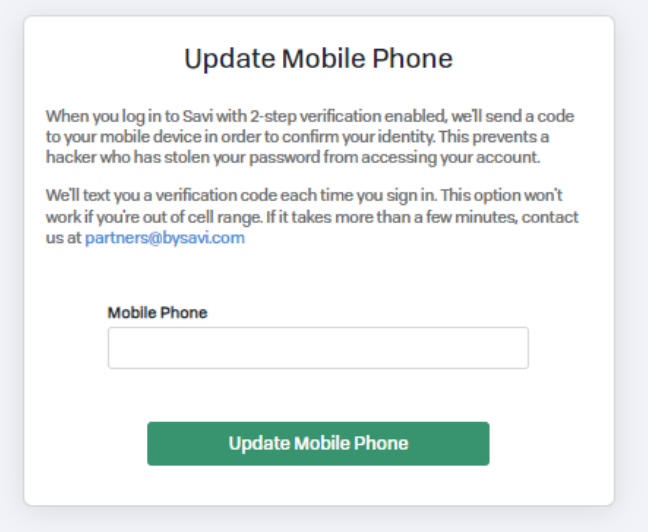
How to Apply

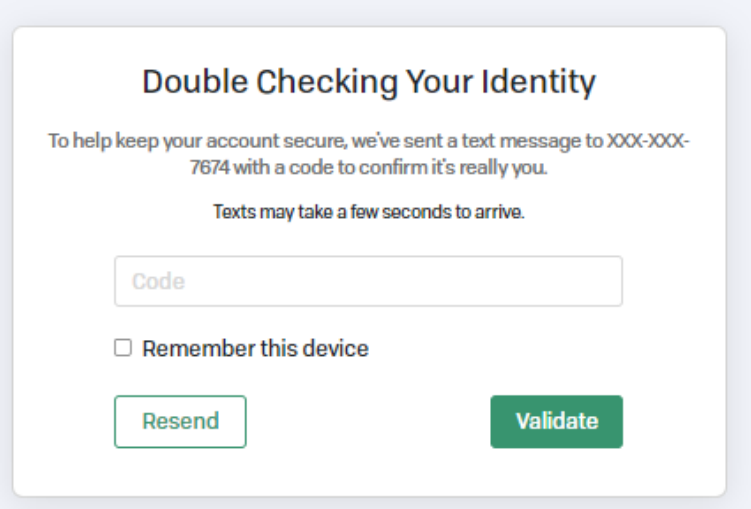
- Create an account by entering:
  - First & last name
  - Email address
  - Password
- Once all fields are completed, click *Register*



How to Apply

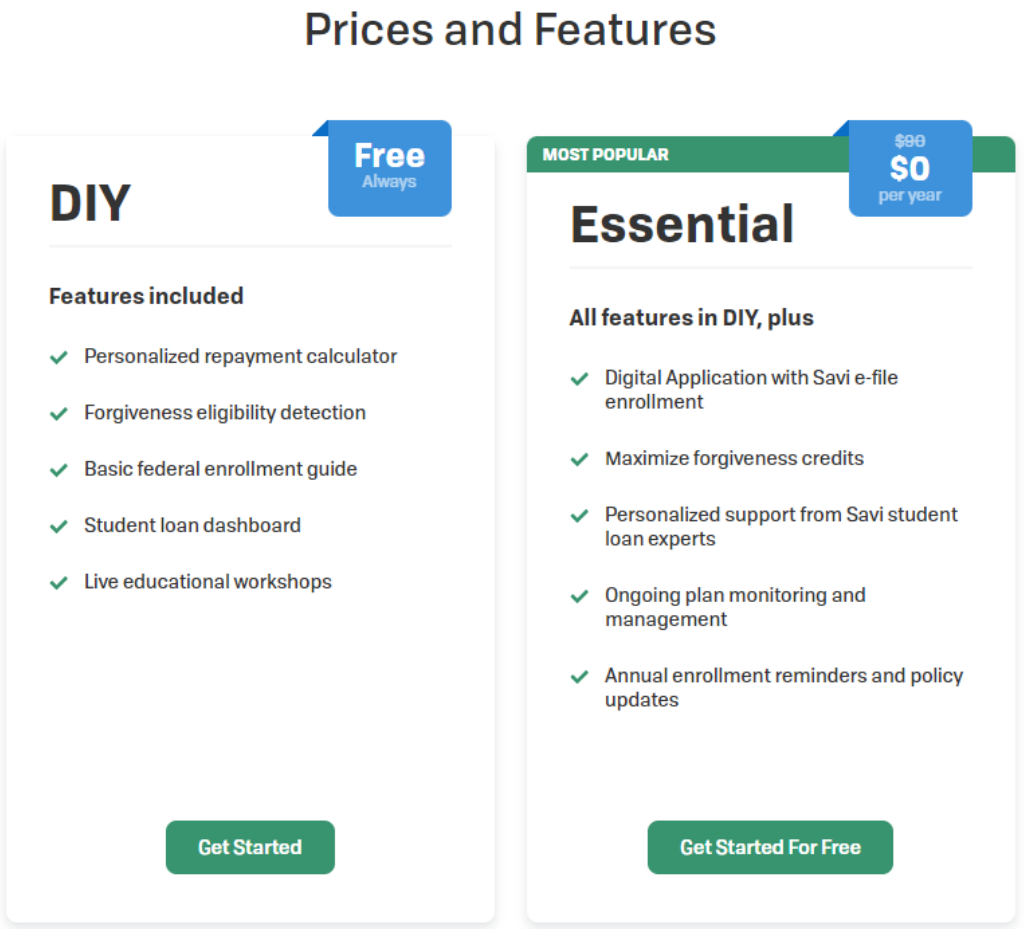
- After registering, you'll be prompted to provide your phone number to enable two-step verification.
- After clicking *Update Mobile Phone*, you'll receive a text message with a verification code and be directed to a page labeled *Double Checking Your Identity*.
- Enter the code from the text and click *Validate*.





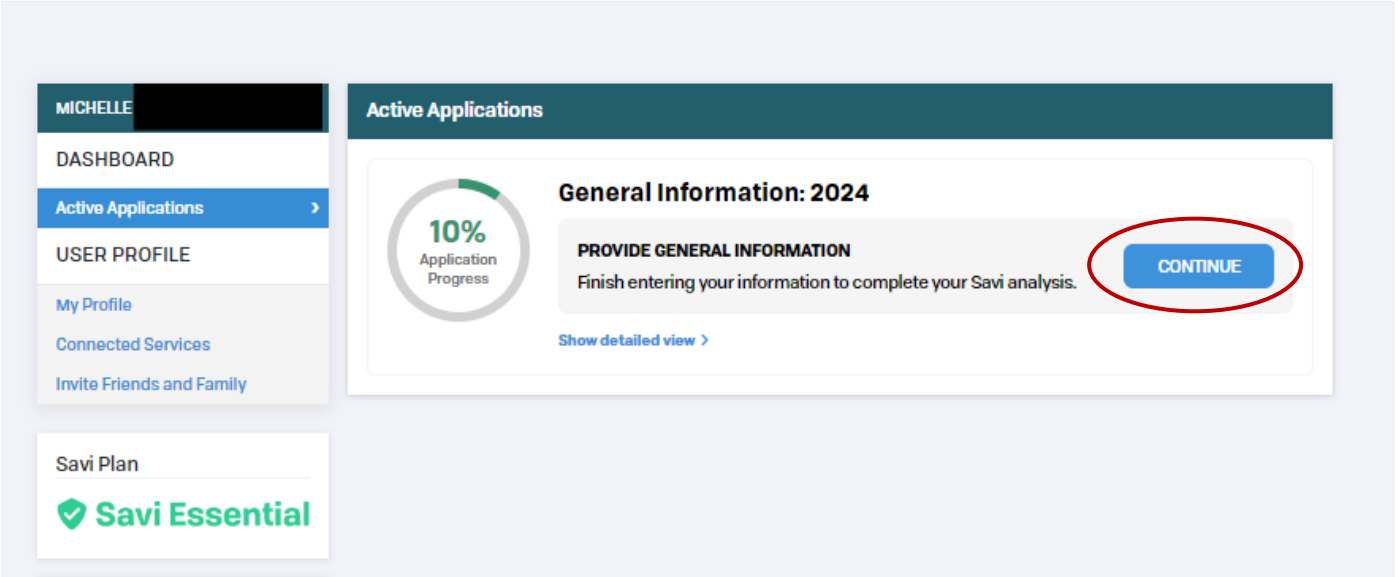
How to Apply

- Next, choose your package. Oakland County is offering the Essential plan free for up to one year after registration.
- Be sure to apply using the **Essential** plan, rather than the DIY plan, to take full advantage of this offer.



How to Apply

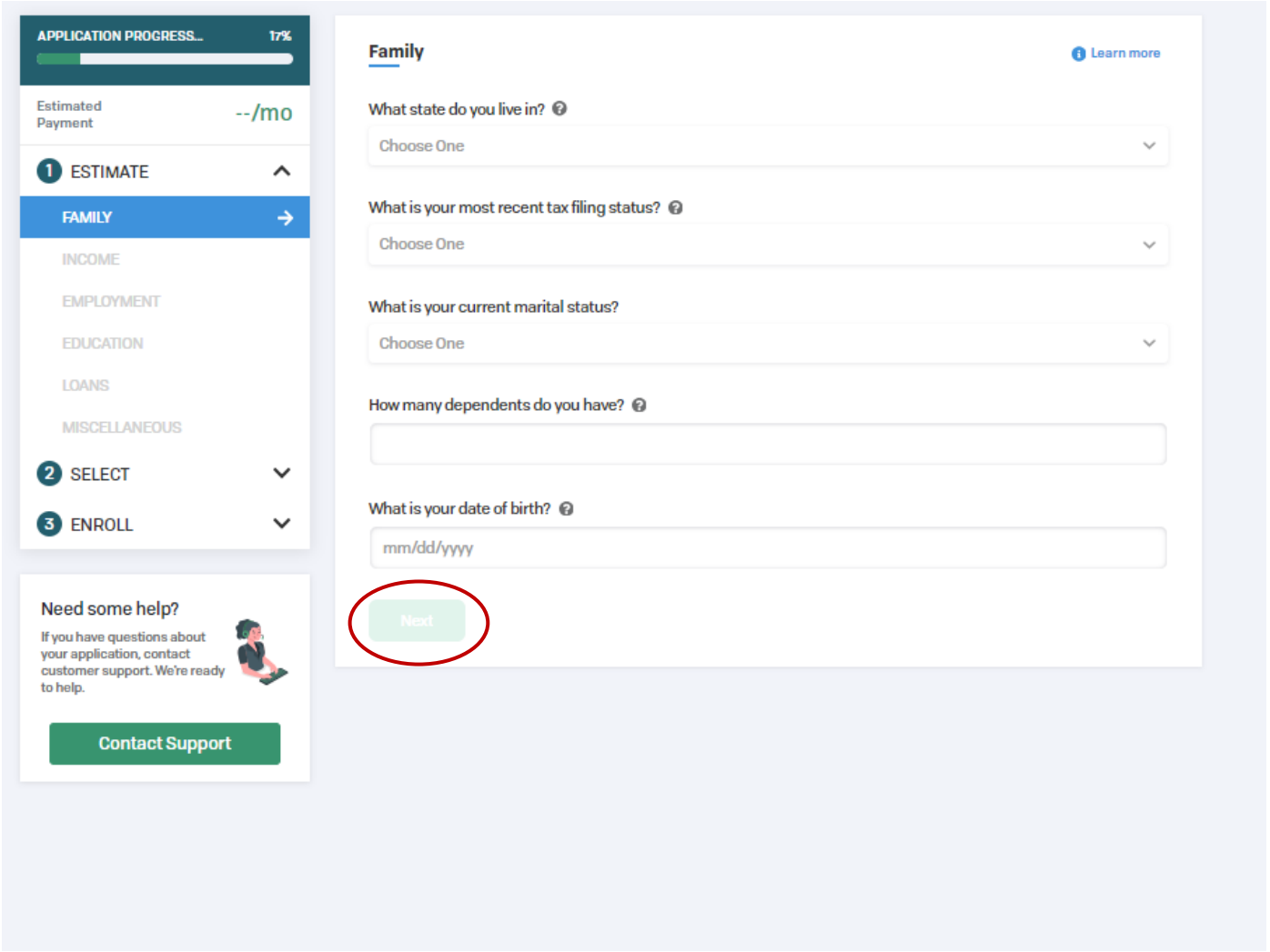
- After selecting the **Savi Essential** plan, you'll be directed to your dashboard to start the application process.
- Click *Continue* to begin your application.



How To Apply

Step 1: Estimate

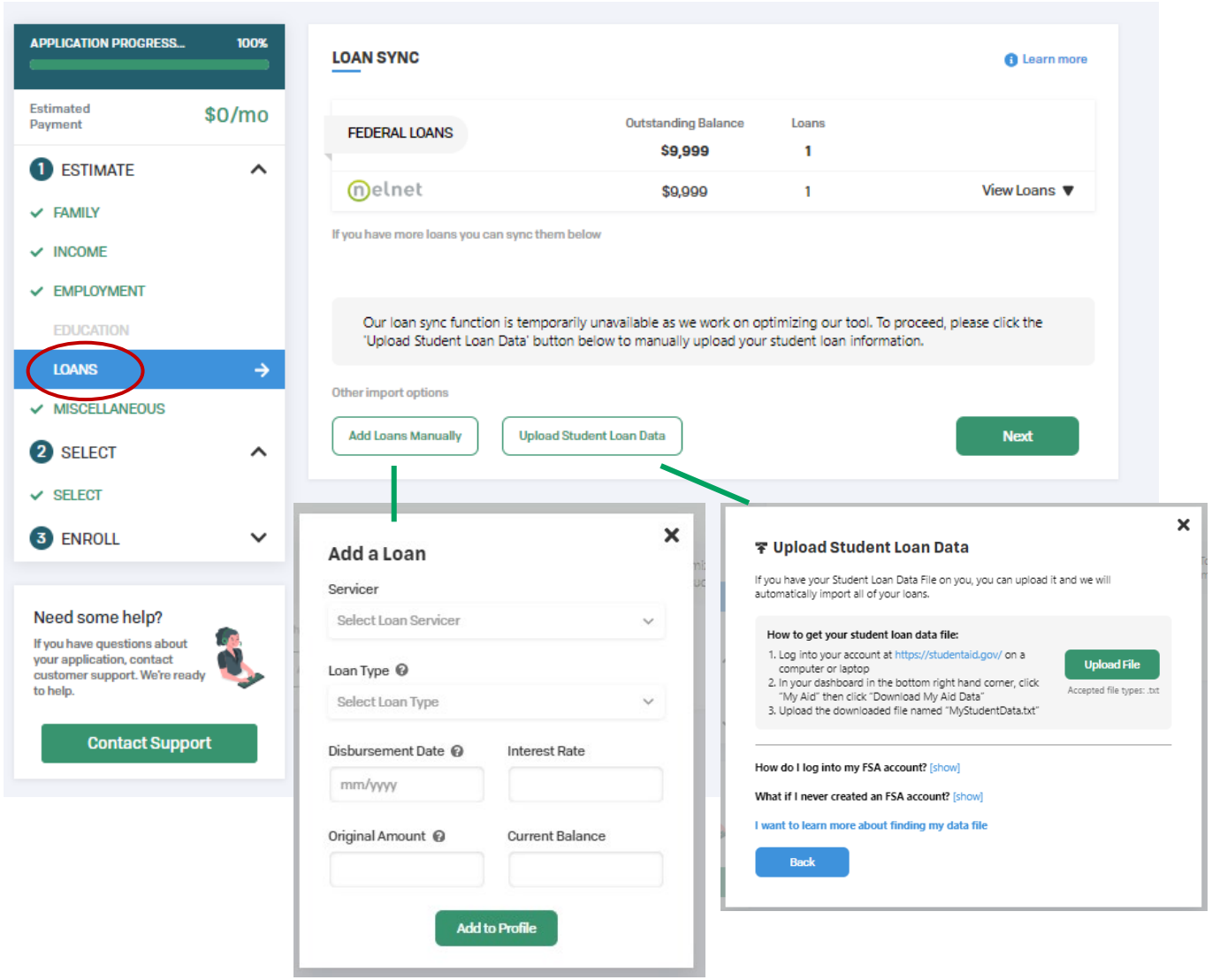
- Complete the sections for Family, Income, Employment, Education, Loans and Miscellaneous.
- Once completed, select *Next*.



How To Apply

Step 1: Estimate (Loans Section)

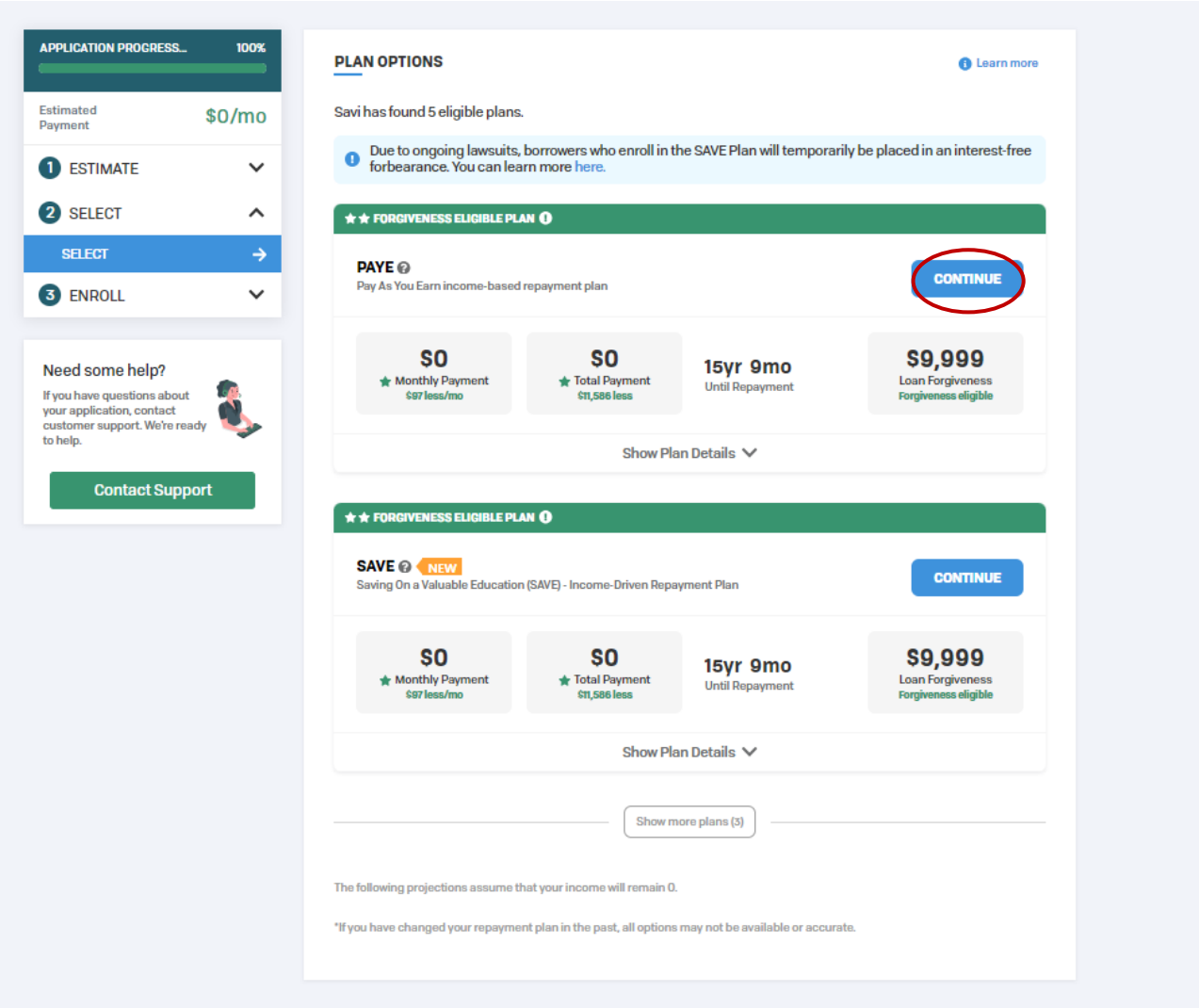
- In the loan section, you will have an option to add your loans manually or upload student loan data.
- To add manually, select Add Loans Manually. You'll be prompted to Add a Loan. Complete the fields and select Add to Profile. Please note, you'll be able to add multiple to your profile.
- To upload student loan data, select Upload Student Loan Data. You'll be given instructions to log into your studentaid.gov account, download your aid data and upload the file.



Step 2: Plan Options

Step 2: Select

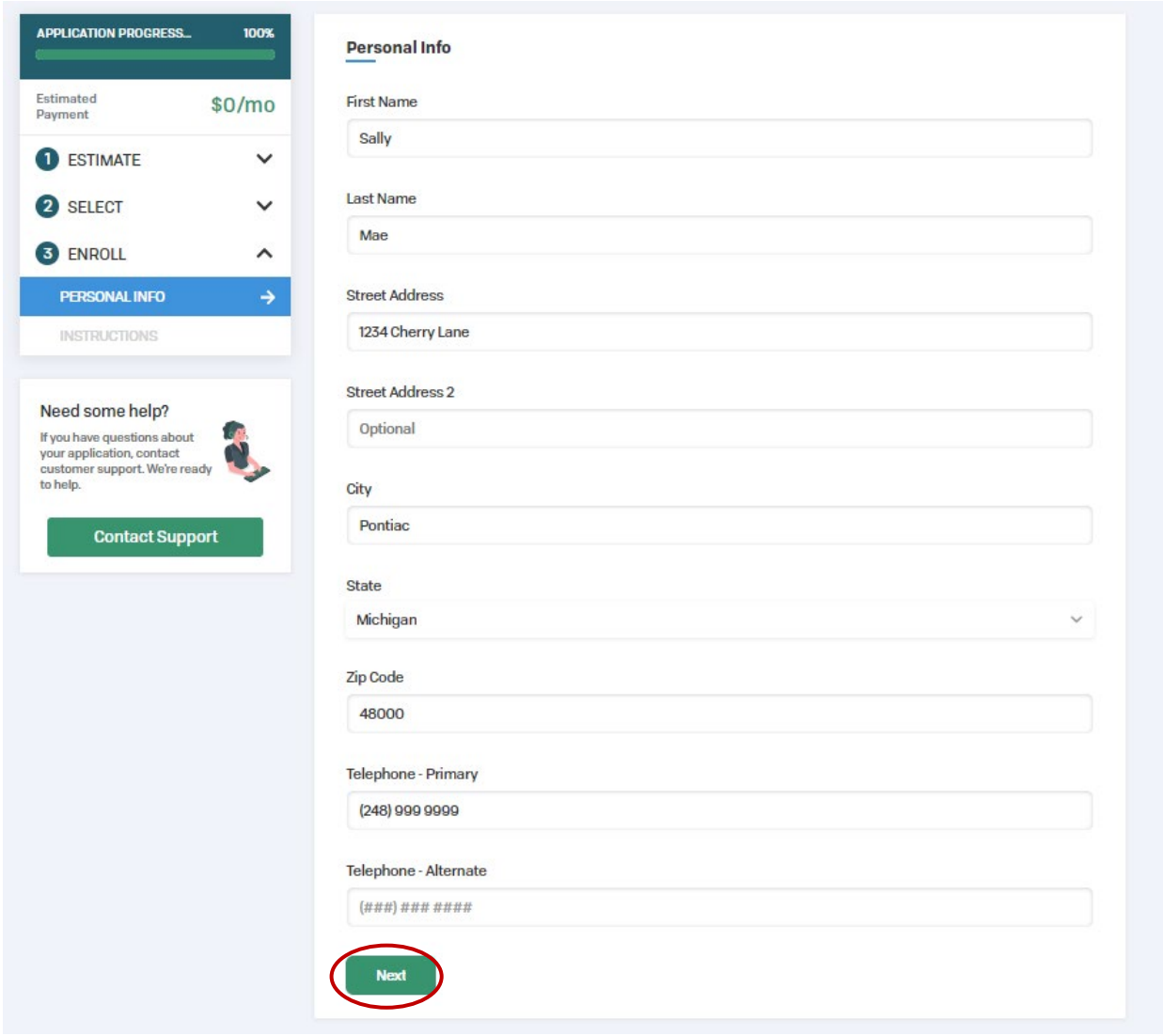
- After completing Step 1, the system will display various plan options.
- To learn more about each one, click *Show Plan Details*.
- Once you've reviewed the plans, select *Continue* on the plan you'd like to enroll in or learn more about.



How to Enroll

Step 3: Enroll

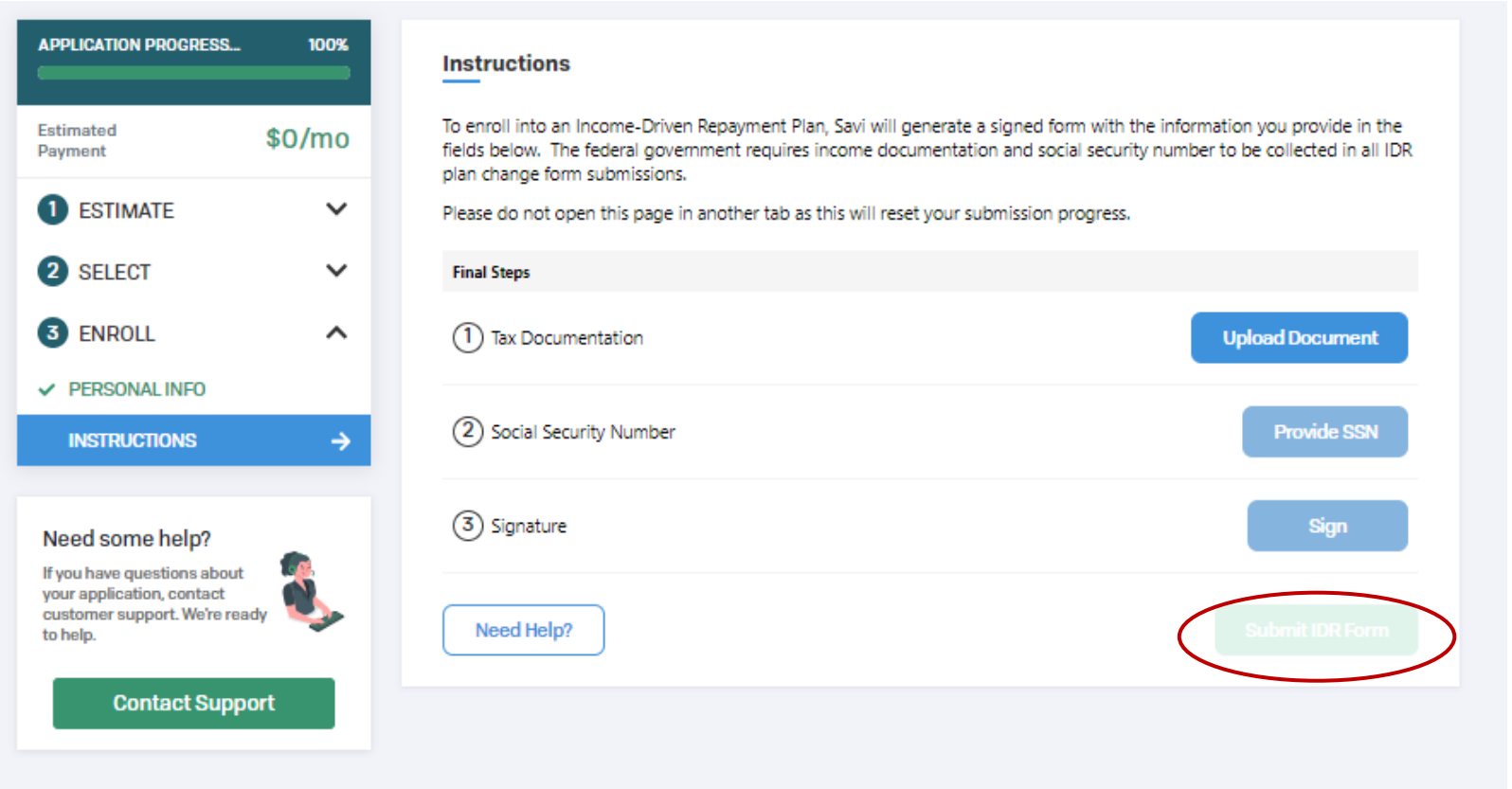
- Depending on the plan you choose in Step 2, you may be prompted to enter your personal information such as your first and last name, address, and more.
- Fill in the required field and click *Next*.



How to Enroll

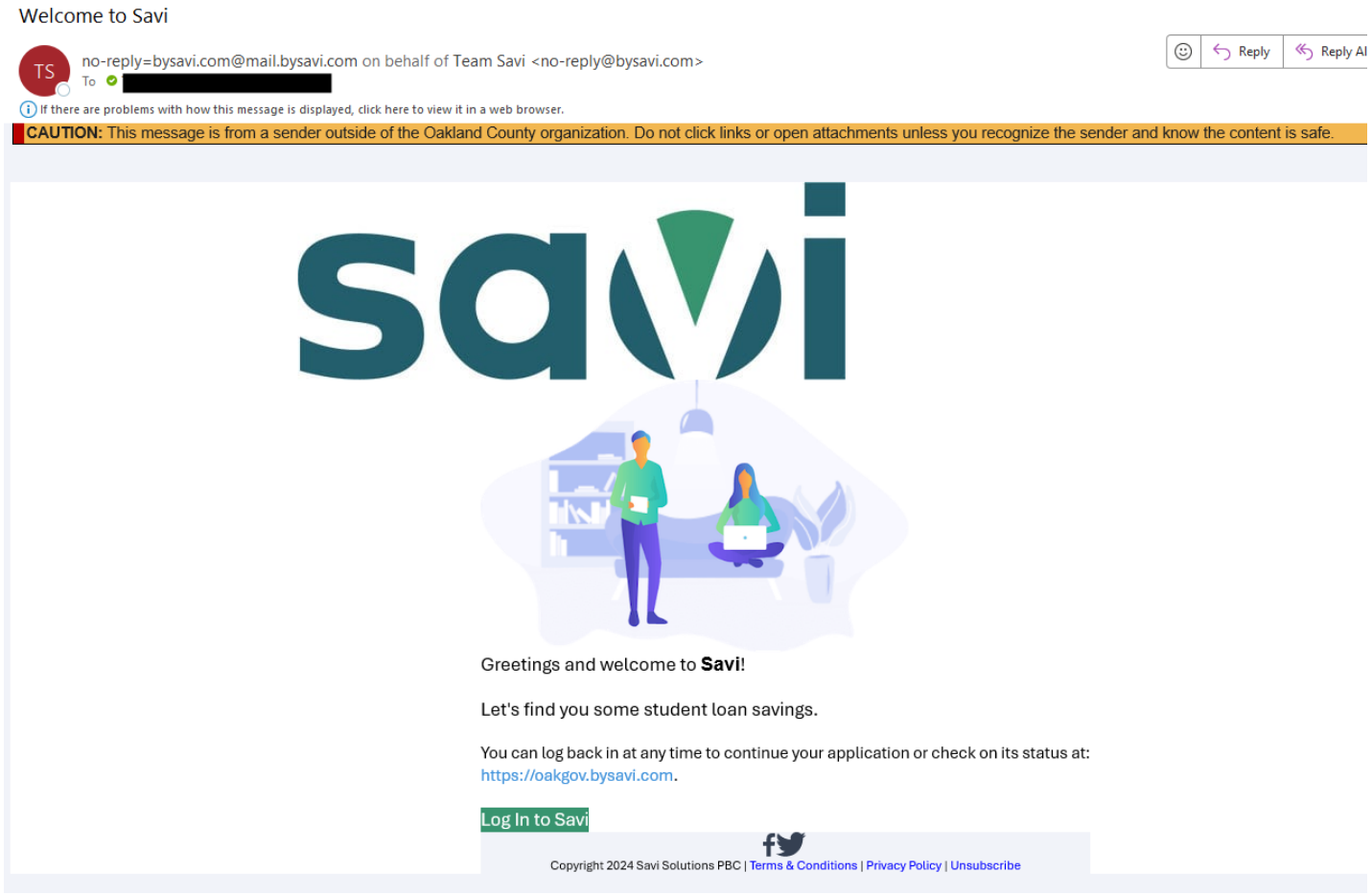
Step 3: Enroll

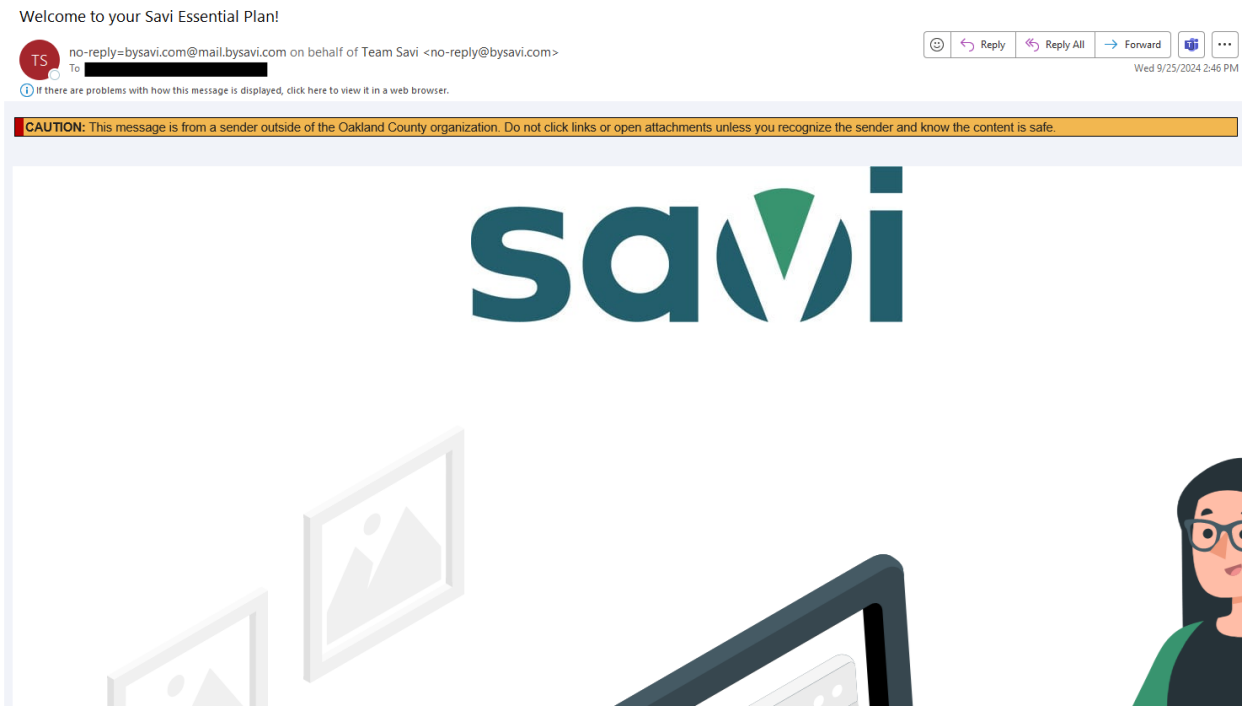
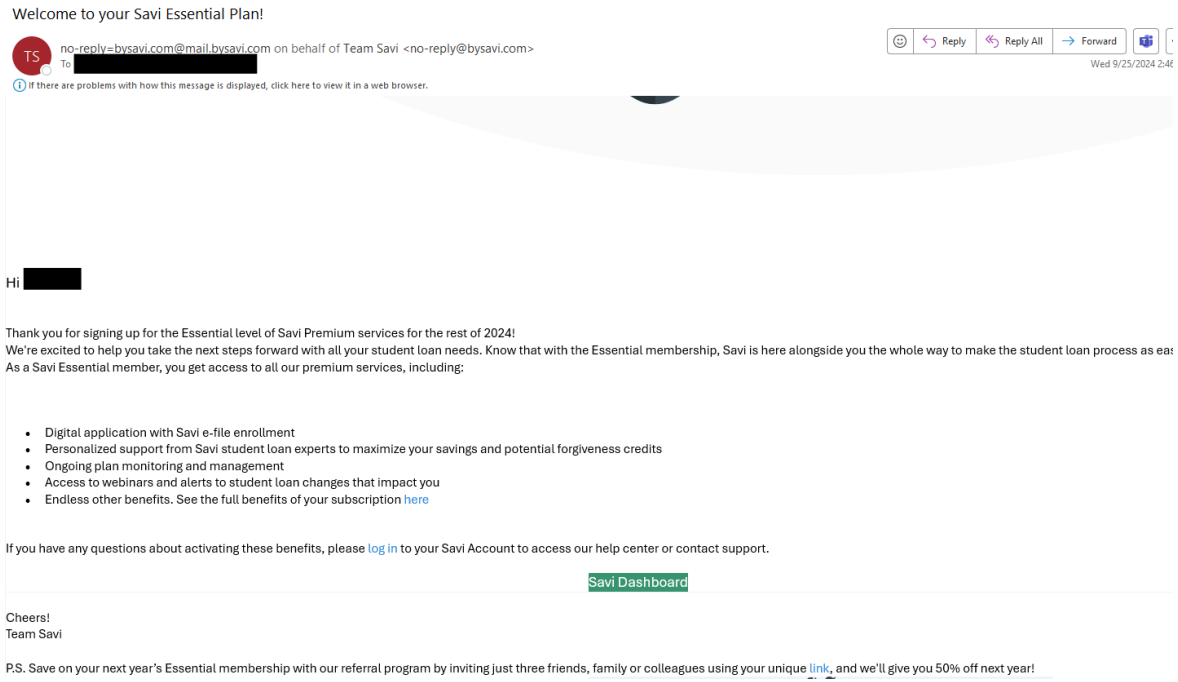
- After entering your personal info, you'll be directed to the Instructions section.
- Here, you'll need to upload your tax documentation, provide your Social Security number and sign the form.
- Once everything is complete, click *Submit Form*.



Savi Emails

- After registering, you'll receive a *Welcome to Savi* email containing a link to the website and login page.



Savi Emails

- After selecting a plan, you'll receive a *Welcome to Savi Essential Plan* email containing a link to your dashboard.