

PeopleSoft 8 SP1 Financial Aid  
Updates for CS Bundle #16  
Regulatory Release 1 2007-2008

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November 2006

## Regulatory Release 1 2007-2008

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# Regulatory Release 1 2007-2008

**Note.** This document is an update to the *PeopleSoft Financial Aid 8 SP1 PeopleBook*. It describes the Product Update Issue #613681 posted to Customer Connection in November 2006. Use this document in conjunction with your PeopleBook to maintain a complete set of documentation.

PeopleSoft Financial Aid 8 SP1 Bundle 16 includes the following essential updates for your 8 SP1 system:

- HERA and regulatory updates for Return of Title IV.
- Annual updates for ISIR Load 2007-2008.
- Updates to Institutional Need Analysis System (INAS) Institutional Methodology (IM) 2007-2008.
- Regulatory updates to PROFILE and Need Access for 2007-2008.

## HERA and Regulatory Updates for Return of Title IV

The Return to Title IV worksheet has been changed and Campus Solutions Financial Aid pages have changed accordingly. This section discusses how to:

- Manage data to calculate return of Title IV aid.
- Use return of funds worksheet.
- Track return of Title IV funds.
- Review return of funds, student summary.
- View RTIV pages in FA History.

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### Managing Data to Calculate Return of Title IV Aid

This section discusses how to manage data to calculate the return of Title IV funds.

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#### Pages Used to Manage Data to Calculate Return of Title IV Aid

Page Name	Object Name	Navigation	Usage
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Return TIV Aid	STDNT_RTRN_TIV_AID	Administer Financial Aid, Package and Disburse Aid, Use, Return of TIV Funds Worksheet HERA, Return TIV Aid	Manage the return of Title IV aid. Add a student who has withdrawn, calculate the withdrawal percentage, view various dates from different sources, view the payment or enrollment period, or view term information.
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## Managing the Return of Title IV Aid

Access the Return of TIV Aid page.

Return TIV Aid | Return of Funds Worksheet | Student/School Return | Post-Withdrawal Disbursement | Return TIV Aid Notes

Safe, Logan A ID: FAIV0046

**Institution:** PSUNV PeopleSoft University **Aid Year:** 2007

**Term:** 0565 2006 Summer **Program Type:** Credit Hour Program

[Student Status](#) [FA Term](#) Calculate All

**Summary**

**Date of Withdrawal:** 07/02/2006  Undetermined Withdrawal Date **Days Elapsed:** 3 [Last Updated](#)

**\*Overall Status:** Pending **\*Institutional Determination Dt:** 10/14/2006 **Date Form Completed:**

**Period Information**

Payment Period  Enrollment Period **\*Start Date:** 05/23/2006 **\*End Date:** 08/14/2006

**Term/Session Information**

<b>Term:</b> 0565	<b>Withdraw Date:</b> 07/02/2006	<b>60 Pct Dt:</b> 07/11/2006	<b>Term Begin Date:</b> 05/23/2006
<b>Session:</b> <input type="text"/>	<b>Withdraw Date:</b>	<b>60 Pct Dt:</b>	<b>Term End Date:</b> 08/14/2006
<b>FA Term Withdraw Date:</b> 07/02/2006			<b>FA Term Academic Career:</b> UGRD

[Return of TIV Aid page](#)

## Using Return of Funds Worksheet

This section discusses how to generate a valid calculation.

### Pages Used to Generate a Valid Calculation

Page Name	Object Name	Navigation	Usage
Return of Funds Worksheet	STDNT_RTRN_TIV_WK1	Administer Financial Aid, Package and Disburse Aid, Use, Return of TIV Funds Worksheet HERA, Return of Funds Worksheet	Generate a valid calculation by entering values in the editable fields or to recalculate the values due by the student and school.

## Generating a Valid Calculation

Access the Return of Funds Worksheet page.

<a href="#">Return TIV Aid</a>	<a href="#">Return of Funds Worksheet</a>	<a href="#">Student/School Return</a>	<a href="#">Post-Withdrawal Disbursement</a>	<a href="#">Return TIV Aid Notes</a>
Safe, Logan A		ID: FAIV0046		
Institution: PSUNV PeopleSoft University		Aid Year: 2007		
Term: 0565 2006 Summer		Program Type: Credit Hour Program		
<input type="button" value="Calculate"/>	<input type="button" value="Calculate All"/>	Date of Withdrawal: 07/02/2006	Institutional Determination Dt: 10/14/2006	
<b>Worksheet Data</b>				
E. Total TIV Aid Disb:	<input type="text" value="5474.34"/>	<a href="#">Detail</a>	N. Unearned Inst Charges:	3276.80
F. Total TIV Grant Aid:	<input type="text" value="4883.34"/>		O. Amt Due From School:	2802.86 <a href="#">Detail</a>
G. Total TIV Aid:	<input type="text" value="5474.34"/>		P. Total School Must Return:	591.00
H. Pct. TIV Aid Earned:	<input type="text" value="48.80"/>	<a href="#">Detail</a>	Q. Amt Due From Student:	0.00
I. TIV Aid Earned:	2671.48		R. Stdnt Loan Repaymnt Amt:	0.00
J. TIV Aid to Disburse:	0.00		S. Initial TIV Grant Amount:	0.00
K. TIV Aid to Return:	2802.86		T. TIV Grant Protection Amt:	0.00
L. Total Institutional Chrgs:	<input type="text" value="6400.00"/>	<a href="#">Detail</a>	U. TIV Grant Return Amt:	0.00 <a href="#">Detail</a>
M. Pct TIV Aid Unearned:	51.20		Action:	<input type="text" value="Complete School Return of Funds"/>

### Return of Funds Worksheet

#### Worksheet Data

- E. Total TIV Aid Disb:** (E. total Title IV aid disbursed) Displays the total amount of disbursed Title IV funds credited to the student's account to pay for both direct and indirect costs.
- F. Total TIV Grant Aid:** (F. total Title IV grant aid) Displays total of Title IV grant aid disbursed plus any amount that could have been disbursed for the payment period or period of enrollment.
- G. Total TIV Aid:** (G. total Title IV aid) Displays an amount that was awarded to the student. This value also includes funds that were not disbursed to the student for which he or she was eligible. It is the total disbursed Title IV aid plus the Title IV aid that could have been disbursed for the payment period or period of enrollment.
- H. Pct. TIV Aid Earned:** (H. percent Title IV aid earned) Displays the percentage of the period of enrollment or payment period that the student completed.
- I. TIV Aid Earned:** (I. Title IV aid earned) Displays the amount of earned Title IV funds disbursed or to be disbursed to the student.

<b>J. TIV Aid to Disburse:</b> (J. Title IV aid to disburse)	Displays the amount of aid the student may be eligible for as a post-withdrawal disbursement. If the student received less than the eligible amount, the system displays the amount to be disbursed.
<b>K. TIV Aid to Return:</b> (K. Title IV aid to return)	Displays the total amount of aid to be returned to the federal government by the student and/or school.
<b>L. Total Institutional Chrgs:</b> (L. total institutional charges)	Displays the value of the charges your institution set up in the Institutional Charges setup page. Institutional costs are defined as charges—the cost of attendance—a student must pay to the institution directly. Whether you use the actual or budgeted charges, the system displays the value for the institutional charges you defined in your setup.
<b>M. Pct TIV Aid Unearned:</b> (M. percent title IV aid unearned)	Displays the amount to be returned based on the percentage of the unearned aid.
<b>N. Unearned Inst Charges:</b> (N. unearned institutional charges)	Displays the amount of aid the student must return for institutional charges. For example, tuition is an institutional charge. If a student withdraws at 10% of the term, the student earns 10% of the charges for tuition. The remaining 90% is unearned.
<b>O. Amt Due From School:</b> (O. amount due from school)	Displays the amount of aid the institution must return to the Title IV program. The institution determines its share of unearned funds first.
<b>P. Total School Must Return:</b>	Displays the total loans the school must return.
<b>Q. Amt Due From Student:</b> (Q. amount due from student)	Displays the amount of aid the student must return to the Title IV program. The student returns the difference between the Title IV aid to be returned and the amount of Title IV aid due by the institution. For example, if the returned aid is 1000.00 USD and your institution returns 600.00 USD, the initial unearned calculation for the student to return is 400.00 USD.
<b>R. Stdnt Loan Repaymnt Amt:</b> (R. Student loan repayment amount)	Displays the total amount the student must repay, which consists of loan funds the student has earned, or unearned loan funds that the school is not responsible for repaying, or both.
<b>S. Initial TIV Grant Amount:</b> (S. initial Title IV grant amount)	Displays the Initial amount of Title IV grants the student must return.
<b>T. TIV Grant Protection Amt:</b> (T. Title IV grant protection amount)	Displays the amount of Title IV grant protection, which is 50% of the total of Title IV grant aid that was disbursed.
<b>U. TIV Grant Return Amt:</b> (U. Title IV grant return amount)	Displays the Title IV grant funds that the student must return.

# Tracking Return of TIV Funds

This section discusses how to track return of TIV funds.

## Pages Used to Track Return of TIV Funds

Page Name	Object Name	Navigation	Usage
Post Withdrawal Disb Tracking	TIV_PWD_TRACKING	Administer Financial Aid, Package and Disburse Aid, Use, PW Disbursement Tracking, PWD Tracking	Review post-withdrawal disbursement tracking data.

## Reviewing Post Withdrawal Disbursement Tracking Data

Access the Post Withdrawal Disb Tracking page.

### Post Withdrawal Disb Tracking

**Academic Institution:** PSUNV PeopleSoft University      **Aid Year:** 2007  
**Term:** 0565 2006 Summer      **Program Type:** Credit Hour Program  
**View:**     All     Complete     Pending

Status	Summary	Dates 1	Dates 2	Last Updated
1	FAIV0049	Knobb,Issa D	Pending	

\* Post-Withdrawal Disbursements must be made within 90 days of the date of the institution's determination that the student withdrew.

### Post Withdrawal Disb Tracking page

#### Dates 1 tab

Select the Dates 1 tab.

Status	Summary	Dates 1	Dates 2	Last Updated						
1		<table border="1"> <thead> <tr> <th>Date Disbursements Offered</th> <th>Date Disbursements Made</th> <th>Date Disbursements Declined</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table>	Date Disbursements Offered	Date Disbursements Made	Date Disbursements Declined	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Date Disbursements Offered	Date Disbursements Made	Date Disbursements Declined								
<input type="text"/>	<input type="text"/>	<input type="text"/>								

#### Dates 1 tab

**Date Disbursements Offered** Enter the date the disbursement was offered to the student.

**Date Disbursements Made** Enter the date the disbursement was made to the student.

**Date Disbursements Declined** Enter the date the disbursement was declined by the student.

**Dates 2 tab**

Select the Dates 2 tab.

Status	Summary	Dates 1	Dates 2	Last Updated
<b>Date Disbursements Credited</b>	<b>Date Disbursements Accepted</b>	<b>Date Loan Funds Needed</b>		
1 <input type="text"/>	<input type="text"/>	<input type="text"/>		

**Dates2 tab**

**Date Disbursements Credited** Enter the date the disbursement was credited to the student's account.

**Date Disbursements Accepted** Enter the date the disbursement was accepted by the student.

**Date Loan Funds Needed** Displays date of confirmation by borrower that loan funds were still needed.

## Reviewing Return of TIV Funds Student Summary

This section discusses how to review the summary of the student's return of funds.

### Page Used to Review Return of TIV Funds Student Summary

Page Name	Object Name	Navigation	Usage
Return of TIV Funds Summary	RTRN_TIV_STU_TRACK	Administer Financial Aid, Package and Disburse Aid, Use, Rtn TIV Funds Stu Sum HERA, Return of TIV Funds Summary	View summary of the student's return of TIV funds calculation.

### Reviewing Summary of Student Return of TIV Funds

Access the Return of TIV Funds Summary page.

## Return of TIV Funds Summary

**Academic Institution:** PSUNV PeopleSoft University **Aid Year:** 2007  
**Term:** 0565 2006 Summer **Program Type:** Credit Hour Program

**View:**  All  Complete  Pending

View All First 1-2 of 2 Last			
Status	Summary	Calculation Period	Worksheet Data
<b>EmpID</b>	<b>Name</b>	<b>*Status</b>	<b>Go To Worksheets</b>
1 FAIV0046	Safe, Logan A	Pending	<a href="#">Go To Worksheets</a>
2 FAIV0049	Knobb, Issa D	Pending	<a href="#">Go To Worksheets</a>

### Return of TIV Funds Summary page

#### Calculation Period tab

Select the Calculation Period tab.

Status	Summary	Calculation Period	Worksheet Data		
Period Used for Calculation	Period Start Date	Period End Date	Date Form Completed	J. TIV Aid to Disburse	Status
1 Enrollment	05/23/2006	08/14/2006			
2 Enrollment	05/23/2006	08/14/2006		1649.88	Pending

#### Calculation Period tab

##### J. TIV Aid to Disburse

Displays the amount of aid the student may be eligible for as a post-withdrawal disbursement. If the student received less than his eligibility, the system displays the amount to be disbursed.

#### Worksheet Data tab

Select the Worksheet Data tab.

Status	Summary	Calculation Period	Worksheet Data
O. Amt Due From School	Status	Q. Amt Due From Student	Status
1	2802.86 Pending		
2			

#### Worksheet Data tab

##### O. Amt Due from School (O. amount due from school)

Displays the amount of aid the institution must return to the Title IV programs. The institution allocates its share of unearned funds first.

##### Status

Displays the school's return status of the calculation for the amount due from the school as *Pending* or *Complete*.

**Q. Amt Due from Student**  
(Q. amount due from student)

Displays the amount of aid the student must return to the Title IV programs. The student returns the difference between the Title IV aid to be returned and the amount of Title IV aid due by the institution. For example, if the returned aid is 1000.00 USD and your institution returns 600.00 USD, the initial unearned calculation for the student to return is 400.00 USD.

**Status**

Displays the student's return status of the calculation for the amount due from the student as *Pending* or *Complete*.

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## RTIV Pages Moved to FA History

RTIV records prior to the implementation of HERA 2006 are stored in Financial Aid History.

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### Page Used to Review RTIV Pages in FA History

Page Name	Object Name	Navigation	Usage
Historical Application Information	FA_APP_HIST_TRNSFR	Administer Financial Aid, Financial Aid History, App Info, Historical Application Info	View RTIV Worksheet, RTIV PW Disbursement, RTIV Return Summary, or RTIV Fund Return for records calculated prior to the implementation of HERA 2006.

## Annual Updates for ISIR Load 2007-2008

This section includes updates and changes to ISIR processing to support regulatory release changes for the 2007-2008 aid year cycle. It documents changes to ISIR pages and discusses:

- New pages and components for 2007-2008.
- Changes to ISIR data corrections for 2007-2008.
- Changes to the ISIR processes.

**Note.** These updates are based on the August 2006 draft 2007-2008 ISIR file specifications. Additional updates may be necessary when the *2007-2008 EDE Technical Reference Guide* is published and reviewed. Updates are normally delivered in the following bundle.

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## New Pages and Components

This section discusses the following pages and components that are new with this release.

## Pages New for ISIR Load 2007-2008

Page Name	Object Name	Navigation	Usage
ISIR Suspense Management 07/08	ISIR_SUSP_CNTRPIA8	<ul style="list-style-type: none"> <li>Administer Financial Aid, Exchange Financial Aid Data, Use, ISIR Susp Management 07/08</li> <li>Administer Financial Aid, Manage Need Analysis, Use2, ISIR Suspense Management 07/08</li> </ul>	Review all ISIR records processed by the FA Inbound processes.
CPS Generated Fields	ISIR_CPS_GEN_INF6	Click the CPS Generated Data link on the ISIR Suspense Management 07/08 page.	View information generated by CPS for this ISIR.
ISIR Inbound Load Summary	ISIR_08_IN_SRCH	Administer Financial Aid, Exchange Financial Aid Data, Inquire, ISIR Inbound Summary 07/08	View processing information for a batch of ISIRs.
ISIR Data 1	ISIR_08_IN_1SEC	Click the ISIR Data 1 link on the ISIR Inbound Load Summary page: ISIR Inbound File Data tab.	View the FAFSA questions reported on the ISIR.
ISIR Data 2	ISIR_08_IN_2SEC	Click the ISIR Data 2 link on the ISIR Inbound Load Summary page: ISIR Inbound File Data tab.	View Federal database match and FM computational information reported on the ISIR.
NSLDS Data 1	ISIR_08_IN_3SEC	Click the NSLDS Data 1 link on the ISIR Inbound Load Summary page: ISIR Inbound File Data tab.	View NSLDS history information reported on the ISIR.
NSLDS Data 2	ISIR_03_IN_4ASEC	Click the NSLDS Data 2 link on the ISIR Inbound Load Summary page: ISIR Inbound File Data tab.	View NSLDS history information reported on the ISIR.
Header and Trailer Data	ISIR_08_IN_HSEC	Click the Header and Trailer Data link on the ISIR Inbound Load Summary page.	View header and trailer information for the ISIR record.

NSLDS ACG	NSLDS_ACG	Administer Financial Aid, Process Loans, Inquire 1, NSLDS Inquiry, NSLDS ACG	View Academic Competitiveness Grant award history for the student.
NSLDS NSG	NSLDS_NSNG	Administer Financial Aid, Process Loans, Inquire 1, NSLDS Inquiry, NSLDS NSG	View National Smart Grant award history for the student.
NSLDS Activity	NSLDS_ERR_CD_SEC	Administer Financial Aid, Process Loans, Inquire 1, NSLDS Inquiry. Click the Detail link on any page in the component.	View NSLDS activity and change flags.
NSLDS Overpayment Information	NSLDS_CONTACT_SEC	Administer Financial Aid, Process Loans, Inquire 1, NSLDS Inquiry. Click the Overpayment Information link on the NSLDS Information page.	View NSLDS grant and Perkins loan overpayment status.

## ISIR Suspense Management 07/08

Access the ISIR Suspense Management 07/08 page.

### ISIR Suspense Management 07/08

EC Queue Instance/Seq. No: 5 1 Transaction Receipt Date: 08/27/2006 Load Status: Loaded

ISIR Manual Load Parameters			
EmpID:	<input type="text" value="0042046"/>	<input checked="" type="checkbox"/> ID Lock	<input type="radio"/> Add ISIR <input type="radio"/> Recycle <input checked="" type="radio"/> Skip/Done <input type="button" value="Process ISIR"/>
*Institution:	<input type="text" value="PSUNV"/>	School Code:	<input type="text" value="001315"/>
Process Dt (Effdt):	<input type="text" value="09/03/2006"/>	Alternate Effective Date:	<input type="text"/>
Student Information			
Last Name:	BALSTARUB	First Name:	TIMOTHY      MI: W
SAR ID:	466-91-0253 LU 12	SSN:	866-91-8899      Date of Birth: 08/25/1988
Dependency Status:	D Dependent w/Primary EFC	Primary EFC:	00000
Federal PELL Eligibility:	Yes	Student's Admit Lvl:	0 - Student Not Found
ED Verification Status:	Required to be Performed	Verification Select/Tracking:	Y 0023
<a href="#">ISIR Load Information</a> <a href="#">CPS Generated Data</a> <a href="#">ISIR Reject Reasons</a> <a href="#">Search Match</a> <a href="#">Corrected Fields</a>			

ISIR Suspense Management 07/08 page

## CPS Generated Fields

Access the CPS Generated Fields page.

### CPS Generated Fields

CPS Generated Information		
<b>Transaction Data Source/Type:</b>	1A	Electronic Application
<b>Application Data Source/Type:</b>	4A	Paper Application
<b>Address Only Change Flag:</b>	4	More than one address
<b>CPS Pushed ISIR Flag:</b>		
<b>NSLDS Post-Screening Code 1:</b>	04	Overpayment resolved
<b>NSLDS Post-Screening Code 2:</b>		
<b>NSLDS Post-Screening Code 3:</b>		
<b>Processed Record Type:</b>		
<b>History Correction Applied:</b>	01	
<b>Source of Correction:</b>	A	Applicant
<b>Electronic Institution Ind:</b>	3	001999
<b>Reprocess Code:</b>		
<b>EFC Change Flag:</b>	2	EFC Decrease
<b>ISIR SAR C Flag Changed:</b>	Y	SAR C Flag Has Changed
<b>Rejected Status Change Flag:</b>		
<b>Verification Select Chng Flag:</b>		
<b>ISIR Elec Trans Indicator:</b>	3	Non-School Generated, Request

[CPS Generated Fields page](#)

## ISIR Inbound Load Summary

Access the ISIR Inbound Load Summary page.

### ISIR Inbound Load Summary

**EC Transaction ID:** CPS\_ISIR\_2008      **EC Queue Instance:** 5  
**Batch Number:** PS2006-09-08-09.13.04      **ISIR Load Date:Time:** 09/08/06 9:13AM      [Header and Trailer Data](#)

Inbound ISIR Batch Detail							View All	First	1-2 of 2	Last	
ISIR Batch Detail Records							Student Information	Load Information	ISIR Inbound File Data		
Original SSN	Name CD	Trans Nbr	Load Status	EmplID	Suspend Reason	Admit Level					
1 466-91-0253	LU	12	Loaded	0042046		0					
2 486-91-0254	LO	12	Suspended	<a href="#">Suspense</a>	1 - Stu Not Found (Max Match)	0					

[ISIR Inbound Load Summary page](#)

## ISIR Data 1

Access the ISIR Data 1 page.

**ISIR Data 1**

**Sequence Number:** 1    **Load Status:** L    **EmplID:** 0042046  
**Transaction Number:** 12    **Original SSN:** 466-91-0253    **Name Code:** LU

Inbound ISIR (1A)			
<b>Batch Year:</b>	8	<b>Date of Birth:</b>	08/25/1988
<b>Last Name-SSN Change Flag:</b>	N	<b>Perm Phone Number:</b>	6065639030
<b>Original SSN:</b>	466-91-0253	<b>Driver's License #:</b>	NONE
<b>Name Code:</b>	LU	<b>Driver's License State Code:</b>	
<b>Transaction Number:</b>	12	<b>Citizenship Status:</b>	2
<b>Social Security #:</b>	866-91-8899	<b>Alien Registration Number:</b>	455981231
<b>Student's Last Name:</b>	BALSTARUB	<b>Marital Status:</b>	1
<b>Student's First Name:</b>	TIMOTHY	<b>Marital Status Date:</b>	
<b>Student Middle Initial:</b>	W	<b>Enrollment Status:</b>	1
<b>Permanent Mailing Address:</b>	613 MISSION BEACH DR		
<b>City:</b>	SAN DIEGO		
<b>State:</b>	CA		
<b>Zip:</b>	20816		

Inbound ISIR (1B)			
<b>Father's Highest Grade Level:</b>	4	<b>Drug Offense Conviction:</b>	1
<b>Mother's Highest Grade Level:</b>	2	<b>Tax Form-Student:</b>	3
<b>State of Legal Res:</b>	CA	<b>Student Type of 2006 Tax Form:</b>	
<b>Legal Res Before 01-01-2002:</b>	2	<b>Eligible For 1040A or EZ:</b>	2
<b>Legal Res Date:</b>	08	<b>Stu Agi:</b>	
<b>Are You Male:</b>	1	<b>Student Income Tax Paid:</b>	
<b>Permit Sel Serv to Enroll:</b>	1	<b>Number of Exemptions:</b>	
<b>Degree/Certificate:</b>		<b>Student Income From Work:</b>	00000{
<b>Grade Level in College:</b>	4	<b>Spouse Income From Work:</b>	
<b>HS Diploma or GED Received:</b>	1	<b>Student's Total from WK A:</b>	00000
<b>Rcvd 1st Bach Deg By 7-01-2007:</b>	2	<b>Student's Total from WK B:</b>	00000

<b>Work Study or Student Loans:</b>	4	<b>Student's Total from WK C:</b>	00000
<b>Receives SSI Income:</b>	1	<b>Student's Investment Net Worth:</b>	000000
<b>Receives Food Stamps:</b>	2	<b>TANF Recipients:</b>	2
<b>Participates in Lunch Program:</b>	1	<b>WIC Benefits Recipient:</b>	1
<b>Inbound ISIR (1C)</b>			
<b>Student's Business Net Worth:</b>	000000	<b>Father's SSN:</b>	466-78-8253
<b>Cash and Savings:</b>	000000	<b>Father's Last Name:</b>	LIU
<b>VA Ben Nbr of Months:</b>	03	<b>Father's First Name Initial:</b>	
<b>Monthly Veterans Benefits:</b>	0100	<b>Father's Date of Birth:</b>	08/25/1980
<b>Born Before 01-01-1984:</b>	2	<b>Mother's SSN:</b>	466-77-7253
<b>Working on Masters/Doctorate:</b>	2	<b>Mother's Last Name:</b>	LIU
<b>Student Married:</b>	2	<b>Mother's First Name Initial:</b>	
<b>Have Children you support:</b>	2	<b>Mother's Date of Birth:</b>	08/25/1980
<b>Dependents Other Than Spouse:</b>	2	<b>Par Family Members:</b>	03
<b>Orphan or Ward of the Court:</b>	2	<b>Parents' Number in College:</b>	1
<b>Veteran:</b>	2	<b>State of Legal Res:</b>	KY
<b>Active Duty in U.S. Military:</b>	2	<b>Legal Res Before 01-01-2002:</b>	1
<b>Marital Status-Parents:</b>	2	<b>Parent School Lunch Program:</b>	2
<b>Parent Receives SSI Income:</b>	2	<b>Parent TANF Recipient:</b>	1
<b>Parent Receives Food Stamps:</b>	1	<b>Parent WIC Benefits:</b>	1
<b>Parent's E-mail Address:</b>			

ISIR Data 1 page (2 of 3)

Inbound ISIR (1D)			
<b>Legal Res Date:</b>	12	<b>Cash and Savings:</b>	
<b>Tax Form Filed? -Parents:</b>	3	<b>Stu Family Members:</b>	04
<b>Parent's Type of 2006 Tax Form:</b>	2	<b>Student's Number in College:</b>	1
<b>Eligible For 1040A or EZ:</b>	3	<b>Student's 1st Choice School:</b>	001315
<b>Par AGI:</b>		<b>Student's Housing Code Col 1:</b>	
<b>Income Tax Paid:</b>		<b>Student's 2nd Choice School:</b>	001328
<b>Number of Exemptions:</b>		<b>Student's Housing Code Col 2:</b>	
<b>Father Income From Work:</b>		<b>Student's 3rd Choice School:</b>	001999
<b>Mother Income From Work:</b>		<b>Student's Housing Code Col 3:</b>	
<b>Total from WK A:</b>		<b>Student's 4th Choice School:</b>	001963
<b>Total from WK B:</b>		<b>Student's Housing Code Col 4:</b>	
<b>Total from WK C:</b>	00000	<b>Student's 5th Choice School:</b>	001976
<b>Investment Net Worth:</b>	000000	<b>Student's Housing Code Col 5:</b>	
<b>Business Net Worth:</b>	000000	<b>Student's 6th Choice School:</b>	001968
		<b>Student's Housing Code Col 6:</b>	

Inbound ISIR (1E)	
<b>FAFSA Signed by:</b>	A
<b>Date Application Completed:</b>	08/26/2006
<b>Preparers SSN:</b>	571889123
<b>Preparers EIN:</b>	06764
<b>Preparers Signature:</b>	1
<b>Transaction Receipt Date:</b>	08/27/2006
<b>Dependency Override:</b>	
<b>FAA Federal School Code:</b>	
<b>FAA Adjustment:</b>	

[ISIR Data 1 page \(3 of 3\)](#)

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## ISIR Data 2

Access the ISIR Data 2 page.

**ISIR Data 2**

**Sequence Number:** 1    **Load Status:** L    **EmplID:** 0042046  
**Transaction Number:** 12    **Original SSN:** 466-91-0253    **Name Code:** LU

Inbound ISIR (2A)			
<b>Student's Email Address:</b>	SANDROCK@USC.EDU		
<b>ETI Destination Code:</b>	TG99999	<b>Dependency Status:</b>	D
<b>Rej Ovr A:</b>		<b>Application Receipt Date:</b>	08/26/2006
<b>Rej Ovr B:</b>		<b>Processed Record Type:</b>	
<b>Rej Ovr C:</b>		<b>History Correction Applied:</b>	01
<b>Rej Ovr G:</b>		<b>Address Only Change Flag:</b>	4
<b>Rej Ovr N:</b>		<b>Source of Correction:</b>	A
<b>Rej Ovr W:</b>		<b>Parent's Calc 2006 Tax Stat:</b>	
<b>Reject Override 3:</b>		<b>Student's Calc 2006 Tax Stat:</b>	4
<b>Reject Override 12:</b>		<b>CPS Pushed ISIR Flag:</b>	
<b>Reject Override J:</b>		<b>ISIR SAR C Flag Changed:</b>	Y
<b>Reject Override K:</b>		<b>Graduate Flag:</b>	
<b>Assumption Override 1:</b>		<b>Rejected Status Change Flag:</b>	
<b>Assumption Override 2:</b>		<b>Verification Select Chng Flag:</b>	
<b>Assumption Override 3:</b>			
<b>Assumption Override 4:</b>			
<b>Assumption Override 5:</b>			
<b>Assumption Override 6:</b>			
Inbound ISIR (2B)			
<b>Auto Zero EFC:</b>	Y	<b>NSLDS Post-Screening Code 2:</b>	
<b>EFC Change Flag:</b>	2	<b>NSLDS Post-Screening Code 3:</b>	
<b>SAR C Flag:</b>	Y	<b>Veteran Status Match Flag:</b>	4
<b>Simplified Need Test:</b>	Y	<b>Verification Tracking Flag:</b>	0023
<b>Reject Reason Codes:</b>		<b>Verification Selection Flag:</b>	Y
<b>Selective Service Match:</b>	Y	<b>Father's SSN Match:</b>	4
<b>Selective Service Registration:</b>	Y	<b>Mother's SSN Match:</b>	4
<b>DHS Match:</b>	N	<b>Appl Data Source/Type Code:</b>	4A

ISIR Data 2 page (1 of 4)

<b>DHS Verification Number:</b>		<b>Trans Data Source/Type Code:</b>	1A
<b>Secondary DHS Match Flag:</b>	X	<b>Transaction Process Date:</b>	09/03/2006
<b>SSN Match:</b>	2	<b>Compute Number:</b>	009
<b>SSA Citizenship Indicator:</b>	A		
<b>NSLDS Match:</b>	1		
<b>NSLDS Post-Screening Code:</b>	04		
<b>Inbound ISIR (2C)</b>			
<b>Primary EFC:</b>	00000	<b>Primary Alternate Month 1:</b>	
<b>Secondary EFC:</b>		<b>Primary Alternate Month 2:</b>	
<b>Primary Formula Type:</b>	6	<b>Primary Alternate Month 3:</b>	
<b>Secondary Formula Type:</b>	2	<b>Primary Alternate Month 4:</b>	
		<b>Primary Alternate Month 5:</b>	
		<b>Primary Alternate Month 6:</b>	
		<b>Primary Alternate Month 7:</b>	
		<b>Primary Alternate Month 8:</b>	
		<b>Primary Alternate Month 10:</b>	
		<b>Primary Alternate Month 11:</b>	
		<b>Primary Alternate Month 12:</b>	
<b>Inbound ISIR (2D)</b>			
<b>Secondary Alternate Month 1:</b>	01188	<b>State Tax Allowance:</b>	
<b>Secondary Alternate Month 2:</b>	02365	<b>Employment Allowance:</b>	
<b>Secondary Alternate Month 3:</b>	03542	<b>Inc Protection Allowance:</b>	
<b>Secondary Alternate Month 4:</b>	04719	<b>Available Income:</b>	
<b>Secondary Alternate Month 5:</b>	05896	<b>Contribution Available Income:</b>	
<b>Secondary Alternate Month 6:</b>	07073	<b>Discretionary Net Worth:</b>	
<b>Secondary Alternate Month 7:</b>	08250	<b>NW: EFC Net Worth:</b>	
<b>Secondary Alternate Month 8:</b>	09427	<b>Asset Protection Allowance:</b>	
<b>Secondary Alternate Month 10:</b>	10741	<b>Parent Asset Contribution:</b>	
<b>Secondary Alternate Month 11:</b>	10874	<b>Adj Available Income:</b>	
<b>Secondary Alternate Month 12:</b>	11007	<b>Total Student Contribution:</b>	
<b>Total Income:</b>	000000{	<b>Total Parent Contribution:</b>	

ISIR Data 2 page (2 of 4)

Allowance VS Total Income:		Parent Contribution:	
<b>Inbound ISIR (2E)</b>			
Student's Total Income:		Secondary DNW:	
Student's Allowance vs TI:		Secondary Net Worth:	
Student Income Contribution:		Secondary Asset Protect Allow:	
Student's Disc Net Worth:		Secondary Par Cont From Assets:	
Student Asset Contribution:		Secondary Adj Avail Inc:	
FISAP Total Income:	000000{	Secondary Total Stu Contrib:	
Secondary total Income:		Secondary Total Par Contrib:	
Secondary Allowance vs Income:		Secondary Par Contrib:	
Secondary State Tax Allowance:		Secondary Stu Total Income:	
Secondary Employment Allowance:		Secondary Stu All vs TI:	
Secondary Inc Prot Allowance:		Secondary Stu Ind Dep IC:	
Secondary Available Income:		Secondary Stu DNW:	
Secondary Contrib From AI:		Secondary Stu Cont from Assets:	
<b>Inbound ISIR (2F)</b>			
Secondary FISAP Total Inc:		Assumed Par Nbr in Fam:	
Assumed Citizenship:		Assumed Par Nbr in Coll:	
Assumed Student's Mar Status:		Assumed Par AGI:	
Assumed AGI:		Assumed Parents' Tax Pd:	
Assumed Tax Paid:		Assumed Father Income:	
Assumed Income From Work:		Assumed Mother Income:	
Assumed Income From Work - SPS:		Assumed Parents' WK C:	
Assumed Stu Inc from WK C:		Federal PELL Eligibility:	Y
Assumed DOB Prior:		Reprocess Code:	
Assumed Student is Married:		Duplicate SSN Indicator:	
Assumed Children:		Electronic Institution Ind:	3
Assumed Stu Legal Deps:		ISIR Elec Trans Indicator:	3
Assumed VA Status:		Parents' Marital Status Date:	
Assumed Num in Family:		Multiple Institution Flag 1:	
Assumed Num in Coll:		Multiple Institution Flag 2:	3

ISIR Data 2 page (3 of 4)



**NSLDS Data 1**

**Sequence Number:** 1    **Load Status:** L    **EmplID:** 0042046  
**Transaction Number:** 12    **Original SSN:** 466-91-0253    **Name Code:** LU

Inbound ISIR (NSLDS 1A)			
<b>NSLDS Transaction Nbr:</b>	01	<b>Aggregate Unsub Out Principal:</b>	042167
<b>NSLDS DB Results Flag:</b>	1	<b>Aggr Combined Out Principal:</b>	042167
<b>NSLDS Pell Overpayment:</b>	N	<b>Unalloc Cons Outstand Prin Bal:</b>	N/A
<b>NSLDS Pell Overpay Contact:</b>	N/A	<b>Aggr Subsidized Pending Disb:</b>	001237
<b>NSLDS SEOG Overpayment:</b>	W	<b>Aggr Unsubsidized Pending Disb:</b>	001697
<b>NSLDS SEOG Overpay Contact:</b>	N/A	<b>Aggr Combined Pending Disb:</b>	002934
<b>NSLDS Perkins Overpayment:</b>	N	<b>Aggregate Subsidized Total:</b>	022250
<b>NSLDS Perkins Overpay Contact:</b>	N/A	<b>Aggregate Unsubsidized Total:</b>	022851
<b>NSLDS ACG Overpayment:</b>	W	<b>Aggregate Combined Total:</b>	045101
<b>NSLDS ACG Overpay Contact:</b>	N/A	<b>NSLDS Unalloc Consol Total:</b>	N/A
<b>NSLDS NSG Overpayment:</b>	N	<b>ISIR Sub Limit Flag:</b>	N
<b>NSLDS NSG Overpay Contact:</b>	N/A	<b>ISIR Combo Limit Flag:</b>	N
<b>NSLDS Default Reported:</b>	N	<b>Perkins Cum Disb Amt:</b>	003000
<b>NSLDS Discharged Rptd:</b>	N	<b>NSLDS Active Bankruptcy:</b>	N
<b>NSLDS Satisfctry Rpymnt:</b>	N	<b>Aggregate Sub Out Principal:</b>	021013

Inbound ISIR (NSLDS 1B)			
<b>Perkins CY Disbursement Amt:</b>	N/A	<b>DL Master-Prom Note Flag:</b>	U
<b>NSLDS Default Ln Chg:</b>	N	<b>DL Plus Master-Prom Note Flag:</b>	N
<b>NSLDS Dschrgd Ln Chg:</b>	N	<b>DL GPlus Master-Prom Note Flag:</b>	A
<b>NSLDS Satsfctry Rpymnt Chg:</b>	N	<b>NSLDS Pell Seq No:</b>	01
<b>NSLDS Actv Bnkruptcy Chg:</b>	N	<b>NSLDS Pell Verif Flag:</b>	VER
<b>NSLDS Overpymnt Chg:</b>	N	<b>NSLDS Pell EFC:</b>	000120
<b>NSLDS Aggr Loan Chg:</b>	N	<b>NSLDS Pell School Cd:</b>	00131500
<b>NSLDS Perkins Chg:</b>	N	<b>NSLDS Pell Trans Nbr:</b>	01
<b>NSLDS Pell Pymnt Chg:</b>	N	<b>NSLDS Pell Last Update Dt:</b>	20010712
<b>NSLDS Additional Pell:</b>	N	<b>NSLDS Pell Sch Amt:</b>	003400
<b>NSLDS Additional Loans:</b>	Y	<b>NSLDS Pell Paid:</b>	001750

NSLDS 1 page (1 of 3)

<b>NSLDS Additional ACG:</b>	Y	<b>NSLDS Pct Used:</b>	00050
<b>NSLDS Additional NSG:</b>	N		
<b>Inbound ISIR (NSLDS 1C)</b>			
<b>NSLDS Pell Award Amount 1:</b>	003400	<b>NSLDS Pell Seq No (3):</b>	03
<b>NSLDS Pell Seq No (2):</b>	02	<b>NSLDS Pell Verif Flag (3):</b>	VER
<b>NSLDS Pell Verif Flag (2):</b>	VER	<b>NSLDS EFC (3):</b>	000120
<b>NSLDS EFC (2):</b>	000120	<b>NSLDS Pell School Cd (3):</b>	00131500
<b>NSLDS Pell School Cd (2):</b>	00131500	<b>NSLDS Pell Trans Nbr (3):</b>	01
<b>NSLDS Pell Trans Nbr (2):</b>	01	<b>NSLDS Pell Last Update Dt (3):</b>	20000112
<b>NSLDS Pell Last Update Dt (2):</b>	19990412	<b>NSLDS Pell Sch Amt (3):</b>	002400
<b>NSLDS Pell Sch Amt (2):</b>	002400	<b>NSLDS Pell Paid (3):</b>	001200
<b>NSLDS Pell Paid (2):</b>	001200	<b>NSLDS Pct Used (3):</b>	00050
<b>NSLDS Pct Used (2):</b>	00050	<b>NSLDS Pell Award Amount 3:</b>	002400
<b>NSLDS Pell Award Amount 2:</b>	001400		
<b>Inbound ISIR (NSLDS 1D)</b>			
<b>ACG Sequence No (1):</b>	01	<b>ACG Award Amount (2):</b>	765432
<b>ACG School Code (1):</b>	00392300	<b>ACG School Year (2):</b>	7
<b>ACG Transaction No (1):</b>	10	<b>ACG Eligibility Code (2):</b>	01
<b>ACG Last Update Date (1):</b>	20060829	<b>ACG High School Prog Code (2):</b>	CD3923
<b>ACG Amount Paid (1):</b>	004321	<b>ACG Sequence Code (2):</b>	666
<b>ACG Award Amount (1):</b>	054321	<b>ACG Sequence No (3):</b>	03
<b>ACG School Year (1):</b>	6	<b>ACG School Code (3):</b>	00114600
<b>ACG Eligibility Code (1):</b>	03	<b>ACG Transaction No(3):</b>	30
<b>ACG High School Prog Code (1):</b>	AB1147	<b>ACG Last Update Date (3):</b>	20060831
<b>ACG Sequence Code (1):</b>	555	<b>ACG Amount Paid (3):</b>	864200
<b>ACG Sequence No (2):</b>	02	<b>ACG Award Amount (3):</b>	876543
<b>ACG School Code (2):</b>	00114700	<b>ACG School Year (3):</b>	8
<b>ACG Transaction No (2):</b>	20	<b>ACG Eligibility Code (3):</b>	04
<b>ACG Last Update Date (2):</b>	20060830	<b>ACG High School Prog Code (3):</b>	EF1154
<b>ACG Amount Paid (2):</b>	055431	<b>ACG Sequence Code (3):</b>	777

NSLDS 1 page (2 of 3)

Inbound ISIR (NSLDS 1E)			
<b>NSG Sequence No (1):</b>	01	<b>NSG Award Amount (2):</b>	110150
<b>NSG School Code (1):</b>	00121800	<b>NSG School Year (2):</b>	2
<b>NSG Transaction No (1):</b>	40	<b>NSG Instruct Program Code (2):</b>	8765432
<b>NSG Last Update Date (1):</b>	20060901	<b>NSG Sequence Code (2):</b>	101
<b>NSLDS NSG Paid (1):</b>	105050	<b>NSG Sequence No (3):</b>	03
<b>NSG Award Amount (1):</b>	100050	<b>NSG School Code (3):</b>	00352200
<b>NSG School Year (1):</b>	1	<b>NSG Transaction No (3):</b>	60
<b>NSG Instruct Program Code (1):</b>	9876543	<b>NSG Last Update Date (3):</b>	20060903
<b>NSG Sequence Code (1):</b>	100	<b>NSLDS NSG Paid (3):</b>	133025
<b>NSG Sequence No (2):</b>	02	<b>NSG Award Amount (3):</b>	125250
<b>NSG School Code (2):</b>	00115400	<b>NSG School Year (3):</b>	3
<b>NSG Transaction No (2):</b>	50	<b>NSG Instruct Program Code (3):</b>	7654321
<b>NSG Last Update Date (2):</b>	20060902	<b>NSG Sequence Code (3):</b>	102
<b>NSLDS NSG Paid (2):</b>	124050		

[NSLDS 1 page \(3 of 3\)](#)

## NSLDS Data 2

Access the NSLDS Data 2 page.

### NSLDS Data 2

**Sequence Number:** 1    **Load Status:** L    **EmplID:** 0042046  
**Transaction Number:** 12    **Original SSN:** 466-91-0253    **Name Code:** LU

Inbound ISIR (NSLDS 2A)			
<b>NSLDS Loan Seq Nbr:</b>	01	<b>NSLDS Original School Code:</b>	00222100
<b>NSLDS Loan Type Cd:</b>	R	<b>NSLDS Contact:</b>	00100
<b>NSLDS Change Flag:</b>	N	<b>NSLDS Grade Level:</b>	5
<b>NSLDS Loan Program Cd:</b>	D1	<b>NSLDS Loan Extra UnSub (1):</b>	N
<b>NSLDS Net Loan Amt:</b>	002475	<b>NSLDS Loan Cap Interest (1):</b>	N
<b>NSLDS Current Status Code:</b>	ID	<b>NSLDS Last Disbursement Amt 1:</b>	N/A
<b>Loan Status Effective Date:</b>	09/08/1999	<b>Date of Last Loan Disb (1):</b>	N/A
<b>NSLDS Loan Outstand Prin Bal:</b>	001238	<b>NSLDS Loan Seq Nbr (2):</b>	02
<b>NSLDS Principal Loan Bal Dt:</b>	19991031	<b>NSLDS Loan Type Cd (2):</b>	R
<b>NSLDS Loan Beginning Date:</b>	19990908	<b>NSLDS Change Flag (2):</b>	N
<b>NSLDS Loan Ending Date:</b>	20000523	<b>NSLDS Loan Program Cd (2):</b>	D2
<b>Guarantee Agency:</b>	N/A	<b>NSLDS Net Loan Amt (2):</b>	002372
<b>Contact Type:</b>	DLS	<b>NSLDS Current Status Code (2):</b>	ID

[NSLDS Data 2 page \(1 of 3\)](#)

Inbound ISIR (NSLDS 2B)			
<b>Loan Status Effective Date (2):</b>	09/08/1999	<b>Date of Last Loan Disb (2):</b>	N/A
<b>NSLDS Loan Outstand Prin Bal (2):</b>	001186	<b>NSLDS Loan Seq Nbr (3):</b>	03
<b>NSLDS Principal Loan Bal Dt (2):</b>	19991031	<b>NSLDS Loan Type Cd (3):</b>	R
<b>NSLDS Loan Beginning Date (2):</b>	19990908	<b>NSLDS Change Flag (3):</b>	N
<b>NSLDS Loan Ending Date (2):</b>	20000523	<b>NSLDS Loan Program Cd (3):</b>	D2
<b>Guarantee Agency (2):</b>	N/A	<b>NSLDS Net Loan Amt (3):</b>	001023
<b>NSLDS Contact Type (2):</b>	DLS	<b>NSLDS Current Status Code (3):</b>	ID
<b>NSLDS Original School Code (2):</b>	00222100	<b>Loan Status Effective Date (3):</b>	09/08/1999
<b>NSLDS Contact (2):</b>	00100	<b>NSLDS Loan Outstand Prin Bal (3):</b>	000512
<b>NSLDS Grade Level (2):</b>	5	<b>NSLDS Principal Loan Bal Dt (3):</b>	19991130
<b>NSLDS Loan Extra UnSub (2):</b>	N	<b>NSLDS Loan Beginning Date (3):</b>	19990908
<b>NSLDS Loan Cap Interest (2):</b>	N	<b>NSLDS Loan Ending Date (3):</b>	20000523
<b>NSLDS Last Disbursement Amt 2:</b>	N/A	<b>Guarantee Agency (3):</b>	N/A

Inbound ISIR (NSLDS 2C)			
<b>NSLDS Contact Type (3):</b>	DLS	<b>NSLDS Current Status Code (4):</b>	ID
<b>NSLDS Original School Code (3):</b>	00222100	<b>Loan Status Effective Date (4):</b>	06/02/1999
<b>NSLDS Contact (3):</b>	00100	<b>NSLDS Loan Outstand Prin Bal (4):</b>	001275
<b>NSLDS Grade Level (3):</b>	5	<b>NSLDS Principal Loan Bal Dt (4):</b>	19990930
<b>NSLDS Loan Extra UnSub (3):</b>	H	<b>NSLDS Loan Beginning Date (4):</b>	19990602
<b>NSLDS Loan Cap Interest (3):</b>	N	<b>NSLDS Loan Ending Date (4):</b>	19990818
<b>NSLDS Last Disbursement Amt 3:</b>	N/A	<b>Guarantee Agency (4):</b>	N/A
<b>Date of Last Loan Disb (3):</b>	N/A	<b>NSLDS Contact Type (4):</b>	DLS
<b>NSLDS Loan Seq Nbr (4):</b>	04	<b>NSLDS Original School Code (4):</b>	00222100
<b>NSLDS Loan Type Cd (4):</b>	R	<b>NSLDS Contact (4):</b>	00100
<b>NSLDS Change Flag (4):</b>	N	<b>NSLDS Grade Level (4):</b>	5
<b>NSLDS Loan Program Cd (4):</b>	D1	<b>NSLDS Loan Extra UnSub (4):</b>	N
<b>NSLDS Net Loan Amt (4):</b>	001275	<b>NSLDS Loan Cap Interest (4):</b>	N

NSLDS 2 page (2 of 3)

Inbound ISIR (NSLDS 2D)			
<b>NSLDS Last Disbursement Amt 4:</b>	N/A	<b>Guarantee Agency (5):</b>	N/A
<b>Date of Last Loan Disb (4):</b>	N/A	<b>NSLDS Contact Type (5):</b>	DLS
<b>NSLDS Loan Seq Nbr (5):</b>	05	<b>NSLDS Original School Code (5):</b>	00222100
<b>NSLDS Loan Type Cd (5):</b>	R	<b>NSLDS Contact (5):</b>	00100
<b>NSLDS Change Flag (5):</b>	N	<b>NSLDS Grade Level (5):</b>	N/A
<b>NSLDS Loan Program Cd (5):</b>	D2	<b>NSLDS Loan Extra UnSub (5):</b>	N
<b>NSLDS Net Loan Amt (5):</b>	001222	<b>NSLDS Loan Cap Interest (5):</b>	N
<b>NSLDS Current Status Code (5):</b>	ID	<b>NSLDS Last Disbursement Amt 5:</b>	N/A
<b>Loan Status Effective Date (5):</b>	06/02/1999	<b>Date of Last Loan Disb (5):</b>	N/A
<b>NSLDS Loan Outstand Prin Bal (5):</b>	001222	<b>NSLDS Loan Seq Nbr (6):</b>	06
<b>NSLDS Principal Loan Bal Dt (5):</b>	19990930	<b>NSLDS Loan Type Cd (6):</b>	R
<b>NSLDS Loan Beginning Date (5):</b>	19990602	<b>NSLDS Change Flag (6):</b>	N
<b>NSLDS Loan Ending Date (5):</b>	19990818	<b>NSLDS Loan Program Cd (6):</b>	D1

Inbound ISIR (NSLDS 2E)			
<b>NSLDS Net Loan Amt (6):</b>	005500	<b>NSLDS Contact Type (6):</b>	DLS
<b>NSLDS Current Status Code (6):</b>	ID	<b>NSLDS Original School Code (6):</b>	00222100
<b>Loan Status Effective Date (6):</b>	09/09/1998	<b>NSLDS Contact (6):</b>	00100
<b>NSLDS Loan Outstand Prin Bal (6):</b>	005500	<b>NSLDS Grade Level (6):</b>	3
<b>NSLDS Principal Loan Bal Dt (6):</b>	19991130	<b>NSLDS Loan Extra UnSub (6):</b>	P
<b>NSLDS Loan Beginning Date (6):</b>	19980909	<b>NSLDS Loan Cap Interest (6):</b>	N
<b>NSLDS Loan Ending Date (6):</b>	19990521	<b>NSLDS Last Disbursement Amt 6:</b>	
<b>Guarantee Agency (6):</b>	N/A	<b>Date of Last Loan Disb (6):</b>	

[NSLDS 2 page \(3 of 3\)](#)

## Header and Trailer Data

Access the Header and Trailer Data page.

### Header and Trailer Data

**EC Transaction ID:** CPS\_ISIR\_2008

**EC Queue Instance:** 5      **In/Out:** I

Header Information			
<b>ISIR Load Date:Time:</b>	09/08/06 9:13AM	<b>TG Number:</b>	TG11115

Trailer Information	
<b>Total Records:</b>	2

[Header and Trailer Data page](#)




## NSLDS ACG



Access the NSLDS ACG page.

[NSLDS Information](#)
[NSLDS Loan Detail](#)
[NSLDS Pell](#)
[NSLDS ACG](#)
[NSLDS NSG](#)
[NSLDS Additional Information](#)



Timothy Balstarub ID: 0042046

---

**SSN:** 866-91-8899   
 **NSLDS DOB:**                     
 **Last Updated:** 09/08/2006   
 **Last Effseq:** 1   
 



**Aggregate Data** View All    First  1 of 1  Last

**Eff Date:** 09/08/2006   
 **Seq:** 1   
 **NSLDS Txn Nbr:** 1   
 **NSLDS Transaction Source:** ISIR   
 [Detail](#)

**Academic Competitiveness Grant Information** View All    First  1 of 3  Last

<b>Sequence:</b>	1	<b>Transaction Nbr:</b>	10	<b>Last Update:</b>	08/29/2006
<b>School Code:</b>	00392300	<b>School Year:</b>		<b>School Year:</b>	6
<b>Award Amount:</b>	\$54321	<b>Paid to Date:</b>	\$4321		
<b>Eligibility Code:</b>	03	<b>High School Prog:</b>	AB1147	<b>Sequence Code:</b>	555

[NSLDS ACG page](#)




## NSLDS NSG



Access the NSLDS NSG page.

[NSLDS Information](#)
[NSLDS Loan Detail](#)
[NSLDS Pell](#)
[NSLDS ACG](#)
[NSLDS NSG](#)
[NSLDS Additional Information](#)



Timothy Balstarub ID: 0042046

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**SSN:** 866-91-8899   
 **NSLDS DOB:**                     
 **Last Updated:** 09/08/2006   
 **Last Effseq:** 1   
 



**Aggregate Data** View All    First  1 of 1  Last

**Eff Date:** 09/08/2006   
 **Seq:** 1   
 **NSLDS Txn Nbr:** 1   
 **NSLDS Transaction Source:** ISIR   
 [Detail](#)

**National SMART Grant Information** View All    First  1 of 3  Last

<b>Sequence:</b>	1	<b>Transaction Nbr:</b>	40	<b>Last Update:</b>	09/01/2006
<b>School Code:</b>	00121800	<b>School Year:</b>		<b>School Year:</b>	1
<b>Award Amount:</b>	\$100050	<b>Paid to Date:</b>	\$105050	<b>Sequence Code:</b>	100
<b>Instructional Program Code:</b> 9876543					

[NSLDS page](#)

## NSLDS Activity

Access the NSLDS Activity page.

NSLDS Activity			
<b>Additional Pell:</b>	N	<b>Additional Loans:</b>	Y
<b>Additional ACG:</b>	Y	<b>Additional NSG:</b>	N
<b>NSLDS Active Match:</b>			
Change Flags			
<b>NSLDS Default Ln Chg:</b>	N	<b>NSLDS Overpymnt Chg:</b>	N
<b>NSLDS Dschrgd Ln Chg:</b>	N	<b>NSLDS Aggr Loan Chg:</b>	N
<b>NSLDS Satsfctry Rpymnt Chg:</b>	N	<b>NSLDS Perkins Chg:</b>	N
<b>NSLDS Actv Bnkrptcy Chg:</b>	N	<b>NSLDS Pell Pymnt Chg:</b>	N
<b>NSG Chg:</b>	N	<b>ACG Payment Chg:</b>	N
Loan Limit Flags			
<b>NSLDS Sub Limit Exceeded:</b>		<b>NSLDS Combo Limit Exceeded:</b>	
<b>ISIR Sub Limit Flag:</b>	N	<b>ISIR Combo Limit Flag:</b>	N
DL Plus Master-Prom Note Flag			
<b>DL Staff Master-Prom Note Flag:</b>	U	Unavailable	
<b>DL Plus Master-Prom Note Flag:</b>	N	No MPN on file	
<b>DL Grad Plus MPN Fig:</b>	A	Active	
NSLDS Alert File Flags			
<b>Aggregate Change Flag:</b>		<b>Loan Change Flag:</b>	
<b>Pell Change Flag:</b>			

[NSLDS Activity page](#)

## Changes to the ISIR Processes

The changes to the ISIR load processes in the current bundle are limited to the handling of the new fields added to the 2008 ISIR. There are no changes made to the ISIR load and suspend rules. Changes may be required once the final EDE technical specifications are published, usually in November. For a complete list of new and modified ISIR fields, please refer to the current 2007-08 ISIR layout documents available at the Federal Student Aid website at <http://ifap.ed.gov>.

In addition:

- The delivered ISIR comments and reject codes are copied from the prior year. The 2007-08 comments and codes have not yet been published. Normally, these will be delivered in the following bundle.
- FM INAS for 2007-08 is not yet available, so INAS calculations during the ISIR load will not occur. Schools should set the ISIR Load parameter settings to not call INAS. When FM INAS is delivered, all ISIRs loaded with this setting will be processed using the batch INAS process.
- Set up the Prospect Cross Reference table for 2008 and create a prospect data source of **ISIR08**. This is part of the normal processing setup for new financial aid years.

- Peoplecode was added to the ISIR Corrections 07/08 component to set the student dependency status based on the answer to the new Active duty in the military question. The behavior should follow that of the traditional dependency status questions.

## Changes to ISIR Data Corrections for 2007-2008

The new ISIR Corrections 07/08 component reflects the changes to the 2008 ISIR.

### Pages Used to Make ISIR Data Corrections for 2007-2008

Page Name	Object Name	Navigation	Usage
FAFSA Information	ISIR_PIA_CS1_08	Administer Financial Aid, Manage Need Analysis, Use 2, ISIR Corrections 07/08, FAFSA Information	Correct information on the FAFSA Information page.
INAS Federal Extension	INAS_FED_EXT06_SEC	Click the FM link on the FAFSA Information page.	Override INAS local policy options.
Change Student Income Values	ISIR_ASM_ST1_SEC03	Click the Assumptions link in the Student Data – Financial Information group box on the FAFSA Information page.	Click the Assumptions link in the Student Data – Dependency Status Information group box on the FAFSA Information page.
Change Student Status Values	ISIR_ASM_ST2_SEC08	Click the Assumptions link in the Student Data – Dependency Status Information group box on the FAFSA Information page.	Edit any fields that are unavailable for entry on the main page due to the CPS assigning an assumed value to the field.
Change Parent Household Information	ISIR_ASM_PR2_SEC08	Click the Assumptions link in the Parent Data – Parent Background Information group box on the FAFSA Information page.	Change the Assumption Indicator for each of the fields pertaining to parent household information so that the field can be corrected on the Parent Data – Parent Background Information page.
Change Parent Earnings and Income Values	ISIR_ASM_PR1_SEC03	Click the Assumptions link in the Parent Data – Parent Financial Information group box on the FAFSA Information page.	Change the Assumption Indicator for each of the fields pertaining to parent financial information so that the field can be corrected on the Parent Data – Parent Financial Information page.

Assumptions and School Codes	ISIR_PIA_CS2_08	Administer Financial Aid, Manage Need Analysis, Use2, ISIR Corrections 07/08, Assumptions\School Codes	Enter corrections to a student's choice of school and housing, to override a student's dependency status, and to override FAFSA Assumption and/or Reject information on behalf of the student. You can use this page to override this data.
EFC\DB Matches\Corr	ISIR_PIA_CS3_08	Administer Financial Aid, Manage Need Analysis, Use2, ISIR Corrections 07/08, EFC\DB Matches\Corr	View the expected family contribution detail for a student and information about all ISIR database matches and processing flags set by the Central Processing System.

## FAFSA Information

Access the FAFSA Information page.

FAFSA Information | Assumptions\School Codes | EFC\DB Matches\Corr

Balstarub, Timothy W      ID: 0042046

Aid Year: 2008      Financial Aid Year 2007-2008      Institution: PSUNV

**ISIR Data** First 1 of 2 Last

\*Effective Date: 09/08/2006      Transaction Nbr: 12      Correction Status: Pending      Status Date:

EFC Status: Unofficial      Primary EFC: 0      Prorated EFC: 0      [FM](#)      [IM](#)      [Need Summary](#)      [INAS](#)

Actual Bio/Demo Data		ISIR Bio/Demo Data	
<input type="checkbox"/> Correct Name	First Name: Timothy      Middle: W Last Name: Balstarub	<b>Student's First Name:</b> TIMOTHY <b>MI:</b> W <b>Last Name:</b> BALSTARUB	
<input type="checkbox"/> Correct Address	<a href="#">Student Address</a>	<a href="#">ISIR Address</a>	
<input type="checkbox"/> Correct SSN	866-91-8899	<b>SSN:</b> 866-91-8899	
<input type="checkbox"/> Correct Birthdate	08/25/1988	<b>Birthdate:</b> 08/25/1988	
<input type="checkbox"/> Correct Telephone	606/563-9030	<b>Telephone Nbr:</b> 606/563-9030	
<input type="checkbox"/> Correct Citizenship	3 Alien Perm	<b>Citizenship Status:</b> 2 Eligible non-citizen	
<input type="checkbox"/> Correct Alien Reg Nbr	A455981231	<b>Alien Registration Number:</b> 455981231	
		<b>Driver's License #:</b> NONE	
<input type="checkbox"/> Correct Email	SANDROCK@USC.EDU	<b>DL State:</b> <b>Student's Email Address:</b> SANDROCK@USC.EDU	

**Student Data - Enrollment Information**

Enrollment Status 2007-2008: Full Time       3/4 Time       1/2 Time       Below 1/2       Don't Know

**Student Data - Background Information**

State of Residence: CA  California      Res Prior 02: Blank  Yes  No       Residency Date:

Are You Male: Yes  No       Permit Sel Serv to Enroll: Yes  No

Degree/Certificate: 1st Bachlr       Current Grade Level: 4th yr Snr

HS Diploma or GED: Yes  No       Received First Bachelor Degree: Yes  No

FAFSA Information page (1 of 3)

Work Study or Student Loans: Work Study  Student Loans  Both  Neither  Don't Know   
 Drug Conviction Affecting Elig: Blank  No  Yes (Part Year)  Yes/Don't Know

Student Data - Financial Information

2006 Federal Benefits Received: SSI  Food Stamps  School Lunch  TANF  WIC

Tax Return Filed: Blank  Already Filed/Completed  Will File  Will Not File

Tax Form Used: Blank  IRS 1040  IRS 1040A/EZ  Foreign Tax Return  U.S. Territory Tax Return

Eligible For 1040A or 1040EZ: Blank  Yes  No  Don't Know

[Assumptions](#)

AGI:  Student Income:  Worksheet A:   
 U. S. Tax Paid:  Spouse Income:  Worksheet B:   
 Exemptions:  Worksheet C:   
 Investment Net Worth:  Bus/Farm Net Worth:  Cash Savings:   
 VA Ben Nbr of Months:  VA Ben Monthly Amt:

Student Data - Dependency Status Information

[Assumptions](#) DOB Before 01/01/84: Yes  No  Dependents: Yes  No   
 Grad Student: Yes  No  Orphan: Yes  No   
 Student Married: Yes  No  Veteran: Yes  No   
 Children: Yes  No  On Active Duty: Yes  No   
 Marital Status: Blank  Single/Divorced/Widowed  Married/Remarried  Separated   
 Marital Status Date:  Marital Status (Personal Data): Single  
 Dependency Status: D DEP Citizenship Status: 2 Eligible n

Student Data - Independent Student Information

Number in Family:  Number in College:

Parent Data - Parent Background Information

[Assumptions](#)

Marital Status: Blank  Married/Remarried  Single  Divorced/Separated  Widowed

FAFSA Information page (2 of 3)

**Marital Status Date:**  BT  
**State of Residence:**   **Res Prior 02:** Blank  Yes  No  **Residency Date:**  BT  
**Father's SSN:**  **Father's Last Name:**  **Nbr Family Members:**   
**Father's Date of Birth:**  BT **Father's First Name Initial:**  **Number in College:**   
**Mother's SSN:**  (a) **Mother's Last Name:**   
**Mother's Date of Birth:**  BT **Mother's First Name Initial:**   
**Father's Highest Grade Level:** Blank  Elementary  High School  College  Unknown   
**Mother's Highest Grade Level:** Blank  Elementary  High School  College  Unknown   
**Parent's E-mail Address:**   
**Parent Data - Parent Financial Information**  
**2006 Federal Benefits Received:** SSI  Food Stamps  School Lunch  TANF  WIC   
**Tax Return Filed:** Blank  Already Filed/Completed  Will File  Will Not File   
**Tax Form Used:** Blank  IRS 1040  IRS 1040A/EZ  Foreign Tax Return  U.S. Territory Tax Return   
**Eligible For 1040A or 1040EZ:** Blank  Yes  No  Don't Know   
[Assumptions](#)  
**AGI:**  **Father Income:**  **Worksheet A:**   
**U. S. Tax Paid:**  **Mother Income:**  **Worksheet B:**   
**Exemptions:**  **Worksheet C:**   
**Investment Net Worth:**  **Bus/Farm Net Worth:**  **Cash Savings:**

[FAFSA Information page \(3 of 3\)](#)

## INAS Federal Extension

Access the INAS Federal Extension page.

**INAS Federal Extension**

	STUDENT	PARENT
<b>Federal</b>		
INAS Rule Set:	<input type="text" value="Ugrad/Grad"/>	
INAS Calc Type:	<input type="text" value="IM"/>	
INAS Data Source:	<input type="text" value="Institutnl"/>	
Dependency Override:	<input type="text"/>	
<input type="checkbox"/> Calc a PC for Independent		
<a href="#">Budget Durations</a> <a href="#">EFC Proration Options</a> <a href="#">Override Federal EFC</a>		
<b>Allowances</b>		
Calculate Federal Tax:	<input type="checkbox"/>	<input type="checkbox"/>
Tuition:	<input type="text"/>	<input type="text"/>
Medical/Dental:	<input type="text"/>	<input type="text"/>
Other:	<input type="text"/>	<input type="text"/>
Asset Allowance:	<input type="text"/>	<input type="text"/>
<b>Assets</b>		
Other:	<input type="text"/>	<input type="text"/>
<b>Assumption Overrides</b>		
Number in College:		<input type="text"/>
<b>Reject Overrides</b>		
Reject D Override:		<input type="text"/>
Reject E Override:		<input type="text"/>
Reject F Override:		<input type="text"/>
Reject R Override:		<input type="text"/>
Reject S Override:		<input type="text"/>
Reject T Override:		<input type="text"/>

[INAS Federal Extension page](#)

## Change Student Income Values

Access the Change Student Income Values page.

### Change Student Income Values

	Assumed Value	ISIR Value	Assumption Indicator
<b>Adjusted Gross Income:</b>	0		<input type="text" value="Blank"/>
<b>Taxes Paid:</b>	0		<input type="text" value="Blank"/>
<b>Student's Earned Income:</b>	0	0	<input type="text" value="Blank"/>
<b>Spouse's Earned Income:</b>	0		<input type="text" value="Blank"/>
<b>Worksheet C Total:</b>	0	0	<input type="text" value="Blank"/>

[Change Student Income Values page](#)

## Change Student Status Values

Access the Change Student Status Values page.

### Change Student Status Values

	Assumed Value	ISIR Value	Assumption Indicator
<b>Born Before 1/1/1984:</b>	2	No	Blank <input type="text"/>
<b>Student Married:</b>	2	No	Blank <input type="text"/>
<b>Marital Status:</b>	1	Single	Blank <input type="text"/>
<b>Legal Dependents:</b>	2	No	Blank <input type="text"/>
<b>Number in Family:</b>	04		Blank <input type="text"/>
<b>Number in College:</b>	1		Blank <input type="text"/>
<b>Assumed Citizenship:</b>	2	Elg NonCit	Blank <input type="text"/>
<b>Veteran:</b>	2	No	Blank <input type="text"/>
<b>Children:</b>	2	No	Blank <input type="text"/>

[Change Student Status Values page](#)

## Change Parent Household Information

Access the Change Parent Household Information page.

### Change Parent Household Information

	Assumed Value	ISIR Value	Assumption Indicator
<b>Marital Status:</b>	2	Single	Blank <input type="text"/>
<b>Number in Family:</b>	03		Blank <input type="text"/>
<b>Number in College:</b>	1		Blank <input type="text"/>
<b>Assumed Father's SSN:</b>		466-78-8253	Blank <input type="text"/>
<b>Assumed Mother's SSN:</b>	Y	466-77-7253	Assumption <input type="text"/>

[Change Parent Household Information page](#)

## Change Parent Earnings and Income Values

Access the Change Parent Earnings and Income Values page.

### Change Parent Earnings and Income Values

	Assumed Value	ISIR Value	Assumption Indicator
<b>Adjusted Gross Income:</b>	0	15,000	Reported
<b>Taxes Paid:</b>	0	11	Reported
<b>Father's Earnings:</b>	0	15,000	Reported
<b>Mother's Earnings:</b>	0		Blank
<b>Total From Worksheet C:</b>	0	0	Blank

[Change Parent Earnings and Income Values page](#)

## Assumptions and School Codes

Access the Assumptions and School Codes page.

[FAFSA Information](#) | [Assumptions/School Codes](#) | [EFC/DB Matches/Corr](#)

Balstarub, Timothy W      ID: 0042046  
 Aid Year: 2008    Financial Aid Year 2007-2008    Institution: PSUNV

ISIR Data      First 1 of 2 Last

\*Effective Date: 09/08/2006    Transaction Nbr: 12    Correction Status: Pending    Status Date:

EFC Status: Unofficial    Primary EFC: 0    Prorated EFC: 0    FM    IM    Need Summary    INAS

**Miscellaneous Information**

Dependency Override Indicator:  Dependent To Independent     Cancel Dep Override-Corr Only     Override Failed

Authorizing Institution:      Date Application Completed: 08/26/2006

Preparers SSN: 571889123       Preparers Signature

Preparers EIN: 06764       Include Verify Fields       Adjusted EFC Calc Requested

Application Signed By:  Applicant     Applicant and Parent

Owning School Cd: 001315    PeopleSoft University

**Student Data - Housing/School Code Information**

1st School Choice:	001315	UNIVERSITY OF CALIFORNIA (UCLA)	Housing Code 1:	
2nd School Choice:	001328	UNIVERSITY OF SOUTHERN CALIFOR	Housing Code 2:	
3rd School Choice:	001999	UNIVERSITY OF LOUISVILLE	Housing Code 3:	
4th School Choice:	001963	EASTERN KENTUCKY UNIVERSITY	Housing Code 4:	
5th School Choice:	001976	MOREHEAD STATE UNIVERSITY	Housing Code 5:	
6th School Choice:	001968	KENTUCKY STATE UNIVERSITY	Housing Code 6:	

[Assumptions and School Codes page \(1 of 4\)](#)

Assumptions and Reject Overrides			
<input type="checkbox"/> Parent Nbr In College	<input type="checkbox"/> Student Nbr In College	<input type="checkbox"/> Reject Override N	<input type="checkbox"/> Reject Override A
<input type="checkbox"/> Parent AGI	<input type="checkbox"/> Student AGI	<input type="checkbox"/> Reject Override B	<input type="checkbox"/> Reject Override C
<input type="checkbox"/> Parent WK C	<input type="checkbox"/> Student WK C	<input type="checkbox"/> Reject Override W	<input type="checkbox"/> Reject Override G
<input type="checkbox"/> Reject Override J	<input type="checkbox"/> Reject Override K	<input type="checkbox"/> Reject Override 12	<input type="checkbox"/> Reject Override 3
FAA Information			
<b>CPS Process Date:</b>	09/03/2006	<b>Pell ID:</b>	466-91-0253 LU 12
<b>Institution Process Date:</b>	09/08/2006	<b>Duplicate SSN Code:</b>	
<b>Date Application Received:</b>	08/26/2006	<b>CPS Pushed ISIR Flag:</b>	
<b>Application Data Source Cd:</b>	4A Paper App	<b>ISIR SAR C Flag Changed:</b>	Y
<b>Transaction Data Source Cd:</b>	1A Elec App	<b>Rejected Status Change Flag:</b>	
<b>Reprocess Code:</b>		<b>Verification Select Chng Flag:</b>	
Reject Reasons			
Reject Reason	Description		

Assumptions and School Codes page (2 of 4)

Comments	
Comment	Description
001	
002	This SAR reflects your Financial Aid Administrator's use of professional judgment.
007	As we previously indicated, your father's date of birth in Item 60 does not match his date of birth in the Social Security Administration's (SSA) records for his Social Security Number (SSN). If his SSN (Item 57) or date of birth is incorrect, you need to make a correction. If his SSN and date of birth are correct, your father should contact the SSA to make sure that they correct their records. The SSA can be contacted by calling 1-800-772-1213 or by visiting <a href="http://www.socialsecurity.gov">www.socialsecurity.gov</a> .
010	For additional information about your FSEOG overpayment, your Financial Aid Administrator must access NSLDS.
011	The Social Security Administration (SSA) did not confirm the Social Security Number you reported for your father in Item 57. If you believe that the SSN you reported is correct, your father must contact the SSA. The SSA can be contacted by calling 1-800-772-1213 or by visiting <a href="http://www.socialsecurity.gov">www.socialsecurity.gov</a> . If the Social Security Number is incorrect, you must make the necessary correction.
043	To resolve your Pell overpayment, call the U.S. Department of Education at 1-800-621-3115, or write to the U.S. Department of Education, P.O. Box 4222, Iowa City, Iowa 52245.
053	You left Drug Conviction Affecting Eligibility? blank. Your failure to provide an answer to this question makes you ineligible to receive Title IV aid. Either indicate that you have never been convicted of possessing or selling illegal drugs or use the enclosed worksheet to determine your answer to this question. In any case, you can correct this item by calling 1-800-4-FED-AID (1-800-433-3243) or by going to <a href="http://www.fafsa.ed.gov">www.fafsa.ed.gov</a> . You can also see your Financial Aid Administrator for assistance. Please understand that a drug conviction does not necessarily disqualify you from receiving student aid.
091	It appears you reported the same income amount for more than one of your parent(s)' income questions.
133	The National Student Loan Data System (NSLDS) indicates that you have received at least one overpayment of federal student aid funds. You are required by law to repay any funds received from the federal student aid programs to which you were not entitled. You are not eligible to receive any federal student aid until your overpayment has been resolved.

Assumptions and School Codes page (3 of 4)

143	Your citizenship status has been confirmed by the Department of Homeland Security and you meet the citizen-ship requirements for federal student aid.
154	The amount you reported for your parents' income tax appears to be over the allowable amount based on what you reported for their adjusted gross income. Review Items 73 and 74 and make the necessary corrections.
Field Review	
ISIR Field Nbr	Description
0001	Student's Last Name
0003	Student's Middle Initial
0004	Student's Address
0005	Student's City
0007	Student's Zip
0008	Student's SSN
0009	Student's Birthdate
0011	Driver's License Number
0012	Driver's License issue State
0041	Total Amount from WK B
0042	Total Amount from WK C
0043	Student's cash,saving,cheq
0044	Investment Net Worth
0045	Business Net Worth
0046	#of months vet beni's recvd
0047	Monthly Veteran Edu. Bene's
0071	Parent Security Income Benefit
0113	
0116	
0120	
0123	
0127	

[Assumptions and School Codes page \(4 of 4\)](#)

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## EFC\DB Matches\Corr

Access the EFC\DB Matches\Corr page.

FAFSA Information Assumptions\School Codes EFC\DB Matches\Corr

Balstarub,Timothy W ID: 0042046

Aid Year: 2008 Financial Aid Year 2007-2008 Institution: PSUNV

ISIR Data First 1 of 2 Last

Effective Date: 09/08/2006 Transaction Nbr: 12 Correction Status: Pending Status Date:

EFC Status: Unofficial Primary EFC: 0 Prorated EFC: 0 FM IM Need Summary INAE

EFC Information

Primary EFC: No Calc Formula Type: Prorated EFC: No Calc Monthly EFC

Secondary EFC: 0 Secondary EFC Type: 2 EFC Change Flag: 2 Dependency Status: D DEP

TI:	0	STI:	0	FTI:	0	DNW:	0
ATI:	0	SATI:	0	AAI:	0	SDNW:	0
STX:	0	SIC:	0	APA:	0	NW:	0
EA:	0	SCA:	0	PC:	0	Calculated PC:	No Calc
IPA:	0	PCA:	0	TSC:	0	Calculated TSC:	No Calc
AI:	0	CAI:	0	TPC:	0	Calculated Prorated EFC:	No Calc

EFC\DB Matches\Corr page (1 of 2)

Database Matches\Flags

SSA Citizenship Indicator:	A U.S. Citiz	NSLDS Match:	1 Eligible
Selective Service Match:	Y Reg Conf	NSLDS Transaction Nbr:	01
Selective Service Registration:	Y Reg Conf	Verification Selection Ind:	Y
SSN Match:	2 No DOB	Verification Tracking Flag:	0023
VA Match:	4 Active Dty	Verification Type:	
DHS Match:	N Not Conf	SAR C Flag:	Y Flag Set
DHS Verification Nbr:		Title IV Fund Eligibility:	Y
Secondary DHS Match Flag:	X No info	Federal PELL Eligibility:	Y Yes
Father's SSN Match:	4		
Mother's SSN Match:	4		

Corrected / Verified Fields

Correction Source: A Applicant

Corrected Fields View All First 1-2 of 26 Last

ISIR Field Nbr:	0001 Student's Last Name	Code:	1 This Trans
	0003 Student's Middle Initial		1 This Trans

Verified Fields View All First 1-2 of 8 Last

ISIR Field Nbr:	0007 Student's Zip	Code:	1 Same
	0010 Student's Phone Number		1 Same

EFC\DB Matches\Corr page (2 of 2)

# Updates to Institutional Need Analysis System (INAS) Institutional Methodology (IM) 2007-2008

The College Board deactivated options I-10 (exclude tuition and fee deduction from income) and I-20 (allow parents in college).

This section describes corresponding changes to Financial Aid pages.

See also the College Board *INAS User Manual* for 2007-2008.

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## Excluding Tuition Fee Deductions

This section shows changes to pages used to:

- Define IM Yes and No options.
- View INAS Institutional extension 1.
- View INAS Institutional extension 4.
- Define home asset projections.

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## Pages Used to Define IM Options and Make ISIR Corrections

Page Name	Object Name	Navigation	Usage
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IM Yes/No Options	INAS_LCL_PLCY10_06	<ul style="list-style-type: none"> <li>• Administer Financial Aid, Apply for Financial Aid, Setup, INAS Local Policy Opts 07/08, IM Yes/No Options</li> <li>• Design Student Administration, Design Financial Aid1, Setup F-K, INAS Local Policy Opts 07/08, IM Yes/No Options</li> <li>• Administer Financial Aid, Exchange Financial Aid Data, Setup, INAS Local Policy Opts 07/08, IM Yes/No Options</li> <li>• Administer Financial Aid, Manage Need Analysis, Setup, INAS Local Policy Opts 07/08, IM Yes/No Options</li> </ul>	Define values for IM PROFILE options. Select the student and parent options appropriate for your IM.
Student Data	INST_STUDENT_08	<ul style="list-style-type: none"> <li>• Administer Financial Aid, Apply for Financial Aid, Use, Maintain Inst Appl 07/08, Student Data</li> <li>• Administer Financial Aid, Manage Need Analysis, Use2, Maintain Inst Appl 07/08, Student Data</li> </ul>	Click the IM link to access INAS Institutional Extension 1.
INAS Institutional Extension 1	INAS_PROF_EXT1_S04	Click the IM link on the FAFSA Information page.	Override INAS local policy options institutional calculations on a student-by-student basis.
INAS Institutional Extension 4	INAS_PROF_EXT4_SEC	Click the Extension 4 link on the INAS Institutional Extension 1 page.	Override INAS Local Policy Option institutional calculations on a student-by-student basis.

Home/Asset Projections	INAS_LCL_PLCY7_01	<ul style="list-style-type: none"> <li>• Administer Financial Aid, Apply for Financial Aid, Setup, INAS Local Policy Opts 07/08, Home/Asset Projections</li> <li>• Design Student Administration, Design Financial Aid1, Setup F-K, INAS Local Policy Opts 07/08, Home/Asset Projections</li> <li>• Administer Financial Aid, Exchange Financial Aid Data, Setup, INAS Local Policy Opts 07/08, Home/Asset Projections</li> <li>• Administer Financial Aid, Manage Need Analysis, Setup, INAS Local Policy Opts 07/08, Home/Asset Projections</li> </ul>	Define options and values for assessing home equity for parents, students, and students with dependents. Define asset assessment rates.
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## Defining IM Yes and No Options

Access the IM Yes/No Options page.

IM Value Params 2 | IM Yes/No Options | Minimum GC Income | Asset Options | Home/Asset Projections

Aid Year: 2008 Financial Aid Year 2007-2008 Institution: PSUNV

View All First 1 of 2 Last

\*INAS Rule Set: CSS Rules/Values

	STUDENT	PARENT
IM-Profile	<input type="checkbox"/> Use Projected Year Income <input type="checkbox"/> Use FM Tx <input type="checkbox"/> Calc PC For Independent <input type="checkbox"/> Add Non Cust PC to PC <input type="checkbox"/> Add Hope/LTL <input checked="" type="checkbox"/> IM < FM <input type="checkbox"/> Ind Use Par St Tax Alwnc	<input type="checkbox"/> Use Projected Year Income <input type="checkbox"/> Use FM Tx <input type="checkbox"/> Allow Parent Other Loss <input type="checkbox"/> Allow Parent Bus/Farm Loss <input type="checkbox"/> Add Hope/LTL <input type="checkbox"/> Disallow Low Inc Asset Alwnc <input type="checkbox"/> Use Rpt PC <input checked="" type="checkbox"/> IM < FM

IM Yes/No Options page

The **Exclude Tuition Fee Deduction** field and the **Home Equity Cap** fields have been removed from this page. The **Home Equity Cap** field was moved to Home/Asset Projections page.

## Viewing INAS Institutional Extension 1

Access the INAS Institutional Extension 1 page.

### INAS Institutional Extension 1

INAS Rule Set: [dropdown] [Extension 2](#) [Extension 3](#) [Extension 4](#) [Extension 5](#) [Delete](#)

Application Source: [dropdown] **IGNORE LOSSES**

[Budget Durations](#)  Calc PC For Independent  Business/Farm

[Override Institutional EFC](#)  Skip Family Member Exclusion  Other

	STUDENT	PARENT
Use Projected Year Income:	<input type="checkbox"/>	<input type="checkbox"/>
Can IM Contribution Fall Below FM:	<input type="checkbox"/>	<input type="checkbox"/>
Hope/Lifetime Add Back:	<input type="checkbox"/>	<input type="checkbox"/>
Parent Tax Table - Independent:	<input type="checkbox"/>	

[OK](#) [Cancel](#)

INAS Institutional Extension 1 page

The **Exclude Tuition Fee Deduction** field and the **Cap Home Equity** field have been removed from this page.

## Viewing INAS Institutional Extension 4

Access the INAS Institutional Extension 4 page.

### INAS Institutional Extension 4

	STUDENT	PARENT
Local Tax - Percent:	<input type="text"/>	<input type="text"/>
Cap Housing Value:	<input type="text"/>	<input type="text"/>
Home Equity Cap Factor:	<input type="text"/>	<input type="text"/>
Asset Assessment Percent:	<input type="text"/>	<input type="text"/>
Local Tax:	<input type="text"/>	<input type="text"/>
Other Asset:	<input type="text"/>	<input type="text"/>
Minimum Asset:	<input type="text"/>	<input type="text"/>
Asset Allowance:	<input type="text"/>	<input type="text"/>
Minimum Income:	<input type="text"/>	<input type="text"/>
Number In College:	<input type="text"/>	<input type="text"/>
	<input type="button" value="OK"/>	<input type="button" value="Cancel"/>

[INAS Institutional Extension 4 page](#)

The **Home Equity Cap Factor** field formerly used a static factor of 2. You can now enter a factor from 0.0 to 9.9.

The **Allow Parents in College** field has been removed from this page.

## Defining Home Asset Projections

Access the Home/Asset Projections page.

IM Value Params 2 | IM Yes/No Options | Minimum GC Income | Asset Options | Home/Asset Projections

Aid Year: 2008 Financial Aid Year 2007-2008 Institution: PSUNV

View All First 1 of 2 Last

\*INAS Rule Set: CSS Rules/Values

**Institutional**

	PARENT	IND STUDENT
Home Projection		
Home Option:	1 Reported	1 Reported
Home Tolerance:	00000	00000
Home Cap:	999	999
Home Equity Cap Factor:		

**Asset Assessment Rate**

Asset % Dep:	0.25	(Leave These Two Entries Blank To Invoke Standard IM Rules -- Else Provide Value Between 000/100)	
Asset % Ind No Dep-Married:	0.25		
Asset % Ind No Dep-Single:	0.25	Asset % Parent:	<input type="checkbox"/>
		Asset % Ind W/Dep:	<input type="checkbox"/>

### Home/Asset Projections page

**Home Equity Cap Factor** Enter a cap factor from 0.0 to 9.9.

## Regulatory Updates to PROFILE and Need Access for 2007-2008

This section discusses:

- Field and page changes driven by the 2007-2008 CSS Data Reporting Layout.
- Changes to PROFILE and Need Access navigation paths.
- Changes to PROFILE and Need Access run control search pages.

### Field and Page Changes Driven by the 2007-2008 CSS Data Reporting Layout

This section lists the field changes driven by the 2007-2008 CSS Data Reporting Layout and displays the online Institutional Application component that is updated to reflect these changes.

#### Modified, New, and Deleted Fields

The following fields effect existing translate values. Other modified fields listed on the 2007-2008 CSS Data Reporting Layout that are defined as either required (cannot be blank) or signed positive response (cannot be negative) have been addressed but are not itemized here. Refer to the CSS Data Reporting Layout for those specific fields.

**Note.** For non-numeric fields that are required, no value is assigned if the field is blank. The field remains blank during the PROFILE Load process. INAS handles the field accordingly if it is blank.

This table lists the modified fields.

Field Number	Description	Action
36B	Tax Form Type (TAX-FORM-TYPE)  Component: Maintain Institutional Application 2007-2008 Page: Student Data Section: Student's Income and Benefits	Translate values have been changed to:  Can be blank. 1 = 1040 2 = 1040A 3 = 1040EZ 4 = Puerto Rican Tax Return 5 = Other US Territory Tax Return 6 = Canadian Tax Return 7 = Other Non-US Tax Return
88	Natural Parent Status (P-NATURAL-PAR-STATUS)  Component: Maintain Institutional Application 2007-2008 Page: Student Data Section: Student's Information	Translate values have been changed to:  Can be blank. 1 = Married 2 = Separated 3 = Divorced 4 = Never Married Living Separate 5 = Never Married Living Together 6 = Widowed
121B	Parents' Tax Form Type (P-TAX-FORM-TYPE)  Component: Maintain Institutional Application 2007-2008 Page: Parent Data Section: Parents' Income and Benefits	Translate values have been changed to:  Can be blank. 1 = 1040 2 = 1040A 3 = 1040EZ 4 = Puerto Rican Tax Return 5 = Other US Territory Tax Return 6 = Canadian Tax Return 7 = Other Non-US Tax Return

This table lists the new fields.

Field Number	Description	New Item
--------------	-------------	----------

25D	Lowest Income Filer	Status
36A	Student's 2006 Tax Filing Status	Question
49A	Student's 2006 – Means Tested Benefits	Question
61	Students Assets – Own Business, Home, or Self-Employed?	Question
63C	Student's Business, FTE Employees > 100	Question
82A	Parent receive TANF	Question
82B	Parent receive SSI	Question
82C or 82D	Father or Mother – Retirement Assets	Question
82C or 82D	Father or Mother – Retirement Assets	Question
85	Parents' 2006 – Means Tested Benefits	Question
105A	Parent – Either parent self-employed?	Question
105B	Parent – Housing status	Question
115	Parents' Business, FTE Employees > 100	Question
121A	Parents' Tax Status	Question
409C	Student's biological/adoptive parents are treated as married	Message

This table lists fields deleted from the layout.

Field Number	Description	Removed Item
	Parents' Assets – Siblings pre-paid tuition	Question
	Parents' Assets – Student's pre-paid tuition	Question
138B	Parents Tuition and Fee Deduction	Question
	Student – Location of computer	Question
	Parents – Number of Parents in College	Question
	FNAR-MESSAGE-50 – Parents' number of Parents in college differs from family member listing	Message
10	REVISION-FNAR-COMPUTE-DATE	Field

## Pages Used to Process PROFILE and Need Access Applications

Page Name	Object Name	Navigation	Usage
Student Data	INST_STUDENT_08	Administer Financial Aid, Manage Need Analysis, Use2, Maintain Inst Appl 0708, Student Data	View or enter all the information about the student.

Parent Data	INST_PARENT_08	Administer Financial Aid, Manage Need Analysis, Use2, Maintain Inst Appl 0708, Parent Data	View or enter all the parent information.
Miscellaneous Data	INST_MISC_08	Administer Financial Aid, Manage Need Analysis, Use2, Maintain Inst Appl 0708, Miscellaneous Data	View or enter signature, family member, school selection, and institutional question (the College Board PROFILE Section Q) information. You can also view FNAR messages on this page.
Computation Data	INST_COMP_SUMM_08	Administer Financial Aid, Manage Need Analysis, Use2, Maintain Inst Appl 0708, Computation Data	View or enter computed parent and student income, allowance, and asset information using your institutional and estimated federal methodology. The system displays computed values here. Because the system loads and supports the short form, you must invoke INAS to view interim calculations.

---

## Viewing Student Data

Access the Student Data page.

Student Data	Parent Data	Miscellaneous Data	Computation Data
Abatski, Christopher		<b>ID:</b> 0042051	<b>Institution:</b> PSUNV
<b>Dependency Status:</b> Dependent		<b>Source:</b> Profile	<b>Aid Year:</b> 2008
		<a href="#">Need Summary</a> <a href="#">FM</a> <a href="#">IM</a> <a href="#">INAS</a>	
Bio/Demo Data		CSS Data	
<b>SSN</b>	977-11-1253	<b>Marital Status:</b>	Single
<b>Birthdate:</b>	01/16/1987	<b>Citizenship Status:</b>	Native
		<b>Lowest Income Filer:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
		<b>CSS ID:</b>	3000075
		<b>Date Loaded:</b>	10/06/2006
		<b>Fee Waiver:</b>	No
Student's Information			
<b>State of Residence:</b>	WI	<b>Number in Family:</b>	00
<b>Postal:</b>	54941	<b>Number in College:</b>	
		<b>Natural Parent Status:</b>	Married
<b>Lives With:</b>		<b>Most Support:</b>	
<b>Year in School:</b>	1st yr Never Attended	<b>Veteran :</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> No Response
<b>Financial Aid Status:</b>	First-time App, New Student	<b>Orphan / Ward :</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> No Response
<b>Marital Status:</b>	Unmarried	<b>Dependents :</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> No Response
<b>Email Address:</b>	comp@test.com	<b>Date Application Received:</b>	08/21/2006
Student's Income and Benefits			
<b>Tax Filed Status:</b>	Will File	<b>Itemized Deductions:</b>	0
<b>Tax Form Type:</b>	1040A	<b>Student's Earnings:</b>	1,783
<b>Exemptions:</b>	00	<b>Spouse's Earnings:</b>	0
<b>Adjusted Gross Income:</b>	1,789	<b>Dividend/Interest:</b>	6
<b>U. S. Tax Paid:</b>	268	<b>Social Security Benefits:</b>	0
<b>Hope Lifetime Learning Credit:</b>	0	<b>Means Tested benefits:</b>	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/R
		<b>Welfare TANF:</b>	0
		<b>Child Support Received:</b>	0
		<b>Earned Income Credit:</b>	0
		<b>Other Untaxed Income:</b>	0
		<b>Taxable Financial Aid:</b>	0

Student Data page, 1 of 2

Student's Assets			
Cash Savings:	<input type="text" value="329"/>	Investment:	<input type="text" value="0"/>
IRA, Keogh, etc:	<input type="text" value="0"/>	Home:	<input type="text" value="0"/>
Self Employed:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Home Purchase Year:	<input type="text"/> Price: <input type="text" value="0"/>
Student Lives on Farm ?	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/R	Other Real Estate:	<input type="text" value="0"/>
FTE Employees < 100:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/R	Business/Farm:	<input type="text" value="0"/>
Student's Trust Information		Student's Expenses	
Value of Trust Fund:	<input type="text" value="0"/>	Child Support Paid:	<input type="text" value="0"/>
Trust Available ?	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/R	Medical/Dental:	<input type="text" value="0"/>
Trust Established by:	<input type="text"/>		
Student's Expected Resources			
Veterans Benefits:	<input type="text" value="0"/>	Months:	<input type="text" value="00"/>
Student's Earnings:	<input type="text" value="15,000"/>	Award Year:	<input type="text" value="0"/>
Spouse's Earnings:	<input type="text" value="0"/>	Grant/Scholarship:	<input type="text" value="0"/>
Other Taxable Income:	<input type="text" value="0"/>	Tuition Benefits:	<input type="text" value="0"/>
Untaxed Income:	<input type="text" value="0"/>	Parent(s) Contribution:	<input type="text" value="75,000"/>
		Relatives Contributions:	<input type="text" value="0"/>

[Student Data page, 2 of 2](#)

The following are new or modified Student Data fields based on the changes contained on the 2007-2008 CSS Data Reporting Layout.

**Bio Demo Data**

**Lowest Income Filer** Indicates status identifying lowest income filer.

**Student's Information**

**Natural Parent Status** Optional. Select from *Married, Separated, Divorced, Never Married Living Separate, Never Married Living Together, or Widowed.*

**Student's Income and Benefits**

**Tax Filed Status** Select blank, *Completed, Non Filer, or Will File.*

**Tax Form Type** Optional. Select from *1040, 1040A, 1040EZ, Canadian, Puerto Rican, Other US, or Other Non-US.*

**Means Tested Benefits** Select Yes, No, or N/R (Not Reported).

**Student's Assets**

**Self Employed** Select Yes or No.

**FTE Employees > 100** Select Yes, No, or N/R (Not Reported).

## Viewing Parent Data

Access the Parent Data page.

[Student Data](#)
[Parent Data](#)
[Miscellaneous Data](#)
[Computation Data](#)

Abatski, Christopher      **ID:** 0042051      **Institution:** PSUNV      [Need Summary](#)  
**Dependency Status:** Dependent      **Source:** Profile      **Aid Year:** 2008      [FM](#) [IM](#) [INAS](#)

### Parents' Household

**Number Family Members:**       **Number in College:**       **Date of Remarriage:**   
**Marital Status:**       **Legal Residence:**       **Housing Status:**   
**Means Tested benefits:**       Yes       No       N/R

### Parents' Expenses

	Current	Expected		Current	Expected
<b>Child Support Paid:</b>	<input type="text" value="0"/>	<input type="text" value="0"/>	<b>Other Tuition Paid:</b>	<input type="text" value="0"/>	<input type="text" value="0"/>
<b>Educational Loans:</b>	<input type="text" value="0"/>	<input type="text" value="0"/>	<b>Number of Tuition Paid:</b>	<input type="text" value="0"/>	<input type="text" value="0"/>
<b>Medical/Dental:</b>	<input type="text" value="0"/>	<input type="text" value="24,000"/>			

Parent Data page, 1 of 3

### Parents' Assets

<b>Cash Savings:</b>	<input type="text" value="10,248"/>	<b>Father Retirement Assets:</b>	<input type="text"/>
<b>Assets Held by Siblings:</b>	<input type="text" value="0"/>	<b>Mother Retirement Assets:</b>	<input type="text"/>

	Value	Debt		Value	Debt
<b>Investment:</b>	<input type="text" value="207,865"/>	<input type="text" value="0"/>	<b>Business:</b>	<input type="text" value="0"/>	<input type="text" value="0"/>
<b>Home:</b>	<input type="text" value="175,000"/>	<input type="text" value="0"/>	<b>Farm:</b>	<input type="text" value="0"/>	<input type="text" value="0"/>
<b>Home Purchase Year:</b>	<input type="text" value="1999"/> <b>Price:</b>	<input type="text" value="155,000"/>	<b>Other Real Estate:</b>	<input type="text" value="0"/>	<input type="text" value="0"/>
<b>Monthly Mortgage/Rent Payment:</b>		<input type="text" value="0"/>	<b>Other Real Estate Purchase Yr:</b>	<input type="text"/>	<b>Price:</b> <input type="text" value="0"/>

**Self Employed:**       Yes       No       N/R  
**Own a Business or Farm:**       Yes       No       N/R  
**Family Lives on Farm ?**       Yes       No       N/R  
**FTE Employees < 100:**       Yes       No       N/R

### Parent's Prior Year Income

<b>Prior Year AGI:</b>	<input type="text" value="70,521"/>	<b>Prior Year Item Deductions:</b>	<input type="text" value="12,474"/>
<b>Prior Year Taxes Paid:</b>	<input type="text" value="5,686"/>	<b>Prior Year Untaxed Income:</b>	<input type="text" value="0"/>

Parent Data page, 2 of 3

Parents' Income and Benefits			
Tax Filed Status:	Completed	Social Security Benefits Family:	0
Tax Form Type:	1040	Social Security Benefit Student:	0
Exemptions:	04	Welfare TANF:	0
Adjusted Gross Income:	55,856	Child Support Received:	0
Wages, Salary, & Tips:	29,300	IRA/Keogh Payments:	0
Interest Income:	13,960	Tax Deferred Plans:	0
Dividend Income:	5,355	Medical/Spending Accounts:	0
Business/Farm:	7,241	Earned Income Credit:	0
Other Taxable:	0	Living Allowance:	0
Adjustments to Income:	0	Tax-Exempt Interest:	0
U. S. Tax Paid:	2,329	Foreign Income Exclusions:	0
Hope Lifetime Learning Credit:	2,000	Other Untaxed:	0
Itemized Deductions:	11,903	Receive TANF:	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/R
Father's Earnings:	0	Receive SSI:	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/R
Mother's Earnings:	29,300		
Parents' Expected Income			
Father's Earnings:	0	Other Taxable Income:	26,566
Mother's Earnings:	29,300	Untaxed Income & Benefits:	0
Parents' Information			
DOB Parent 1:	02/15/1994	DOB Parent 2:	10/01/1949
Custodial Parent:			
Email Address:	MOMANDPOP@AOL.COM		
Non-Custodial Parent Info			
Separation Year:		Divorce Year:	
		Non-Custodial Parent's Contribution:	0

Parent Data page, 3 of 3

The following are new or modified Parent Data fields based on the changes contained on the 2007-2008 CSS Data Reporting Layout.

**Parents' Household**

**Housing Status** Select *Living with Others, Own Home, Provided by Employer, or Rent.*

**Means Tested benefits** Select Yes, No, or N/R (Not Reported).

**Parents' Assets**

**Father Retirement Asset** Can be blank or a number from 0000000 – 9999999.

**Mother Retirement Assets** Can be blank or a number from 0000000 – 9999999.

**Self Employed** Select Yes, No, or N/R (Not Reported).

**FTE Employees > 100** Select Yes, No, or N/R (Not Reported).

### Parents' Income and Benefits

- Tax Filed Status**                      Select blank, *Completed*, *Non Filer*, or *Will File*.
- Tax Form Type**                        Optional. Select from *1040*, *1040A*, *1040EZ*, *Canadian*, *Other Non-US*, *Puerto Rican*, or *Other US*.
- Receive TANF**                         Select Yes, No, or N/R (Not Reported).
- Receive SSI**                             Select Yes, No, or N/R (Not Reported).

## Viewing Miscellaneous Data

Access the Miscellaneous Data page.

Student Data	Parent Data	Miscellaneous Data	Computation Data
--------------	-------------	--------------------	------------------

Abatski,Christopher                      **ID:** 0042051                      **Institution:** PSUNV                      [Need Summary](#)  
**Dependency Status:** Dependent                      **Source:** Profile                      **Aid Year:** 2008                      [FM](#) [IM](#) [INAS](#)

**Explanation / Certification**

**Special Circumstances**

Family Members				First	1-3 of 3	Last
Relationship	Age	Attend College	College Type			
Sibling	19	Half-Time	4Y Public	+	-	
Parent	13	Full-Time		+	-	
Parent	58	Full-Time		+	-	

School Selection		First	1 of 1	Last
*CSS Code	Housing Code			
8507	Campus Housing	+	-	

FNAR Messages		First	1-5 of 5	Last
Message Number				
20				
60				
74				
75				
76				

Institutional Questions		First	1 of 1	Last
*Number Size Answer				
		+	-	

### Miscellaneous Data page

The Miscellaneous Data page reflects 2007-2008 CSS Data Reporting Layout changes.

## Viewing Computation Data

Access the Computation Data page.

Student Data Parent Data Miscellaneous Data Computation Data

Abatski, Christopher ID: 0042051 Institution: PSUNV [Need Summary](#)  
 Dependency Status: Dependent Source: Profile Aid Year: 2008 [EM](#) [IM](#) [INAS](#)

Contribution Summary

	PARENT'S CONTRIBUTION			STUDENT'S CONTRIBUTION			
	IM	IM w / Options	EFM	IM	IM Estimated	IM w / Options	EFM
<b>Total Income:</b>	55,856	55,856	53,856	1,789	1,789	1,789	1,789
<b>Total Contribution:</b>	20,940	20,940	15,481	1,632	1,632	1,632	66
<b>Number in College Adjustment:</b>	60.0 %	60.0 %	2	100.0 %	100.0 %	100.0 %	0
<b>Contribution for Student:</b>	12,564	12,564	7,741	1,632	1,632	1,632	66
<b>From Income:</b>	2,623	2,623	3,356	1,550	1,550	1,550	0
<b>From Assets:</b>	9,941	9,941	18,890	82	82	82	66
<b>Calculated Contribution:</b>	12,564	12,564	7,741	1,632	1,632	1,632	66

Custodial Parent Information

	PARENT'S CONTRIBUTION	
	IM	IM w / Options
<b>Total Income:</b>		
<b>Percent Income:</b>	%	00 %
<b>From Income:</b>		
<b>From Assets:</b>		

Computation Data page, 1 of 3

**Education Savings Calculation**

<b>Parents':</b>	<b>AESA</b>	<b>CESA</b>	<b>Student's:</b>	<b>AESA</b>	<b>CESA</b>
	0	00		0	00

**Income**

	PARENT'S CONTRIBUTION			STUDENT'S CONTRIBUTION			
	IM	IM w / Options	EFM	IM	IM Estimated	IM w / Options	EFM
<b>Taxable Income:</b>	55,856	55,856	55,856	1,789	1,789	1,789	1,789
<b>Untaxed Income:</b>	0	0	0	0	0	0	0
<b>Adjustments to Income:</b>	0	0	2,000	0	0	0	0
<b>Total Income:</b>	55,856	55,856	53,856	1,789	1,789	1,789	1,789

**Allowances**

	PARENT'S CONTRIBUTION			STUDENT'S CONTRIBUTION			
	IM	IM w / Options	EFM	IM	IM Estimated	IM w / Options	EFM
<b>U.S. Income Tax:</b>	2,329	2,329	2,329	0	0	0	0
<b>State Income Tax:</b>	6,703	6,703	3,231	36	36	36	72
<b>FICA Taxes:</b>	2,241	2,241	2,241	136	136	136	136
<b>Medical/Dental:</b>	0	0	0	0	0	0	0
<b>Elementary/Secondary Tuition:</b>	0	0	0	0	0	0	0
<b>Employment Allowance:</b>	0	0	0	0	0	0	0
<b>Annual Educations Savings:</b>	0	0	N/A	0	0	0	N/A
<b>Income Protection Allowance/MMA:</b>	25,380	25,380	20,510	0	0	0	3,000
<b>Total Allowances:</b>	36,653	36,653	28,311	172	172	172	3,208
<b>Calculated Available Income:</b>	19,203	19,203	3,356	1,617	1,617	1,617	-1,419
<b>Available Income:</b>	19,203	19,203	25,545	1,617	1,617	1,617	0
<b>Total Contribution - Income:</b>	2,623	2,623	3,356	1,550	1,550	1,550	0

Computation Data page, 2 of 3

## Assets

	PARENT'S CONTRIBUTION			STUDENT'S CONTRIBUTION			
	IM	IM w / Options	EFM	IM	IM Estimated	IM w / Options	EFM
<b>Cash Savings:</b>	10,248	10,248	10,248	329	329	329	329
<b>IRA Value:</b>	N/A	N/A	0	0	0	0	0
<b>Home Equity:</b>	175,000	175,000	0	0	0	0	0
<b>Real Estate/Investment Equity:</b>	207,865	207,865	207,865	0	0	0	0
<b>Adjusted Business/Farm Value:</b>	0	0	0	0	0	0	0
<b>Sibling's Assets/Prepaid Tuition:</b>	0	0	N/A	N/A	N/A	N/A	N/A
<b>Value of Trusts:</b>	0	0	N/A	0	0	0	0
<b>Net Worth:</b>	393,113	393,113	218,113	329	329	329	329
<b>Emergency Reserve Allowance:</b>	24,260	24,260	N/A	0	0	0	N/A
<b>Cumulative Education Savings:</b>	19,690	19,690	N/A	0	0	0	N/A
<b>Low Income Asset Allowance:</b>	0	0	N/A	0	0	0	N/A
<b>Discretionary Net Worth:</b>	349,163	349,163	157,413	329	329	329	329
<b>Asset Protection Allowance:</b>	N/A	N/A	60,700	N/A	N/A	N/A	0
<b>Conversion Percentage:</b>	N/A	N/A	12.0 %	N/A	N/A	N/A	20.0 %
<b>Income Supplement:</b>	N/A	N/A	18,890	N/A	N/A	N/A	66
<b>Total Contribution - Assets:</b>	9,941	9,941	18,890	82	82	82	66

[Computation Data page, 3 of 3](#)

## Changes to PROFILE and Need Access Navigation Paths

This table lists navigation paths that reflect 2007-2008 records:

Navigation Paths
Administer Financial Aid, Exchange Financial Aid Data, Process 2, Profile Load 07/08
Administer Financial Aid, Exchange Financial Aid Data, Process 2, Profile Suspense Move 07/08
Administer Financial Aid, Exchange Financial Aid Data, Process 2, Profile Susp Recycle 07/08
Administer Financial Aid, Exchange Financial Aid Data, Process 2, Need Access Load 07/08
Administer Financial Aid, Exchange Financial Aid Data, Process 2, Need Access Susp Move 07/08
Administer Financial Aid, Exchange Financial Aid Data, Process 2, Need Access Susp Recycle 07/08
Administer Financial Aid, Exchange Financial Aid Data, Use, Profile Susp Mgmt 07/08
Administer Financial Aid, Exchange Financial Aid Data, Use, Need Access Susp Mgmt 07/08
Administer Financial Aid, Apply for Financial Aid, Use, Maintain Application 2007-2008
Administer Financial Aid, Apply for Financial Aid, Use, View 2007-2008 IM EFC Detail
Administer Financial Aid, Manage Need Analysis, Use2, Maintain Application 2007-2008

Administer Financial Aid, Manage Need Analysis, Use2, View 2007-2008 IM EFC Detail
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## Changes to PROFILE and Need Access Search Page

The search page for the Profile/Need Access Run Controls page has been updated to include the 2007-2008 processes.

### Page Used to Define Run Controls for PROFILE and Need Access Processes

Page Name	Object Name	Navigation	Usage
Profile/Need Access Run Controls	RUNCTL_CPS	<ul style="list-style-type: none"> <li>Administer Financial Aid, Exchange Financial Aid Data, Setup, Profile/Need Access Run Cntls</li> <li>Design Student Administration, Design Financial Aid2, Setup N-P, Profile/Need Access Run Cntls</li> </ul>	Define run controls for PROFILE and Need Access processes.

### Defining PROFILE and Need Access Process Run Controls

Access the Profile/Need Access Run Cntls page.

## Profile/Need Access Run Cntls

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### Find an Existing Value

Process Name:


[Basic Search](#)

### Search Results

[View All](#)

 First  1-12 of 12  Last

Process Name	Process Type	Description
<a href="#">FAMVNA07</a>	<a href="#">SQR Report</a>	<a href="#">06/07 Need Access Susp Move</a>
<a href="#">FAMVNA08</a>	<a href="#">SQR Report</a>	<a href="#">07/08 Need Access Susp Move</a>
<a href="#">FAMVPF07</a>	<a href="#">SQR Report</a>	<a href="#">06/07 Profile Suspense Move</a>
<a href="#">FAMVPF08</a>	<a href="#">SQR Report</a>	<a href="#">07/08 Profile Suspense Move</a>
<a href="#">FANAIN07</a>	<a href="#">SQR Report</a>	<a href="#">06/07 Need Access Load</a>
<a href="#">FANAIN08</a>	<a href="#">SQR Report</a>	<a href="#">07/08 Need Access Load</a>
<a href="#">FANASR07</a>	<a href="#">SQR Report</a>	<a href="#">06/07 Need Access Susp Recycle</a>
<a href="#">FANASR08</a>	<a href="#">SQR Report</a>	<a href="#">07/08 Need Access Susp Recycle</a>
<a href="#">FAPFIN07</a>	<a href="#">SQR Report</a>	<a href="#">06/07 Profile Load</a>
<a href="#">FAPFIN08</a>	<a href="#">SQR Report</a>	<a href="#">07/08 Profile Load</a>
<a href="#">FAPFSR07</a>	<a href="#">SQR Report</a>	<a href="#">06/07 Profile Suspense Recycle</a>
<a href="#">FAPFSR08</a>	<a href="#">SQR Report</a>	<a href="#">07/08 Profile Suspense Recycle</a>

[Profile/Need Access Run Cntls page](#)