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PEOPLESOFT ENTERPRISE

Oracle's PeopleSoft 8 SP1
Financial Aid
Changes and Updates for SA
Bundle #21
Regulatory Release 1 2008-2009

November 2007

ORACLE®

Changes and Updates for SA Bundle #21, Regulatory Release 1 2008-2009

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PeopleSoft Financial Aid Documentation Updates for SA Bundle #21

Note. This document is an update to the *PeopleSoft 8 SP1 Financial Aid PeopleBook*. It describes the Product Update ID #687648 that was posted to Customer Connection in November 2007. Use this document in conjunction with your PeopleBook to maintain a complete set of documentation.

This document discusses changes related to updates and fixes delivered with SA Bundle # 21.

This bundle includes updates to:

- Regulatory changes to Return of Title IV.
- Annual updates for ISIR Load 2008-2009.
- Regulatory Updates to Institutional Need Analysis System (INAS) Institutional Methodology (IM) 2008-2009.
- Regulatory updates to PROFILE and Need Access for 2008-2009.
- Change in treatment for awarding ACG/SMART awards for less than full-time students.
- Change in Self Service actions for ACG/SMART awards.

Regulatory Changes to Return of Title IV

The Department of Education has changed the manual form for post-withdrawal disbursements. The Campus Solutions Financial Aid post-withdrawal pages are updated to reflect those changes. In addition, other pages contain improvements.

This section discusses how to:

- Enter student totals for Return of Loan Funds.
- Manage student and school return information.
- Track the return of Title IV Funds.

Entering Student Totals for Return of Loan Funds

A new Detail link on the Return of Funds Worksheet page allows access to a new Return of Loan Funds worksheet page.

This section discusses how to:

- Access the Return of Loan Funds worksheet.
- Use the Return of Loan Funds worksheet.

Pages Used to Enter Student Totals for Return of Loan Funds

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 Worksheet, Return of Funds Worksheet	Enter values in the editable fields to generate a valid calculation or to recalculate the totals due by the student and school.
Return of Loan Funds	STDNT_RTN_TIVSEC7N	Click the Detail link for the R. Student Loan Repayment Amount field on the Return of Funds Worksheet.	Enter debt totals for various loan types for withdrawn students.

Accessing the Return of Loan Funds Worksheet

Access the Return of Funds Worksheet 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: 2008		
Term: 0585 2007 Summer		Program Type: Credit Hour Program		
<input type="button" value="Calculate"/>	<input type="button" value="Calculate All"/>	Date of Withdrawal: 07/02/2007	Institutional Determination Dt: 10/05/2007	
Worksheet Data				
E. Total TIV Aid Disb:	<input type="text" value="5474.34"/>	Detail	N. Unearned Inst Charges:	3276.80
F. Total TIV Grant Aid:	<input type="text" value="4883.34"/>		O. Amt Due From School:	2802.86 Detail
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"/>	Detail	Q. Amt Due From Student:	0.00
I. TIV Aid Earned:	2671.48		R. Stdnt Loan Repaymnt Amt:	0.00 Detail
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"/>	Detail	U. TIV Grant Return Amt:	0.00 Detail
M. Pct TIV Aid Unearned:	51.20		Action:	<input type="text" value="Complete School Return of Funds"/>

Return of Funds Worksheet page

Use the new Detail link to access a worksheet for entering information about the return of loan funds for the student. This worksheet is useful when counseling a withdrawn student on loan indebtedness.

R. Stdnt Loan Repaymnt Amt (return student loan repayment amount) Click the **Detail** link to access the Return of Loan Funds detail page.

Using the Return of Loan Funds Worksheet

Access the Return of Loan Funds page.

Return of Loan Funds	
Student Return of Funds	
1. Unsub:	<input type="text" value="0.00"/>
2. Sub:	<input type="text" value="0.00"/>
3. Perkins:	<input type="text" value="0.00"/>
4. Grad PLUS:	<input type="text" value="0.00"/>
5. PLUS:	<input type="text" value="0.00"/>

Return of Loan Funds page

Enter the totals for any Unsubsidized FFEL or Direct Loan, Subsidized FFEL or Direct Loan, Perkins, Graduate PLUS, or PLUS loans for which the student is responsible.

Managing Student and School Return Information

The Post-Withdrawal Disbursement page and the new Allocation of PWD page contain new fields.

This section discusses how to:

- Track post-withdrawal disbursement.
- View allocation of post-withdrawal disbursements.

Pages Used to Manage Student and School Return Information

Page Name	Object Name	Navigation	Usage
Post-Withdrawal Disbursement	STDNT_RTRN_TIV_WK3	Administer Financial Aid, Package and Disburse Aid, Use, Return of TIV Worksheet, Post-Withdrawal Disbursement	Track post-withdrawal disbursements. The student was entitled to these funds but they were not disbursed.
Allocation of PWD	STDNT_PWD_SEC1A	Click the Part IV Allocation of PWD link on the Post-Withdrawal page.	Enter post-withdrawal disbursement amounts for various types of loans.

Tracking Post-Withdrawal Disbursement

Access the Post-Withdrawal Disbursement page.

Return TIV Aid		Return of Funds Worksheet		Student/School Return		Post-Withdrawal Disbursement	
Knobb,Issa D				ID:		FAIV0049	
Institution:		PSUNV PeopleSoft University		Aid Year:		2008	
Term:		0585 2007 Summer		Program Type:		Credit Hour Program	
Calculate		Date of Withdrawal:		07/01/2007		Institutional Determination Dt:	
		Post-Withdrawal Disb Status:		Pending		Date Form Completed:	
						10/12/2007	
Part I, II, III							
J. TIV Aid to Disburse (Box 1):		1649.88		Total PWD Credited (Box 2):		900.00	
Part IV Allocation of PWD		1649.88		-		900.00	
PWD Detail		Box 1		Box 2		Box 3:	
						= 749.88	
Part V, VI							
PWD Notification Sent:		07/20/2007					
Response Deadline:		08/13/2007					
Date Response Received:		08/03/2007		<input checked="" type="checkbox"/> Response Received <input type="checkbox"/> Not Received			
Date Direct Disb Mailed:		08/10/2007		<input type="checkbox"/> Late Response Not Accepted			

Post-Withdrawal Disbursement page

New fields added to this page reflect changes made to the Department of Education manual form. The new fields are listed here.

Post-Withdrawal Disb Status (post-withdrawal disbursement status)

The *Pending* status is set when the worksheet is created. Select *Complete* when appropriate for the current stage of processing.

Date Form Completed

Displays the system date at the time the **Post-Withdrawal Disb Status** field is set to *Complete*.

Part I, II, III

J. TIV Aid to Disburse (Box 1)

Displays the total amount of post-withdrawal disbursement due. This field is from Step J. Post Withdrawal Disbursement on the Return of Funds Worksheet page.

Part IV Allocation of PWD

Click this link to access the Allocation of PWD page.

Total PWD Credited (Box 2)

Enter the total outstanding charges scheduled to be paid from PWD.

Box 3

The amount to offer directly to the student is derived from the TIV Aid to Disburse amount less the Total PWD Credited amount. Box 3 = Box 1 - Box 2.

Part IV, V

PWD Notification Sent

Select the date that the post-withdrawal disbursement notification was sent to the student, parent, or both.

- Response Deadline** Select the date by which the student, parent, or both must respond.
- Date Response Received** Select the date that the response was received from the student or parent.
- Date Direct Disb Mailed** Select the date that the direct disbursement was mailed or transferred.
(date direct disbursement mailed)
- Response Received** Select this check box if the response was received from the student or parent.
- Not Received** Select this check box if the response was not received from the student or parent.
- Late Response Not Accepted** Select this check box if the response was received from the student or parent after the date in the **Response Deadline** field.

Viewing Post Withdrawal Disbursements

Access the Allocation of PWD page.

Allocation of PWD

Type of Aid	Grant Credited	Ln Amt Sought	Ln Amt Auth	Aid Offered	Aid Accepted
Unsub:		0.00	0.00	0.00	0.00
Sub:		0.00	0.00	0.00	0.00
Perkins:		0.00	0.00	0.00	0.00
Grad Plus:		0.00	0.00	0.00	0.00
Plus:		0.00	0.00	0.00	0.00
Pell Grant:	500.00			0.00	0.00
ACG:	0.00			0.00	0.00
SMART:	400.00			749.88	0.00
FSEOG:	0.00			0.00	0.00
Totals:	900.00	0.00	0.00	749.88	0.00

Allocation of PWD page

Enter appropriate amounts for each column and type of aid.

- Grant Credited** Enter grant aid credited to the account.
- Ln Amt Sought** (loan amount sought) Enter loan amount school seeks to credit to the account.

- Ln Amt Auth** (loan amount authorized) Enter loan amount authorized to credit to the account.
- Aid Offered** Enter amount of aid offered as direct disbursement.
- Aid Accepted** Enter amount of aid accepted as direct disbursement.
- Calculate** Click this button to total the columns.

Tracking the Return of Title IV Funds

Date fields are changed on the Dates 1 tab and on the Dates 2 tab on the Post Withdrawal Disb Tracking page.

This section discusses how to review post-withdrawal disbursement tracking data.

Page Used to Track the 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. Select the Dates 1 tab.

Post Withdrawal Disb Tracking

Academic Institution: PSUNV PeopleSoft University **Aid Year:** 2008
Term: 0585 2007 Summer **Program Type:** Credit Hour Program

View: All Complete Pending

View All First ◀ 1 of 1 ▶ Last

Status	Summary	Dates 1	Dates 2	Last Updated
PWD Notification Sent Response Deadline				
1	07/20/2007	08/13/2007		

* 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

For 2007-2008, three fields, **Date Disbursements Offered**, **Date Disbursements Made**, and **Date Disbursements Declined**, were removed from the Dates 1 tab. Two new date fields are updated from the Return of TIV Worksheet HERA - Post-Withdrawal Disbursement page. You can edit these fields.

PWD Notification Sent View or edit the date that the post-withdrawal disbursement notification was sent to the student, parent, or both.

Response Deadline View or edit the date by which the student, parent, or both need to respond.

Select the Dates 2 tab.

Post Withdrawal Disb Tracking

Academic Institution: PSUNV PeopleSoft University **Aid Year:** 2008

Term: 0585 2007 Summer **Program Type:** Credit Hour Program

View: All Complete Pending

View All First ◀ 1 of 1 ▶ Last

Status	Summary	Dates 1	Dates 2	Last Updated										
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;"></th> <th style="width: 20%;">Date Response Received</th> <th style="width: 10%;"></th> <th style="width: 20%;">Date Direct Disb Mailed</th> <th style="width: 10%;"></th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;">08/03/2007 <input type="text"/></td> <td style="text-align: center;"><input type="text"/></td> <td style="text-align: center;">08/10/2007 <input type="text"/></td> <td style="text-align: center;"><input type="text"/></td> </tr> </tbody> </table>						Date Response Received		Date Direct Disb Mailed		1	08/03/2007 <input type="text"/>	<input type="text"/>	08/10/2007 <input type="text"/>	<input type="text"/>
	Date Response Received		Date Direct Disb Mailed											
1	08/03/2007 <input type="text"/>	<input type="text"/>	08/10/2007 <input type="text"/>	<input type="text"/>										

* 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 2 tab

For 2007-2008, three fields, **Date Disbursements Credited**, **Date Disbursements Accepted**, and **Date Loan Funds Needed**, were removed from the Dates 2 tab. Two new date fields are updated from the Return of TIV Worksheet HERA - Post-Withdrawal Disbursement page. You can edit both fields.

Date Response Received View or edit the date that the school received the response from the student.

Date Direct Disb Mailed (date direct disbursement mailed) View or edit the date that the direct disbursement was mailed or transferred.

Annual Updates for ISIR Load 2008-2009

This section includes updates and changes to ISIR processing to support regulatory release changes for the 2008-2009 aid year cycle. It documents changes to ISIR pages and discusses:

- New pages and components for 2008-2009.
- Changes to the ISIR processes.
- Changes to ISIR data corrections for 2008-2009.

Note. These updates are based on the August 2007 draft 2008-2009 ISIR file specifications. Additional updates may be necessary when the *2008-2009 EDE Technical Reference Guide* is published and reviewed. Updates are normally delivered in the following bundle.

New Pages and Components for 2008-2009

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

Pages New for ISIR Load 2008-2009

Page Name	Object Name	Navigation	Usage
ISIR Suspense Management 08/09	ISIR_SUSP_CNTRPIA9	<ul style="list-style-type: none"> Administer Financial Aid, Exchange Financial Aid Data, Use, ISIR Susp Management 08/09 Administer Financial Aid, Manage Need Analysis, Use2, ISIR Suspense Management 08/09 	Review all ISIR records processed by the FA Inbound processes and FAPSAR00 processes.
CPS Generated Fields	ISIR_CPS_GEN_INF6	Click the CPS Generated Data link on the ISIR Suspense Management 08/09 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 08/09	View processing information for a batch of ISIRs.
ISIR Data 1	ISIR_09_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_09_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_09_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.

Header and Trailer Data	ISIR_09_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.
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ISIR Suspense Management 08/09

Access the ISIR Suspense Management 08/09 page.

ISIR Suspense Management 08/09

EC Queue Instance/Seq. No: 1 2 Transaction Receipt Date: 09/04/2007 Load Status: Loaded

ISIR Manual Load Parameters

EmpID: <input type="text" value="FA0335"/>	<input 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): 09/06/2007	Alternate Effective Date: <input type="text"/>				

Student Information

Last Name: DAVI	First Name: DUARTE	Mi: W
SAR ID: 495-98-0252 DA 01	SSN: 895-98-0509	Date of Birth: 08/06/1980
Dependency Status: D Dependent w/Primary EFC	Primary EFC: 13522	
Federal PELL Eligibility:	Student's Admit Lvl: 5 - Accepted/Continuing	
ED Verification Status: Not Required	Verification Select/Tracking: N	

[ISIR Load Information](#)
[CPS Generated Data](#)
[ISIR Reject Reasons](#)
[Search Match](#)
[Corrected Fields](#)

ISIR Suspense Management 08/09 page

The ISIR Suspense Management 08/09 page is updated for the 08/09 Aid Year.

CPS Generated Fields

Access the CPS Generated Fields page.

CPS Generated Fields

CPS Generated Information		
Transaction Data Source/Type:	7R	FAFSA 4caster Renewal
Application Data Source/Type:	4A	Paper Application
Address Only Change Flag:	4	More than one address
CPS Pushed ISIR Flag:		
NSLDS Post-Screening Code 1:	02	Overpayment added
NSLDS Post-Screening Code 2:	06	Loan into discharged status
NSLDS Post-Screening Code 3:	07	Loan out of discharged status
Processed Record Type:		
History Correction Applied:	01	
Source of Correction:	D	CPS
Electronic Institution Ind:	4	001999
Reprocess Code:		
EFC Change Flag:	1	EFC Increase
ISIR SAR C Flag Changed:	Y	SAR C Flag Has Changed
Rejected Status Change Flag:		
Verification Select Chng Flag:		
ISIR Elec Trans Indicator:	1	Non-School Generated, Daily

[CPS Generated Fields page](#)

The CPS Generated Fields page is updated for the 08/09 Aid Year.

ISIR Inbound Load Summary

Access the ISIR Inbound Load Summary page.

ISIR Inbound Load Summary

EC Transaction ID: CPS_ISIR_2009 **EC Queue Instance:** 1
Batch Number: PS2007-10-12-08.02.52 **ISIR Load Date:Time:** 10/12/07 8:02AM [Header and Trailer Data](#)

Inbound ISIR Batch Detail							View All	First	1-4 of 4	Last
Original SSN	Name CD	Trans Nbr	Load Status	EmplID	Suspend Reason	Admit Level				
1 457-78-0251	AL	01	Suspended	Suspense FA0333	Duplicate SSN Indicated	5				
2 495-98-0252	DA	01	Loaded	FA0335		5				
3 466-77-0253	LU	01	Loaded	FA0338		5				
4 486-75-0254	LO	01	Loaded	FA0339		5				

[ISIR Inbound Load Summary page](#)

The ISIR Inbound Load Summary page is updated for the 08/09 Aid Year.

ISIR Data 1

Access the ISIR Data 1 page.

ISIR Data 1

Sequence Number: 1 **Load Status:** S **EmplID:** FA0333
Transaction Number: 01 **Original SSN:** 457-78-0251 **Name Code:** AL

Inbound ISIR (1A)

Batch Year:	9	Date of Birth:	07/03/1980
Last Name-SSN Change Flag:	N	Perm Phone Number:	8122944847
Original SSN:	457-78-0251	Driver's License #:	1760234012
Name Code:	AL	Driver's License State Code:	CA
Transaction Number:	01	Citizenship Status:	2
Social Security #:	957-78-8907	Alien Registration Number:	455456644
Student's Last Name:	BYRON	Marital Status:	2
Student's First Name:	ALLON	Marital Status Date:	200210
Student Middle Initial:	P	Enrollment Status:	1
Permanent Mailing Address:	411 MISSION BEACH DR		
City:	SAN DIEGO		
State:	CA		
Zip:	20816		

Inbound ISIR (1B)

Father's Highest Grade Level:	2	Drug Offense Conviction:	1
Mother's Highest Grade Level:	2	Tax Form-Student:	2
State of Legal Res:	CA	2007 Tax Form Used:	4
Legal Res Before 01-01-2003:	1	Eligible For 1040A or EZ:	1
Legal Res Date:	200001	Stu Agi:	00168F
Are You Male or Female?:	1	Student Income Tax Paid:	00023
Permit Sel Serv to Enroll:	2	Number of Exemptions:	00
Degree/Certificate:	1	Student Income From Work:	00168F
Grade Level in College:	2	Spouse Income From Work:	00000{
HS Diploma or Equivalent:	1	Student's Total from WK A:	00010
Rcvd 1st Bach Deg By 7-01-2008:	2	Student's Total from WK B:	00021
Work Study or Student Loans:	2	Student's Total from WK C:	00033
Receives SSI Income:		Student's Investment Net Worth:	005001

ISIR Data 1 page (1 of 3)

Receives Food Stamps:		TANF Recipients:	
Participates in Lunch Program:		WIC Benefits Recipient:	
Inbound ISIR (1C)			
Student's Business Net Worth:	000800	Father's SSN:	457-78-8251
Cash and Savings:	000030	Father's Last Name:	BYRON
VA Ben Nbr of Months:	03	Father's First Name Initial:	F
Monthly Veterans Benefits:	0110	Father's Date of Birth:	07/03/1980
Born Before 01-01-1985:	2	Mother's SSN:	457-77-7251
Working on Masters/Doctorate:	2	Mother's Last Name:	BYRON
Student Married:	1	Mother's First Name Initial:	J
Have Children you support:	2	Mother's Date of Birth:	07/03/1980
Dependents Other Than Spouse:	2	Par Family Members:	03
Orphan or Ward of the Court:	2	Parents' Number in College:	1
Veteran:	2	State of Legal Res:	IN
Active Duty in U.S. Military:	2	Legal Res Before 01-01-2003:	1
Marital Status-Parents:	1	Parent School Lunch Program:	
Parent Receives SSI Income:		Parent TANF Recipient:	
Parent Receives Food Stamps:		Parent WIC Benefits:	
Parent's E-mail Address:	goraiders@yahoo.com		

Inbound ISIR (1D)			
Legal Res Date:	197601	Student's 2nd Choice School:	001328
Tax Form Filed? -Parents:	2	Student's Housing Code Col 2:	1
Parent's Type of 2007 Tax Form:	4	Student's 3rd Choice School:	001804
Eligible For 1040A or EZ:	1	Student's Housing Code Col 3:	1
Par AGI:	06597{	Student's 4th Choice School:	001989
Income Tax Paid:	008490	Student's Housing Code Col 4:	1
Number of Exemptions:	03	Student's 5th Choice School:	003736
Father Income From Work:	03613D	Student's Housing Code Col 5:	1
Mother Income From Work:	02983B	Student's 6th Choice School:	001808
Total from WK A:	00895	Student's Housing Code Col 6:	1
Total from WK B:	00022	Student's 7th Choice School:	
		Student's Housing Code Col 7:	

ISIR Data 1 page (2 of 3)

Receives Food Stamps:		TANF Recipients:	
Participates in Lunch Program:		WIC Benefits Recipient:	
Inbound ISIR (1C)			
Student's Business Net Worth:	000800	Father's SSN:	457-78-8251
Cash and Savings:	000030	Father's Last Name:	BYRON
VA Ben Nbr of Months:	03	Father's First Name Initial:	F
Monthly Veterans Benefits:	0110	Father's Date of Birth:	07/03/1980
Born Before 01-01-1985:	2	Mother's SSN:	457-77-7251
Working on Masters/Doctorate:	2	Mother's Last Name:	BYRON
Student Married:	1	Mother's First Name Initial:	J
Have Children you support:	2	Mother's Date of Birth:	07/03/1980
Dependents Other Than Spouse:	2	Par Family Members:	03
Orphan or Ward of the Court:	2	Parents' Number in College:	1
Veteran:	2	State of Legal Res:	IN
Active Duty in U.S. Military:	2	Legal Res Before 01-01-2003:	1
Marital Status-Parents:	1	Parent School Lunch Program:	
Parent Receives SSI Income:		Parent TANF Recipient:	
Parent Receives Food Stamps:		Parent WIC Benefits:	
Parent's E-mail Address:	goraiders@yahoo.com		

Inbound ISIR (1D)			
Legal Res Date:	197601	Student's 2nd Choice School:	001328
Tax Form Filed? -Parents:	2	Student's Housing Code Col 2:	1
Parent's Type of 2007 Tax Form:	4	Student's 3rd Choice School:	001804
Eligible For 1040A or EZ:	1	Student's Housing Code Col 3:	1
Par AGI:	06597{	Student's 4th Choice School:	001989
Income Tax Paid:	008490	Student's Housing Code Col 4:	1
Number of Exemptions:	03	Student's 5th Choice School:	003736
Father Income From Work:	03613D	Student's Housing Code Col 5:	1
Mother Income From Work:	02983B	Student's 6th Choice School:	001808
Total from WK A:	00895	Student's Housing Code Col 6:	1
Total from WK B:	00022	Student's 7th Choice School:	
		Student's Housing Code Col 7:	

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

The ISIR Data 1 page is updated for the 08/09 Aid Year.

ISIR Data 2

Access the ISIR Data 2 page.

ISIR Data 2

Sequence Number: 1 Load Status: S EmplID: FA0333
 Transaction Number: 01 Original SSN: 457-78-0251 Name Code: AL

Inbound ISIR (2A)

Student's Email Address:	ALLONS@MSN.COM	Assumption Override 5:	1
ETI Destination Code:		Assumption Override 6:	1
Rej Ovr A:	1	Dependency Status:	D
Rej Ovr B:	1	Application Receipt Date:	09/03/2007
Rej Ovr C:	1	Processed Record Type:	C
Rej Ovr G:	1	History Correction Applied:	01
Rej Ovr N:	1	System Generated Indicator:	
Rej Ovr W:	1	Address Only Change Flag:	4
Reject Override 3:		Source of Correction:	A
Reject Override 4:	1	Parent's Calc 2007 Tax Stat:	1
Reject Override 12:		Student's Calc 2007 Tax Stat:	1
Reject Override 20:	1	CPS Pushed ISIR Flag:	Y
Reject Override J:		ISIR SAR C Flag Changed:	Y
Reject Override K:		Graduate Flag:	Y
Assumption Override 1:	1	Rejected Status Change Flag:	
Assumption Override 2:	1	Verification Select Chng Flag:	
Assumption Override 3:	1		
Assumption Override 4:	1		

Inbound ISIR (2B)

Auto Zero EFC:	Y	NSLDS Post-Screening Code 2:	04
EFC Change Flag:	1	NSLDS Post-Screening Code 3:	11
SAR C Flag:	Y	Veteran Status Match Flag:	4
Simplified Need Test:	N	Verification Tracking Flag:	1029
Reject Reason Codes:	19 P	Verification Selection Flag:	Y
Selective Service Match:	Y	Father's SSN Match:	4
Selective Service Registration:	N	Mother's SSN Match:	4
DHS Match:	Y	Appl Data Source/Type Code:	2R
DHS Verification Number:	Z9988P777666555	Trans Data Source/Type Code:	1A
Secondary DHS Match Flag:	Y	Transaction Process Date:	09/06/2007
SSN Match:	2	Compute Number:	009
SSA Citizenship Indicator:	B		

ISIR Data 2 page (1 of 4)

NSLDS Match: 1
NSLDS Post-Screening Code: 01

Inbound ISIR (2C)

Primary EFC:	10608	Primary Alternate Month 1:	01188
Secondary EFC:	05660	Primary Alternate Month 2:	02365
Primary Formula Type:	1	Primary Alternate Month 3:	03542
Secondary Formula Type:	4	Primary Alternate Month 4:	04719
		Primary Alternate Month 5:	05896
		Primary Alternate Month 6:	07073
		Primary Alternate Month 7:	08250
		Primary Alternate Month 8:	09427
		Primary Alternate Month 10:	10741
		Primary Alternate Month 11:	10874
		Primary Alternate Month 12:	11007

Inbound ISIR (2D)

Secondary Alternate Month 1:	01188	State Tax Allowance:	000334C
Secondary Alternate Month 2:	02365	Employment Allowance:	0002800
Secondary Alternate Month 3:	03542	Inc Protection Allowance:	0015260
Secondary Alternate Month 4:	04719	Available Income:	003192F
Secondary Alternate Month 5:	05896	Contribution Available Income:	000092F
Secondary Alternate Month 6:	07073	Discretionary Net Worth:	00003800}
Secondary Alternate Month 7:	08250	NW: EFC Net Worth:	000000400
Secondary Alternate Month 8:	09427	Asset Protection Allowance:	000038400
Secondary Alternate Month 10:	10741	Parent Asset Contribution:	000000{
Secondary Alternate Month 11:	10874	Adj Available Income:	003192F
Secondary Alternate Month 12:	11007	Total Student Contribution:	0002155
Total Income:	006686E	Total Parent Contribution:	0010597
Allowance VS Total Income:	0034939	Parent Contribution:	0010597

Inbound ISIR (2E)

Student's Total Income:	000000{	Secondary DNW:	00012500F
Student's Allowance vs TI:	000220{	Secondary Net Worth:	000125000
Student Income Contribution:	0000000	Secondary Asset Protect Allow:	000000233
Student's Disc Net Worth:	00000003{	Secondary Par Cont From Assets:	000050E
Student Asset Contribution:	000001A	Secondary Adj Avail Inc:	000077F
FISAP Total Income:	006686E	Secondary Total Stu Contrib:	0000120

ISIR Data 2 page (2 of 4)

The ISIR Data 2 page is updated for the 08/09 Aid Year.

NSLDS Data 1

Access the NSLDS Data 1 page is updated for 08/09 Aid Year.

NSLDS Data 1

Sequence Number: 1 **Load Status:** S **EmplID:** FA0333
Transaction Number: 01 **Original SSN:** 457-78-0251 **Name Code:** AL

Inbound ISIR (NSLDS 1A)

NSLDS Transaction Nbr:	01	Aggregate Unsub Out Principal:	005976
NSLDS DB Results Flag:	1	Aggr Combined Out Principal:	005976
NSLDS Pell Overpayment:	N	Unalloc Cons Outstand Prin Bal:	N/A
NSLDS Pell Overpay Contact:	00131500	Aggr Subsidized Pending Disb:	000000
NSLDS SEOG Overpayment:	S	Aggr Unsubsidized Pending Disb:	N/A
NSLDS SEOG Overpay Contact:	N/A	Aggr Combined Pending Disb:	000000
NSLDS Perkins Overpayment:	N	Aggregate Subsidized Total:	003351
NSLDS Perkins Overpay Contact:	N/A	Aggregate Unsubsidized Total:	002625
NSLDS ACG Overpayment:	N	Aggregate Combined Total:	005976
NSLDS ACG Overpay Contact:	N/A	NSLDS Unalloc Consol Total:	N/A
NSLDS NSG Overpayment:	N	NSLDS Grad Sub Loan Limit:	N
NSLDS NSG Overpay Contact:	N/A	NSLDS Grad Combo Loan Limit:	N
NSLDS Default Reported:	N	Perkins Cum Disb Amt:	001000
NSLDS Discharged Rptd:	N	NSLDS Active Bankruptcy:	N
NSLDS Satisfctry Rpymnt:	N	Aggregate Sub Out Principal:	003351
NSLDS Fraud Flag:	Y		

Inbound ISIR (NSLDS 1B)

Perkins CY Disbursement Amt:	N/A	DL Master-Prom Note Flag:	U
NSLDS Default Ln Chg:	N	DL Plus Master-Prom Note Flag:	N
NSLDS Fraud Loan Chg:	N	DL GPlus Master-Prom Note Flag:	N
NSLDS Dschrgd Ln Chg:	N	NSLDS UG Sub Loan Limit:	C
NSLDS Satsfctry Rpymnt Chg:	N	NSLDS UG Combo Loan Limit:	N
NSLDS Actv Bnkruptcy Chg:	N	NSLDS Pell Seq No:	01
NSLDS Overpymnt Chg:	N	NSLDS Pell Verif Flag:	VER
NSLDS Aggr Loan Chg:	N	NSLDS Pell EFC:	000120
NSLDS Perkins Chg:	N	NSLDS Pell School Cd:	00131500
NSLDS Pell Pymnt Chg:	N	NSLDS Pell Trans Nbr:	01
NSLDS Additional Pell:	N	NSLDS Pell Last Update Dt:	20010712
NSLDS Additional Loans:	N	NSLDS Pell Sch Amt:	003400
NSLDS Additional ACG:	Y	NSLDS Pell Paid:	001750

NSLDS 1 page (1 of 3)

NSLDS Additional NSG:	N	NSLDS Pct Used by Awd Year:	0500000
Inbound ISIR (NSLDS 1C)			
NSLDS Pell Award Amount (1):	003400	NSLDS Pell Seq No (3):	03
NSLDS Pell Seq No (2):	02	NSLDS Pell Verif Flag (3):	VER
NSLDS Pell Verif Flag (2):	VER	NSLDS EFC (3):	000120
NSLDS EFC (2):	000120	NSLDS Pell School Cd (3):	00131500
NSLDS Pell School Cd (2):	00131500	NSLDS Pell Trans Nbr (3):	01
NSLDS Pell Trans Nbr (2):	01	NSLDS Pell Last Update Dt (3):	20000112
NSLDS Pell Last Update Dt (2):	19990412	NSLDS Pell Sch Amt (3):	002400
NSLDS Pell Sch Amt (2):	002400	NSLDS Pell Paid (3):	002400
NSLDS Pell Paid (2):	001200	NSLDS Pct Used by Awd Year (3):	1000000
NSLDS Pct Used by Awd Year (2):	1000000	NSLDS Pell Award Amount (3):	002400
NSLDS Pell Award Amount (2):	002400		
Inbound ISIR (NSLDS 1D)			
ACG Sequence No (1):	01	ACG Award Amount (2):	001300
ACG School Code (1):	00132800	ACG Academic Year Level(2):	2
ACG Transaction No (1):	01	ACG Eligibility Code (2):	01
ACG Last Update Date (1):	20070515	ACG High School Prog Code (2):	CA6001
ACG Scheduled Award Amount (1):	001300	ACG COD Sequence Code (2):	001
ACG Amount Paid (1):	000650	ACG Award Year (2):	2006
ACG Prcnt Elig Schdl Award (1):	0001300	ACG Total Elig Acad Yr Lvl (2):	1000000
ACG Award Amount (1):	001300	ACG Sequence No (3):	
ACG Academic Year Level(1):	2	ACG School Code (3):	
ACG Eligibility Code (1):	01	ACG Transaction No(3):	
ACG High School Prog Code (1):	CA6001	ACG Last Update Date (3):	
ACG COD Sequence Code (1):	001	ACG Scheduled Award Amount (3):	
ACG Award Year (1):	2008	ACG Amount Paid (3):	
ACG Total Elig Acad Yr Lvl (1):	1000000	ACG Prcnt Elig Schdl Award (3):	
ACG Sequence No (2):	02	ACG Award Amount (3):	
ACG School Code (2):	00131500	ACG Academic Year Level(3):	
ACG Transaction No (2):	01	ACG Eligibility Code (3):	
ACG Last Update Date (2):	20060515	ACG High School Prog Code (3):	
ACG Scheduled Award Amount (2):	001300	ACG COD Sequence Code (3):	
ACG Amount Paid (2):	001300	ACG Award Year (3):	
ACG Prcnt Elig Schdl Award (2):	1000000	ACG Total Elig Acad Yr Lvl (3):	

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

Inbound ISIR (NSLDS 1E)			
NSG Sequence No (1):	01	NSG Award Amount (2):	
NSG School Code (1):	00132800	NSG Academic Year Level (2):	
NSG Transaction No (1):	01	NSG Instruct Program Code (2):	
NSG Last Update Date (1):	20070707	NSG COD Sequence Code (2):	
NSG Scheduled Award Amount (1):	004000	NSG Award Year (2):	
NSG Prcnt Elig Schdl Award (1):	0500000	NSG Total Elig Acad Yr Lvl (2):	
NSG Amount Paid (1):	002000	NSG Sequence No (3):	
NSG Award Amount (1):	004000	NSG School Code (3):	
NSG Academic Year Level (1):	3	NSG Transaction No (3):	
NSG Instruct Program Code (1):	01.0901	NSG Last Update Date (3):	
NSG COD Sequence Code (1):	001	NSG Scheduled Award Amount (3):	
NSG Award Year (1):	2008	NSG Prcnt Elig Schdl Award (3):	
NSG Total Elig Acad Yr Lvl (1):	1000000	NSG Amount Paid (3):	
NSG Sequence No (2):		NSG Award Amount (3):	
NSG School Code (2):		NSG Academic Year Level (3):	
NSG Transaction No (2):		NSG Instruct Program Code (3):	
NSG Last Update Date (2):		NSG COD Sequence Code (3):	
NSG Scheduled Award Amount (2):		NSG Award Year (3):	
NSG Amount Paid (2):		NSG Total Elig Acad Yr Lvl (3):	
NSG Prcnt Elig Schdl Award (2):			

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

The NSLDS Data 1 page is updated for 08/09 Aid Year.

Header and Trailer Data

Access the Header and Trailer Data page.

Header and Trailer Data

EC Transaction ID: CPS_ISIR_2009

EC Queue Instance: 1 **In/Out:** |

Header Information			
ISIR Load Date:Time:	10/12/07 8:02AM	TG Number:	TG52222

Trailer Information	
Total Records:	4

[Header and Trailer Data page](#)

The Header and Trailer Data page is updated for the 08/09 Aid Year.

Changes to the ISIR Processes

A majority of the changes to the ISIR load processes in the current bundle are limited to the handling of the new fields added to the 2009 ISIR.

The ISIR Load process was modified to handle the new Transaction Data Source/Type Code values of:

- 7R (FAFSA4caster Renewal Application)
- 7T (FAFSA4caster Spanish Renewal)
- 2Q (Web Student Spanish Correction)
- 4Q (Paper Spanish Correction)

The ISIR Load process will handle the values of 7R and 7T as ISIR Applications while the values of 2Q and 4Q will be handled as ISIR Corrections. There are no changes made to the suspend rules.

Additional 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 2008-09 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 2008-09 comments and codes have not yet been published. Normally, these will be delivered in the following bundle.
- FM INAS for 2008-09 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 2009 and create a prospect data source of **ISIR09**. This is part of the normal processing setup for new financial aid years.
- A change was made to the Alien Registration Number on the Correct 2008-2009 ISIR Records > FAFSA Information page (Administer Financial Aid, Manage Need Analysis, Use 2, ISIR Corrections 08/09, FAFSA Information. In the event a student has multiple Visa/Permit Numbers on file, you can now select the exact ones that should be sent as a correction; previously, you could select only Visa/Permit Numbers with a Country of **'USA'** and a type of **'AR1'**. If you select a Visa/Permit Number associated to a country other than USA, a warning message will appear but the page can still be saved and the correction processed.

Changes to ISIR Data Corrections for 2008-2009

The new ISIR Corrections 08/09 component reflects the changes to the 2009 ISIR.

Pages Used to Make ISIR Data Corrections for 2008-2009

Page Name	Object Name	Navigation	Usage
-----------	-------------	------------	-------

FAFSA Information	ISIR_PIA_CS1_09	Administer Financial Aid, Manage Need Analysis, Use 2, ISIR Corrections 08/09, FAFSA Information	Correct information on the FAFSA Information page.
INAS Federal Extension	INAS_FED_EXT08_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_SEC09	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_SEC09	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_SEC09	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_09	Administer Financial Aid, Manage Need Analysis, Use2, ISIR Corrections 08/09, 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_09	Administer Financial Aid , Manage Need Analysis, Use2, ISIR Corrections 08/09, 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 is updated for the 08/09 Financial Aid Year.

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

Davi, Duarte ID: FA0335

Aid Year: 2009 Financial Aid Year 2008-2009 Institution: PSUNV

ISIR Data First 1 of 1 Last

*Effective Date: 09/06/2007 Transaction Nbr: 1 Correction Status: Status Date:

EFC Status: Official Primary EFC: 13,522 Prorated EFC: 13,522 FM IM [Need Summary](#)

Actual Bio/Demo Data		ISIR Bio/Demo Data	
<input type="checkbox"/> Correct Name	First Name: Duarte Middle: Last Name: Davi	Student's First Name: DUARTE MI: W Last Name: DAVI	
<input type="checkbox"/> Correct Address	Student Address	ISIR Address	
<input type="checkbox"/> Correct SSN	895-98-0509	SSN: 895-98-0509	
<input type="checkbox"/> Correct Birthdate	07/05/1980	Birthdate: 08/06/1980	
<input type="checkbox"/> Correct Telephone		Telephone Nbr: 606/781-5246	
<input type="checkbox"/> Correct Citizenship		Citizenship Status: 1 U.S. citizen	
<input type="checkbox"/> Correct Alien Reg Nbr		Alien Registration Number:	
		Driver's License #: D96816768	
		DL State: CA California	
<input type="checkbox"/> Correct Email		Student's Email Address: SUPER_FREAK@SPRINT.COM	

Student Data - Enrollment Information

Enrollment Status 2008-2009: 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 03: Blank Yes No Residency Date:

Male or Female: Male Female Permit Sel Serv to Enroll: Yes No

Degree/Certificate: 1st Bachelr Current Grade Level: 2nd yr Sph

HS Diploma or Equivalent: High School Diploma GED Home Schooled Other

Rcvd 1st Bach Deg By 7-01-2008: Yes No

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

FAFSA Information page (1 of 3)

Student Data - Financial Information

2007 Federal Benefits Received: SSI Food Stamps School Lunch TANF WIC

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

2007 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:	<input type="text" value="4,686"/>	Student Income:	<input type="text" value="4,686"/>	Worksheet A:	<input type="text" value="0"/>
U.S. Taxes Paid:	<input type="text" value="88"/>	Spouse Income:	<input type="text" value="0"/>	Worksheet B:	<input type="text" value="0"/>
Exemptions:	<input type="text" value="01"/>			Worksheet C:	<input type="text" value="0"/>
Investment Net Worth:	<input type="text" value="7,000"/>	Bus/Farm Net Worth:	<input type="text" value="0"/>	Cash Savings:	<input type="text" value="50"/>
VA Ben Nbr of Months:	<input type="text"/>	VA Ben Monthly Amt:	<input type="text" value="0"/>		

Student Data - Dependency Status Information

[Assumptions](#)

DOB Before 01/01/85:	Yes <input type="checkbox"/> No <input checked="" type="radio"/>	Dependents:	Yes <input type="checkbox"/> No <input checked="" type="radio"/>
Grad Student:	Yes <input type="checkbox"/> No <input checked="" type="radio"/>	Orphan:	Yes <input type="checkbox"/> No <input checked="" type="radio"/>
Student Married:	Yes <input type="checkbox"/> No <input checked="" type="radio"/>	Veteran:	Yes <input type="checkbox"/> No <input checked="" type="radio"/>
Children:	Yes <input type="checkbox"/> No <input checked="" type="radio"/>	On Active Duty:	Yes <input type="checkbox"/> No <input checked="" type="radio"/>
Marital Status:	Blank <input type="checkbox"/> Single/Divorced/Widowed <input checked="" type="radio"/> Married/Remarried <input type="checkbox"/> Separated <input type="checkbox"/>		
Marital Status Date:	<input type="text" value="02/01/2002"/>	Marital Status (Personal Data):	Single
Dependency Status:	D DEP	Citizenship Status:	1 Citizen

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

Marital Status Date:

State of Residence: Kentucky Res Prior 03: Blank Yes No Residency Date:

Father's SSN: (a) Father's Last Name: Nbr Family Members:

Father's Date of Birth: Father's First Name Initial: Number in College:

FAFSA Information page (2 of 3)

Mother's Date of Birth: 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: ps_zadora@sbcglobal.com

Parent Data - Parent Financial Information

2007 Federal Benefits Received: SSI Food Stamps School Lunch TANF WIC

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

2007 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:	<input type="text" value="66,997"/>	Father Income:	<input type="text" value="24,768"/>	Worksheet A:	<input type="text" value="718"/>
U. S. Tax Paid:	<input type="text" value="6,129"/>	Mother Income:	<input type="text" value="40,453"/>	Worksheet B:	<input type="text" value="0"/>
Exemptions:	<input type="text" value="05"/>			Worksheet C:	<input type="text" value="0"/>
Investment Net Worth:	<input type="text" value="36,000"/>	Bus/Farm Net Worth:	<input type="text" value="0"/>	Cash Savings:	<input type="text" value="500"/>

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

The FAFSA Information page is updated for the 08/09 Financial Aid Year.

INAS Federal Extension

Access the INAS Federal Extension page.

INAS Federal Extension

	STUDENT	PARENT
Federal		
INAS Rule Set:	<input type="text"/>	
INAS Calc Type:	<input type="text"/>	
INAS Data Source:	<input type="text"/>	
Dependency Override:	<input type="text"/>	
<input type="checkbox"/> Calc a PC for Independent		
Budget Durations		
EFC Proration Options		
Override Federal EFC		
Allowances		
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"/>
Assets		
Other:	<input type="text"/>	<input type="text"/>
Assumption Overrides		
Number in College:		<input type="text"/>
Reject Overrides		
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

The INAS Federal Extension page is updated for the 08/09 Financial Aid Year.

Change Student Income Values

Access the Change Student Income Values page.

Change Student Income Values

	Assumed Value	ISIR Value	Assumption Indicator
Adjusted Gross Income:	0	4,686	Blank <input type="text"/>
Taxes Paid:	0	88	Blank <input type="text"/>
Student's Earned Income:	0	4,686	Blank <input type="text"/>
Spouse's Earned Income:	0	0	Blank <input type="text"/>
Worksheet C Total:	0	0	Blank <input type="text"/>

Change Student Income Values page

The Change Student Income Values page is updated for the 08/09 Financial Aid Year.

Change Student Status Values

Access the Change Student Status Values page.

Change Student Status Values

	Assumed Value	ISIR Value	Assumption Indicator
Born Before 1/1/1985:	2	No	Blank
Student Married:	2	No	Blank
Marital Status:	1	Single	Blank
Legal Dependents:	2	No	Blank
Number in Family:			Blank
Number in College:			Blank
Assumed Citizenship:	1	Elig Cit	Blank
Veteran:	2	No	Blank
Children:	2	No	Blank

[Change Student Status Values page](#)

The Change Student Status Values page is updated for the 08/09 Financial Aid Year.

Change Parent Household Information

Access the Change Parent Household Information page.

Change Parent Household Information

	Assumed Value	ISIR Value	Assumption Indicator
Marital Status:	1	Mar/ReMar	Blank
Number in Family:		04	Blank
Number in College:		1	Blank
Assumed Father's SSN:	Y	495-98-8252	Assumption
Assumed Mother's SSN:	Y	495-97-7252	Assumption

[Change Parent Household Information page](#)

The Change Parent Household Information page is updated for the 08/09 Financial Aid Year.

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
Adjusted Gross Income:	0	66,997	Blank <input type="button" value="v"/>
Taxes Paid:	0	6,129	Blank <input type="button" value="v"/>
Father's Earnings:	0	24,768	Blank <input type="button" value="v"/>
Mother's Earnings:	0	40,453	Blank <input type="button" value="v"/>
Total From Worksheet C:	0	0	Blank <input type="button" value="v"/>

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

The Change Parent Earnings and Income Values page is updated for the 08/09 Financial Aid Year.

Assumptions and School Codes

The Assumptions and School Codes page is updated for the 08/09 Financial Aid Year.

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

Davi,Duarte **ID:** FA0335
Aid Year: 2009 **Financial Aid Year:** 2008-2009 **Institution:** PSUNV

ISIR Data First 1 of 1 Last

*Effective Date: 09/06/2007 **Transaction Nbr:** 1 **Correction Status:** **Status Date:** +
EFC Status: Official **Primary EFC:** 13,522 **Prorated EFC:** 13,522 [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:** 09/03/2007
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:	001325	UNIVERSITY OF SAN FRANCISCO	Housing Code 1:	On-Campus
2nd School Choice:	001328	UNIVERSITY OF SOUTHERN CALIFOR	Housing Code 2:	On-Campus
3rd School Choice:	001989	UNIVERSITY OF KENTUCKY	Housing Code 3:	On-Campus
4th School Choice:	001999	UNIVERSITY OF LOUISVILLE	Housing Code 4:	On-Campus
5th School Choice:	009275	NORTHERN KENTUCKY UNIVERSITY	Housing Code 5:	Parents
6th School Choice:			Housing Code 6:	
7th School Choice:			Housing Code 7:	
8th School Choice:	001315	UNIVERSITY OF CALIFORNIA (UCLA)	Housing Code 8:	On-Campus
9th School Choice:			Housing Code 9:	
10th School Choice:			Housing Code 10:	

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

Assumptions and School Codes page (1 of 3)

- | | | | |
|--|---|---|--|
| <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 |
| <input type="checkbox"/> Reject Override 4 | <input type="checkbox"/> Reject Override 20 | | |

FAA Information

CPS Process Date:	09/06/2007	Pell ID:	495-98-0252 DA 1
Institution Process Date:	10/12/2007	Duplicate SSN Code:	
Date Application Received:	09/03/2007	CPS Pushed ISIR Flag:	
Application Data Source Cd:	4A Paper App	ISIR SAR C Flag Changed:	Y
Transaction Data Source Cd:	7R CPS Rnw	Rejected Status Change Flag:	
Reprocess Code:		Verification Select Chng Flag:	

Reject Reasons

Reject Reason	Description

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 61 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 58) 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 www.socialsecurity.gov.
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 (SSN) you reported for your father in Item 58. 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 www.socialsecurity.gov. If the Social Security Number is incorrect, you must make the necessary correction.
043	To resolve your Federal Pell Grant 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 5609, Greenville, Texas 75403-5609.

[Assumptions and School Codes page \(2 of 3\)](#)

053	You left Item 31 blank. Your failure to provide an answer to this question makes you ineligible to receive federal student aid. Either indicate that you have not been convicted of possessing or selling illegal drugs for an offense that occurred while you were receiving federal student aid (such as grants, loans, and work-study), 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 www.fafsa.ed.gov . You can also use your SAR. 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.
132	The National Student Loan Data System (NSLDS) indicates that you are in DEFAULT on one or more federal student loans. You are not eligible to receive any federal student aid until you resolve any loan default(s).
143	Your citizenship status has been confirmed by the Department of Homeland Security and you meet the citizenship 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 79 and 80 and make the necessary corrections.
267	Based on the information reported on your 2007-2008 Free Application for Federal Student Aid (FAFSA), you may be eligible for an Academic Competitiveness Grant (ACG) depending upon the type of courses that you completed in high school. We will need to ask you some additional questions. You may call the Federal Student Aid Information Center at 1-800-4-FED-AID (1-800-433-3243) to provide the additional information. We will send that information to your college so that they can determine if you are eligible for an ACG. All follow-up information will come from the financial aid office at your college.
270	You reported that you took and passed a series of high school courses that may qualify you for an Academic Competitiveness Grant (ACG)
Field Review	
ISIR Field Nbr	Description
0001	Student's Last Name
0003	Student's Middle Initial
0005	Student's City
0007	Student's Zip
0008	Student's SSN
0009	Student's Birthdate
0011	Driver's License Number
0072	Parent Food Stamp Benefits
0073	Parent Lunch Benefits
0098	Student's house code:coll.1

[Assumptions and School Codes page \(3 of 3\)](#)

The Assumptions and School Codes page is updated for the 08/09 Financial Aid Year.

EFC\DB Matches\Corr

Access the EFC\DB Matches\Corr page is updated for the 08/09 Financial Aid Year.

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

Davi,Duarte ID: FA0335

Aid Year: 2009 Financial Aid Year 2008-2009 Institution: PSUNV

ISIR Data First 1 of 1 Last

Effective Date: 09/06/2007 Transaction Nbr: 1 Correction Status: Status Date: +

EFC Status: Official Primary EFC: 13,522 Prorated EFC: 13,522 FM IM Need Summary INAS

EFC Information

Primary EFC: 13,522 Formula Type: 1 Prorated EFC: 13,522 Monthly EFC

Secondary EFC: 0 Secondary EFC Type: 4 EFC Change Flag: 1

Signature Reject EFC: 215 Dependency Status: D DEP

TI:	67,715	STI:	4,686	FTI:	72,401	DNW:	-8,100
ATI:	36,832	SATI:	2,792	AAI:	30,883	SDNW:	7,050
STX:	4,063	SIC:	947	APA:	44,600	NW:	36,500
EA:	2,800	SCA:	2,468	PC:	10,107	Calculated PC:	0
IPA:	18,850	PCA:	0	TSC:	0	Calculated TSC:	0
AI:	30,883	CAI:	0	TPC:	10,107	Calculated Prorated EFC:	0

Database Matches/Flags

SSA Citizenship Indicator:	A U.S. Citiz	NSLDS Match:	1 Eligible
Selective Service Match:	N Not Conf	NSLDS Transaction Nbr:	01
Selective Service Registration:	N Not comp	Verification Selection Ind:	N
SSN Match:	2 No DOB	Verification Tracking Flag:	
VA Match:	4 Active Dty	Verification Type:	
DHS Match:	Y Confirmed	SAR C Flag:	Y Flag Set
DHS Verification Nbr:	ZL988P777666555	Title IV Fund Eligibility:	Y
Secondary DHS Match Flag:	C Not yet	Federal PELL Eligibility:	N
Father's SSN Match:	4		
Mother's SSN Match:	4		

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

Corrected / Verified Fields

Correction Source: D CPS

Corrected Fields View All First 1-2 of 14 Last

ISIR Field Nbr:	0001 Student's Last Name	Code:	1 This Trans
	0003 Student's Middle Initial		2 Prev Trans

Verified Fields View All First 1-2 of 10 Last

ISIR Field Nbr:	0007 Student's Zip	Code:	2 Verif Req
	0010 Student's Phone Number		2 Verif Req

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

The EFC\DB Matches\Corr page is updated for the 08/09 Financial Aid Year.

Regulatory Updates to Institutional Need Analysis System (INAS) Institutional Methodology (IM) 2008-2009

This section describes corresponding changes to Financial Aid pages.

See also the College Board *INAS User Manual* for 2008-2009 available in early 2008.

Defining Alternate Minimum Student Contribution From Income

This section indicates which records have been moved to Financial Aid History and shows changes to pages used to:

- Defining IM Yes and No options.
- Defining INAS Institutional Extension 1.
- ASG Total Income Percentage
- Processing IM EFM INAS Dependent Parent and Independent with Dependents

Records Moved to Financial Aid History

The following records have been moved to Financial Aid History:

- View 2005-2006 IM EFC Detail
- View 2005-2006 FM EFC Detail
- INAS 2005-2006 Global Options

Pages Used to Define IM Options

Page Name	Object Name	Navigation	Usage
IM Yes/No Options	INAS_LCL_PLCY10_06	<ul style="list-style-type: none"> Administer Financial Aid, Apply for Financial Aid, Setup, INAS Local Policy Opts 08/09, IM Yes/No Options 	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"> Administer Financial Aid, Apply for Financial Aid, Use, Maintain Inst Appl 08/09, Student Data 	Click the IM link to access INAS Institutional Extension 1.
INAS Institutional Extension 1	INAS_PROF_EXT1_S04	<ul style="list-style-type: none"> Administer Financial Aid, Manage Need Analysis, Use2 , Maintain Inst Appl 08/09, IM Hyperlink 	Override INAS local policy options institutional calculations on a student-by-student basis.

Defining IM Yes and No Options

Access the IM Yes/No Options page.

IM Value Parm 2 | IM Yes/No Options | Minimum SC Income | Asset Options | Home/Asset Projections

Aid Year: 2009 Financial Aid Year 2008-2009 Institution: PSUNV

View All First 1 of 1 Last

*INAS Rule Set: [dropdown]

Institutional

	STUDENT	PARENT
IM-Profile	<input type="checkbox"/> Use Projected Year Income <input checked="" type="checkbox"/> Alt Min SCI <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 checked="" type="checkbox"/> IM < FM <input type="checkbox"/> Use FM Tx <input type="checkbox"/> Use Rpt PC <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"/> Exclude Tuition/Fee Deduction

[IM Yes/No Options page](#)

Institutional

Alt Min SCI Yes/No option. Perform alternate minimum student contribution from income calculation using the following steps.

(Alternate Minimum Student Contribution from Income)

A new option introduced for 2008-2009 determines a dependent student contribution from income, **Alternate Minimum Student Contribution from Income**.

The new **Alternate Minimum Student Contribution from Income** calculation field is a Yes/No option and the default is Yes. If the checkbox is selected, the application performs the **Alternate Minimum Student Contribution from Income** calculation using the following calculations:

1. Multiply the **Student's Available Income** by the **Available Income Assessment Rate** (Parent's Marginal Rate from Income Band.) For example, \$10,000 x .22 = \$2,200. The result is used for comparison in Step 2.
2. Compare the result (\$2,200) to the **Student Standard Contribution from Income**. For example, \$2,150 (Non-First Year Dependent Students) and take the higher of the two amounts. In this case, \$2,200.
3. To obtain the **Student Contribution Cap** multiply the **Total Parent Contribution** by .50. For example, \$6,000 x .50 = \$3,000.
4. The **Minimum Student Contribution** from Income is the lesser of the value in Step 2 (\$2,200) or the **Student Contribution Cap** (\$3,000). In this case it is \$2,200.

See Also

PeopleSoft Enterprise Financial Aid 9.0 PeopleBook, "Understanding IM," IM Yes/No Options.

Defining INAS Institutional Extension 1

The INAS Institutional Extension 1 page is updated for the 08/09 Financial Aid Year.

[Home](#) > [Administer Financial Aid](#) > [Manage Need Analysis](#) > [Use2](#) > **Maintain Inst Appl 08/09**

INAS Institutional Extension 1

INAS Rule Set:	<input type="text"/>	Extension 2	Extension 3	Extension 4	Extension 5	<input type="button" value="Delete"/>
Application Source:	<input type="text"/>	<input checked="" type="checkbox"/> Alt Min SC From Income Calc	IGNORE LOSSES			
Budget Durations		<input type="checkbox"/> Calc PC For Independent	<input type="checkbox"/> Business/Farm			
Override Institutional EFC		<input type="checkbox"/> Skip Family Member Exclusion	<input type="checkbox"/> 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"/>				
Exclude Tuition/Fee Deduction:				<input type="checkbox"/>		

INAS Institutional Extension 1 page

A new extension option has been introduced to override the Alternative Minimum Student Contribution global setting.

Application Source

Alt Min SC From Income Calc

Alternate Minimum Student Contribution from Income. The status (On or Off) for this option is determined by the status that exists in Global Policy Options when you create the extension record and select a Rule Set. Select or clear to override the option as appropriate.

See Also

PeopleSoft Enterprise Financial Aid 9.0 PeopleBook,
"Reviewing FAFSA Information," Viewing INAS Institutional Extensions.

ASG Total Income Percentage

ASG Total Income Percentage is the annual savings goal total income percentage.

Select a value for the ASG total income percentage. This percentage is used as an allowance against income. The default value is 1.52 %. Selecting one of the other values (1.3% or 1.13%) changes the minimum value used for **Cumulative Education Savings Allowance (CESA)**.

The following table lists the ASG of total income percentages, the corresponding maximum allowance caps, and CESA minimum values.

ASG Total Income %	Maximum Allowance Cap	CESA Minimum Value
1.52 %	2,470 USD	20,860 USD
1.3%	1,610 USD	17,840 USD
1.13%	1,210 USD	15,500 USD

Pages Used to Process IM EFM INAS

Page Name	Object Name	Navigation	Usage
Computation Data	INST_COMP_SUMM_09	Administer Financial Aid, Manage Need Analysis, Use2, Maintain Inst Appl 0809, 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.

Processing IM EFM INAS Dependent Parents and Independent with Dependents Calculations

Access the Computation Data page.

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

GRENIER,KERRY E **ID:** FA916 **Institution:** PSUNV [Need Summary](#)
Dependency Status: Dependent **Source:** Profile **Aid Year:** 2009 [FM](#) [IM](#) [INAS](#)

Contribution Summary

	PARENT'S CONTRIBUTION			STUDENT'S CONTRIBUTION			
	IM	IM w / Options	EFM	IM	IM Estimated	IM w / Options	EFM
Total Income:	96,400	96,400	96,400	5,500	1,200	0	5,500
Total Contribution:	0	0	0	0	0	0	0
Number in College Adjustment:	0.0 %	0.0 %		0.0 %	0.0 %	0.0 %	
Contribution for Student:	15,007	15,007	15,809	5,105	1,220	0	1,407
From Income:	15,007	15,007	NA	5,005	1,150	0	1,337
From Assets:	0	0	NA	100	70	0	70
Calculated Contribution:	0	0	0	0	0	0	0

[Computation Data page](#)

College Board changes were made to display values on the Maintain Institutional Application Computation Data pages.

Parents of dependent students and independent students with dependents EFM calculations will now display N/A for From Income, From Assets, Total Contribution - Income and Total Contribution - Assets. N/A will also be displayed in View IM EFC Detail – Contrib for Student Detail.

Regulatory Updates to PROFILE and Need Access for 2008-2009

This section discusses:

- Field and page changes driven by the 2008-2009 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 2008-2009 CSS Data Reporting Layout

This section lists the field changes driven by the 2008-2009 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 2008-2009 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 field.

Field Number	Description	Action
464	Student's Email Address	Field size expanded

This table lists the new fields.

Field Number	Description	New Item
25E	AP-FLAG	Status
465	Parent 1 Occupation	Question
466	Parent 1 Employer	Question
467	Parent 2 Occupation	Question
468	Parent 2 Employer	Question

Pages Used to Process PROFILE and Need Access Applications

Page Name	Object Name	Navigation	Usage
Student Data	INST_STUDENT_09	Administer Financial Aid, Manage Need Analysis, Use2, Maintain Inst Appl 0809, Student Data	View or enter all the information about the student.
Parent Data	INST_PARENT_09	Administer Financial Aid, Manage Need Analysis, Use2, Maintain Inst Appl 0809, Parent Data	View or enter all the parent information.
Miscellaneous Data	INST_MISC_09	Administer Financial Aid, Manage Need Analysis, Use2, Maintain Inst Appl 0809, 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_09	Administer Financial Aid, Manage Need Analysis, Use2, Maintain Inst Appl 0809, 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	
Luckland,Maurice		ID:	0042007	Institution:	PSUNV	Need Summary	
Dependency Status:		Source:	Inst App	Aid Year:	2009	FM IM INAS	
Bio/Demo Data				CSS Data			
SSN	323-26-5212	Marital Status:	Single	CSS ID:			
Birthdate:		Citizenship Status:		Date Loaded:			
		Lowest Income Filer:	<input type="radio"/> Yes <input type="radio"/> No	Fee Waiver:			
		AP-Flag:					
Student's Information							
Legal Residence:	WI <input type="text"/>	Number in Family:	04	Lives With:	Mother <input type="text"/>		
Mailing State:	WI <input type="text"/>	Number in College:		Most Support:			
Postal:	54941	Natural Parent Status:	Divorced <input type="text"/>				
Year in School:	3rd yr Junior <input type="text"/>	Veteran :	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> No Response				
Financial Aid Status:	First-time App, New Student <input type="text"/>	Orphan /Ward :	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> No Response				
Marital Status:	Unmarried <input type="text"/>	Dependents :	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> No Response				
Email Address:	<input type="text"/>	Date Application Received:	10/19/2007				
Student's Income and Benefits							
Tax Filed Status:	<input type="text"/>	Itemized Deductions:	0	Welfare TANF:	0		
Tax Form Type:	<input type="text"/>	Student's Earnings:	0	Child Support Received:	0		
Exemptions:	00 <input type="text"/>	Spouse's Earnings:	0	Earned Income Credit:	0		
Adjusted Gross Income:	0	Dividend/Interest:	0	Other Untaxed Income:	0		
U. S. Tax Paid:	0	Social Security Benefits:	0	Taxable Financial Aid:	0		
Hope Lifetime Learning Credit:	0	Means Tested Benefits:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/R				

Student Data page (1 of 2)

Student's Assets			
Cash Savings:	<input type="text" value="0"/>	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 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"/>
Student's Earnings:	<input type="text" value="0"/>	Summer 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="0"/>
		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 2008-2009 CSS Data Reporting Layout.

Bio Demo Data

AP-Flag

Will only be populated with a **“Y”** (from PROFILE) if student passed two or more AP classes with a test grade of three or higher. This field will be blank if no information is available, if the student does not give permission for information to be passed, or if the student does not meet the definition to receive a **“Y”** value.

Student's Information

Email Address Student's email address.

Viewing Parent Data

Access the Parent Data page.

Student Data Parent Data **Miscellaneous Data** Computation Data

Luckland,Maurice **ID:** 0042007 **Institution:** PSUNV [Need Summary](#)
Dependency Status: **Source:** Inst App **Aid Year:** 2009 [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
Child Support Paid:	<input type="text"/>	<input type="text"/>	Other Tuition Paid:	<input type="text"/>	<input type="text"/>
Educational Loans:	<input type="text"/>	<input type="text"/>	Number of Tuition Paid:	<input type="text"/>	<input type="text"/>
Medical/Dental:	<input type="text"/>	<input type="text"/>			

Parents' Assets

Cash Savings: **Father Retirement Assets:**
Assets Held by Siblings: **Mother Retirement Assets:**

	Value	Debt		Value	Debt
Investment:	<input type="text"/>	<input type="text"/>	Business:	<input type="text"/>	<input type="text"/>
Home:	<input type="text"/>	<input type="text"/>	Farm:	<input type="text"/>	<input type="text"/>
Home Purchase Year: <input type="text"/> Price: <input type="text"/>			Other Real Estate:	<input type="text"/>	<input type="text"/>
Monthly Mortgage/Rent Payment: <input type="text"/>			Other Real Estate Purchase Yr: <input type="text"/> Price: <input type="text"/>		
Self Employed: <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/R					
Own a Business or Farm: <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/R					
Family Lives on Farm ? <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/R					
FTE Employees > 100: <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/R					

Parent Data page (1 of 3)

Parent's Prior Year Income

Prior Year AGI:	<input type="text" value="0"/>	Prior Year Item Deductions:	<input type="text" value="0"/>
Prior Year Taxes Paid:	<input type="text" value="0"/>	Prior Year Untaxed Income:	<input type="text" value="0"/>

Parents' Income and Benefits

Tax Filed Status:	<input type="text"/>	Social Security Benefits Family:	<input type="text" value="0"/>
Tax Form Type:	<input type="text"/>	Social Security Benefit Student:	<input type="text" value="0"/>
Exemptions:	<input type="text" value="00"/>	Welfare TANF:	<input type="text" value="0"/>
Adjusted Gross Income:	<input type="text" value="0"/>	Child Support Received:	<input type="text" value="0"/>
Wages, Salary, & Tips:	<input type="text" value="0"/>	IRA/Keogh Payments:	<input type="text" value="0"/>
Interest Income:	<input type="text" value="0"/>	Tax Deferred Plans:	<input type="text" value="0"/>
Dividend Income:	<input type="text" value="0"/>	Tuition and Fee Deduction:	<input type="text" value="0"/>
Business/Farm:	<input type="text" value="0"/>	Medical/Spending Accounts:	<input type="text" value="0"/>
Other Taxable:	<input type="text" value="0"/>	Earned Income Credit:	<input type="text" value="0"/>
Adjustments to Income:	<input type="text" value="0"/>	Living Allowance:	<input type="text" value="0"/>
U. S. Tax Paid:	<input type="text" value="0"/>	Tax-Exempt Interest:	<input type="text" value="0"/>
Hope Lifetime Learning Credit:	<input type="text" value="0"/>	Foreign Income Exclusions:	<input type="text" value="0"/>
Itemized Deductions:	<input type="text" value="0"/>	Other Untaxed:	<input type="text" value="0"/>
Father's Earnings:	<input type="text" value="0"/>	Receive TANF:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/R
Mother's Earnings:	<input type="text" value="0"/>	Receive SSI:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> N/R

Parents' Expected Income

Father's Earnings:	<input type="text" value="0"/>	Other Taxable Income:	<input type="text" value="0"/>
Mother's Earnings:	<input type="text" value="0"/>	Untaxed Income & Benefits:	<input type="text" value="0"/>

[Parent Data page \(2 of 3\)](#)

Parents' Information

DOB Parent 1:	<input type="text"/>	DOB Parent 2:	<input type="text"/>
Occupation Parent 1:	<input type="text"/>	Occupation Parent 2:	<input type="text"/>
Employer Parent 1:	<input type="text"/>	Employer Parent 2:	<input type="text"/>
Custodial Parent:	<input type="text"/>		
Email Address:	<input type="text"/>		

Non-Custodial Parent Info

Separation Year:	<input type="text"/>	Divorce Year:	<input type="text"/>	Non-Custodial Parent's	<input type="text" value="0"/>
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[Parent Data page \(3 of 3\)](#)

The following are new or modified Parent Data fields based on the changes contained on the 2008-2009 CSS Data Reporting Layout.

Parents' Information

- Occupation Parent 1 May be blank.
- Employer Parent 1 May be blank.
- Occupation Parent 2 May be blank.
- Employer Parent 2 May be blank.

Viewing Miscellaneous Data

Access the Miscellaneous Data page.

Student Data	Parent Data	Miscellaneous Data	Computation Data
Luckland,Maurice	ID: 0042007	Institution: PSUNV	Need Summary
Dependency Status:	Source: Inst App	Aid Year: 2009	FM IM INAS
Explanation / Certification			
<input type="checkbox"/> Special Circumstances			
Family Members First ◀ 1 of 1 ▶ Last			
Relationship	Age	Attend College	College Type
Child/Step ▼		Full-Time ▼	4Y Private ▼ + -
School Selection First ◀ 1 of 1 ▶ Last			
*CSS Code	Housing Code		
8507	Campus Housing ▼	+ -	
FNAR Messages First ◀ 1 of 1 ▶ Last			
Message Number			
Institutional Questions First ◀ 1 of 1 ▶ Last			
*Number Size Answer			
			+ -

[Miscellaneous Data page](#)

The Miscellaneous Data page reflects 2008-2009 CSS Data Reporting Layout changes.

Viewing Computation Data

Access the Computation Data page.

Student Data Parent Data Miscellaneous Data **Computation Data**

Luckland,Maurice **ID:** 0042007 **Institution:** PSUNV [Need Summary](#)
Dependency Status: **Source:** Inst App **Aid Year:** 2009 [FM](#) [IM](#) [INAS](#)

Contribution Summary

	PARENT'S CONTRIBUTION			STUDENT'S CONTRIBUTION			
	IM	IM w / Options	EFM	IM	IM Estimated	IM w / Options	EFM
Total Income:	0	0	0	0	0	0	0
Total Contribution:	0	0	0	0	0	0	0
Number in College Adjustment:	0.0 %	0.0 %		0.0 %	0.0 %	0.0 %	
Contribution for Student:	0	0	0	0	0	0	0
From Income:	0	0	0	0	0	0	0
From Assets:	0	0	0	0	0	0	0
Calculated Contribution:	0	0	0	0	0	0	0

Custodial Parent Information

	PARENT'S CONTRIBUTION	
	IM	IM w / Options
Total Income:		
Percent Income:	%	%
From Income:		
From Assets:		

Computation Data page (1 of 3)

Education Savings Calculation

Parents: AESA CESA Student's: AESA CESA

Income

	PARENT'S CONTRIBUTION			STUDENT'S CONTRIBUTION			
	IM	IM w / Options	EFM	IM	IM Estimated	IM w / Options	EFM
Taxable Income:	0	0	0	0	0	0	0
Untaxed Income:	0	0	0	0	0	0	0
Adjustments to Income:	0	0	0	0	0	0	0
Total Income:	0	0	0	0	0	0	0

Allowances

	PARENT'S CONTRIBUTION			STUDENT'S CONTRIBUTION			
	IM	IM w / Options	EFM	IM	IM Estimated	IM w / Options	EFM
U.S. Income Tax:	0	0	0	0	0	0	0
State Income Tax:	0	0	0	0	0	0	0
FICA Taxes:	0	0	0	0	0	0	0
Medical/Dental:	0	0	0	0	0	0	0
Elementary/Secondary Tuition:	0	0	0	0	0	0	0
Employment Allowance:	0	0	0	0	0	0	0
Annual Education Savings:	0	0	N/A	0	0	0	N/A
Income Protection Allowance/MMA:	0	0	0	0	0	0	0
Total Allowances:	0	0	0	0	0	0	0
Calculated Available Income:	0	0	0	0	0	0	0
Available Income:	0	0	0	0	0	0	0
Total Contribution - Income:	0	0	0	0	0	0	0

Computation Data page (2 of 3)

	PARENT'S CONTRIBUTION			STUDENT'S CONTRIBUTION			
	IM	IM w / Options	EFM	IM	IM Estimated	IM w / Options	EFM
Cash Savings:	0	0	0	0	0	0	0
IRA Value:	N/A	N/A	0	0	0	0	0
Home Equity:	0	0	0	0	0	0	0
Real Estate/Investment Equity:	0	0	0	0	0	0	0
Adjusted Business/Farm Value:	0	0	0	0	0	0	0
Sibling's Assets/Prepaid Tuition:	0	0	N/A	N/A	N/A	N/A	N/A
Value of Trusts:	0	0	N/A	0	0	0	0
Net Worth:	0	0	0	0	0	0	0
Emergency Reserve Allowance:	0	0	N/A	0	0	0	N/A
Cumulative Education Savings:	0	0	N/A	0	0	0	N/A
Low Income Asset Allowance:	0	0	N/A	0	0	0	N/A
Discretionary Net Worth:	0	0	0	0	0	0	0
Asset Protection Allowance:	N/A	N/A	0	N/A	N/A	N/A	0
Conversion Percentage:	N/A	N/A	0.0 %	N/A	N/A	N/A	0.0 %
Income Supplement:	N/A	N/A	0	N/A	N/A	N/A	0
Total Contribution - Assets:	0	0	0	0	0	0	0

Computation Data page (3 of 3)

The Computation Data page is updated for the 08/09 Financial Aid Year.

Changes to PROFILE and Need Access Navigation Paths

This table lists navigation paths that reflect 2008-2009 records:

Navigation Paths
Administer Financial Aid, Exchange Financial Aid Data, Process 2, Profile Load 08/09
Administer Financial Aid, Exchange Financial Aid Data, Process 2, Profile Suspense Move 08/09
Administer Financial Aid, Exchange Financial Aid Data, Process 2, Profile Susp Recycle 08/09
Administer Financial Aid, Exchange Financial Aid Data, Process 2, Need Access Load 08/09
Administer Financial Aid, Exchange Financial Aid Data, Process 2, Need Access Susp Move 08/09
Administer Financial Aid, Exchange Financial Aid Data, Process 2, Need Access Susp Recycle 08/09
Administer Financial Aid, Exchange Financial Aid Data, Use, Profile Susp Mgmt 08/09
Administer Financial Aid, Exchange Financial Aid Data, Use, Need Access Susp Mgmt 08/09
Administer Financial Aid, Apply for Financial Aid, Use, Maintain Application 2008-2009
Administer Financial Aid, Apply for Financial Aid, Use, View 2008-2009 IM EFC Detail

Administer Financial Aid, Manage Need Analysis, Use2, Maintain Application 2008-2009
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Administer Financial Aid, Manage Need Analysis, Use2, View 2008-2009 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 2008-2009 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"> Administer Financial Aid, Exchange Financial Aid Data, Setup, Profile/Need Access Run Cntls Design Student Administration, Design Financial Aid2, Setup N-P, Profile/Need Access Run Cntls 	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

Find an Existing Value

Process Name:

[Basic Search](#)

Search Results

View All

First 1-12 of 12 Last

Process Name	Process Type	Description
FAMVNA08	SQR Report	07/08 Need Access Susp Move
FAMVNA09	SQR Report	08/09 Need Access Susp Move
FAMVPF08	SQR Report	07/08 Profile Suspense Move
FAMVPF09	SQR Report	08/09 Profile Suspense Move
FANAIN08	SQR Report	07/08 Need Access Load
FANAIN09	SQR Report	08/09 Need Access Load
FANASR08	SQR Report	07/08 Need Access Susp Recycle
FANASR09	SQR Report	08/09 Need Access Susp Recycle
FAPFIN08	SQR Report	07/08 Profile Load
FAPFIN09	SQR Report	08/09 Profile Load
FAPFSR08	SQR Report	07/08 Profile Suspense Recycle
FAPFSR09	SQR Report	08/09 Profile Suspense Recycle

Profile/Need Access Run Cntls page

The Profile/Need Access Run Cntls page is updated for the 08/09 Financial Aid Year.

Change in Treatment for Awarding ACG/SMART Awards for Less than Full-time Students

ACG/SMART award processing no longer performs a full-time eligibility check on FA Load when awarding ACG/SMART awards. Regardless of the student's FA Load value for a given term, the system packages the student with an ACG/SMART award provided she meets all other eligibility criteria. Prior to this bundle, only full-time students were considered eligible for ACG/SMART awards.

Note. According to your school's business practices, ensure that you identify any students who are not full-time students and resolve their FA Load status before performing any Authorization or Disbursement processing.

Change in Self Service Actions for ACG/SMART Awards

This section discusses updates to the PeopleSoft Enterprise Campus Self Service product.

From Self Service, the student can:

- Accept only the entire ACG/SMART award.
- Decline the entire ACG or SMART Grant award.

Students can no longer accept a reduced or partial ACG/SMART award through self service. This is because of the way the system determines the ACG/SMART award amount. If students were permitted to accept a partial ACG/SMART award, it could impact any subsequent repackaging of that award.

Controlling whether a student can fully accept or decline an ACG/SMART award is established on the FA Item Type Setup. When an item type is defined as either ACG or SMART, the Reduce option is no longer available as a Self Service action.

Page Used to Administer Self Service Action on ACG/SMART Awards

Page Name	Object Name	Navigation	Usage
FA Item Type 3	ITEM_TYPE_FA_3	<ul style="list-style-type: none"> • Design Student Administration, Define Student Financials, Setup A-H, Financial Aid Item Types, FA Item Type 3 • Design Student Administration, Design Financial Aid1, Setup F-K, Financial Aid Item Types, FA Item Type 3 • Administer Financial Aid, Package and Disburse Aid, Setup, Financial Aid Item Types, FA Item Type 3 	Self Service Action Control for ACG/SMART item types

Administering Self Service Action for ACG/SMART Awards

Access the FA Item Type 3 page.

FA Item Type 1	FA Item Type 2	FA Item Type 3	FA Item Type 4	FA Item Type 5	FA Item Type 6
SetID: PSUNV Item Type: 900000000220 ACG1_SEM Aid Year: 2008 Federal Aid Year 2007 - 2008					
Award Attributes View All First 1 of 1 Last					
Effective Date: 01/01/1900		Status: Active			
Pass Anticipated Aid: <input type="text" value="None"/>		Anticip Aid Expiration Days: <input type="text" value="30"/>			
Disbursement Method: <input type="text" value="Stdnt Acct"/>		Auto Cancel Item Type: <input type="text"/>			
<input type="checkbox"/> Signature Required		<input type="checkbox"/> Manual Authorization		<input type="checkbox"/> Include in Transcript	
Print Letter Option: <input type="text" value="Print"/>		<input checked="" type="radio"/> Print as Award Item		Self Service Actions <input checked="" type="checkbox"/> Accept <input type="checkbox"/> Reduce <input checked="" type="checkbox"/> Decline	
Award Letter Print: <input type="text"/>		<input type="radio"/> Other Resource			
Award Message: <input type="text"/>					

FA Item Type 3 page

In the Self Service Actions group box, you cannot select the **Reduce** check box if the **Federal ID = ACG** or **SMART** on the FA Item Type 1 page.

See Also

PeopleSoft Enterprise Campus Self Service 9.0 PeopleBook, "Setting Up Financial Aid Self Service"

SA Bundle # 19 - FA Regs 2 2007-2008, "Changes to Packaging for ACG/SMART," Setting Up Financial Aid Item Types"