Assessing Eligibility for Financial Aid

Setting Up Verification Options

Verification is the process of checking the accuracy of the information provided by students and their families when applying for financial aid. Institutions are required to perform federal verification on a portion of their aid applicants before awarding Title IV aid. The Campus Solutions application provides options for meeting federal and institutional verification requirements.

This section discusses how to set up fields for compare.

For more information see, the Federal Student Aid Handbook

Pages Used to Set Up Verification Options

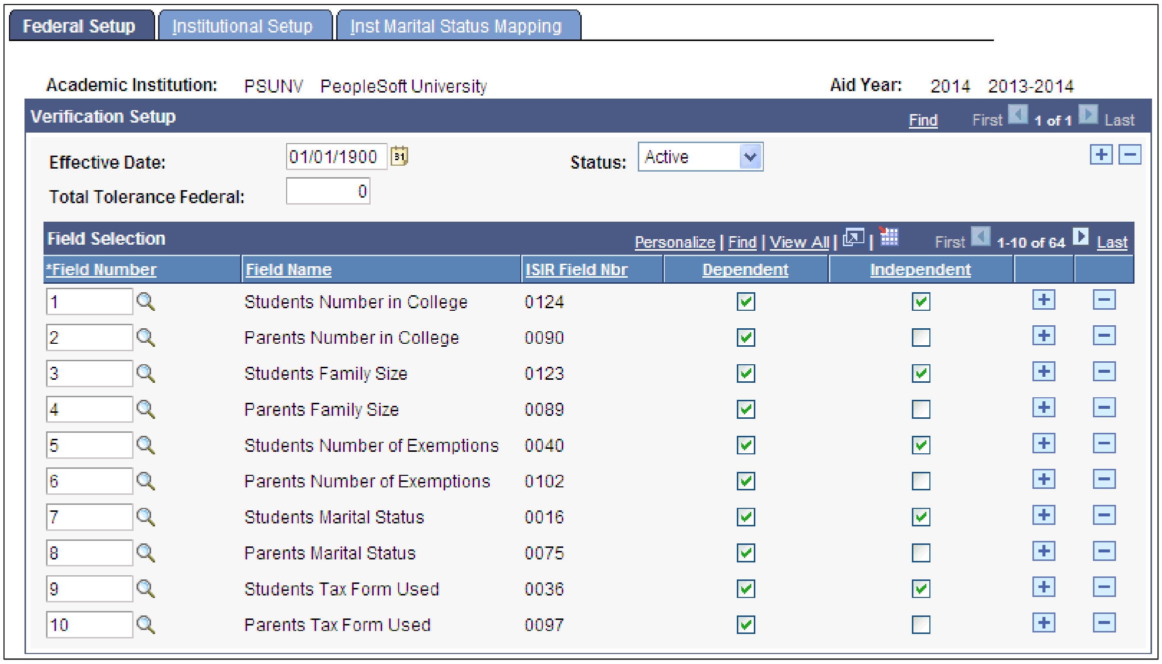
Page Name	***Definition Name***	***Navigation***	***Usage***
Federal Setup	SFA_VER_FLD_TS_FED	Set Up SACR, Product Related, Financial Aid, Application Processing, Verification Setup, Federal Setup tab	Activate fields for federal verification processing and filter for use by dependency status.
Institutional Setup	SFA_VER_FLD_TS_INS	Set Up SACR, Product Related, Financial Aid, Application Processing, Verification Setup, Institutional Setup tab	Activate fields for institutional verification processing and filter for use by dependency status.
Inst Marital Status Mapping	SFA_VERIF_MAR_MAPP	Set Up SACR, Product Related, Financial Aid, Application Processing, Verification Setup, Inst Marital Status Mapping	Map available parent marital statuses to institutional marital statuses

Setting Up Tolerances

Access the Federal Setup page (Set Up SACR, Product Related, Financial Aid, Application Processing, Verification Setup, Federal Setup).

Image: Federal Setup page

This example illustrates the fields and controls on the Federal Setup page. You can find definitions for the fields and controls later on this page.



Insert rows and select fields to be verified and indicate for which type of student the verification applies; dependent or independent.

Effective Date Displays the effective date for these verification tolerance rules. The effective date defines when the status that you select is valid.

Status Displays the status for the data. Values are *Active* and *Inactive.*

Total Tolerance Federal Enter the amount that the combined total of all selected fields can vary between verified and reported information. This tolerance is the maximum difference that can exist as variance before failing the verification process.

Field Number Enter the field number for each of the fields to be compared.

Field Name Displays the corresponding name for each field to verify.

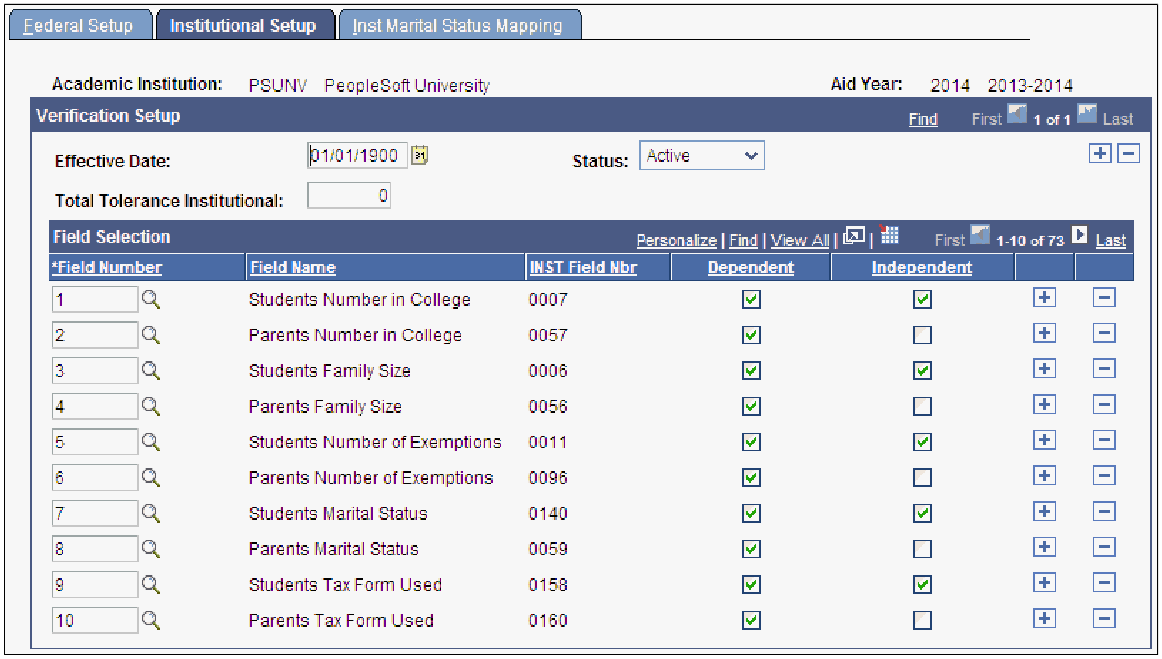
Dependent Select to compare the field for dependent students.

Independent Select to compare the field for independent students.

Access the Institutional Setup page (Set Up SACR, Product Related, Financial Aid, Application Processing, Verification Setup, Institutional Setup).

Image: Institutional Setup page

This example illustrates the fields and controls on the Institutional Setup page. You can find definitions for the fields and controls later on this page.



Refer to the field descriptions for the Federal Setup page with the following exceptions:

Total Tolerance Institutional

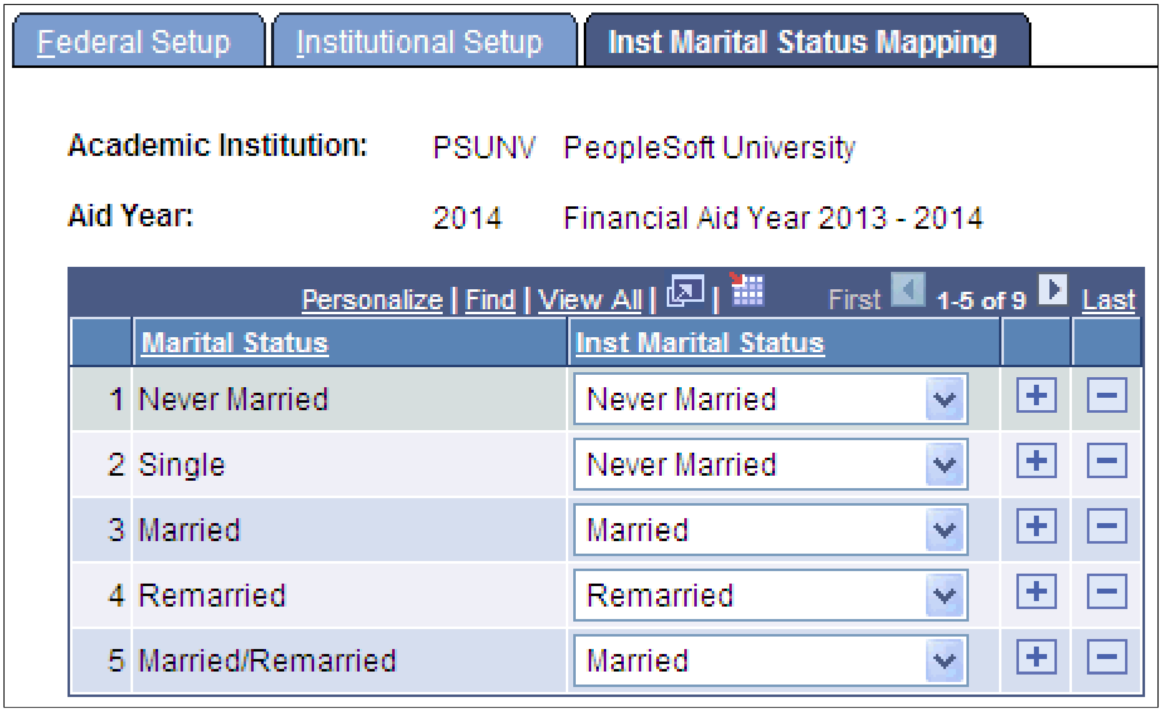
Enter the amount that the combined total of all selected fields can vary between verified and reported information. This tolerance is the maximum difference that can exist as variance before failing the verification process.

Mapping Institutional Marital Statuses

Access the Inst Marital Status Mapping page (Set Up SACR, Product Related, Financial Aid, Application Processing, Verification Setup, Inst Marital Status Mapping).

Image: Institutional Marital Status Mapping page

This example illustrates the fields and controls on the Institutional Marital Status Mapping page. You can find definitions for the fields and controls later on this page.



Use this page to map system marital status values to Institutional marital statuses.

Marital Status Displays all possible ISIR and Institutional parent marital statuses

Inst Marital Status Select the Institutional parent marital status you wish to map to each of the possible marital statuses.

Note: This setup resolves differences between ISIR (Federal) and PROFILE (Institutional) parent marital statuses when performing Verification without first retrieving application data via 'Get Federal Data' or 'Get Institutional Data'.
If you have retrieved application data, the system renders the parent marital statuses based on the application type, Federal or Institutional. However, if application data is not first retrieved, the system cannot determine if the data being verified is Federal or Institutional and renders *all* possible parent marital statuses. When you consolidate Verification data either online or batch, you are required to select the type of consolidation being performed, Federal or Institutional.
Parent marital statuses for consolidation can be mapped without interpretation for Federal Verification. However, Institutional parent marital statuses do not possess the same characteristics and this setup allows you to map the 9 possible parent marital statuses to the 6 actual Institutional parent marital statuses. When consolidation is performed, regardless of what marital status is selected in the Tax Form Data page, the mapped value is used and displayed for consolidation and compare. For example, if you enter a marital status of Married/Remarried and Institutional consolidation is performed, your mapping setup determines if Married or Remarried is used in consolidation.

Verification Field Numbers

To access year specific Verification field numbers cross referenced for ISIR and Institutional applications, query ISIR_VERIF_XREF.

Verifying Resource and Household Information

Use the pages in the Application Data Verification component to verify the number of persons in the household, the number enrolled in post-secondary education, the AGI, income tax paid for the base year, and certain untaxed income and benefits for the base year.

This section provides an overview of calculating Federal Variance and discusses how to:

- View Financial Aid Administrator Information.
- Verify household information.
- Verify tax data.
- Verify W-2 information.
- Verify federal untaxed income.
- Verify federal additional financial information.

- Verify institutional untaxed income.
- Verify institutional other taxable income.
- Consolidate forms.
- View consolidated federal tax data.
- View consolidated institutional tax data.

Note: The navigation paths for the pages listed in the following table are for aid year 20nn-20nn. Oracle supports access for three active aid years.

Pages Used to Verify Resource and Household Information

September 2017 PRP

All references to “Father” and “Mother” have been changed “Parent 1” and “Parent 2” in all Verification fields.

Page Name	***Definition Name***	***Navigation***	***Usage***
FAA Information	SFA_VER_FAA_INFO	Financial Aid, Verification, Manage 20nn-20nn Verification, FAA Information	Displays financial aid administrator information.
Household Info	VERIF02_FORM1	Financial Aid, Verification, Manage 20nn-20nn Verification, Household Info	Enter documented information about the student and members of the student's household.
TIV School Information	VERIF_SCHL_CD_SEC	Click the TIV Information link on the Household Info page. This link appears when you enter a valid school code.	View Title IV school information.
Get Institutional Data	VERIF_APP_SRC_CODE	Click the Get Inst Data button on the Household Info page.	Indicate which Application Source code to use to populate fields with institutional data.
Tax Form Data	VERIFnn_FORM2	Financial Aid, Verification, Manage 20nn-20nn Verification, Tax Form Data	Enter information reported on the filer's tax form.
Student's Income from Wages	VERIF_WAGES_STDNT	Click the Student/Spouse Wages link on the Tax Form Data page.	View detail information about wages reported by the person whose data is being verified.
Parent Income from Wages	VERIF_WAGES_PARENT	Click the Parent's Wages link on the Tax Form Data page.	View detail information about wages reported by the person whose data is being verified.
Other Taxable Income	SFA_OTHER_INC1_nn	Click the Other Taxable Income link on the Tax Form Data page.	Enter 1040, 1040A or 1040EZ taxable income line items other than wages.

Page Name	***Definition Name***	***Navigation***	***Usage***
Income Adjustments	SFA_INCOME_ADJ_09	Click the Income Adjustments link on the Tax Form Data page.	Record 1040 or 1040A adjustments to income. The tax form recorded as filed determines which fields activate. Values entered here write to Tax Form Data/ Income Adjustments and may affect Federal and Institutional specific verification pages.
Tax, Credits and Payments	SFA_TAXCREDIT_nn	Click the Tax, Credits, and Payments link on the Tax Form Data page.	Enter or view tax and credit data. The filed tax form determines which fields are active. With the exception of Earned Income Credit and Additional Child Tax Credit, credits entered are subtracted from the tax amount. The net calculated amount writes to Tax Form Data - US Income Tax Paid field.
W-2 Form	VERIF03_FORM3	Financial Aid, Verification, Manage 20nn-20nn Verification, W-2 Form	Enter or view information reported on a person's W-2 form.
Verification W2 - Box 12	VERIF03_W2_BOX12	Click the Box 12 link on the W-2 Form page.	Enter or view information from Box 12 on the W-2 form.
Fed Untax Income	SFA_FED_UNTAX_INC	Financial Aid, Verification, Manage 20nn-20nn Verification, Fed Untax Income	Enter or view federal untaxed income data. Displays only field values that originate from Total Other Income or Income Adjustment pages. The family member row determines which fields are active.
Fed Add Fin Info	SFA_FEDADFIN_IN_nn	Financial Aid, Verification, Manage 20nn-20nn Verification, Fed Add Fin Info	Enter or view federal additional financial information. Display only field values originate from U. S. Income Tax Paid page.
Inst Untax Income	SFA_INST_UTX_IN_nn	Financial Aid, Verification, Manage 20nn-20nn Verification, Inst Untax Income	Enter or view Institutional untaxed income data. Display only field values originate from Untaxed Income or Income Adjustment pages. The family member row determines which fields are active.

Page Name	***Definition Name***	***Navigation***	***Usage***
Inst Other Taxable	SFA_INSTOTH_TAX_nn	Financial Aid, Verification, Manage 20nn-20nn Verification, Inst Other Taxable	Enter or view institutional other taxable income. Display only field values originate from Total Other Income page. The family member row determines which fields are active.
Tax Data Consolidation	VERIF_TAX_CONSL_nn	Financial Aid, Verification, Manage 20nn-20nn Verification, Tax Data Consolidation	Combine the income and resources of all family members of the individual being verified.
Consolidated Tax Data — Federal	SFA_VER_CSL_FEDnn	Click the Consolidated Tax Data link on the Tax Data Consolidation page.	View or edit consolidated federal tax and resource information.
Consolidated Tax Data – Inst	SFA_VER_CSL_ISTnn	Click the Consolidated Tax Data link on the Tax Data Consolidation page.	View or edit consolidated institutional tax and resource information.

Viewing Financial Aid Administrator Information

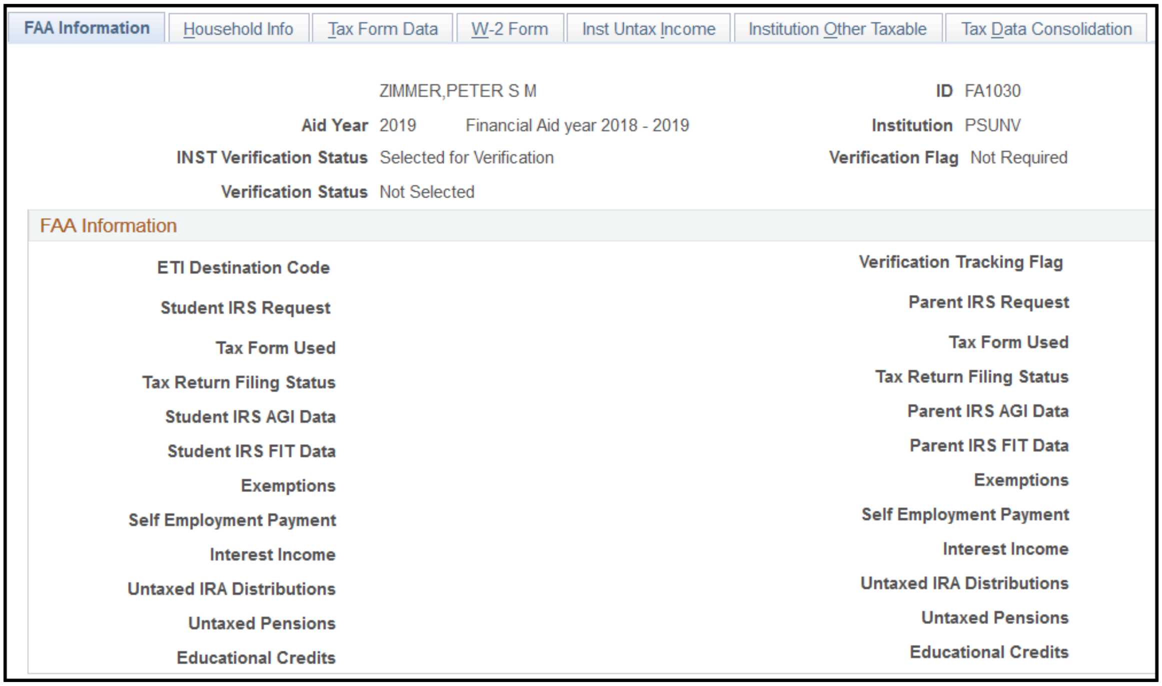
September 2017 PRP

Added IRS Data Retrieval Tool fields.

Access the FAA Information page (Financial Aid, Verification, Manage 20nn-20nn Verification, FAA Information).

Image: FAA Information page

This example illustrates the fields and controls on the FAA Information page. You can find definitions for the fields and controls later on this page.



For field descriptions of the header information on this page,

See Reviewing the Student's Packaging Status.

For field descriptions of the FAA Information,

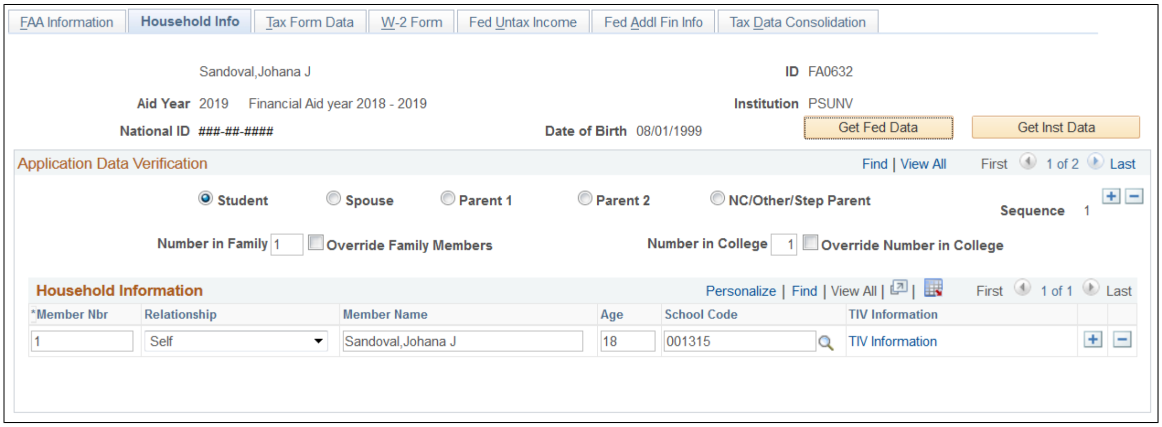
See Making ISIR Corrections.

Verifying Household Information

Access the Household Info page (Financial Aid, Verification, Manage 20nn-20nn Verification, Household Info).

Image: Household Info page

This example illustrates the fields and controls on the Household Info page. You can find definitions for the fields and controls later on this page.



Note: Use the arrow on the right to scroll to the hidden pages. After you click on either the Get Fed Data button or the Get Inst Data button, only the relevant pages display.

The system displays the student information, including National ID. For students in the United States, the National ID is the Social Security number (SSN).

The page maintains a separate row for each household member. Ensure that you are accessing the correct row for the person you are verifying.

Get Fed Data (get federal data) — Click this button to populate fields with the most recent Institutional Student Information Record (ISIR) record data. When federal data is retrieved, the Inst Untax Income page and Inst Other Taxable page are hidden.

Get Inst Data (get institutional data) — Click this button to populate fields with institutional record data. The system prompts you to enter an application source code. When institutional data is retrieved, the Fed Untax Income page and Fed Add Fin Info page are hidden.

Note: You are required to *Get Inst Data* for all institutional records. You are required to *Get Fed Data* for all records with a Student or Parent IRS Request not equal to "02" .
If the Student or Parent IRS Request is “02”, data was transferred from the IRS and not changed prior to submission of the application. For these records, using *Get Fed Data* is optional.

Application Data Verification

September 2017 PRP Included non-custodial parent in the Get Institutional Data process.

Select the radio button for Application Data that you want to verify:

- *Student*
- *Spouse*
- *Parent 1*
- *Parent 2*
- *NC/Other/Step Parent* (non-custodial parent/other/step-parent)

Note: If a non custodial parent file (HHB) only is present, verification cannot be performed.

Sequence

Sequence number for the row of information to be verified. A separate row of verification data is maintained for each person verified.

Number in Family

Enter the number in the student's family.

Override Family Members

Select to override the number of family members used to calculate the expected family contribution (EFC).

Number in College

Enter the number of the student's family members in college.

Override Number in College

Select to override the number of family members in college used to calculate the EFC.

Household Information

Member Nbr (member number)

Displays the household member counter. The system increases this field by one for each row inserted at the household member level.

Relationship

Select the relationship to the student of the person selected in Sequence. For example, the sequence for an independent student might be, self, spouse, son. Data verification for the parent of a dependent student might be self (Parent 1), spouse, son (student applicant), daughter. You would not complete the family grid or enter number in family or college values for a dependent student row.

All dependent students must be listed as a relation with only Parent 1, Parent 2, or NC/Other/Step Parent to be counted in the parent household. Recording the student in more than one of these categories results in over counting.

Members listed for student and spouse household categories are compared to household size and the value for number in college for the student. Members listed for Parent 1, Parent 2, and NC/ Other/Step Parent are compared to household size and the value for the number in college for parent (dependent students are always included in the parent household in an aid application).

School Code

Enter a valid school code, if applicable. Entering a valid school code enables the system to calculate a value for the Number In College field. If the school code remains blank, the system does not calculate the number in college. A TIV Information link becomes available when you enter a valid college code. It displays demographic information for the school.

TIV Information

This link only appears when a valid School Code is selected. Click the link to open the TIV School Information page.

Getting Institutional Data

Access the Get Institutional Data using page (click the Get Inst Data button on the Household Info page).

Application Source Code

Select from these values:

FT Canada Student Loan (full-time Canadian student loan)

Institutional Application

Profile

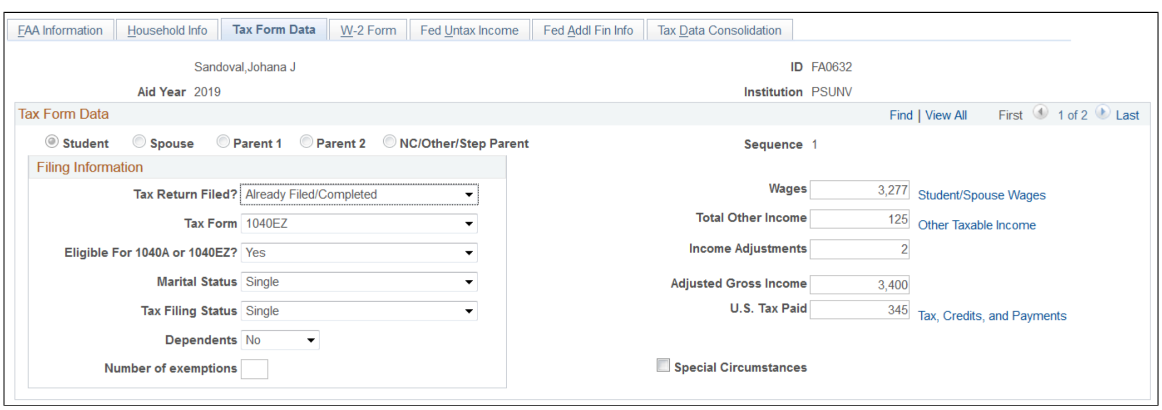
PT Canada Student Loan (part-time Canadian student loan)

Verifying Tax Data

Access the Tax Form Data page (Financial Aid, Verification, Manage 20nn-20nn Verification, Tax Form Data).

Image: Tax Form Data page

This example illustrates the fields and controls on the Tax Form Data page. You can find definitions for the fields and controls later on this page.



Note: This page is for a federal dependent student. Therefore the Inst Untax Income and Inst Other Taxable pages are not available.

Sequence

Displays the sequence number for the row of information to be verified. A separate row of verification data is maintained for each person verified. The selected button indicates the person whose information is being verified.

Note: If a spouse row is created, the values from the student are always used in consolidation for Tax Return Filed, Tax Form, Eligible For 1040A or 1040EZ, and Marital Status. However, if a student value for one of these fields is blank, the student's Filing Status is not *Separate*, and the corresponding spouse value is non-blank, then the spouse value is used.
If more than one parent row is created, the Marital Status of Parent 2 overrides that of Parent 1 in consolidation. Tax Return Filed, Tax Form, and Eligible For 1040A or 1040EZ are consolidated according to the sequence number. If a value is blank for one parent and non blank for the other then the non blank value is used. For example, if the Parent 1 sequence number is 2 with a Tax Return Filed of *blank* and the Parent 2 is sequence number 3 and Tax Return Filed is *Will File*, then the Parent 2 value for Tax Return Filed is used in consolidation. If both parents have a Tax Return Filed value and they happen to differ, then the parent with the lower sequence number value is used.

Filing Information

Tax Return Filed

Select values are dependent on verification type, Federal or Institutional.

Tax Form

Select values are dependent on verification type, Federal or Institutional. The value that you select determines which fields are activated on the Tax Form Data, Other Taxable Income, Income Adjustments and Tax, Credits and Payments pages.

Eligible For 1040A or 1040EZ (eligible to file 1040A or 1040EZ)

Select whether the filer is eligible to file the tax form 1040A or 1040EZ.

Marital Status

Select the marital status of the person whose documents are being verified.

See Mapping Institutional Marital Statuses.

Tax Return Filing Status

Select the tax filing status of the person whose information is being verified. The value that you select determines which fields the system activates in the Wages page.

	Select from the following values: *Don't Know*, *Head of Household, Married-Joint, Married-Separate, Single,* and *Widow(er).*
Dependents	Select *Yes* if the person whose information is being verified has dependents and select *No* if not.
Number of exemptions	Enter the number of exemptions for the person whose information is being verified.
Wages	Enter the amount of wages for the person whose information is being verified.
Total Other Income	Enter any taxable income besides wages reported by the person whose information is being verified.
Income Adjustments	Enter any allowable adjustments to income as reported by the person whose information is being verified.
Adjusted Gross Income	Enter the total of wages and other income less income adjustments for the person whose information is being verified.
U.S. Income Tax Paid	Enter the total of U.S. income tax paid by the person whose information is being verified.
Special Circumstances	Select this checkbox to indicate special circumstances may exist for the student.

Note: You can enter data in the Total Other Income, Income Adjustments, and U.S. Income Tax Paid fields to override information on the associated detail pages. However, overriding information is not recommended.

Entering Student or Parent Income from Wages

Access the Student's Income from Wages page (click the Wages link on the Tax Form Data page).

The wage information displayed on this page depends on which Sequence row is active and the selections made for Filing Status.

Wage Income Student	Displays the student's wage income or the Parent 1 wage income.
Wage Income Spouse	Displays the spouse's wage income or the Parent 2 wage income.
Wages	Displays the total wages from the wage income entries. The system uses this amount to populate the Wages field on the Tax Form Data page.

Entering Other Taxable Income

The elements that appear on the Other Taxable Income page are determined by the tax form indicated on the Tax Form Data page. For the 1040 tax form, fields for Schedules B, C, D, E, F are available. For the 1040A form, a field for Schedule 1 is available.

Access the Other Taxable Income page – 1040 Tax Form (click the Other Taxable Income link on the Tax Form Data page).

The Add to Total Wages check box for Business Income Loss and the Add to Total Wages check box for Farm Income/Losses are selected by default if you perform 'Get Fed Data' to pre-populate the component with ISIR data. If selected, income or loss to wages is calculated to the total wages.

Entering Income Adjustments

Access the Income Adjustments page (click the Income Adjustments link on the Tax Form Data page).

The fields on this page match the order of the fields on the 1040 form.

Note: For a 1040A filer, the available fields are Educator Expenses, Filer's IRA deduction, Student loan interest, and Tuition and fees deduction.
An Income Adjustments page is not available for a 1040EZ filer. Enter the total income adjustment value in the Income Adjustments field on the Tax Form Data page.

Entering Tax, Credits, and Payments

Access the Tax, Credits and Payments page (click the Tax, Credits, and Payments link on the Tax Form Data page).

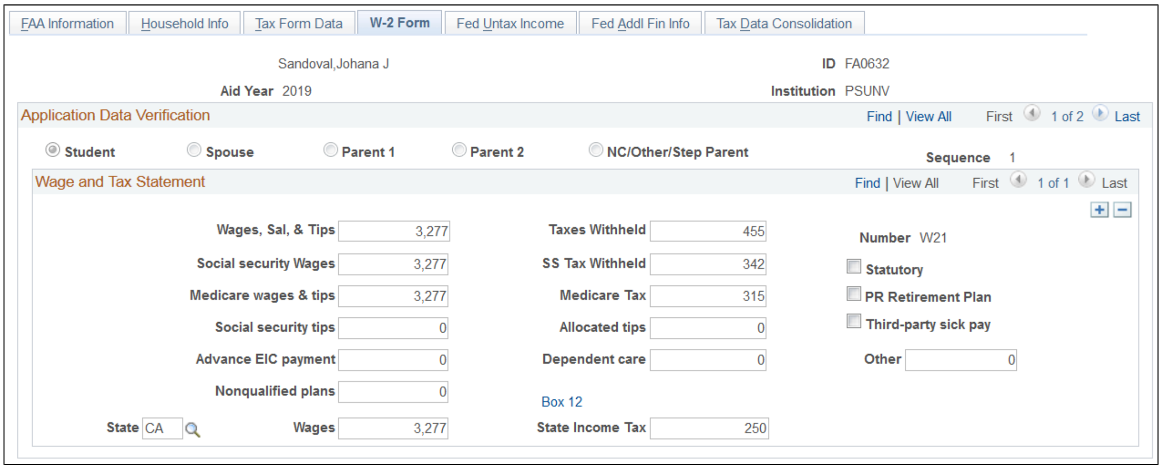
Tax Credits and Payments allows entry of pertinent data from forms 1040, 1040A, and 1040EZ. It captures *Line xx Income Tax Amount* and uses that value to update U.S. Tax Paid on the Tax Form Data entry page for use in the compare process. Other fields used in compare available in Tax, Credits, and Payments are Schedule A itemized Deductions (1040 only), Education Credits, Additional Medicare Form 8959, Earned Income Credit, and Additional Child Tax Credit.

Verifying W-2 Information

Access the W-2 Form page (Financial Aid, Verification, Manage 20nn-20nn Verification, W-2 Form).

Image: W-2 Form page

This example illustrates the fields and controls on the W-2 Form page. You can find definitions for the fields and controls later on this page.



Application Data Verification

Sequence

Displays the sequence number for the row of information to be verified. A separate row of verification data is maintained for each person verified. Ensure that you entering and viewing data for the correct row.

Wage and Tax Statement

Box 12

Click this link to enter or view information from Box 12 on the W-2 form.

Viewing W-2 Box 12 Information

Access the Verification W2 - Box 12 page (click the Box 12 link on the W-2 Form page).

Code

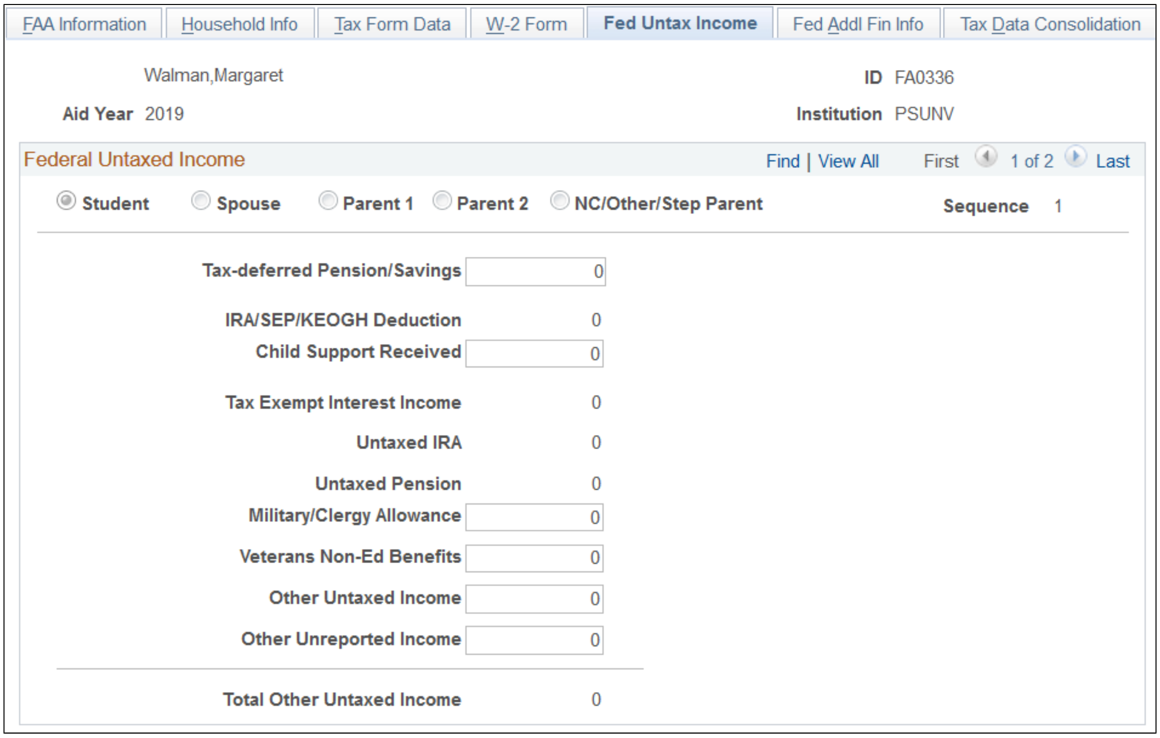
Refer to the W-2 instructions for details on valid values for the code.

Verifying Federal Untaxed Income

Access the Fed Untax Income page (Financial Aid, Verification, Manage 20nn-20nn Verification, Fed Untax Income).

Image: Fed Untax Income page

This example illustrates the fields and controls on the Fed Untax Income page. You can find definitions for the fields and controls later on this page.



Federal Untaxed Income

You can view and enter data in some fields on this page. Other fields are display only.

The Other Unreported Income field is not included for parent rows.

The following fields are display only fields. For all other fields on the page, you can view and enter data.

IRA/SEP/KEOGH Deduction (Individual Retirement Account/Self Employment Plan/Keogh Deduction)	Displays the combined amounts for IRA, SEP and KEOGH deductions. This amount writes from the Income Adjustments page.
Tax Exempt Interest Income	Displays interest income that is tax exempt. This amount writes from the Other Taxable Income page.
Untaxed IRA (Untaxed Individual Retirement Account)	Displays the amount of funds disbursed from an IRA that is nontaxable. This amount writes from the Other Taxable Income page and is the difference between Total IRA payments and Taxable IRA payments.

Untaxed Pension

Displays the amount of pension earnings that are untaxed. This amount writes from the Other Taxable Income page and is the difference between Total Pension and Taxed Pension.

Total Other Untaxed Income

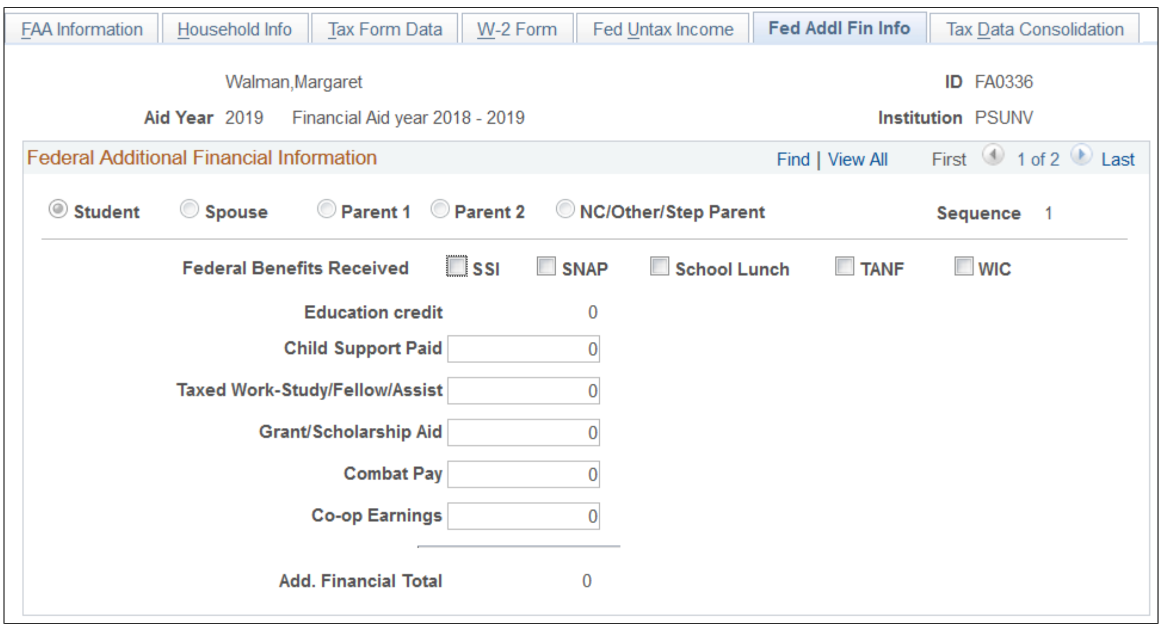
Displays the total of the amounts in the untaxed income fields on this page.

Verifying Federal Additional Financial Information

Access the Fed Addl Fin Info page (Financial Aid, Verification, Manage 20nn-20nn Verification, Fed Addl Fin Info).

Image: Fed Addl Fin Info page

This example illustrates the fields and controls on the Fed Addl Fin Info page. You can find definitions for the fields and controls later on this page.



Federal Additional Financial Information

You can view and enter data in some fields on this page. Other fields are display only.

Federal Benefits Received

Select each Federal benefit that the student received. If you fetch Federal data, these fields populate as recorded on the student's ISIR.

Education credit

Displays the Education Credit. This amount writes from the Tax, Credits, and Payments page.

Add. Financial Total (additional financial total)

Displays the total for all additional financial information fields on this page.

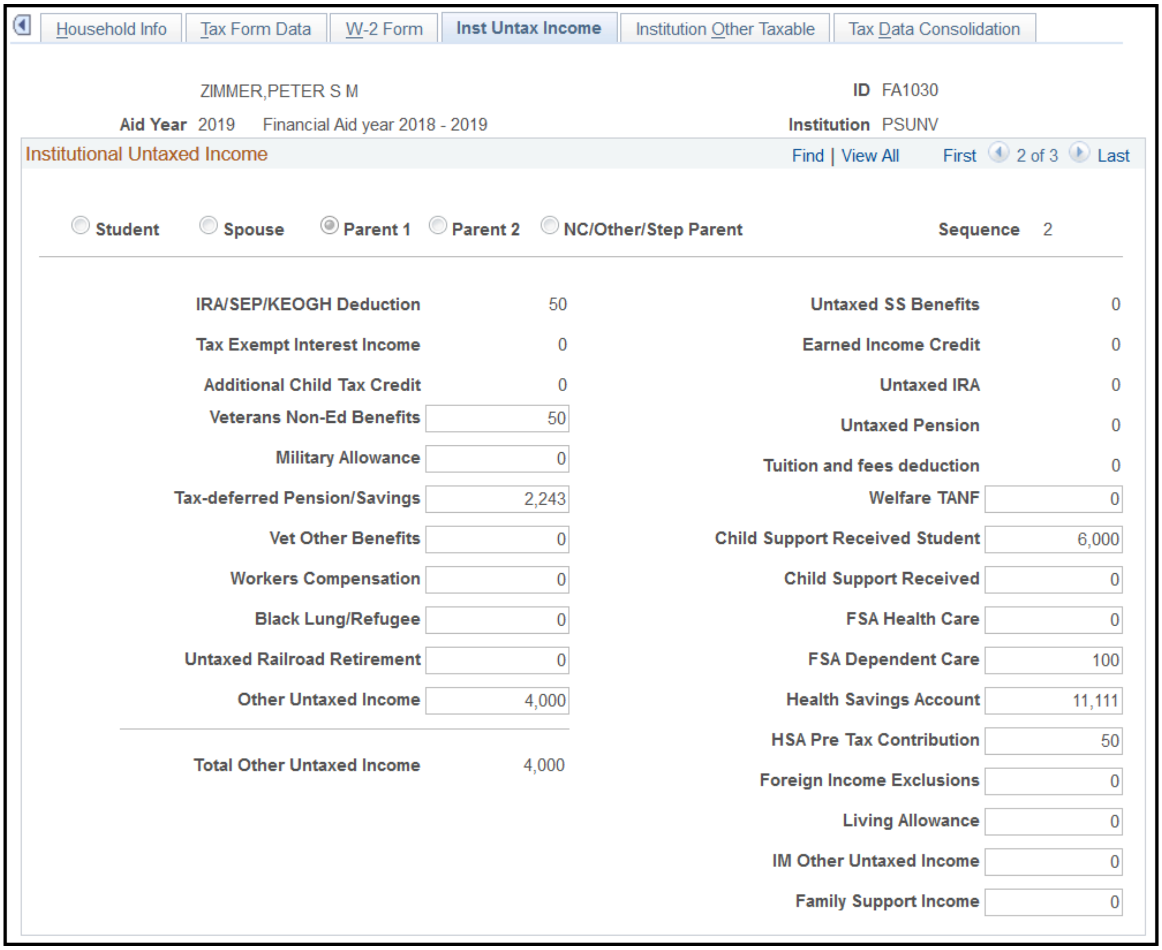
You can enter and view data in the other fields.

Verifying Institutional Untaxed Income

Access the Inst Untax Income page (Financial Aid, Verification, Manage 20nn-20nn Verification, Inst Untax Income).

Image: Inst Untax Income page

This example illustrates the fields and controls on the Inst Untax Income page. You can find definitions for the fields and controls later on this page.



Institutional Untaxed Income — Student

You can view and enter data in some fields on this page. Other fields are display only.

IRA/SEP/KEOGH Deduction (Individual Retirement Account/Self Employment Plan/Keogh Deduction)	Displays the combined amounts for IRA, SEP and KEOGH deductions. This amount writes from the Income Adjustments page.
Tax Exempt Interest Income	Displays interest income that is tax exempt. This amount writes from the Other Taxable Income page.
Additional Child Tax Credit	Displays additional child tax credit. This amount writes from Tax, Credits and Payments page.

Untaxed SS Benefits (Untaxed Social Security Benefits)	Displays untaxed social security benefits. This amount writes from the Other Taxable Income page and is the difference between Social Security benefits and Taxed Social Security Benefits.
Earned Income Credit	Displays earned income credit. This amount writes from Tax, Credits and Payments page.

You can enter and view data in the other fields on this page.

Institutional Untaxed Income — Parent

September 2017 PRP

Added “Child Support Received Student” field.

IRA/SEP/KEOGH Deduction (Individual Retirement Account/Self Employment Plan/Keogh Deduction)	Displays the combined amounts for IRA, SEP and KEOGH deductions. This amount writes from the Income Adjustments page.
Tax Exempt Interest Income	Displays interest income that is tax exempt. This amount writes from the Other Taxable Income page.
Additional Child Tax Credit	Displays additional child tax credit. This amount writes from Tax, Credits and Payments page.
Untaxed SS Benefits (Untaxed Social Security Benefits)	Displays untaxed social security benefits. This amount writes from the Other Taxable Income page and is the difference between Social Security benefits and Taxed Social Security Benefits.
Earned Income Credit	Displays earned income credit. This amount writes from Tax, Credits and Payments page.
Untaxed IRA (Untaxed Individual Retirement Account)	Displays the amount of funds disbursed from an IRA that is nontaxable. This amount writes from the Other Taxable Income page and is the difference between Total IRA payments and Taxable IRA payments.
Untaxed Pension	Displays the amount of pension earnings that are untaxed. This amount writes from the Other taxable Income page and is the difference between Total Pension and Taxed Pension.
Tuition and fees deduction	Displays the amount of tuition and fees deduction derived from entries on the Income Adjustments page.

You can enter and view data in the other fields.

Verifying Institutional Other Taxable Income

Access the Inst Other Taxable page (Financial Aid, Verification, Manage 20nn-20nn Verification, Inst Other Taxable).

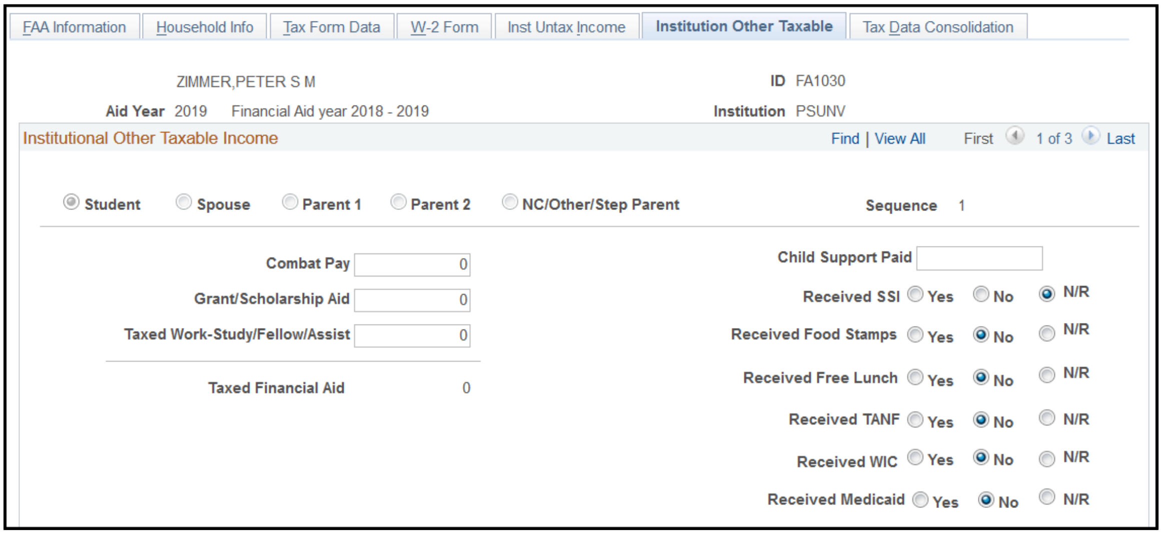
September 2017 PRP

Removed “Dislocated Worker”, “Homeless”, “Orphan/Foster/Ward”, and “Upward Bound” fields.

Added “Received Medicaid” field.

Image: Inst Other Taxable page

This example illustrates the fields and controls on the Inst Other Taxable page. You can find definitions for the fields and controls later on this page.



Institutional Other Taxable Income — Student

Taxed Financial Aid

Displays total for Grant/Scholarship Aid and Taxed Work-Study/Fellow/Assist fields. Combat Pay is not included in this total.

You can enter and view data in the other fields.

Institutional Other Taxable Income — Parent

September 2017 PRP

Removed “Dislocated Worker” field.

Added “Received Medicaid” field.

Taxable Refund

Displays taxable refunds. This amount writes from the Other Taxable Income page.

Alimony Income

Displays alimony income. This amount writes from the Other Taxable Income page.

Capital Gains/Loss

Displays capital gains/loss. This amount writes from the Other Taxable Income page.

Other Gains/Losses	Displays other gains/losses. This amount writes from the Other Taxable Income page.
Taxable IRA/Keogh	Displays other taxable IRA/Keogh. This amount writes from the Other Taxable Income page.
Taxed Pension	Displays taxed pension. This amount writes from the Other Taxable Income page.
Unemployment Benefits	Displays unemployment benefits. This amount writes from the Other Taxable Income page.
Taxed Social Security Benefits	Displays taxed social security. This amount writes from the Other Taxable Income page.
Other Taxed Income	Displays other taxed income. This amount writes from the Other Taxable Income page.
Combat Pay	Enter or view the combat pay amount.
Total Other Income	Displays total for other taxable fields on this page. Combat Pay is not included in this total.

Institutional Other Taxable Income — NC/Other/Step Parent

September 2017 PRP

New section description.

This page differs from the Parent 1 and Parent 2 pages in the following way:

- Includes Child Support Paid for Student and Alimony Paid fields.
- Does not include Child Support Received for Student field.

Consolidating Forms

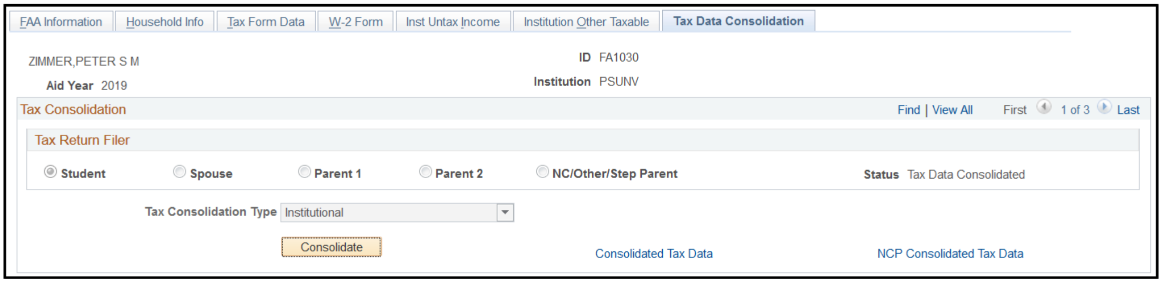
September 2017 PRP

Added link to Non Custodial Parent Consolidated Tax Data.

Access the Tax Data Consolidation page (Financial Aid, Verification, Manage 20nn-20nn Verification, Tax Data Consolidation).

Image: Tax Data Consolidation page

This example illustrates the fields and controls on the Tax Data Consolidation page. You can find definitions for the fields and controls later on this page.



Sequence

Displays the sequence number for the row of information to be verified.

Tax Consolidation Type

Select the Tax Consolidation Type you want to use. This field is active only if you do *not* select "Get Fed Data" or "Get Inst Data" for Household Verification. If you choose the Institutional Tax Consolidation Type, then the Institutional Marital Status Mapping is used. This field is display only if you use the "Get Fed Data" or "Get Inst Data".

See Mapping Institutional Marital Statuses.

Consolidate

Click the Consolidate button to combine all income and resources. Consolidation takes whatever you have entered in the prior Application Verification pages of this component and consolidates pertinent information. Consolidation only captures the fields from Verification Setup.

Consolidated Tax Data

Click this link to view or edit all tax and resource information on the Consolidated Tax Data page. Values that appear should represent the tax form information entered for each verified person. You can make bottom-line changes to tax information here, but your changes are not saved if you re-run consolidation after the changes are made.

NCP Consolidated Tax Data (non custodial parent consolidated tax data)

Click this link to view or edit all tax and resource information on the Non-Custodial Parent Consolidated Tax Data page. Values that appear should represent the tax form information entered for each verified person. You can make bottom-line changes to tax information here, but your changes are not saved if you re-run consolidation after the changes are made.

Note: This link only appears for PROFILE applicants.

Viewing Federal Consolidated Tax Data

Access the Consolidated Tax Data – Federal page (click the Consolidated Tax Data link on the Tax Data Consolidation page).

Note: The fields on this page compare to your target tables.

For descriptions of the fields in this section, please refer to the United States Department of Education's *Electronic Data Exchange Technical Reference* or

See Making ISIR Corrections.

Student's Tax Data

Marital Status	Displays the marital status of the student based on ISIR values.
Federal Benefits Received	Check boxes indicate which Federal benefits were received.

Parent's Tax Data

Marital Status	Displays the marital status of the Parent based on ISIR values.
Federal Benefits Received	Check boxes indicate which Federal benefits were received.

Viewing Institutional Consolidated Tax Data

Access the Consolidated Tax Data – Inst page (click the Consolidated Tax Data link on the Tax Data Consolidation page).

Note: The fields on this page compare to your target tables.

For descriptions of the fields in this section, please refer to the College Board's Financial Aid Services Information Center (https://groups.collegeboard.org/fas) for supporting documentation.

See Maintaining Institutional Financial Aid Applications.

Student's Tax Data

Marital Status	Displays the marital status of the student based on Institutional values.
Benefits Received	Displays federal benefits received based in Institutional values.

Parent's Tax Data

Marital Status	Displays marital status of the Parent based on Institutional values.
Benefits Received	Displays federal benefits received based on Institutional values.

Working with Auto Verification

This section discusses how to:

- Use auto verification.
- Edit student level tolerances.
- Edit verification status.
- Compare verification results.

Pages Used for Auto Verification

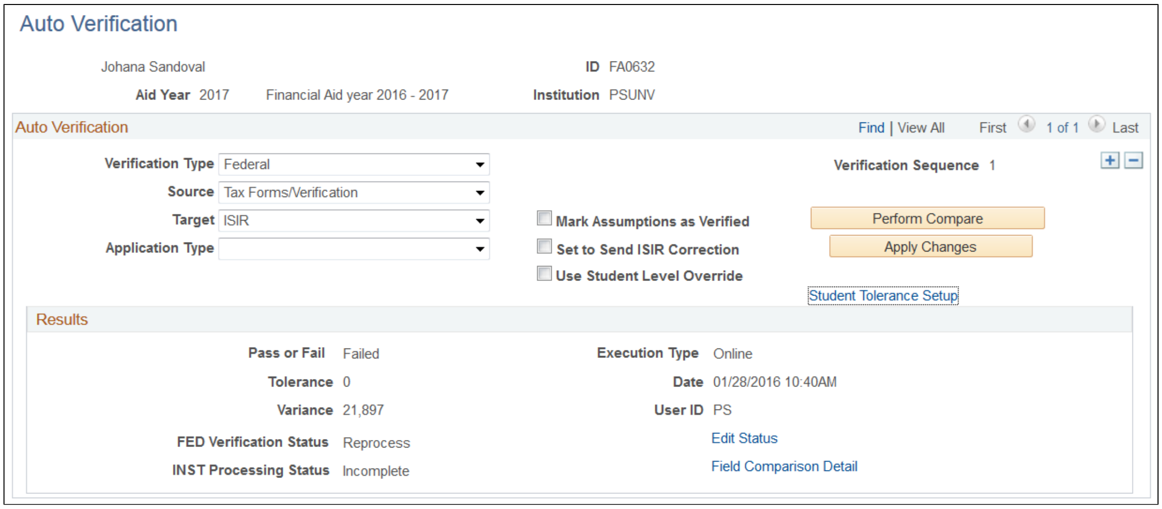
Page Name	***Definition Name***	***Navigation***	***Usage***
Auto Verification	VERIF_COMP_DTL	Financial Aid, Verification, Perform Auto Verification, Auto Verification	Perform comparison of source and target data. Compare income documents to financial aid applications or compare ISIR to Institutional data. View comparison results to determine whether to update the target table with source information.
Student Tolerance Setup – FED	SFA_VER_STU_FED_TS	Click the Student Tolerance Setup link on the Auto Verification page.	View or edit federal tolerance levels.
Student Tolerance Setup – INST	SFA_VER_STU_INT_TS	Click the Student Tolerance Setup link on the Auto Verification page.	View or edit institutional tolerance levels.
Edit Verification Status	VERIF_RES_STAT_SEC	Click the Edit Status button on the Auto Verification page.	View or change verification codes or statuses.
Verification Compare Results	VERIF_TEST_DTL_SEC	Click the Field Comparison Detail link on the Auto Verification page.	View a summary of fields that were compared and for which the system indicated a variance.

Using Auto Verification

Access the Auto Verification page (Financial Aid, Verification, Perform Auto Verification, Auto Verification).

Image: Auto Verification page

This example illustrates the fields and controls on the Auto Verification page. You can find definitions for the fields and controls later on this page.



Verification is the process of comparing source data to a target set of data. Use this page to set up verification parameters.

Verification Type	Select from: *Federal:* Applies federal setup rules to this verification. *Institutional:* Applies institutional setup rules to this verification.
Source	This is a translate field and should not be adjusted. Values are: *Inst App:* Data from the Institutional Application tables. *ISIR:* Data from the ISIR Data Corrections tables. *Tax/Verif:* Selected data from the Application Data Verification pages created from the Consolidate routine.
Target	This is a translate field. Translate values should not be adjusted. Values include: *Inst App:* Data from the Maintain Institutional Application tables. *ISIR:* Data from the ISIR Data Corrections tables.
Application Type	Values are: *Inst App:* Institutional application

	Profile: PROFILE application *FT - CSL:* Full-time Canadian student loan *PT - CSL:* Part-time Canadian student loan
Mark Assumptions as Verified	Use this option only when the Source value is *Tax/Verif* and the Target value is *ISIR.* Select to tag fields originally identified as Assumption fields with a field status of *Verified.* Assumed ISIR data fields that result from the federal methodology calculation are maintained on secondary pages of the ISIR Data Corrections pages.
Set to Send ISIR Correction	Select this check box to set the Correction Status to *Send* on ISIR corrections when the Apply Changes button is selected.
Use Student Level Override	Select this check box to apply verification tolerance levels for this student. This selection overrides the tolerance levels set up at the global level. Select when you want to activate changes made in the Student Tolerance setup.
Verification Sequence	Displays the verification sequence number, which tracks multiple background processes. Row insertion is suggested for sequencing online iterations. Use it to track the results and accompanying verification setup performed for this student.
Perform Compare	Click this button to compare your target and source data and to activate the Field Comparison Detail link when variances are found.
Apply Changes	Click this button to move marked fields to the target tables when fields that you mark as *Apply* in Field Comparison Detail (see View Field Comparison Detail) are acceptable.
Student Tolerance Setup	Click this link to open a page to view or edit fields or the tolerance amount at the student level.

Results

The system displays the results of the most recent verification setup. The fields include Date, Tolerance, Variance, Execution Type, FED Verification Status, INST Processing Status, and Pass or Fail.

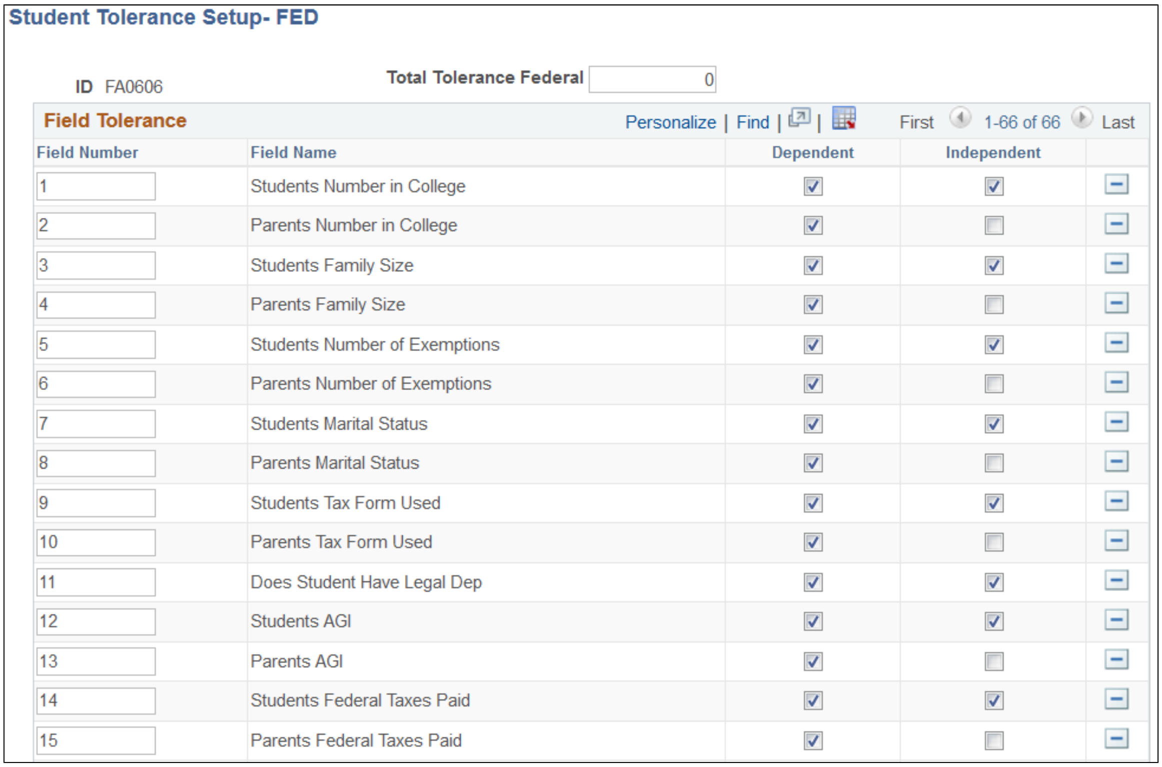
Click the Edit Status link to access the Edit Verification Status page, where you can change the program-generated verification statuses for federal and institutional verification and processing.

Editing Student Level Tolerances

Access the Student Tolerance Setup page (click the Student Tolerance Setup link on the Auto Verification page).

Image: Student Tolerance Setup – FED page

This example illustrates the fields and controls on the Student Tolerance Setup – FED page.



Student Tolerance Setup- FED

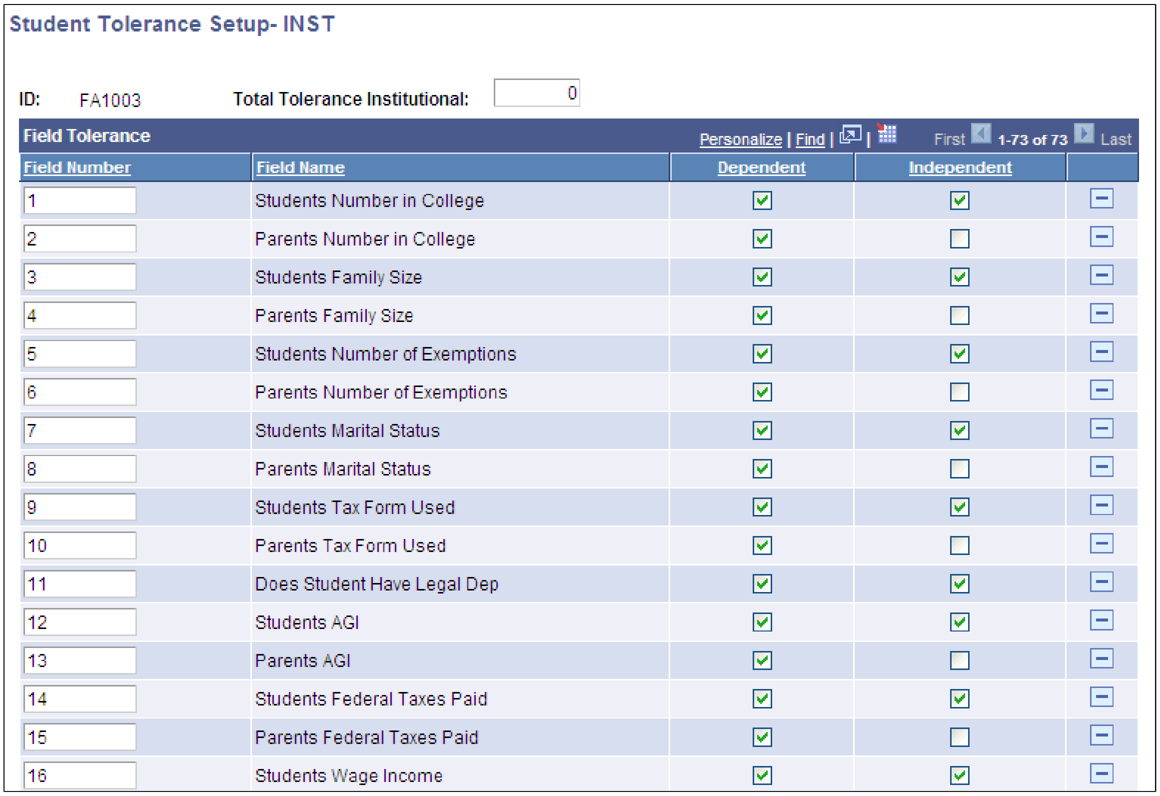
ID FA0606 Total Tolerance Federal 0

Field Tolerance Personalize | Find | First 1-66 of 66 Last

Field Number	Field Name	Dependent	Independent	
1	Students Number in College	☑	☑	−
2	Parents Number in College	☑	☐	−
3	Students Family Size	☑	☑	−
4	Parents Family Size	☑	☐	−
5	Students Number of Exemptions	☑	☑	−
6	Parents Number of Exemptions	☑	☐	−
7	Students Marital Status	☑	☑	−
8	Parents Marital Status	☑	☐	−
9	Students Tax Form Used	☑	☑	−
10	Parents Tax Form Used	☑	☐	−
11	Does Student Have Legal Dep	☑	☑	−
12	Students AGI	☑	☑	−
13	Parents AGI	☑	☐	−
14	Students Federal Taxes Paid	☑	☑	−
15	Parents Federal Taxes Paid	☑	☐	−

Image: Student Tolerance Setup – INST page

This example illustrates the fields and controls on the Student Tolerance Setup – INST page.


Student Tolerance Setup- INST

ID: FA1003 Total Tolerance Institutional: 0

Field Tolerance — Personalize | Find | First 1-73 of 73 Last

Field Number	Field Name	Dependent	Independent
1	Students Number in College	☑	☑
2	Parents Number in College	☑	☐
3	Students Family Size	☑	☑
4	Parents Family Size	☑	☐
5	Students Number of Exemptions	☑	☑
6	Parents Number of Exemptions	☑	☐
7	Students Marital Status	☑	☑
8	Parents Marital Status	☑	☐
9	Students Tax Form Used	☑	☑
10	Parents Tax Form Used	☑	☐
11	Does Student Have Legal Dep	☑	☑
12	Students AGI	☑	☑
13	Parents AGI	☑	☐
14	Students Federal Taxes Paid	☑	☑
15	Parents Federal Taxes Paid	☑	☐
16	Students Wage Income	☑	☑

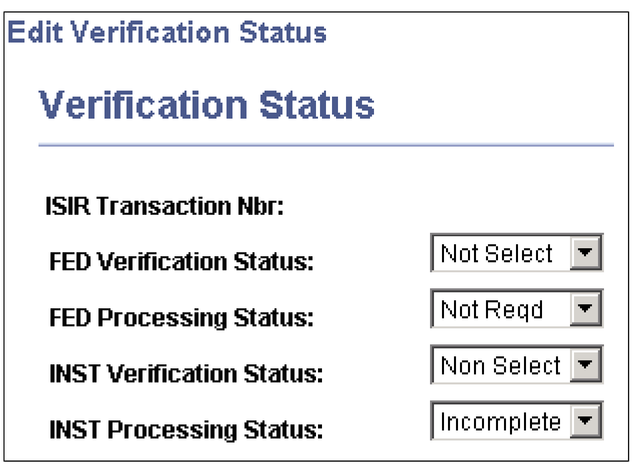
Use these pages to override Verification setup for individual students.

Editing Verification Status

Access the Edit Verification Status page (click the Edit Status button on the Auto Verification page).

Image: Edit Verification Status page

This example illustrates the fields and controls on the Edit Verification Status page.


Edit Verification Status

Verification Status

ISIR Transaction Nbr:

FED Verification Status: Not Select

FED Processing Status: Not Reqd

INST Verification Status: Non Select

INST Processing Status: Incomplete

You can update the verification and processing status fields that reside on the Packaging Status Summary page. The compare process automatically updates the status to *Pending* if the comparison results exceed the tolerance. If the ISIR transaction number is 1 and the verification process passes, then the verification status changes to *Accurate.*

Note: The Field Comparison Detail link is active only after the Perform Compare is run.

Use the Field Comparison Detail link to view the field differences on the Verification Compare Results page. Only fields that have differences appear. To use the source data to update your target tables, select the Apply check box for the fields. If you do not select the Apply check box, the field value remains the same as that in your target.

Comparing Verification Results

Access the Verification Compare Results page (click the Field Comparison Detail link on the Auto Verification page).

Image: Verification Compare Results page

This example illustrates the fields and controls on the Verification Compare Results page. You can find definitions for the fields and controls later on this page.

Verification Compare Results

Compared Field		Apply	Done	Source	Target	Difference
1	Students Number in College	☐	☐	1	0	1
3	Students Family Size	☐	☐	1	0	1
5	Students Number of Exemptions	☑	☑	0	1	1
9	Students Tax Form Used	☑	☑	2	1	0
12	Students AGI	☑	☑	6,233	4,964	1,269
13	Parents AGI	☑	☑	239,985	213,195	26,790
14	Students Federal Taxes Paid	☑	☑	144	57	87
15	Parents Federal Taxes Paid	☑	☑	42,037	46,134	4,097
16	Students Wage Income	☑	☑	5,600	4,939	661

This page lists fields with differences. You can select to update all or only select fields for moving to ISIR or Institution tables.

Apply	Select this check box to use the source data to update your target tables. If you do not select the Apply check box, the field value remains the same as that in your target.
Source	This data comes from the source table, tax/verification, ISIR, or institutional application.
Target	This data comes from the target table, ISIR, or institutional application.
Difference	Displays the difference between the source and target information.

Using Batch Verification

This section discusses how to:

- Process batch consolidation.
- View batch consolidated tax data.
- Process batch verification.
- Use batch verification results.
- Use batch verification summary.
- Use batch verification detail.

Pages Used for Batch Verification

Page Name	*Definition Name*	*Navigation*	*Usage*
Batch Consolidation	RUNCTL_FA_CONSL	Financial Aid, Verification, Perform Batch Consolidation, Batch Consolidation	Set consolidation parameters for batch consolidation and run the process.
Batch Consolidation Detail	VERIF_CONSUL_SMRY	Financial Aid, Verification, View Batch Consolidation, Batch Consolidation Detail	View batch consolidation results at the student level from the Application Data Verification - Tax Consolidation Consolidated Tax Data page.
Consolidated Tax Data – Fed	SFA_VER_CSL_FED2	Click the Consolidated Tax Data link on the Batch Consolidation Detail inquiry page.	View federal consolidated tax information for a student or parent.
Consolidated Tax Data – Inst	SFA_VER_CSL_INST2	Click the Consolidated Tax Data link on the Batch Consolidation Detail inquiry page.	View institutional consolidated tax information for a student or parent.

Page Name	***Definition Name***	***Navigation***	***Usage***
Batch Verification	RUNCTL_FAPCMPR1_01	Financial Aid, Verification, Perform Batch Verification, Batch Verification	Set parameters to verify batches and to run the process.
Batch Verification Results	RUNCTL_VERIF_SEC	Click the Results link on the Batch Verification Results page.	View summary verification information.
Batch Verification Summary	VERIF_COMP_SMRY	Financial Aid, Verification, View Verification Summary, Batch Verification Summary	View summary verification information.
Batch Verification Detail	STDNT_VERIF_DTL1	Financial Aid, Verification, View Verification Detail, Batch Verification Detail	View detail verification information from the Field Comparison Detail button on the Auto Verification page.

Processing Batch Consolidation

Access the Batch Consolidation page (Financial Aid, Verification, Perform Batch Consolidation, Batch Consolidation).

Selection Criteria Select *Unconsolidated* or *All Stdnts in Verification.*

Tax Consolidation Type Select the Tax Consolidation Type you want to use. This field is active only if you do *not* select "Get Fed Data" or "Get Inst Data" for Household Verification. If you choose the Institutional Tax Consolidation Type, then the Institutional Marital Status Mapping is used. This field is display only if you use the "Get Fed Data" or "Get Inst Data"

See Mapping Institutional Marital Statuses.

Viewing Batch Consolidated Tax Data

Access the Batch Consolidation Detail page (Financial Aid, Verification, View Batch Consolidation, Batch Consolidation Detail).

View Batch Consolidated Tax Data by clicking the Consolidated Tax Data link.

September 2017 PRP

Added link to Non Custodial Parent Consolidated Tax Data.

View Batch Non Custodial Parent Batch Consolidated Tax Data by clicking the NC Consolidated Tax Data link.

The Batch Consolidated Tax Data pages are the same as the Online Consolidated Tax Data pages except that the Batch pages are view–only. Refer to the documentation about the Online pages for information about the fields on the Batch pages.

See Viewing Federal Consolidated Tax Data.

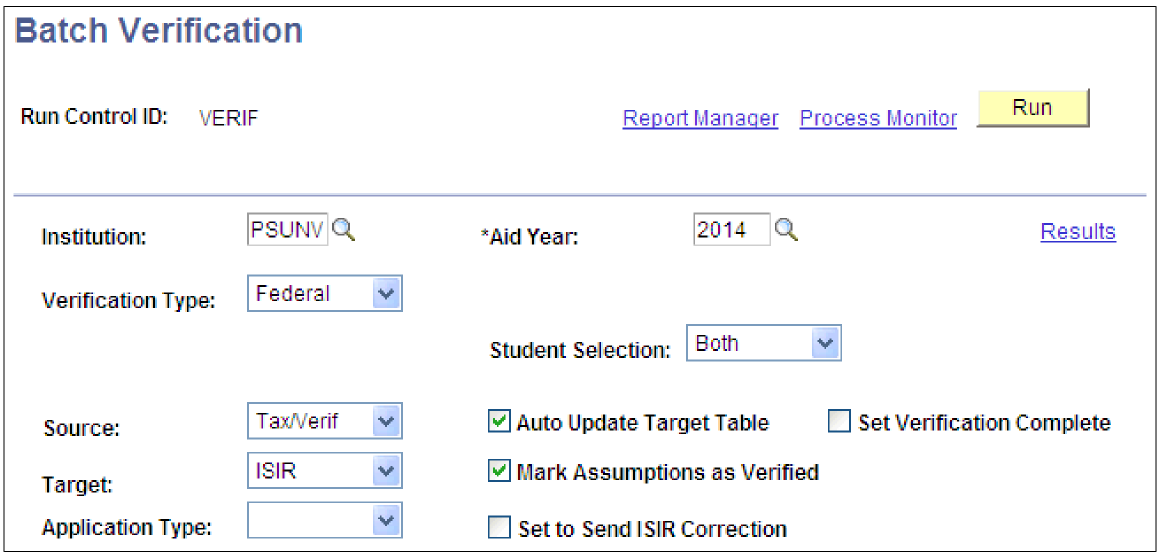
See Viewing Institutional Consolidated Tax Data.

Processing Batch Verification

Access the Batch Verification page (Financial Aid, Verification, Perform Batch Verification, Batch Verification).

Image: Batch Verification page

This example illustrates the fields and controls on the Batch Verification page. You can find definitions for the fields and controls later on this page.



Use the Batch Verification page to run verification for all students selected, according to the criteria that you establish.

Verification Type

Select from these values:

Federal: Select to apply federal setup rules to this verification.

Institutional: Select to apply institutional setup rules to this verification.

Source

Verification is the process of comparing source data to a target set of data. This is a translate field, and translate values should not be adjusted. Select from these values:

Inst App: Data from the Maintain Institutional Application tables

ISIR: Data from the ISIR Data Corrections tables

Tax/Verif: Selected data from the Application Data Verification pages created from the Consolidate routine

Target

This is a translate field, and translate values should not be adjusted. Select from these values:

	Inst App: Data from the Maintain Institutional Application tables *ISIR:* Data from the ISIR Data Corrections tables
Application Type	Values are valid with a source or target of *Inst App* only and include the following: *Inst App:* Institutional application *PROFILE:* PROFILE application *FT – CSL:* Full-time Canadian student loan *PT – CSL:* Part-time Canadian student loan
Student Selection	Select from the following values: *Both:* Processes records with a verification status of either pending or required. *Pending:* Processes records with a verification status of pending only. *Required:* Processes records with a verification status of required only.
Auto Update Target Table	Automatically updates the target table with verified data identified with a variance.
Mark Assumptions as Verified	Use this check box only when the Source value is *Tax/Verif* and the Target value is *ISIR.* Select to tag fields originally identified as Assumption fields with a field status of *Verified.* Assumed ISIR data fields that result from the federal methodology calculation are maintained on secondary pages of the ISIR Data Corrections pages.
Set to Send ISIR Correction	Select to set the Correction Status to *Send* on ISIR Corrections when the Auto Update Target Table is used.
Set Verification Complete	Select to automatically set the Verification Status to *Complete.* This field is enabled only when the Auto Update Target table is activated.

Using Batch Verification Summary

Access the Batch Verification Summary page (Financial Aid, Verification, View Verification Summary, Batch Verification Summary).

The system displays Institution, Aid Year, Process Instance, Verification Type, Date/Time, Source, User ID, Target, Students Selected, Students Skipped, Students Processed, Students Passed,Students Failed, and Verification options selected for the run: Mark Assumptions as Verified, Auto Update Target Table, Set Verification Complete, and Set to Send ISIR Correction.

Using Batch Verification Detail

Access the Batch Verification Detail page (Financial Aid, Verification, View Verification Detail, Batch Verification Detail).

Results

The system displays Pass or Fail, Tolerance, Verification Sequence, Verification Status, Variance, Verification Date, Review Status, Verification Type, User ID, Verification options selected for the run: Changes Applied to Target, Mark Assumptions as Verified, and Set to Send ISIR Correction.

Field Comparison Detail

The system displays the most recent verification results for the listed fields. Only fields that have differences appear.

The Done check box is activated when the process is run with the Auto Update Target Table option activated. Source data comes from the source table, tax/verification, ISIR, or institutional application. Target data comes from the target table, ISIR, or institutional application. There can be a difference between the source and target information.

Managing Ability to Benefit

This section provides an overview of Ability to Benefit and discusses how to:

- Update Student Eligibility Code descriptions.
- Create and manage Ability to Benefit data at the student level.
- Create Ability to Benefit data for students in batch

Understanding Ability to Benefit

An Ability-to-Benefit test is required of students seeking United States federal financial aid who did not graduate from high school in the United States. To this end, these students must demonstrate they possess sufficient "ability to benefit" (ATB) from post-secondary education via their performance in an approved test.

For these students, data regarding their ATB status must be reported as part of the Common Origination and Disbursement process. Oracle provides a way to create and maintain ATB data for these students.

Pages for Managing Ability to Benefit

Page Name	*Definition Name*	*Navigation*	*Usage*
Student Eligibility Codes	SFA_ATB_CODE_XREF	Set Up SACR, Product Related, Financial Aid, Student Eligibility Codes	Use this page to edit descriptions of Student Eligibility Codes in the setup table.

Page Name	***Definition Name***	***Navigation***	***Usage***
Manage Ability to Benefit	SFA_ATB_STDNT	Financial Aid, Ability to Benefit, Manage Ability to Benefit	Use this page to create and maintain Ability to Benefit data for a student.
Create Ability to Benefit	SFA_RUN_ATB	Financial Aid, Ability to Benefit, Create Ability to Benefit	Use this page to create and maintain Ability to Benefit data in batch.

Updating SEC Descriptions

Access the Student Eligibility Codes page (Set Up SACR, Product Related, Financial Aid, Student Eligibility Codes).

Keyed by Institution, use this page to update descriptions in the CS-delivered Student Eligibility Codes setup table. Descriptions are limited to 55 alphanumeric characters.

These descriptions apply to COD Pell and COD Direct Loan origination awards and can be obtained through the 2015-2016 COD Technical Reference, Volume II, Section 1, Implementation Guide - Student Eligibility Fields (formerly Ability to Benefit).

The following table lists recommended Student Eligibility Code descriptions.

Student Eligibility Code	***Description***
01: Complete before 7/1/2012	Test Completed - First enrolled before 7/1/2012
02: College before 7/1/2012	College Credits - First enrolled before 7/1/2012
03: State Process	Effective 10/9/2015: Invalid for all award years
04: Home Schooled	Home Schooled
05: Other	Effective 10/9/2015: Invalid for all award years
06: High School Diploma	High School Diploma
07: General Ed Development	GED or State Authorized HS Equivalent Certificate
08: State-Authorized exam/cert	Effective 10/9/2015: Invalid for all award years
09: Acad Trans min 2 YR Prog	2-Year program Transcript Accepted for Credits to BA
10: Excelled in High School	Program leads to Assoc degree, excel in HS and met reqt
11: Complete 7/1/12 - 06/30/15	Test Completed - First enrolled 7/1/2012 - 6/30/2015
12: Complete after 6/30/15	Test Completed - First enrolled 7/1/2015 or After
13: College 7/1/12 - 6/30/15	College Credits - First enrolled 7/1/2012 - 6/30/2015
14: College after 06/30/2015	College Credits - First enrolled 7/1/2015 or After

Creating and Managing Ability to Benefit

Access the Manage Ability to Benefit page (Financial Aid, Ability to Benefit, Manage Ability to Benefit).

Use this page to create ATB data for applicable students. This data is reported on all COD Pell origination awards to COD. Data is also reported for all COD Direct Loan origination award. Any ATB changes, based on a new sequence number, are also reported to COD with a change record.

Sequence

Displays the sequence number of the record. This number increases by one every time a new row is inserted. A new row should only be inserted if a change to the Ability to Benefit Code is necessary.

Aid Year

Select the Aid Year. For COD reporting purposes:

- If Aid Year is blank for the highest sequence number row, then the Student Eligibility Code for that row is used for all Aid Years.
- If Aid Year is *not* blank for the highest sequence number row and:
    - the Aid Year for that row is *less than or equal to* the Aid Year for the process Run Control, then the Student Eligibility Code for that row is used for the process.
    - the Aid Year for that row is *greater than* the Aid Year for the process Run Control , then the process searches for the *next* highest sequence row, and repeats the above logic until a sequence row is selected to be used in processing.

Note: Specifying an Aid Year allows you to designate different Student Eligibility Codes by Aid Year. For example, you may wish to take advantage of a new (expanded) code in a new Aid Year when it was not available in an earlier Aid Year.

Stdnt Eligibility Code (student eligibility code)

Select the value that indicates how the student achieved the ATB. Select from the ATB codes established in the Student Eligibility Codes crosswalk table setup. When a code is selected, its description appears.

Note: TheAbility to Benefit Code drives the remaining field edits to ensure the correct 'set' of data is populated for COD reporting requirements. All other changes should be made directly to field element.

Test Administrator Code

Select the administrator code of the ATB testing.

Test Code

Select which ATB test was taken by the student.

State Code Select the state in which the student completed the State Process to achieve ATB.

Completion Date Enter the date that the student completed the ATB test or State Process.

Comment Enter optional explanatory comments. This information is not shared with COD.

Creating Ability to Benefit Data in Batch

Access the Create Ability to Benefit page (Financial Aid, Ability to Benefit, Create Ability to Benefit).

Population Selection

Use this page to create Ability to Benefit data for students in batch using standard Population Selection functionality.

Selection Tool Select from *Equation Engine, PS Query,* or *External File.* Additional parameters are displayed for your selected tool. System data is available in Population Selection Context Definition SFA_ATB.

Query Name This field is only available the *PS Query* Selection Tool is selected. Select a population selection query that joins with the bind record SFA_ATB_BIND.

Default Values

If any of the following fields come in from Population Selection with blanks then use the value from the run control to populate the Ability to Benefit record.

Institution Enter the academic institution that the student is attending during the aid year.

Aid Year Select the Aid Year. For COD reporting purposes:

- If Aid Year is blank for the highest sequence number row, then the Student Eligibility Code for that row is used for all Aid Years.
- If Aid Year is *not* blank for the highest sequence number row and:
    - the Aid Year for that row is *less than or equal to* the Aid Year for the process Run Control, then the Student Eligibility Code for that row is used for the process.
    - the Aid Year for that row is *greater than* the Aid Year for the process Run Control , then the process searches for the *next* highest sequence row, and repeats the above

logic until a sequence row is selected to be used in processing.

Note: Specifying an Aid Year allows you to designate different Student Eligibility Codes by Aid Year. For example, you may wish to take advantage of a new (expanded) code in a new Aid Year when it was not available in an earlier Aid Year. If the Aid Year value is specified on this Run Control, it populates the ATB record for all Population Selection cohorts whose Aid Year value is blank.

Stdnt Eligibility Code (student eligibility code)	Select from the ATB codes established in the Student Eligibility Codes crosswalk table setup. When a code is selected, its description appears. Entering a default value is optional, however if blank, then the data retrieved from Population Selection must indicate an ATB Code value.
Test Administrator Code	Optional. Enter the ATB Test Administrator Code.
Test Code	Optional. Enter ATB Test Code
State Code	Optional. Enter the State Code if ATB Code is equal to '03:State Process'.
Completion Date	Enter the Completion Date of the ATB test.

Note: Ability to Benefit—related field values are based on the most current COD Technical Reference material.

Using NSLDS Data and Processes

This section provides an overview of NSLDS data and processes and discusses how to:

- Generate Financial Aid History or Transfer Student Monitoring Inform file requests.
- Load Financial Aid History and Transfer Student Monitoring files.
- Set up NSLDS Data Load Parameters.
- Process NSLDS Files.
- Use NSLDS Suspense Management.
- Generate NSLDS FAT Load Error Reports.
- Use NSLDS Change Review.
- Process NSLDS Alert File information.

- Review NSLDS general aggregate information.
- View details of NSLDS aggregate data
- View NSLDS Pell information.
- View NSLDS Academic Competitiveness Grant (ACG) details.
- View NSLDS National SMART grant (NSG) details.
- View NSLDS TEACH grant details.
- View NSLDS additional information.
- Use the NSLDS Data Push Process

Understanding NSLDS Data and Processes

The National Student Loan Data System (NSLDS) is a central database operated by the Department of Education to track student aid information. The NSLDS database is updated with information from schools, agencies that guaranty loans, the Direct Loan program, the Pell Grant program and other Department of Education programs. Schools use the NSLDS data to determine aid eligibility based on past and current awards.

Schools can receive NSLDS data in the following ways:

- School submits a Financial Aid History (FAH) Inform request.

  If requested, NSLDS sends a file that contains the student's full NSLDS Financial Aid History.

- School submits a Transfer Student Monitoring (TSM) Inform request.

  If requested, NSLDS monitors students for changes affecting student eligibility not covered by the ISIR post-screening process. If eligibility changes are detected, NSLDS sends an Alert file which contains the student's full NSLDS Financial Aid History with the appropriate alert change flags.

- Limited NSLDS data is also part of the Institutional Student Information Record (ISIR).

Oracle provides a process to generate the FAH/TSM Inform (request) file to send to the NSLDS. Additionally, once a FAH/Alert file is received, options are available to load and manage the NSLDS data through use of suspense management, processes and reports. You can view loaded NSLDS data by using the NSLDS Inquiry components.

To use NSLDS data in the Awarding and Packaging processes, NSLDS must be loaded, pushed to aggregate aid tables, and the Packaging process must be directed to use NSLDS as an aggregate source to assess how much aid had been used towards lifetime limits.

Pages Used to Review and Process NSLDS Data

Page Name	*Definition Name*	*Navigation*	*Usage*
NSLDS Request	SFA_RUN_NSLDS_OUT	Financial Aid, File Management, NSLDS, Process NSLDS Request, NSLDS Request	Generate an NSLDS Inform file containing requests for either Financial Aid History, Transfer Student Monitoring or both.
FA Inbound	RUNCTL_FAT_INBOUND	Financial Aid, File Management, Import Federal Data Files, FA Inbound	Load the NSLDS Financial Aid History and Alert files into the NSLDS staging tables.
NSLDS Data Load Parameters	SFA_NSLDS_LD_CNTRL	Set Up SACR, Product Related, Financial Aid, File Management, NSLDS Data Load Parameters, NSLDS Load Options tab	Configure the load parameters for processing NSLDS data from the staging tables to the application tables.
NSLDS Search/Match	SFA_NSLDS_SRCHMCH	Set Up SACR, Product Related, Financial Aid, File Management, NSLDS Data Load Parameters, NSLDS Search/Match tab	Define the Search/Match parameters for processing NSLDS data from the staging tables to the application tables.
Process NSLDS Files	RUNCTL_FAPTALRT	Financial Aid, File Management, NSLDS, Process NSLDS Files, Process NSLDS Files	Load NSLDS data from the staging tables to the application tables.
NSLDS Suspense Management	NSLDS_SUSP_CNTRL	Financial Aid, File Management, NSLDS, Manage NSLDS Records, NSLDS Suspense Management	View NSLDS records that have been loaded into the staging tables by the FA Inbound process. Once the Process NSLDS Files process runs, review NSLDS records that were not loaded into the application tables.
NSLDS FAT Load Error Report	RUNCTL_FA921	Financial Aid, File Management, NSLDS, NSLDS FAT Load Error Report	Create a report listing all NSLDS records that failed to load to the application tables. These records have a Load Status of Suspended or Error.
NSLDS Change Review	NSLDS_CHANGE_RVW	Financial Aid, File Management, NSLDS, Review NSLDS Flagged Students, NSLDS Change Review	Review all NSLDS Alert file records that have been loaded into the application tables. After student NSLDS information has been reviewed, use this page to indicate that you have reviewed and resolved any student aid eligibility discrepancies.

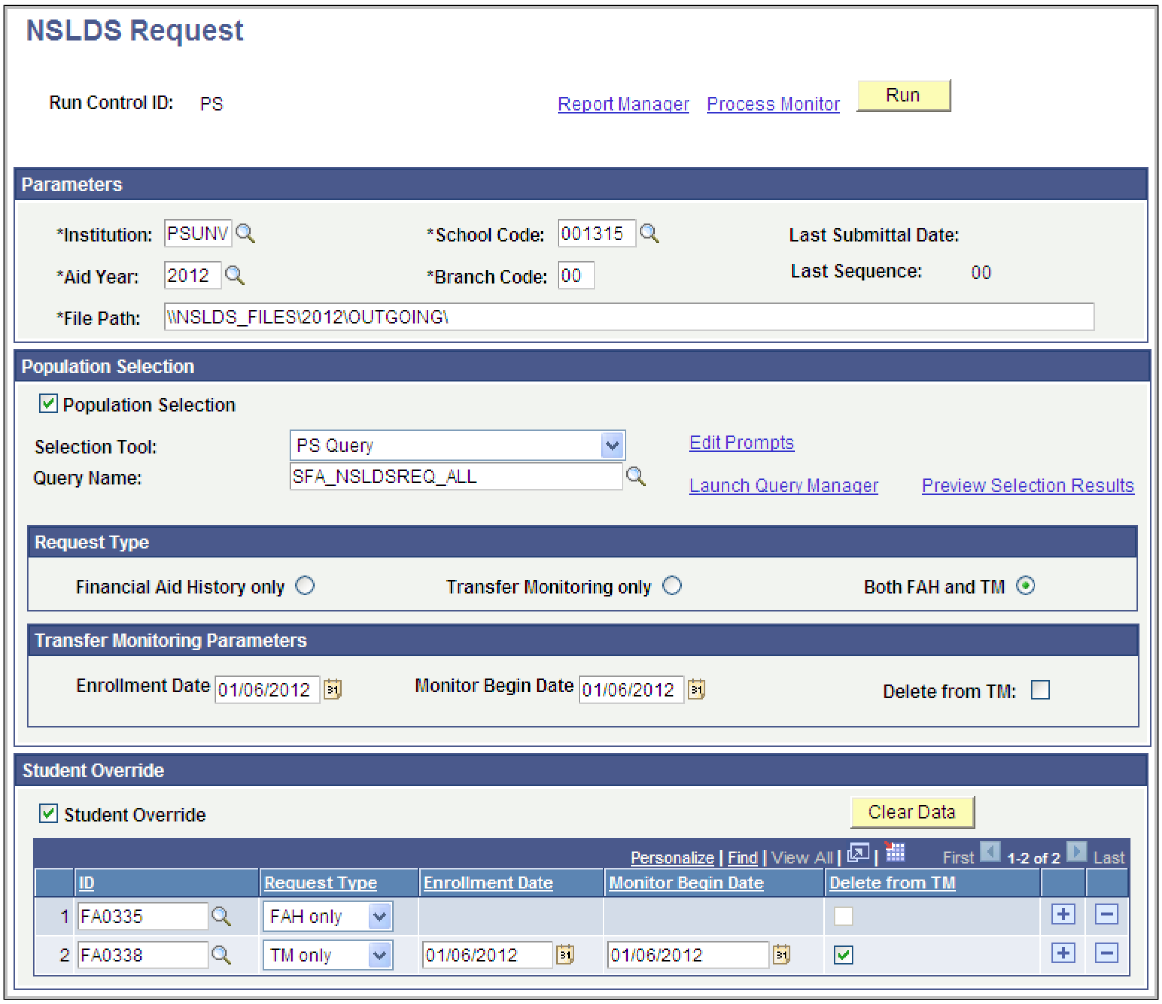
Page Name	***Definition Name***	***Navigation***	***Usage***
NSLDS Information	NSLDS_GEN_AGGR	Financial Aid, Awards, View NSLDS Loan Data, NSLDS Information	View error codes, change flags, MPN flags, and alert file flags.
NSLDS Overpayment Information	NSLDS_CONTCT_SEC	Click the Overpayment Information link on the NSLDS Information page.	View loan overpayment and contact information for Pell, Perkins, and SEOG.
NSLDS Detail	NSLDS_ERR_CD_SEC	Click the Detail link on the NSLDS Information page.	View NSLDS error codes, change flags, master promissory note flags, and alert file flags for the effective-dated row.
NSLDS Loan Detail	NSLDS_LOAN_DTL	Financial Aid, Awards, View NSLDS Loan Data, NSLDS Loan Detail	Review detailed information for every federal loan that the student has received.
NSLDS Pell	NSLDS_PELL	Financial Aid, Awards, View NSLDS Loan Data, NSLDS Pell	Review a summary of a student's last three Pell awards.
NSLDS ACG	NSLDS_ACG	Financial Aid, Awards, View NSLDS Loan Data, NSLDS ACG	View details for Academic Competitiveness Grants.
NSLDS NSG	NSLDS_NSG	Financial Aid, Awards, View NSLDS Loan Data, NSLDS NSG	View details for National SMART Grants.
NSLDS TEACH	NSLDS_TEACH	Financial Aid, Awards, View NSLDS Loan Data, NSLDS TEACH	View details for TEACH Grants.
NSLDS Additional Information	NSLDS_ADDL_INFO	Financial Aid, Awards, View NSLDS Loan Data, NSLDS Additional Information	Review overpayment information or name history.
NSLDS Activity	NSLDS_ERR_CD_SEC	Financial Aid, Awards, View NSLDS Loan Data. Click the Detail link on any page in the component.	View NSLDS activity and change flags.
NSLDS Data Push	SFA_RUN_NSLDS_UPDT	Financial Aid, File Management, NSLDS, Update Aggregates with NSLDS, NSLDS Data Push	Run the Update Aggregates with NSLDS as an independent process to push NSLDS totals into the aggregate aid tables to be used by the Packaging process.

Generating Financial Aid History or Transfer Student Monitoring Inform File Requests

Access the NSLDS Request page (Financial Aid, File Management, NSLDS, Process NSLDS Request, NSLDS Request).

Image: NSLDS Request page

This example illustrates the fields and controls on the NSLDS Request page. You can find definitions for the fields and controls later on this page.



Use the NSLDS Request page to generate an NSLDS Inform file to request Financial Aid History (FAH), add or remove students to the Transfer Student Monitoring (TSM) list or both.

Note: Before submitting your first Batch Inform file for the TSM process, you must establish a School Transfer Profile on the NSLDS FAP website. If the School Transfer Profile is not set up, the entire Batch Inform file is rejected.

Parameters

School Code	Enter a valid six digit ED School Code

Branch Code — Enter a valid two digit ED Branch Code, if applicable. If left blank, value defaults to "00".

Note: The School and Branch Codes used here indicate the 'informing' school when generating the NSLDS Inform file. NSLDS sends the FAH/Alert files back to the 'informing' school and includes these codes within the files.

Population Selection

Population Selection — Select this check box to access population selection options. If not selected, the process attempts to process Student Overrides. If Student Override is not selected either, the run parameters can be saved and the process run, but no file is created.

See "Using the Population Selection Process" (PeopleSoft Campus Solutions 9.2: Campus Community).

Query Name — Select a PS Query that uses the *SFA_NSLDS_QRYVW* bind record.

Equation Name — Select an equation that is defined with the application prompt *NSLDS Request Process.*

Financial Aid History only — Select to request a FAH file.

Transfer Monitoring only — Select to request to add or remove students from the TSM list.

Both FAH and TM — Select to request a FAH file and to add or remove students from the TSM list.

Note: The Enrollment Date, Monitor Begin Date and Delete from TM options are only used for Transfer Monitoring requests and are therefore only displayed if a Request Type of Transfer Monitoring Only or Both FAH and TM is selected.

Enrollment Date — Enter the begin date for the period of enrollment. This date can be a future date, but not more than 18 months greater than the current date. Also, it cannot be more than 90 days less than the current date.

Monitor Begin Date — Enter the date when monitoring should begin. This date can be a future date, but not greater than the enrollment date. If the enrollment date has already passed, the submittal date (current date) is the default.

Delete from TM — Select to remove the selected population from the TSM list. This option should only be selected for students who were previously added to the TSM list but are not going to attend your institution.

Student Override

Student Override

Select this check box to access student override options.

You can use the Student Override function to enter student IDs individually for inclusion in the Inform file. Select the Request Type, Enrollment Date, Monitor Begin Date and Delete from TM options for each row. These options work the same as described in the Population Selection section.

Note: You can use the Student Override option in conjunction with the Population Selection option. If you use both features, the student override function processes first. If duplicate IDs exist in the student override function and the population selection function, only one row is inserted using the student override information.

Related Links

Defining Item Type Disbursement Rules

Loading Financial Aid History and Transfer Student Monitoring Files

Access the FA Inbound page (Financial Aid, File Management, Import Federal Data Files, FA Inbound).

Use the FA Inbound page to load Financial Aid History and Alert files into the NSLDS staging tables.

Run Option

Select Single File to enter a single file location or File List to indicate a list of files in the Inbound File field.

Inbound File

Enter the name and location of the NSLDS file that you want to load into the staging tables. Be sure that the server has read access rights to the location of the file.

ISIR TG Number

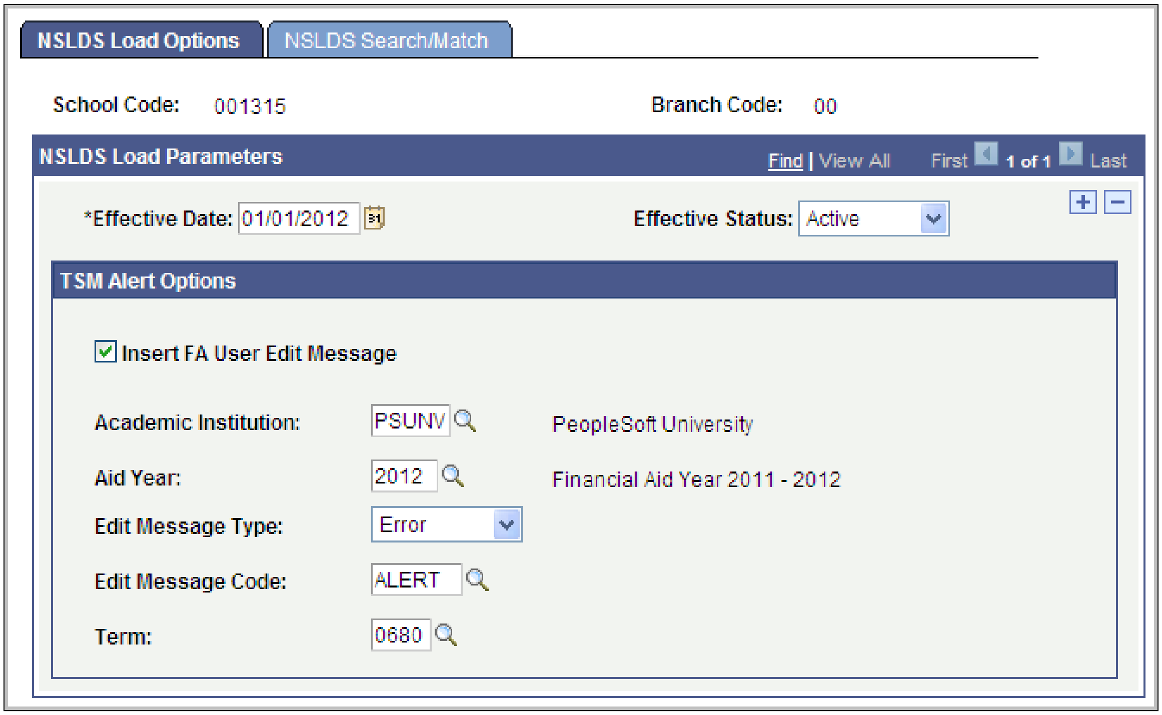
Assign the ISIR TG number for the ISIRs that are loaded. When processing a file list, the system assigns the same TG number to all ISIRs in the list. This value is not used when loading NSLDS files.

Setting Up NSLDS Data Load Parameters

Access the NSLDS Data Load Parameters page (Set Up SACR, Product Related, Financial Aid, File Management, NSLDS Data Load Parameters, NSLDS Load Options tab).

Image: NSLDS Load Options page

This example illustrates the fields and controls on the NSLDS Load Options page. You can find definitions for the fields and controls later on this page.



Use the NSLDS Data Load Parameters page to setup options for processing NSLDS data from the staging tables to the application tables, either in batch or online. Data load parameters must be setup for each separate School/Branch Code combination you plan to process.

Insert FA User Edit Message

Select this check box to insert FA User Edit messages. Checking this box opens the Aid Year, Institution, Edit Message Type, Edit Message Code, and Term fields for input.

Note: This option only allows insertion of FA User Edit Messages for Alert records. FA User Edit messages are *not* inserted when FAH records are processed. If you wish to insert FA User Edit Messages for FAH records, please use the stand-alone FA User Edit Message assignment process.

Aid Year

Select the valid aid year for the current Transfer Monitoring process.

Institution

Select the institution for which you want to enter a user edit message.

Edit Message Type

Select Error, Informtnal (informational), or Warning.

Edit Message Code	Select the edit message code to be entered for the student. The available codes are restricted based on the Edit Message Type selected.
Term	Select the term for which the user edit message is to become active.

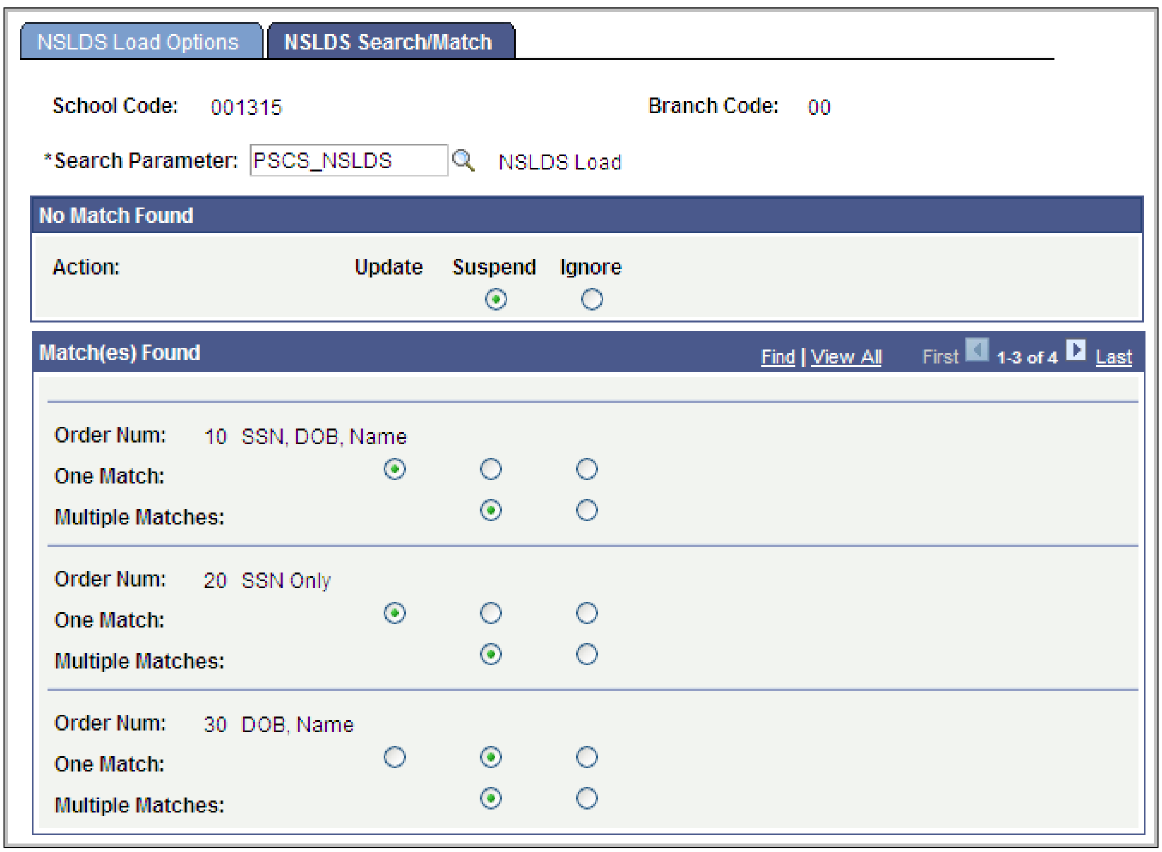
Note: You must setup FA User Edit Messages to support this process.

See Defining User Edit Messages.

Access the NSLDS Search/Match page (Set Up SACR, Product Related, Financial Aid, File Management, NSLDS Data Load Parameters, NSLDS Search/Match tab).

Image: NSLDS Search/Match page

This example illustrates the fields and controls on the NSLDS Search/Match page. You can find definitions for the fields and controls later on this page.



Use this page to define the Search/Match parameters when processing NSLDS data from the staging tables to the application tables. Select which action to take when No Match, a Single Match or Multiple Matches are found.

Search Parameter	Select the search parameter to be used for NSLDS Search/Match

Note: You are advised to setup a Search Parameter specifically for NSLDS. Unlike ISIR and Profile, NSLDS only has a handful of fields available to use for Search/Match: First Name, Last Name, Date of Birth, and Social Security Number.

No Match Found — Select the action, *Suspend* or *Ignore,* to take when no match is found for a record during Search/Match.

Match(es) Found — The Search Parameter value entered above determines which levels are displayed. For each level, select the action to take when One Match or Multiple Matches are found. Select *Update* (only available when one match is found), *Suspend* or *Ignore.*

Understanding the Process NSLDS Files Logic

The Process NSLDS Files process selects all records from the NSLDS staging table with a Load Status of *Unprocessed* or *Suspended.* The program attempts to match each selected NSLDS record with a student in the database using the Search/Match settings configured on the NSLDS Data Load Parameters page.

If Search/Match finds a single match and the parameters are set to *Update,* the NSLDS data loads to the application tables, the Load Status is set to *Loaded* and the data can be viewed in the NSLDS Inquiry component. The loaded NSLDS information also updates the student's NSLDS Match field on the Packaging Status Summary/Database Match page. If a student has previously been reported in Default or Overpayment, the status is reset to Eligible if the new NSLDS information confirms the status. Conversely, a current status of Eligible can also be reset to Default or Overpayment if the new NSLDS data confirms the status.

If Search/Match finds no match, multiple matches or a single match and the parameters are NOT set to *Update,* the Load Status is either set to *Suspended* or *Skipped,* depending on the Search/Match settings. The NSLDS record can also be *Suspended* if the Transaction Process Date on the incoming data is older than the current Effective Date on the NSLDS application tables. Use the NSLDS Suspense Management page to review *Suspended* and *Skipped* records and attempt to get them loaded.

Processing NSLDS Files

Access the Process NSLDS Files page (Financial Aid, File Management, NSLDS, Process NSLDS Files, Process NSLDS Files).

Use the Process NSLDS Files page to load the FAH/Alert data from the staging tables to the application tables. When NSLDS files are loaded through the FA Inbound process, the 6-digit school code and 2-digit branch code from the files are identified. The options on this page allow you to process all School/Branch Codes found on the staging tables or elect to only process certain ones.

All School/Branch Codes — Selecting this option processes the NSLDS data on the staging tables for ALL School/Branch Code combinations.

School/Branch Code Override — Selecting this option only processes the NSLDS data in the staging tables for the School/Branch Code(s) entered in the School/Branch Code Override grid.

School Code
Enter a valid six digit ED School Code. Use the lookup button to search for valid school codes on the NSLDS Staging tables.

Branch Code
Enter a valid two digit ED Branch Code. Use the lookup button to search for valid branch codes on the NSLDS Staging tables.

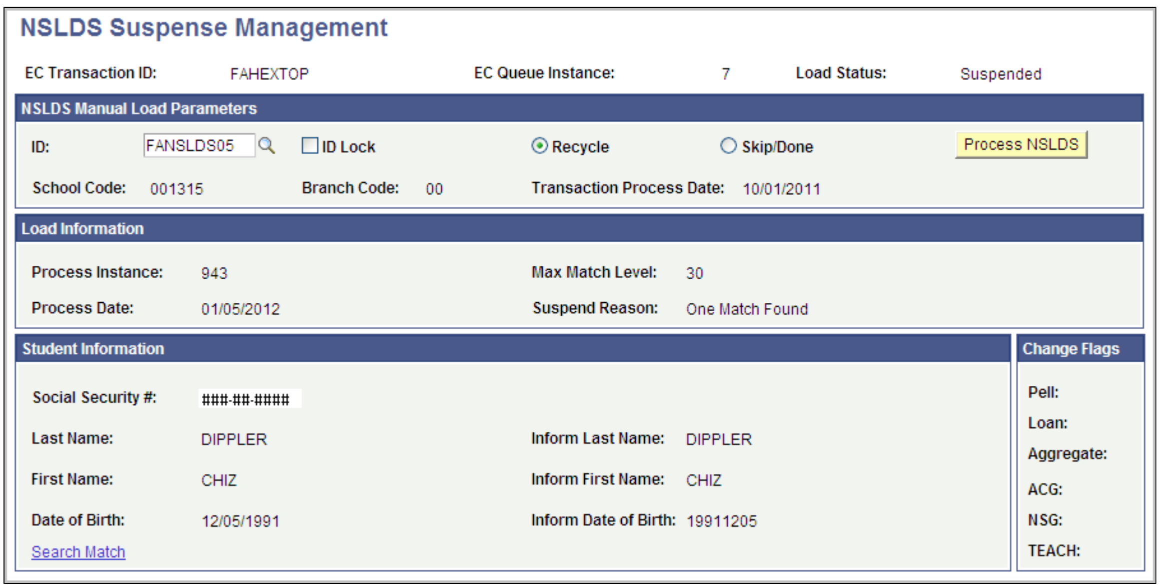
Note: A warning message appears if the selected School/Branch Code combination does not have an associated NSLDS Data Load Parameters setup.

Using NSLDS Suspense Management

Access the NSLDS Suspense Management page (Financial Aid, File Management, NSLDS, Manage NSLDS Records, NSLDS Suspense Management).

Image: NSLDS Suspense Management page

This example illustrates the fields and controls on the NSLDS Suspense Management page. You can find definitions for the fields and controls later on this page.



The system displays the EC Transaction ID (electronic commerce transaction ID) and EC Queue Instance. The valid EC Transaction ID values are FAHEXTOP (Financial Aid History file) and TRALRTOP (Alert file).

Load Status
The system displays one of these values:

Error: An error occurred while trying to process this record from the staging tables. Records with this status are not picked up by the batch process. Refer to the Error Code description below.

Loaded: The record successfully loaded from the NSLDS staging tables into the application tables..

Skipped: This status is either set manually on the Suspense Management page or by the batch process when Search/Match parameters are set to 'Ignore'. Records with this status are not picked up by the batch process. Refer to the Skip Reason description below.

Suspended: The record did not load into the application tables because it did not meet the NSLDS load parameters. Records with this status are picked up by the batch process. Refer to the Suspend Reason description below.

Unprocessed: The FA Inbound process loaded the record loaded into the NSLDS staging tables, but the Process NSLDS Load process has not yet been run for the record. Records with this status are picked up by the batch process.

NSLDS Manual Load Parameters

ID

For records with a Load Status of *Loaded,* this field shows which ID the NSLDS data was loaded to.

For records with a Load Status of *Skipped* or *Suspended,* the ID field may be blank or populated with one of the Search/Match results.

For records with a Load Status of *Suspended* or *Unprocessed* records, you can use this field in conjunction with the ID Lock check box to manually match an ID to incoming NSLDS data.

ID Lock

Select to match the *Suspended* or *Unprocessed* NSLDS record to the specified ID. This works in conjunction with the ID field. In order to use the ID Lock option, the ID field MUST be populated. Using this option essentially bypasses Search/Match the next time this record is processed. Although Search/Match is bypassed, the record must still meet the other NSLDS Data Load Parameters in order to load to the application tables.

Recycle

This is set by the NSLDS load process if a student's NSLDS record cannot be loaded into the application tables because it does not meet the NSLDS Data Load Parameters.

Skip/Done

This is set by the system when the NSLDS record has been loaded to the application tables or if the record has been skipped/ignored (either manually or by the batch routine). To manually set the Load Status to *Skipped,* select this radio button and click the Process NSLDS button.

Process NSLDS

Click this button to perform the selected action: *Recycle* or *Skip/Done.*

School Code

Displays the School Code value reported in the NSLDS file.

Branch Code

Displays the Branch Code value reported in the NSLDS file.

Transaction Process Date
Displays the date when NSLDS generated the incoming NSLDS data.

Load Information

Process Instance
Displays the most recent process instance of when this record was processed through the batch load routine.

Process Date
Displays the most recent process date of when this record was processed through the load routine (either online or through the batch routine).

Max Match Level
Displays the Search/Match level at which the NSLDS record was matched to an ID.

Note: Records with a Load Status of *Error, Suspended* or *Skipped* have an associated reason or code displayed. No reason or code is displayed for records having a Load Status of *Unprocessed* or *Loaded*.

Suspend Reason
Displays the reason the record was suspended and not loaded into the application tables.

- *Data Load Parameters not found*: Data Load Parameters were not found for the School/Branch code combination on this NSLDS record.
- *Effective Date Conflict*: The record passed Search/Match but the Transaction Process Date is older than the student's current Effective Dated row in the NSLDS application tables.
- *Multiple Matches Found*: Search/Match found multiple matches and the action in NSLDS Data Load Parameters is set to 'Suspend' for the designated Search/Match level. If multiple matches were found, the ID field is blank.
- *No Match Found*: Search/Match found no matches and the No Match Found action in NSLDS Data Load Parameters is set to 'Suspend'.
- *One Match Found*: Search/Match found one match and the action in NSLDS Data Load Parameters is set to 'Suspend' for the designated Search/Match level. If one match was found, the ID field is populated.

Skip Reason
Displays the reason the record is skipped and not loaded into the application tables.

- *Manually set to Skip*: The user manually set this record to Skip/Done on the NSLDS Suspense Management page.
- *No Match Found*: Search/Match found no matches and the No Match Found action in NSLDS Data Load Parameters is set to 'Ignore'.

- *Multiple Matches Found*: Search/Match found multiple matches and the action in NSLDS Data Load Parameters is set to 'Ignore' for the designated Search/Match level. If multiple matches were found, the ID field is blank.
- *One Match Found*: Search/Match found one match and the action in NSLDS Data Load Parameters is set to 'Ignore' for the designated Search/Match level. If one match was found, the ID field is populated.

Error Code

Displays the reason the record was set to Error and not loaded into the application tables.

Invalid SSN Encountered: The SSN on this record is outside the valid range (001010001 – 999999999).

Student Information

Social Security #

Displays the student's current SSN maintained by the NSLDS and reported in the FAH/Alert files.

Last Name

Displays the student's current last name maintained by the NSLDS and reported in the FAH/Alert files.

First Name

Displays the student's current first name maintained by the NSLDS and reported in the FAH/Alert files.

Date of Birth

Displays the student's current birth date maintained by the NSLDS and reported in the FAH/Alert files.

Inform Last Name

Displays the last name reported by the institution in the NSLDS Inform file or online. This information is returned to the school in the FAH/Alert file.

Inform First Name

Displays the first name reported by the institution in the NSLDS Inform file or online. This information is returned to the school in the FAH/Alert file.

Inform Date of Birth

Displays the date of birth reported by the institution in the NSLDS Inform file or online. This information is returned to the school in the FAH/Alert file.

Change Flags

Change Flags

These flags are only populated on Alert files and indicate where changes have been detected on the student's NSLDS record which may affect eligibility. Valid values are *Y*: Yes and *N*: No. These fields are blank for FAH files.

Generating NSLDS FAT Load Error Reports

Access the NSLDS FAT Load Error Report page (Financial Aid, File Management, NSLDS, NSLDS FAT Load Error Report).

Use this page to generate the NSLDS FAT Load Error Report. This report shows records from the staging tables that have a Load Status of *Suspended* or *Error.* Review the records on this report, and using the Suspense Management page, either attempt to get the record *Loaded* or set the record to *Skipped.*

This page has no run control options. Click the Run button to generate the report. The Process Scheduler runs the NSLDS FAT Load Errors query (FA921) and creates a report.

Note: Oracle also delivers the FA921A query that is a clone of the NSLDS FAT Load Error Report but includes School Code and Branch Code information. You must run this query directly through the PS Query component.

Using NSLDS Change Review

Access the NSLDS Change Review page ((Financial Aid, File Management, NSLDS, Review NSLDS Flagged Students, NSLDS Change Review page).

Use the NSLDS Change Review page to review Alert records that have been loaded into the application tables.

NSLDS Alert files contain change flags that indicate recent changes detected on the student's NSLDS record that may affect eligibility. These changes must be reviewed before Federal funds can be disbursed to the student. Once the Alert files have been received and loaded into the application tables, use this page to identify all records needing review. The contents of this page match the records captured on the NSLDS Alert File report. Once the records have been reviewed and any necessary award adjustments made, mark them as *Reviewed* on this page to remove them from displaying on this page again.

Reviewed	Select to indicate that you reviewed the changes to the student's NSLDS information and completed any adjustments to the student's current financial aid eligibility. Selecting this check box removes the record from this page the next time the page is accessed. Also, the record is removed from the NSLDS Alert File Report.
Queue Inst (queue instance)	Indicates when the record was loaded. The system generates a unique sequential queue instance number for each NSLDS Alert file loaded. A greater value indicates a more recently loaded file.
School Code	Displays the School Code value reported in the NSLDS file.
Branch Code	Displays the Branch Code value reported in the NSLDS file.
Change Flags	These indicate where changes have been detected on the student's NSLDS record which may affect eligibility. Valid values are *Y*: Yes and *N*: No.
Awards	Click this link to access the Award Summary and Award Term Summary pages.

Loans	Click this link to access the Origination Student Summary page.
NSLDS	Click this link to access the NSLDS Information page.

Processing NSLDS Alert File Information

The following steps describe how you can implement the NSLDS Transfer Student Monitoring process using the applications provided. Each institution, however, should implement the process based on their specific business requirements.

To run the Transfer Student Monitoring process:

1. Contact NSLDS to establish your transfer monitoring profile and elect to receive NSLDS Alert files in extract format.
2. Use the NSLDS Request process to generate the NSLDS Inform file of the transfer students that you want monitored for eligibility changes. You can also request monitoring online at www.NSLDSFAP.ed.gov.

   Note: Institutions may want to assign a checklist, service indicator, or financial aid user edit message to ensure that disbursements are suspended until the monitoring process is completed.

3. Receive an Alert file.

   a. Use the FA Inbound page to load the Alert file into the staging tables. Use the Review CPS/NSLDS Transactions page to confirm the file (Transaction ID: TRALRTOP) was successfully loaded.

   b. Use the Process NSLDS Files program to load the data from the staging tables into the application tables. View the loaded data in the NSLDS Inquiry component. Use the NSLDS Suspense Management page to review records that failed to load to the application tables.

   Note: Financial Aid User Edit Messages can be assigned by the Process NSLDS Files program which can be used to suspend the authorization and disbursement of funds for a specific term. See NSLDS Data Load Parameters.

4. Review and resolve various load error messages.

   The Process NSLDS Files program uses the settings on the NSLDS Data Load Parameters page to load the incoming NSLDS data to a matching record within the database. Use the NSLDS FAT Load Errors report and NSLDS Suspense Management page to manage records that failed to load to the application tables.

5. Review Alert file records for possible changes in financial aid eligibility.

NSLDS Alert files contain change flags that indicate recent changes detected on the student's NSLDS record that may affect eligibility. These changes must be reviewed before Federal funds can be disbursed to the student. Once the Alert files have been received and loaded into the application tables, use the NSLDS Alert File report and NSLDS Change Review page to identify all records needing review. Once the records have been reviewed and any necessary award adjustments made, mark them as *Reviewed* . If a checklist, service indicator, or financial aid user edit message was used to suspend disbursement of funds, update the appropriate statuses at this time.

For more information, see the National Student Loan Data System (NSLDS) Transfer Student Monitoring/Financial Aid History Processes and Batch File Layouts.

Related Links

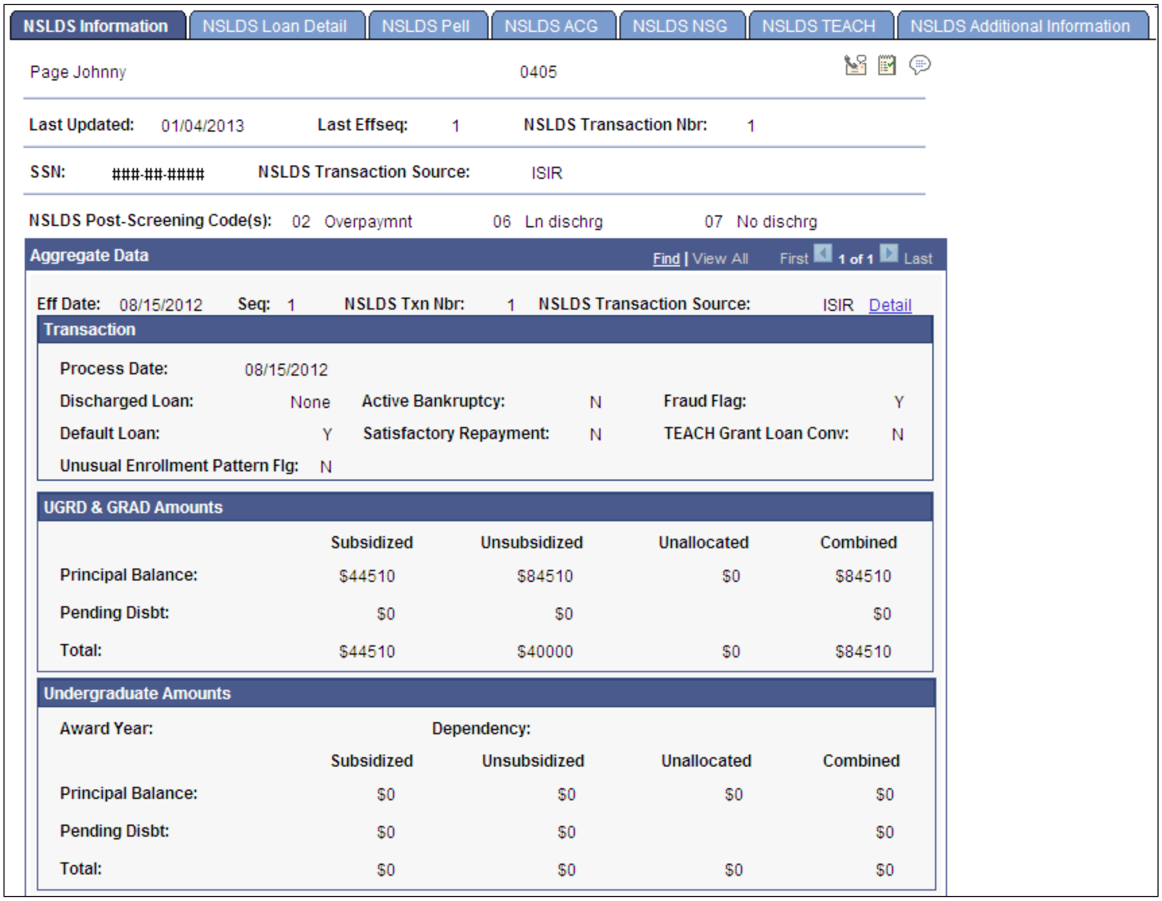
Defining Basic Global Rules for Authorization

Reviewing NSLDS General Aggregate Information

Access the NSLDS Information page (Financial Aid, Awards, View NSLDS Loan Data, NSLDS Information).

Image: NSLDS Information page (1 of 2)

This example illustrates the fields and controls on the NSLDS Information page (1 of 2). You can find definitions for the fields and controls later on this page.


NSLDS Information | NSLDS Loan Detail | NSLDS Pell | NSLDS ACG | NSLDS NSG | NSLDS TEACH | NSLDS Additional Information

Page Johnny 0405

Last Updated: 01/04/2013 Last Effseq: 1 NSLDS Transaction Nbr: 1

SSN: ###-##-#### NSLDS Transaction Source: ISIR

NSLDS Post-Screening Code(s): 02 Overpaymnt 06 Ln dischrg 07 No dischrg

Aggregate Data — Find | View All First 1 of 1 Last

Eff Date: 08/15/2012 Seq: 1 NSLDS Txn Nbr: 1 NSLDS Transaction Source: ISIR Detail

Transaction

Process Date: 08/15/2012

Discharged Loan: None Active Bankruptcy: N Fraud Flag: Y

Default Loan: Y Satisfactory Repayment: N TEACH Grant Loan Conv: N

Unusual Enrollment Pattern Flg: N

UGRD & GRAD Amounts

	Subsidized	Unsubsidized	Unallocated	Combined
Principal Balance:	$44510	$84510	$0	$84510
Pending Disbt:	$0	$0		$0
Total:	$44510	$40000	$0	$84510

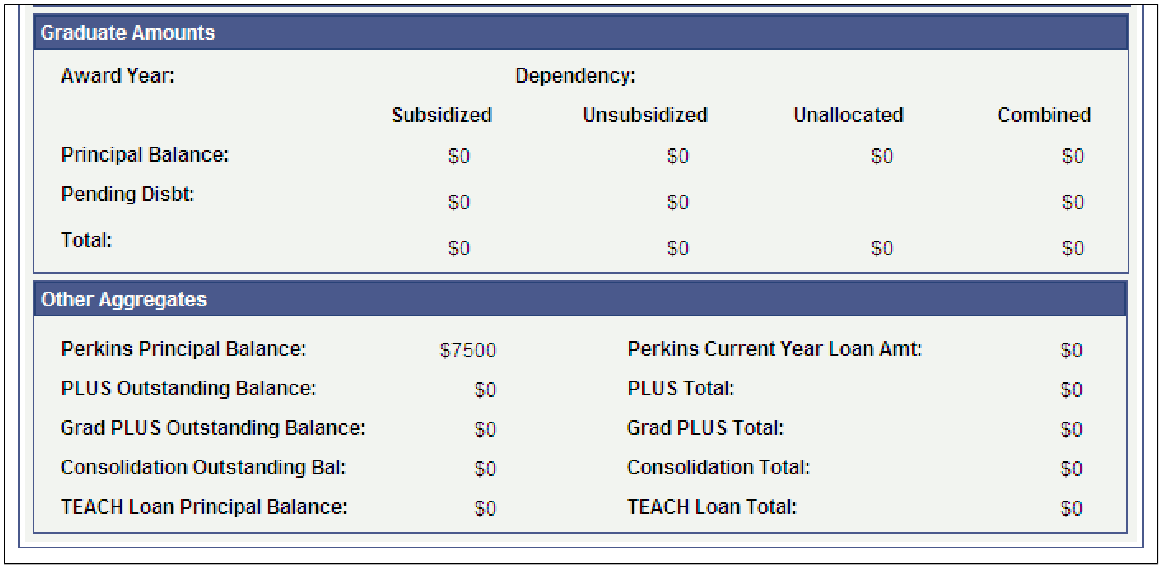
Undergraduate Amounts

Award Year: Dependency:

	Subsidized	Unsubsidized	Unallocated	Combined
Principal Balance:	$0	$0	$0	$0
Pending Disbt:	$0	$0		$0
Total:	$0	$0	$0	$0

Image: NSLDS Information page (2 of 2)

This example illustrates the fields and controls on the NSLDS Information page (2 of 2). You can find definitions for the fields and controls later on this page.


Graduate Amounts

Award Year: Dependency:

	Subsidized	Unsubsidized	Unallocated	Combined
Principal Balance:	$0	$0	$0	$0
Pending Disbt:	$0	$0		$0
Total:	$0	$0	$0	$0

Other Aggregates

Perkins Principal Balance:	$7500	Perkins Current Year Loan Amt:	$0
PLUS Outstanding Balance:	$0	PLUS Total:	$0
Grad PLUS Outstanding Balance:	$0	Grad PLUS Total:	$0
Consolidation Outstanding Bal:	$0	Consolidation Total:	$0
TEACH Loan Principal Balance:	$0	TEACH Loan Total:	$0

If you choose to push aggregate totals to the aggregate aid tables for direct use by the Packaging and Awarding process, the subsidized and unsubsidized aggregate totals under the UGRD & GRAD Amounts section, Perkins principal balance, and Grad PLUS Outstanding Balance are pushed to the corresponding aggregate areas for this student.

Overpayment Information — Click this link to access NSLDS overpayment details The link appears when federal overpayment information exists.

Aggregate Data

Eff Date (effective date) — Displays the effective date of the loaded aggregate information. Aggregate data is the loan history. There can be a date for an ISIR and multiple sequences. You can view loans that are in default, discharged loans, or active bankruptcies.

NSLDS Txn Nbr (NSLDS transaction number) — Displays the transaction number of the NSLDS data from the NSLDS. As the student's financial aid history is updated by the NSLDS, the transaction number moves upward one increment. If new NSLDS information is received by a school that has a lower transaction number than the current data, the new information does not load. The system assumes that the current information is more recent.

NSLDS Transaction Source — Displays the source of the loaded NSLDS information. Values are: *ISIR, Alert* (NSLDS Transfer Alert file), and *FA History.*

Transaction

Process Date — Displays the process date for the transaction. If the data source is the ISIR, this date is the CPS process date of the ISIR. If the

	data source is the NSLDS FAT file, the date used is the NSLDS file process date.
Discharged	Indicates whether a student's defaulted loan has been discharged. The values for the field are *Y* (yes) or *N* (no).
Default	Displays whether the transaction is in default.
Active Bankruptcy (active bankruptcy)	Displays whether the loan is part of an active bankruptcy proceeding.
Satisfactory Repayment (satisfactory repayment)	Indicates whether the loan has been repaid satisfactorily.
Fraud	Identifies a student having a fraud loan status on one or more loans or one or more fraud overpayment indicators.
TEACH Grant Loan Conv	Indicates whether a TEACH Grant has been converted to a loan on one or more grant records.
Unusual Enrollment Pattern Flg	Displays whether the transaction has unusual enrollment patterns. The values for the field are: • *1* = For Federal Student Aid use only. • *2* = Possible enrollment pattern problem, school may need to resolve. • *3* = Questionable enrollment pattern, school must resolve. • *N* = Enrollment pattern not unusual, no school action required. • Blank = Record not sent for match.

UGRD/GRAD

This section displays combined amounts for undergraduate and graduate loans.

Principal Balance	Displays FFELP/FDLP aggregate loan information in Subsidized, UnSub (unsubsidized), Combined, and Consolidated categories.
Unallocated (for Principal Balance)	Displays the NSLDS unallocated consolidated outstanding principal balance.
Unallocated (for Total)	Displays the NSLDS unallocated consolidated total.
Pending Disbt (pending disbursement)	Displays undisbursed loan amounts for the Subsidized, UnSub (unsubsidized), Combined, and Consolidated categories.

Undergraduate Amounts

This section displays amounts for undergraduate loans.

Award Year	Displays the Award Year used in the student's undergraduate loan limits determination.
Dependency	Displays the Dependency status used in the student's undergraduate loan limits determination.
Principal Balance	Displays FFELP/FDLP aggregate loan information in Subsidized, UnSub (unsubsidized), Combined, and Consolidated categories.
Unallocated (for Principal Balance)	Displays the NSLDS unallocated consolidated outstanding principal balance.
Unallocated (for Total)	Displays the NSLDS unallocated consolidated total.
Pending Disbt (pending disbursement)	Displays undisbursed loan amounts for the Subsidized, UnSub (unsubsidized), Combined, and Consolidated categories.

Graduate Amounts

This section displays amounts for graduate loans.

Award Year	Displays the Award Year used in the student's graduate loan limits determination.
Dependency	Displays the Dependency status used in the student's graduate loan limits determination.
Principal Balance	Displays FFELP/FDLP aggregate loan information in Subsidized, UnSub (unsubsidized), Combined, and Consolidated categories.
Unallocated (for Principal Balance)	Displays the NSLDS unallocated consolidated outstanding principal balance.
Unallocated (for Total)	Displays the NSLDS unallocated consolidated total.
Pending Disbt (pending disbursement)	Displays undisbursed loan amounts for the Subsidized, UnSub (unsubsidized), Combined, and Consolidated categories.

Other

Perkins Principal Balance	Displays Perkins loans outstanding principal balance.
PLUS Outstanding Balance	Displays the aggregate loan outstanding principal balance amount for all PLUS loans where the borrower is the PLUS holder.
Grad PLUS Outstanding Balance	Identifies a student having a fraud loan status on one or more loans or one or more fraud overpayment indicators.
Consolidation Outstanding Balance	Displays the outstanding principal balance for all FFELP consolidation loans.

TEACH Loan Principal Balance	Displays the outstanding principal balance for TEACH unsubsidized loan type (D8).
Perkins Current Year Loan Amount	Displays the total Perkins loan disbursements for the award year (July-June).
PLUS Total	Displays the aggregate loan total amount for all PLUS loans where the borrower is the PLUS holder.
Grad PLUS Total	Displays the total loan amount of graduate PLUS loans borrowed by the student.
Consolidation Total	Displays the total of all FFELP consolidation loans.
TEACH Loan Total	Displays the total of Aggregate TEACH unsubsidized loan outstanding principal balance.

Viewing NSLDS Overpayment Information

Access the NSLDS Overpayment Information page (click the Overpayment Information link on the NSLDS Information page).

The system displays any overpayments for the following:

- Pell Overpy (Pell overpayment)
- Perk Overpy (Perkins overpayment)
- SEOG Ovrpy (SEOG overpayment)
- ACG Ovrpy (ACG overpayment)
- NSG Overpy (NSG overpayment)
- TEACH Overpay (TEACH overpayment)
- IASA Overpay (Iraq/Afghanistan Service Award overpayment)

The values for overpayment are:

- *F:* Fraud designated through an overpayment.
- *Y:* An active overpayment exists.
- *S:* The student has an overpayment, but has made satisfactory arrangements for repayment.
- *N:* Not applicable.
- *D:* Deferred.
- *W:* Waived.

The Pymnt Contct (payment contact) fields refer to the contact agency for the overpayment. The federal ID appears if an overpayment is present.

Viewing Details of NSLDS Aggregate Data

Access the NSLDS Detail page (click the Detail link on the NSLDS Information page).

The system displays NSLDS change flags, loan limit flags, MPN flags, and NSLDS Alert file flags:

- The NSLDS Activity group box displays data from the ISIR record that indicates if more than three rows exist in NSLDS for the respective area.
- The Change Flags group box indicates changes that have occurred to the respective area on the student's NSLDS record.
- The Limit Flags group box indicates the condition of various aggregates.

  Possible values for the loan limits are *E: Met or Exceeded Loan Limit, C: Close to Limit, N: No Problem.*

  Possible values for the Pell Limit are *E: Met or Exceeded Limit*, *C: Close to Limit*, *H: High Pell Percent*, *N: No Problem*.

  Possible values for NSLDS Sub Usage Limit Applies are *Y* and *N*.
- The MPN Flags group box indicates the promissory note status for various Direct Lending loans.
- The NSLDS Alert File Flags group box fields indicate when a change has been reported that might affect the student's eligibility. These data elements come from the TSM and ISIR records.

Viewing NSLDS Loan Details

Access the NSLDS Loan Detail page (Financial Aid, Awards, View NSLDS Loan Data, NSLDS Loan Detail).

Image: NSLDS Loan Detail page (1 of 2)

This example illustrates the fields and controls on the NSLDS Loan Detail page. You can find definitions for the fields and controls later on this page.

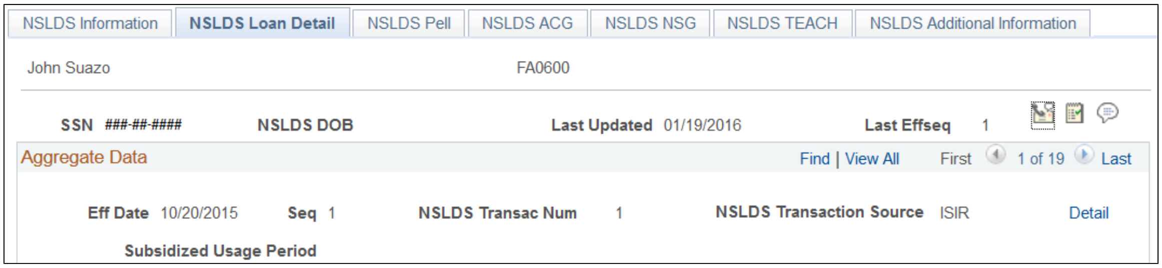
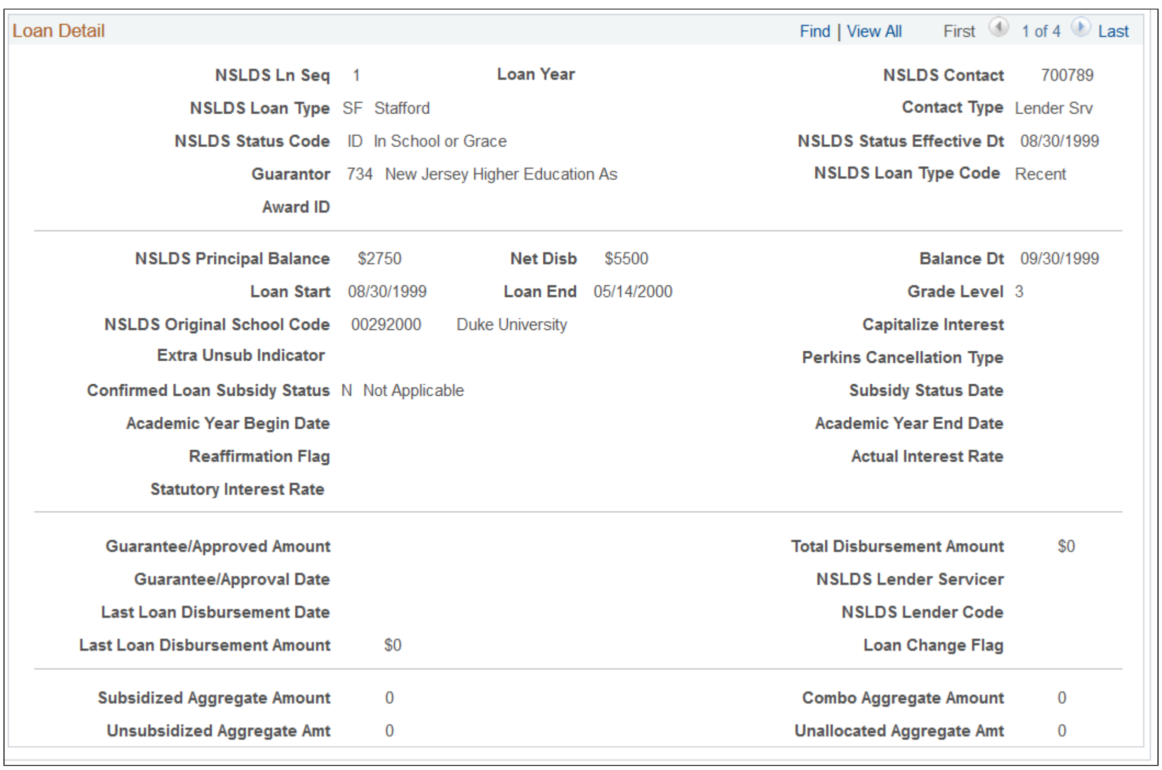


Image: NSLDS Loan Detail page (2 of 2)

September 2017 PRP

Added “Statutory Interest Rate” and “Actual Interest Rate” fields.

This example illustrates the fields and controls on the NSLDS Loan Detail page. You can find definitions for the fields and controls later on this page.



The system displays the student's name and ID, SSN, NSLDS DOB, Last Updated, Last Effseq, Eff Date (effective date), Seq (sequence), NSLDS Txn Nbr (NSLDS transaction number), , NSLDS Txn Src (NSLDS transaction source), and Subsidized Loan Elig Used (Subsidized Loan Eligibility Used) field.

Loan Detail

In the Loan Detail group box, the system displays NSLDS Ln Seq (NSLDS loan sequence), Loan Year, NSLDS Contact, NSLDS Type, Contact Type, NSLDS Status, Stat EFFDT (status effective date), Guarantor, and NSLDS Ln TypCd (NSLDS loan type code). The system displays Prin Bal (principal balance), Net Disb (net disbursed), Balance Dt (balance date), Loan Start and Loan End, Orig Schl (original school), and Grade Level.

Award ID	Displays the Award ID provided by COD. The Award ID identifies the TEACH loan (D8 Loan Type Code) that was converted from a grant.
Grade Level	Displays NSLDS grade level for the student in this loan year.
Perkins Cancellation Type	Indicates the cancellation status of the Perkins loan. Values are: *DT:* Defense Teacher *PB:* Perkins Bankruptcy *PD:* Perkins Death *PE:* Perkins Early Intervention *PI:* Perkins Disability *PL:* Perkins Law Enforcement *PM:* Perkins Military Service *PN:* Perkins Nurse/Medical Technician *PS:* Perkins Subject Matter Area *PT:* Perkins Teacher Service *PV:* Perkins Volunteer *N/A:* Not Applicable
Guarantee/Approved Amount	Displays approved amount for the loan.
Guarantee/Approved Date	Displays date of the loan approval.
Subsidized Aggregate Amount	Displays FFELP consolidation loan subsidized aggregate amount, the amount included in the subsidized aggregate calculation. The system populates this value only if the loan type is CL.
Unsubsidized Aggregate Amt (unsubsidized aggregate amount)	Displays FFELP consolidation loan unsubsidized aggregate amount, the amount included in the unsubsidized aggregate calculation. The system populates this value only if the loan type is CL.
Combo Aggregate Amount (combined aggregate amount)	Displays FFELP consolidation loan combined aggregate amount, the amount included in the combined aggregate

calculation, which can include HEAL. The system populates this value only if the loan type is CL.

Unallocated Aggregate Amt (unallocated aggregate amount)

Displays FFELP consolidation loan unallocated aggregate amount, the amount that could not be determined to be subsidized, unsubsidized, or Perkins. The system populates this value only if the loan type is CL.

Confirmed Loan Subsidy Status

Displays the current status of a SULA eligible loan's subsidy as reported by the servicer. Valid values are:

- *L – Lost Subsidy*
- *R – Reinstated Subsidy*
- *N – Not applicable for non-D0 loans or no change to subsidy status for D) loans*
- *blank*

Subsidy Status Date

Displays the effective date of the Confirmed Loan Subsidy Status.

Academic Year Begin Date and **Academic Year End Date**

Displays the student's academic year begin and end dates for the period covered by the loan. These fields are only updated by imported NSLDS (FAH/TSM) data.

Reaffirmation Flag

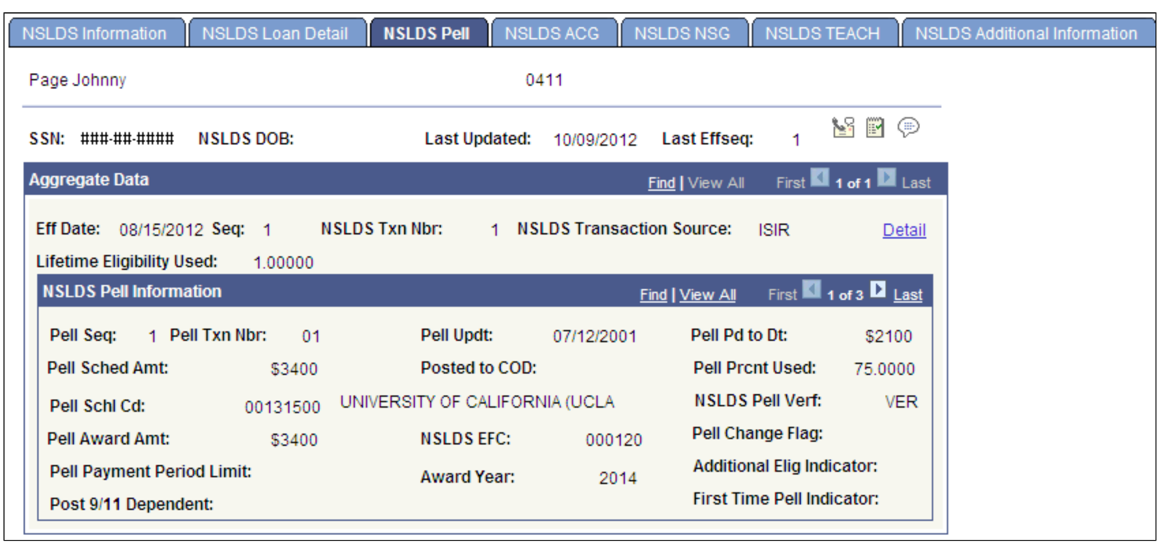
Indicates if the loan has an active reaffirmation.

Viewing NSLDS Pell Information

Access the NSLDS Pell page (Financial Aid, Awards, View NSLDS Loan Data, NSLDS Pell).

Image: NSLDS Pell page

This example illustrates the fields and controls on the NSLDS Pell page. You can find definitions for the fields and controls later on this page.



NSLDS Pell Information

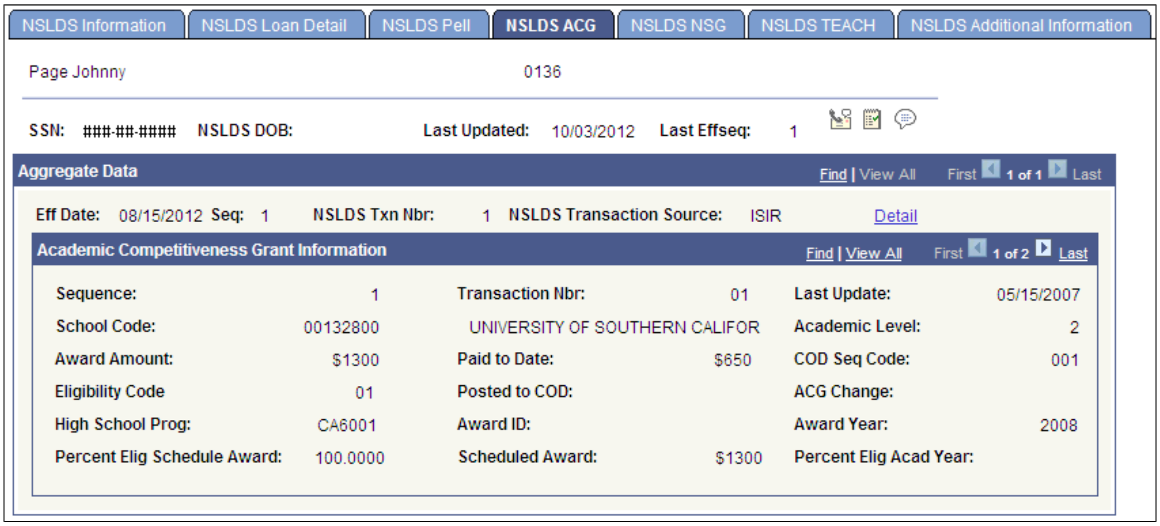
Lifetime Eligibility Used	Displays the Lifetime Eligibility Used for Pell grant recipients as defined by current regulations. This value is displayed in the 99.99999 format. For example, a value of 01.00000 is 0100.000%. **Note:** The Pell Lifetime Eligibility Used (LEU) field can be populated by the ISIR record or the NSLDS FAH/TSM file.
NSLDS EFC(NSLDS Pell expected family contribution)	Displays the EFC used when the particular Pell Award was paid.
NSLDS Pell Verf (NSLDS Pell verification)	Displays the Verification status of the EFC.
Pell Change Flag	Displays *Y* if there has been a change in the student's Pell eligibility.
Pell Payment Period Limit	Displays the payment period limit for Pell grants.
Post 9/11 Dependent	Displays *Y* if the student was a dependent of a post 9/11 deceased veteran.
Additional Elig Indicator (Additional Eligibility Indicator)	Displays *Y* if the student is eligible for two Pell grants in an award year.
First Time Pell Indicator	Displays *Y* if the Pell award is the student's first actual Pell disbursement.

Viewing NSLDS ACG Grant Details

Access the NSLDS ACG page (Financial Aid, Awards, View NSLDS Loan Data, NSLDS ACG)

Image: NSLDS ACG page

This example illustrates the fields and controls on the NSLDS ACG page. You can find definitions for the fields and controls later on this page.



Sequence — Displays the sequential key value assigned by the NSLDS load process.

Transaction Nbr (transaction number) — Displays the transaction number on the SAR or ISIR for the payment accepted by the school.

Last Update — Displays the last reported update to the grant record maintained by NSLDS.

School Code — Displays an 8-digit ED OPE code used to identify the school and branch attended by the student with the grant. The last two digits are 00 if no branch code exists.

Academic Level — Indicates the student's grade level for ACG and SMART grants.

Award Amount — Displays the accepted origination amount.

Paid to Date — Displays the amount of the Federal Grant the school has disbursed to the student.

COD Sequence Code — Displays the identifying sequence number from the Award ID for ACG and SMART grants.

Eligibility Code — Indicates the eligibility payment code for the ACG grant.

Posted to COD — Displays the date that disbursement was posted to the COD system. The format is CCYYMMDD.

ACG Change — Indicates change to this Academic Competitiveness Grant record in the current transaction, either *Y* or *N*.

High School Prog (high school program code)
: Indicates the high school program code for the ACG grant.

Award ID
: Displays the award ID provided by COD, which consists of:

- SSN (9 characters)
- Award Type (ACG = A)
- Award Year (2 characters)
- Pell School ID (6 characters)
- Award Sequence Number (3 characters)

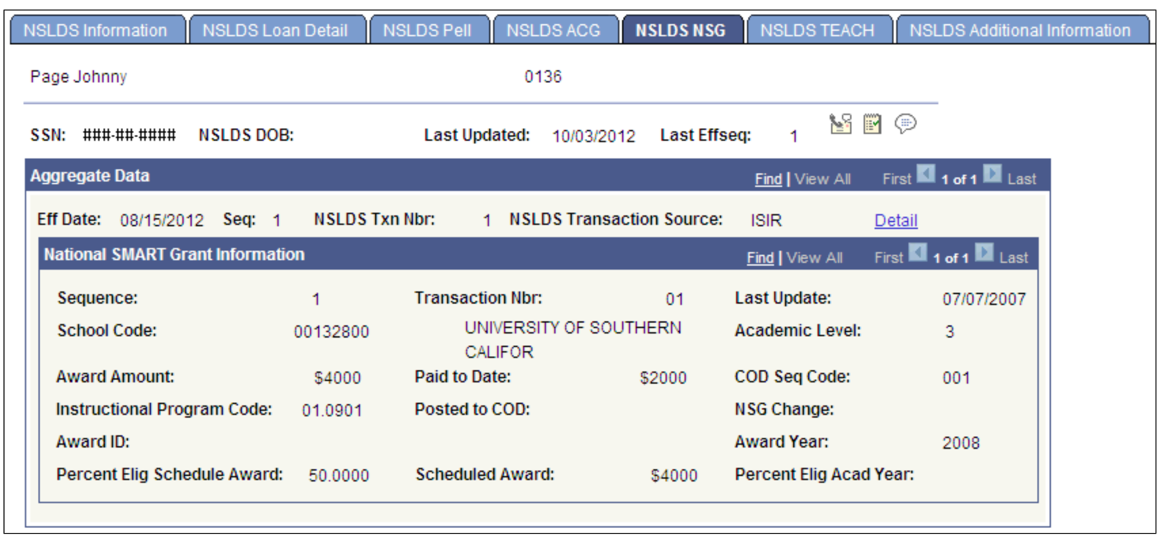
Percent Elig School Award (percent eligible school award)
: Indicates the Total Percent Eligibility Used by Academic Year Level field from the NSLDS batch file layout.

Viewing NSLDS NSG Grant Details

Access the NSLDS NSG page (Financial Aid, Awards, View NSLDS Loan Data, NSLDS NSG).

Image: NSLDS NSG page

This example illustrates the fields and controls on the NSLDS NSG page. You can find definitions for the fields and controls later on this page.



The fields on the NSLDS NSG page are the same as the fields on the NSLDS ACG page with the following exceptions:

Instructional Program Code
: Indicates a student's major course of study; the CIP-designated (Classification of Instructional Programs designated) code for SMART grants.

NSG Change
: Indicates change to this NSG record in the current transaction, either *Y* or *N.*

Award ID

Displays the Award ID provided by COD, which consists of:

- SSN (9 characters)
- Award Type (NSG = T)
- Award Year (2 characters)
- Pell School ID (6 characters)
- Award Sequence Number (3 characters)

Percent Elig School Award (percent eligible school award)

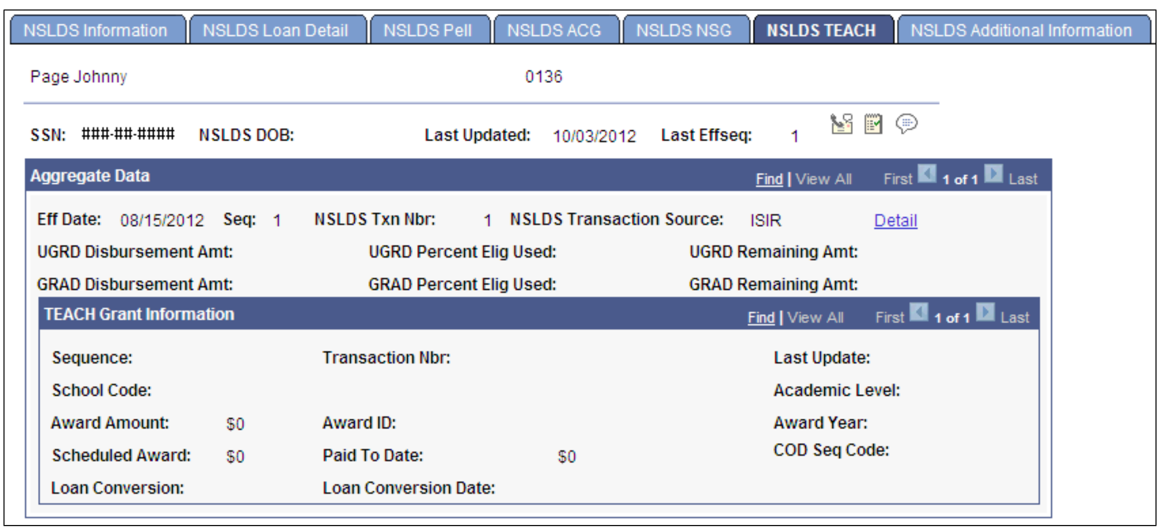
Indicates the Total Percent Eligibility Used by Academic Year Level field from the NSLDS batch file layout.

Viewing NSLDS TEACH Grant Details

Access the NSLDS TEACH page (Financial Aid, Awards, View NSLDS Loan Data, NSLDS TEACH).

Image: NSLDS TEACH page

This example illustrates the fields and controls on the NSLDS TEACH page. You can find definitions for the fields and controls later on this page.



Aggregate Data

The fields on the NSLDS TEACH page are the same as the fields on the NSLDS ACG page with the following exceptions:

UGRD Disbursement Amt (undergraduate disbursement amount)

Displays the Aggregate Undergraduate/Post Baccalaureate TEACH grand disbursed amounts for the undergraduate academic levels.

GRAD Disbursement Amt (graduate disbursement amount)

Displays the Aggregate Undergraduate/Post Baccalaureate TEACH grand disbursed amounts for the graduate academic levels.

UGRD Percent Elig Used (undergraduate percent eligibility used)
Displays the TEACH grant awarded percent used by Undergraduate/Post Baccalaureate Academic Levels.

GRAD Percent Elig Used (graduate percent eligibility used)
Displays the TEACH grant awarded percent used by Graduate Academic Levels.

UGRD Remaining Amt (undergraduate remaining amount)
Displays the remaining eligible amount used by Undergraduate/ Post Baccalaureate Academic Levels. Displays N/A if no applicable grant exists.

GRAD Remaining Amt (undergraduate remaining amount)
Displays the remaining eligible amount by Graduate Academic Levels. Displays N/A if no applicable grant exists.

Teach Grant Information

Loan Conversion
Displays *Y* if TEACH Grant was converted to a loan and *N* if it has not been converted.

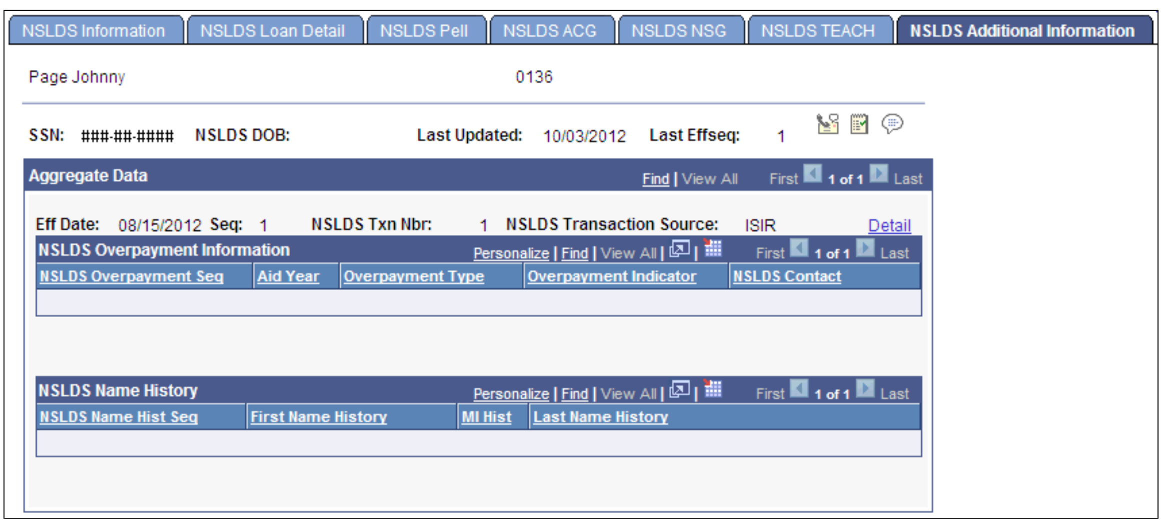
Loan Conversion Date
Displays the date the TEACH grant was converted to a loan. Displays N/A if grant was not converted.

Viewing NSLDS Additional Information

Access the NSLDS Additional Information page (Financial Aid, Awards, View NSLDS Loan Data, NSLDS Additional Information).

Image: NSLDS Additional Information page

This example illustrates the fields and controls on the NSLDS Additional Information page. You can find definitions for the fields and controls later on this page.



The system displays the student's name, ID, SSN, NSLDS DOB, Last Updated, Eff Date (effective date), Last Effseq, (last effective sequence), Seq, (sequence), NSLDS Txn Nbr, (NSLDS transaction number), and NSLDS Txn Src (NSLDS transaction source).

NSLDS Overpayment Information

NSLDS Overpayment Seq (NSLDS overpayment sequence)	Displays the sequential order (1, 2, 3) in which the ISIR loads.
Overpayment Type	Displays the type of aid, such as Pell, Perkins, or SEOG, that was overpaid.
Overpayment Indicator	Overpayment indicator refers to the overpayment. Values are: *N:* No *Y:* Yes *S:* Satisfactory Arrangement.
NSLDS Contact	Displays the agency school, servicer, or lender to contact for this loan.

NSLDS Name History

The system displays Nm Hist Seq (name history sequence), F Name Hist (first name history), MI Hist (middle initial history), and L Name Hist (last name history).

Using the NSLDS Data Push Process

This section describes using the NSLDS Data Push Process

Understanding the NSLDS Data Push Process

To use NSLDS data in the Awarding and Packaging processes, you must ensure that the Packaging Processes are setup to use NSLDS as an aggregate source, load NSLDS Data via ISIR Load, FAH request, or TSM request, and push NSLDS data into aggregate aid tables used by the Packaging processes.

This section describes the NSLDS Data Push process.

When you run the NSLDS Data Push process, the following updates happen:

- Subsidized Aggregate Area: The NSLDS Aggregate Subsidized Outstanding Principal Balance populates the NSLDS Total field .
- Unsubsidized Aggregate Area: The NSLDS Aggregate Unsubsidized Outstanding Principal Balance populates the NSLDS Total field.
- Perkins Aggregate Area: The NSLDS Perkins Total Outstanding Principal Balance populates the NSLDS Total field.
- Graduate PLUS Aggregate Area: The NSLDS Aggregate PLUS Graduate/Professional Loans Outstanding Principal Balance populates the NSLDS Total field. Note, that balance is only provide with the TSM/FAH file layouts.
- TEACH Aggregate Areas: Distinct calculated TEACH undergraduate and graduate totals, depending upon grade level, aid year and school code, populate the respective Undergraduate and Graduate NSLDS Total fields.

- Pell Aggregate Area: NSLDS Total and Percent Scheduled Used based on current aid year Pell Disbursed Amounts are updated. Beginning with Aid Year 2013 an additional Lifetime Eligibility Used percentage field will also be updated. See Awarding Pell Grants for more information.
- Areas Subject to Overpayment: When the NSLDS Data Push process encounters an overpayment indicator for the Pell, SEOG, Perkins, and TEACH programs of either *Y* or *F,* it posts a value of 999,999,999.00 as the NSLDS Total for the corresponding aggregate area.
- Excluded NSLDS Transactions: For the Pell and TEACH grant programs, transactions that match like award types that have already been internally packaged in the system are not included when determining which NSLDS transactions to sum and post to the NSLDS Total for a given aid year. Beginning with Aid Year 2013, the Pell Lifetime Eligibility Used percentage field also excludes NSLDS transactions from the Lifetime percentage value.

Note: Because the NSLDS Data Push process evaluates the most recent NSLDS data regardless of source (ISIR, FAH, or TSM), the NSLDS data that is pushed may not include the complete lifetime amounts used. For example, if the most recent NSLDS data is from an ISIR, the ISIR only includes up to three transaction sequences of data for each grant and loan type. The ISIR record does provide flags and indicators if there are more than 3 transactions. Check the NSLDS Financial Aid Professionals web site for additional information.

Note: For the 2013 Aid Year, the Pell Lifetime Eligibility Used value is pushed from the most current NSLDS data; sourced from either FAH or TSM. Oracle recommends that if you plan to push aggregates for the 2013 Aid Year, you should ensure a recent FAH or TSM has been requested and loaded into the NSLDS tables.
Beginning with the 2014 Aid Year, the Pell Lifetime Eligibility Used value will be pushed from the most current NSLDS data, regardless of source.

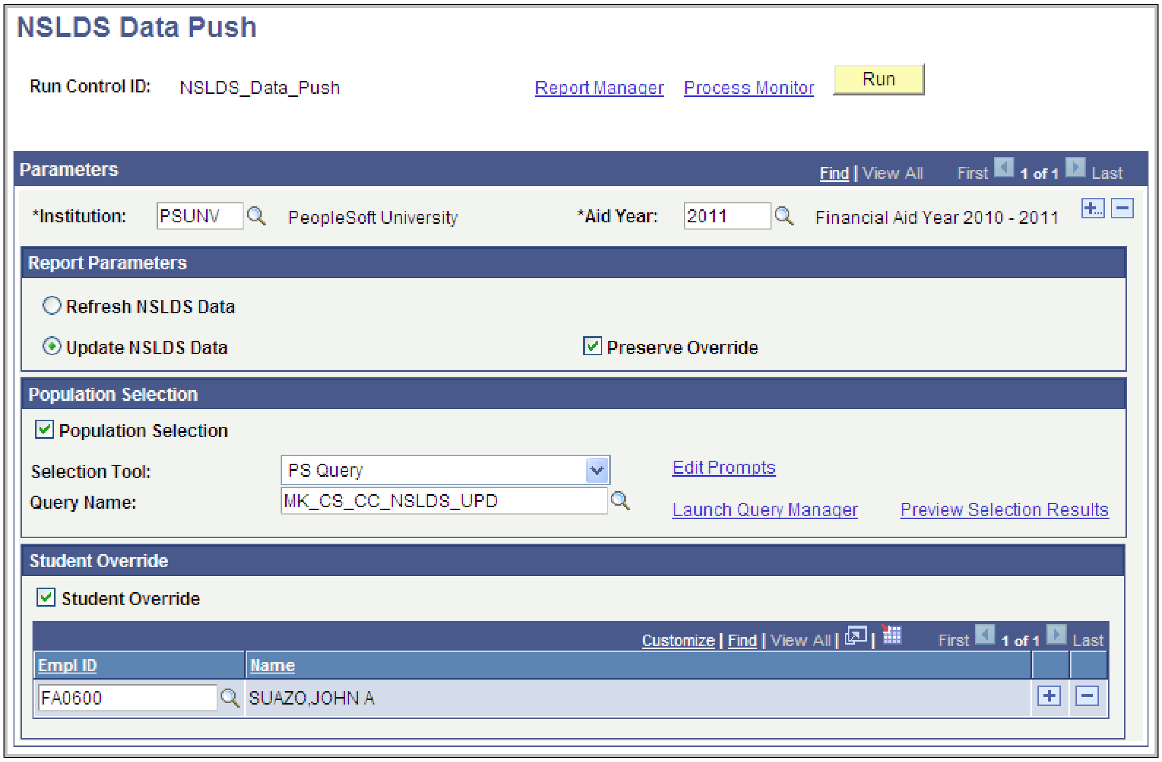
See Understanding Aggregate Aid.

Pushing NSLDS Data

Access the NSLDS Data Push page (Financial Aid, File Management, NSLDS, Update Aggregates with NSLDS, NSLDS Data Push).

Image: NSLDS Data Push page

This example illustrates the fields and controls on the NSLDS Data Push page. You can find definitions for the fields and controls later on this page.



Use this page to push NSLDS totals into the Packaging aggregate aid tables.

Institution

Enter the Institution Code for the institution for which you want NSLDS data pushed.

Note: You can identify multiple institutions in this run control.

Report Parameters

Refresh NSLDS Data: Always overwrites the existing NSLDS Total present for the Aid Year defined above.

Update NSLDS Data: Updates NSLDS Total only if NSLDS data is more current than present data for the aid year defined above.

Preserve Override: Update does not take place if the NSLDS Total amount has been overridden at the student level.

Population Selection

Select this check box to access population selection options. If not selected, the process attempts to process Student Overrides.

See "Using the Population Selection Process" (PeopleSoft Campus Solutions 9.2: Campus Community).

Query Name

Select a PS Query that uses the *SFA_NSLDS_BND* bind record.

System Provided Queries:

- QA_CS_CC_NSLDS_UPD1: Query based on NSLDS _GEN (NSLDS General Info record). Embedded field prompts on LAST_UPDATED – Last Updated From Date/ LAST_UPDATED – Last Updated To Date.
- QA_CS_CC_NSLDS_UPD2: Query based on NSLDS _GEN (NSLDS General Info record). Embedded field prompts on LAST_UPDATED – Last Updated From Date/ LAST_UPDATED – Last Updated To Date and NSLDS_ UPDT_SOURCE-NSLDS Transaction Source.
- QA_CS_CC_NSLDS_UPD_DAY_BEFORE: Query based on NSLDS_GEN (NSLDS General Info record).

  Use this SQL to schedule the independent NSLDS Aggregate Push on a daily basis. This query identifies students whose Last Updated NSLDS record has changed since one day ago.

  SELECT DISTINCT B.EMPLID, B.NAME FROM PS_ SFA_NSLDS_BND B, PS_NSLDS_GEN A WHERE (B. EMPLID = A.EMPLID AND A.LAST_UPDATED >= ((TO _DATE(TO_CHAR(SYSDATE,'YYYY-MM-DD'),'YYYY- MM-DD')) + (-1))) ORDER BY 1

  Example: If the system date = 20111129, then query selects EMPLIDs whose NSLDS_GEN.LAST_UPDATED value is either 20111128 or 20111129.
- QA_CS_CC_NSLDS_UPD_WEEK_BEFORE: Query based on NSLDS_GEN (NSLDS General Info record).

  Use this SQL schedule the independent NSLDS Aggregate Push on a weekly basis. This query is used to identify students whose Last Updated NSLDS record has changed within the last 7 calendar days.

  SELECT DISTINCT B.EMPLID, B.NAME FROM PS_ SFA_NSLDS_BND B, PS_NSLDS_GEN A WHERE (B. EMPLID = A.EMPLID AND A.LAST_UPDATED >= ((TO _DATE(TO_CHAR(SYSDATE,'YYYY-MM-DD'),'YYYY- MM-DD')) + (-7))) ORDER BY 1

  Example: If the system date = 20111129, then query selects EMPLIDs whose NSLDS_GEN.LAST_UPDATED value is 20111122, 20111123, 20111124, 20111125, 20111126, 20111127, 20111128, or 20111129.

Student Override Select this check box and populate the accompanying group box with student ID's to be evaluated. IDs can be combined with IDs identified with Population Selection.

Viewing Application History

The oldest aid-year-specific pages are removed from the various menus and stored in the Financial Aid History menu. You can access pages and components for three years of processing.

This section discusses how to review application history.

Pages Used to View Application History

Page Name	***Definition Name***	***Navigation***	***Usage***
Historical Application Information	FA_APP_HIST_TRNSFR	Financial Aid, Financial Aid History, View Archived Application Data, Historical Application Information	Access Federal EFC Summary, Institutional Application, Application Data Verification, Institutional EFC Summary, and ISIR History components and pages.
Federal EFC Summary	ISIR_FM_SUMRY	Click the Federal EFC Summary link on the Historical Application Information page.	View archived EFC summary data.
Institutional Application	INST_STUDENT_A, INST _STUDENT_01, INST _STUDENT_02, INST_ STUDENT_03	Click the Institutional Application link on the Historical Application Information page.	View data on the following pages in the Maintain Institutional Application component: Student Data, Parent Data, Miscellaneous Data, and Computation Data.
ISIR Inbound Load Summary	ISIR _nn_IN_SRCH	Click the ISIR Inbound link on the Historical Application Information page.	View ISIR Inbound Data history beginning with the 2014–2015 Aid Year.
RTIV Worksheet	STDNT_RTRN_TIV_WK1	Click the View RTIV Worksheet link on the Historical Application Information page. Then select the Return of Funds Worksheet page.	View the RTIV worksheet for the selected student and aid year.
Post Withdrawal Disb Tracking	TIV_PWD_TRACKING	Click the View RTIV PW Disbursement link on the Historical Application Information page.	View RTIV Post Withdrawal Disbursement information such as status (pending or complete) and disbursement dates.

Page Name	***Definition Name***	***Navigation***	***Usage***
Return of TIV Summary	RTRN_TIV_STU_TRACK	Click the View RTIV Return Summary link on the Historical Application Information page.	View RTIV summary information for students who have *Complete* or *Pending* status. The calculation period, amount due from school, and amount due from student is shown.
Institutional EFC Summary	INST_INAS_SMRY_06	Click the Institutional EFC Summary link on the Historical Application Information page.	View data for aid year.
ISIR Corrections NN/NN	ISIR_PIA_CS1_nn	Click the ISIR Corrections link on the Historical Application Information page.	View ISIR Correction history. Formerly labeled "ISIR History".
ISIR Suspense Management NN/NN	ISIR_SUSP_CNTRPIAnn	Click the ISIR Suspense link on the Historical Application Information page.	View ISIR Suspense history beginning with the 2014–2015 Aid Year.
Application Data Verification	VERIFICATION_INC	Click the Application Verification link on the Historical Application Information page.	View data on the following pages in the Application Data Verification History component: Income Verification, Household Information, Worksheet A, Worksheet B, and Consolidated Tax Forms.
View RTIV Fund Return	TIV_RTRN_TRACKING	Click the View RTIV Fund Return link on the Historical Application Information page.	View student return of Title IV funds. View the status of funds for all students where a calculation exists.

Reviewing Application History

Access the Historical Application Information page (Financial Aid, Financial Aid History, View Archived Application Data, Historical Application Information).

Click any link to view the detailed information for the selected student and aid year.

Source

FT CSL: full-time Canada student loan

Inst App: institutional application

PT CSL: part-time Canada student loan

Profile