# Defining Application Processing Options

## Prerequisites for Defining Application Processing Options

The College Board's *INAS User Manual,* which is delivered with this application, describes most of the functionality discussed here.

The Financial Aid system provides predefined tables in compliance with federal regulations and enables you to use the INAS process and CSS PROFILE. Before you define application processing options, review these tables for warnings about the consequences of making changes.

Also, ensure that the financial aid applications used by your institution are available, and make sure that you understand the different admit levels that influence how external data loads are processed. To help you most effectively use the Financial Aid application processing, refer to these websites:

- U.S. Department of Education, Federal Student Aid: http://www.ifap.ed.gov
- National Association of Financial Aid Administrators (NASFAA): http:\\www.nasfaa.org
- The College Board: http:\\www.collegeboard.com

## Working with Applications

To set up applications, use the Application Source Rank component (FA_APP_SOURCE_RANK), the Assign Status to Admit Levels component (ADMIT_LVL_TBL), and the Define Careers for Prospects component (PROSPECT_SOURCE).

This section provides an overview of application processing options and discusses how to:

- Define application source rank.
- Review admit level associations.
- Set up Academic Career assignments from the Financial Aid application

### Understanding Application Processing Options

Managing financial aid application data requires coordinating many data files—both incoming and outgoing—with the Department of Education's Central Processing System (CPS) through the Student Aid Internet Gateway (SAIG). Campus Solutionssupports the CSS PROFILE application and provides you with the tools to construct your own institutional application.

This section discusses how to control the import and export of financial aid data through the Campus Solutions system. It discusses setting up global options and defines how your institution handles both federal and institutional need analysis methodologies.

Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

Controlling the flow of incoming need analysis data is essential because more students apply to an institution than are admitted. Admit levels are associated with an academic program status in PeopleSoft Student Records. These levels enable you to filter requests for ISIRs or PROFILE applications based on a student's admission level, such as accepted or continuing, admitted, applied, or inactive.

You define your ISIR and PROFILE data load parameters on the Load parameter page. For example, you can elect to have a student's biographical and demographic data updated in PeopleSoft Campus Community and request records of students that you want to process. You can process only those students with a status level of accepted or continuing. At the same time, you can elect to suspend student records not already loaded into the system, suspend incoming records if the institutional review status and federal verification is completed, or load records of ISIRs that were rejected.

For students with multiple addresses, to ensure that you send financial aid information to the correct address throughout the year, select the order in which the system checks for an address to use. For example, you can have the system locate a mailing address and if it is not available, the system searches for a second address. The Campus Solutions system shares address options, so you must coordinate address option changes with other departments that use the system.

You can define the parameters for global, federal, and institutional methodologies by using the College Board's INAS. FM is a need analysis formula used to determine the EFC toward a student's education. FM takes into account family size, the number of family members in college, taxable and nontaxable income, and assets. IM is a need analysis formula used to determine financial need for allocation of the school's own financial aid funds. Financial Aid calculates need analysis based on the options that you select.

## Pages Used to Work with Applications

| ***Page Name*** | ***Definition Name*** | ***Navigation*** | ***Usage*** |
|---|---|---|---|
| Application Source Ranking | FA_APP_SOURCE_RANK | Set Up SACR, Product Related, Financial Aid, Budgets, Application Source Rank, Application Source Ranking | Define which application the Budget Assignment background process should use for Budget Formula and Budget Tree criteria. |
| Admit Level Associations | ADMIT_LVL_TBL | Set Up SACR, Product Related, Financial Aid, File Management, Assign Status to Admit Levels, Admit Level Associations | Review the admit designations set up by your institution. |
| Prospect Source X-Ref Setup (prospect source cross-reference setup) | PROSPECT_XREF_TBL | Set Up SACR, Product Related, Financial Aid, File Management, Define Careers for Prospects, Prospect Source X-Ref Setup | Set up prospect cross-references by associating careers from external sources with an academic career at your institution. The ISIR load process uses this information to assign a default academic career for financial aid applicants who are not yet admitted. |

 Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

# Defining Application Source Rank

Access the Application Source Ranking page (Set Up SACR, Product Related, Financial Aid, Budgets, Application Source Rank, Application Source Ranking).

**Image: Application Source Ranking page**

This example illustrates the fields and controls on the Application Source Ranking page. You can find definitions for the fields and controls later on this page.

The system displays the academic institution, aid year, and source rank type.

## Application Source Ranking Information

**Status** Select *Active* or *Inactive.*

**Award Period** Select *Academic* or *Non Std* (nonstandard), to associate the award period with the application source rank.

**Description** Enter the description of the application source rank.

**Comments** Enter any additional information regarding the application source rank.

**Source of Information** Select the source of information. Values are:

*FAFSA* (Free Application for Federal Student Aid).

*Inst App* (institutional application).

**Application Source** If the source of information is *Inst App* (institutional application), select from these values: *FT CSL* (Full-time

Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

Canada Student Loan), *Inst App* (institutional application), *PROFILE,* and *PT CSL* (Part-time Canada Student Loan).

**Source Ranking** Rank your preference for source data. The system selects the lowest number first, and if that application does not exist for the student, the system searches for the next ranked item.

---

**Note:** For the Canadian Need Analysis system, run full-time CSL applications first, followed by part-time CSL applications.

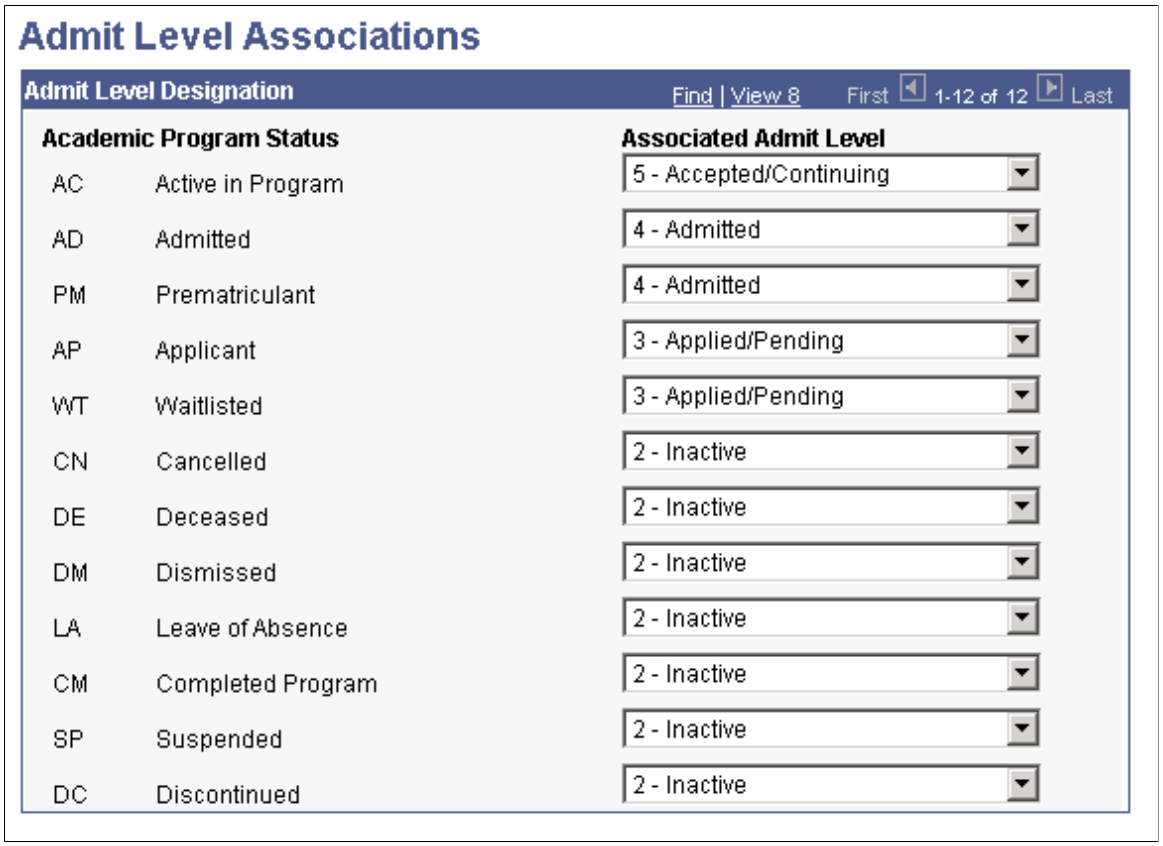
---

## Reviewing Admit Level Associations

Access the Admit Level Associations page (Set Up SACR, Product Related, Financial Aid, File Management, Assign Status to Admit Levels, Admit Level Associations).

**Image: Admit Level Associations page**

This example illustrates the fields and controls on the Admit Level Associations page. You can find definitions for the fields and controls later on this page.




External data loads, such as the FAFSA and the CSS PROFILE application can consider a student's admission status and academic progress. According to your business rules, you decide how to handle different academic program statuses during the external data load and which level of student to add to the database.

The Admit Level Associations page displays the association between each academic program status and an admit level.

 Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

**Note:** The system delivers admit level values as translate values. Any modification to these values requires substantial programming and modification effort. However, the descriptions can be changed to fit your institution's terminology, as used by your institution.

The system displays all available academic program status options.

**Associated Admit Level**

Associate an admit level with each academic program status. The associated admit level that you select affects the selections that you make when setting up your ISIR data load parameters. The associated admit levels are associated with the student academic program status in PeopleSoft Student Records. Values are:

*5 - Accepted/Continuing*

*4 - Admitted*

*3 - Applied/Pending*

*2 - Inactive*

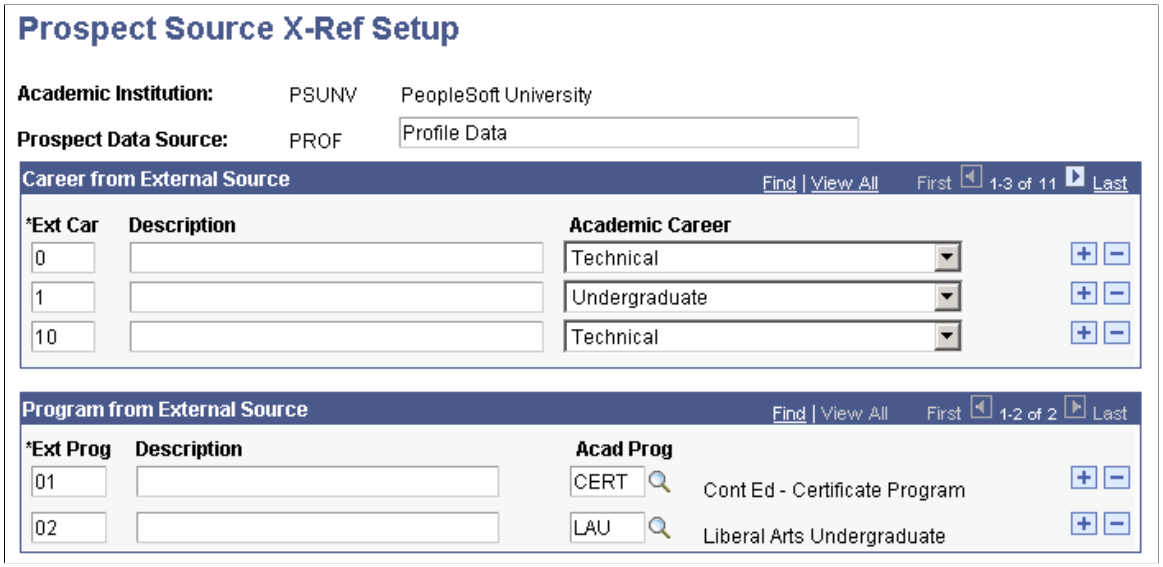
*1 - Has Not Applied*

## Setting Up Academic Career Assignments from the Financial Aid Application

Access the Prospect Source X-Ref Setup page (Set Up SACR, Product Related, Financial Aid, File Management, Define Careers for Prospects, Prospect Source X-Ref Setup).

**Image: Prospect Source X-Ref Setup page**

This example illustrates the fields and controls on the Prospect Source X-Ref Setup page. You can find definitions for the fields and controls later on this page.




Copyright © 2017, Oracle and/or its affiliates. All rights reserved. 

The system displays the academic institution and the prospect data source for ISIR processing. ISIRnn indicates the aid year. For example, ISIR08 is for the 2007–2008 ISIRs. Refer to the annual regulatory release documentation for information on the Prospect Data Source for future financial aid years.

### Career from External Source

Click the Add button to insert additional rows for external careers to associate with an academic career.

| | |
|---|---|
| **Ext Car** (external career) | Select the corresponding external career sections for the CSS PROFILE application. The external career relates to the expected degree or certificate question on the FAFSA. |
| **Description** | Enter a description from the ISIR for the external career. |
| **Academic Career** | Select the academic career that you want to associate with the various external career codes that come in on students' ISIR records.<br><br>You can also assign a default academic career to ISIR records that are loaded where the expected degree question on the FAFSA is blank. Insert a new row under the Career from External Source group box and enter *DFLT* (default) in the Ext Car column. Enter the default academic career that you want to assign to the ISIR record. |

### Program from External Source

This section is no longer used by any process.

## Setting Up Financial Aid Processing

To set up financial aid processing, use the ISIR Data Load Parameters component (ISIR_INST_CONTROL), the Maintain ISIR Comment Codes component (ISIR_MESSAGES), the Maintain EDI Transactions component (FA_ECTRANS), and the Define Commit Levels component (PROCESS_COMMIT_TBL).

This section provides an overview of financial aid processing setup and discusses how to:

- Define ISIR data load options 1.
- Define ISIR data load options 2.
- Define ISIR data load options 3.
- Define ISIR institutional search match.
- Set severity levels for ISIR reject reasons.
- Set severity levels for ISIR comment codes.
- Set up Financial Aid EDI transactions.

 Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

- Set up commit levels for COBOL processes.

## Understanding Financial Aid Processing Setup

This section describes the setup for inbound and outbound ISIR file processing.

Inbound processes are used to load ISIRs and to evaluate and load error files. Not every inbound process requires a separate setup. In this section, you set up the data load parameters for loading ISIRs from the EDI staging tables into the system database.

You can control the file information that appears on the ISIR EC Queue Review and Loan EC Queue Review pages. This information is populated by the system and does not require any additional setup unless you want to change the file information that appears on the EC Queue pages.

### Processing ISIRs Out of Sequence

The load process ensures that the system processes ISIR files in the order that they are loaded into the ISIR staging tables. This is achieved by using the EC Queue instance number assigned to each ISIR file as the FA EC File Inbound processes it. As long as a school loads its ISIR files based on the creation date by the CPS, the load process addresses them in order. If schools use the Process ISIR run control page to restrict the types of files to be processed, the system processes those files in load order.

If the system cannot load ISIR files into the staging tables in the proper sequence, ISIR records with a lower ISIR transaction number than the current loaded ISIR can load. However, the FM EFC and federal database match information from the older ISIR does not update the current information. You can view that information on the Packaging Status Summary panel group.

### Using the EFC Override Option

You can override the Expected Family Contribution (EFC) for a student. Because schools may not want to enforce an EFC override at the point a new ISIR is loaded, the ISIR Data Load Parms option of *EFC Override Encountered* controls how these records would be processed. The system enforces this option only when the Call INAS option is not used. Based on the setting of this option, the following occurs during the ISIR Load process:

| | |
|---|---|
| ***Ignore EFC Override Values*** | The system processes the ISIR as if a prior EFC override never existed. The prorated EFC values that are calculated during the ISIR load function normally. An EFC Status Message of *EFC Override Ignored* posts on the ISIR Inbound Summary nn/nn component. |
| ***Suspend Incoming Record*** | The system automatically suspends the ISIR record for manual review by the staff. A new suspend reason of *EFC Override Found* posts. |
| ***Use EFCs Values*** | The system loads the ISIR, but uses established EFC override values instead of recalculating them from the ISIR information. The system posts an EFC Status Message of *EFC Override Used* on the ISIR Inbound Summary nn/nn component. |

Copyright © 2017, Oracle and/or its affiliates. All rights reserved. 

### Updating NSLDS History from the ISIR

When an ISIR is loaded, the NSLDS data on the ISIR updates the NSLDS tables if the Transaction Process Date on the ISIR is greater than the current effective dated row on the NSLDS tables. If the Transaction Process Date on the ISIR is equal to the current effective dated row on the NSLDS tables, the process compares the NSLDS Transaction Numbers. NSLDS data on ISIRs that are suspended can be allowed to load by using the Load NSLDS Data option on the ISIR Load Options 1 page.

See Defining ISIR Data Load Options 1.

NSLDS sends system generated ISIRs to schools whenever a change occurs to the student's eligibility status within the National Student Loan Database System. It's important to load this information in a timely manner in order to have the most recent eligibility information on file. NSLDS data that is loaded can also be 'pushed' to the aggregate tables to allow the packaging routine access to the NSLDS data when evaluating aid eligibility. Use the NSLDS Data Push routine to push data into the aggregate tables.

See Using the NSLDS Data Push Process.

### Determining the ISIR Type During the ISIR Load

The ISIR load process determines the type of ISIR record—applications, corrections, or system generated—by reviewing each individual ISIR. The system accomplishes this by reviewing the Transaction Data Source/Type field on the ISIR.

---

**Note:** For a complete description of the Transaction Data Source/Type field values, review the U.S. Department of Education's *Technical Manual for Electronic Data Exchange (EDE)*.

---

The following table indicates the Transaction Data Source/Type values that are selected for processing based on the ISIR Type selected on the ISIR Load Run Control page.

| *ISIR Load Run Option* | *Transaction Data Source/Type* |
|---|---|
| Applications | 1A, 2A, 2B, 2E, 2F, 2G, 2H, 2R, 2T, 3A, 3E, 3G, 3R, 4A, 4B, 4J, 4K, 4R, 4U, 4V, 5S, 6A, 6B, 6E, 6F, 7G, 7H, 7R, 7T |
| System Generated | 5D, 5L, 5M, 5N, 5P, 5W, 5X, 5Y |
| Corrections | 1C, 2C, 3C, 4C, 6C |

## Pages Used to Set Up Financial Aid Processing

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| ISIR Load Options 1 | ISIR_INST_CONTROL | Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Load Options 1 | Define how ISIR data from the CPS is loaded into the system. |

 Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| ISIR Load Options 2 | ISIR_INST_CONTROL2 | Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Load Options 2 | Define how ISIR data from the CPS is loaded into the system. |
| ISIR Load Options 3 | ISIR_INST_CONTROL3 | Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Load Options 3 | Define how corrected ISIR data from the CPS is loaded into the system. |
| ISIR Inst SearchMatch | ISIR_INST_SRCHMCH | Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Inst Search Match, ISIR Inst SearchMatch | Define how ISIR records are processed when identified by the Search Match process. You can avoid duplicate records and determine whether the ISIR records are loaded into the database as new records, are appended to existing records in the database, or are ignored. |
| ISIR Reject Reasons | ISIR_REJECT_TBL | Set Up SACR, Product Related, Financial Aid, Application Processing, Maintain ISIR Comment Codes, ISIR Reject Reasons | Review delivered ISIR reject reasons and set severity levels. |
| ISIR Comments | ISIR_COMMT_TBL | Set Up SACR, Product Related, Financial Aid, Application Processing, Maintain ISIR Comment Codes, ISIR Comments | Review delivered ISIR comment codes and set severity levels. DB Match Use setting can be adjusted to control treatment by the Packaging process. This page links the comment codes with the long description or text defined by the Department of Education. |
| Financial Aid EDI Transactions | FA_ECTRANS | Set Up SACR, Product Related, Financial Aid, File Management, Maintain EDI Transactions, Financial Aid EDI Transactions | Set up financial aid EDI transactions. Control the EDI transactions that can be viewed in the ISIR File Review and Loan EC Queue Review pages. |
| Setup Commit Levels | PROCESS_COMMIT | Set Up SACR, Product Related, Financial Aid, Define Commit Levels, Setup Commit Levels | Set up commit levels for COBOL processes. Control the commit levels for the ISIR Suspense Load (FAPSAR00) and ISIR Correction Build (FAPCOR00) COBOL processes. |

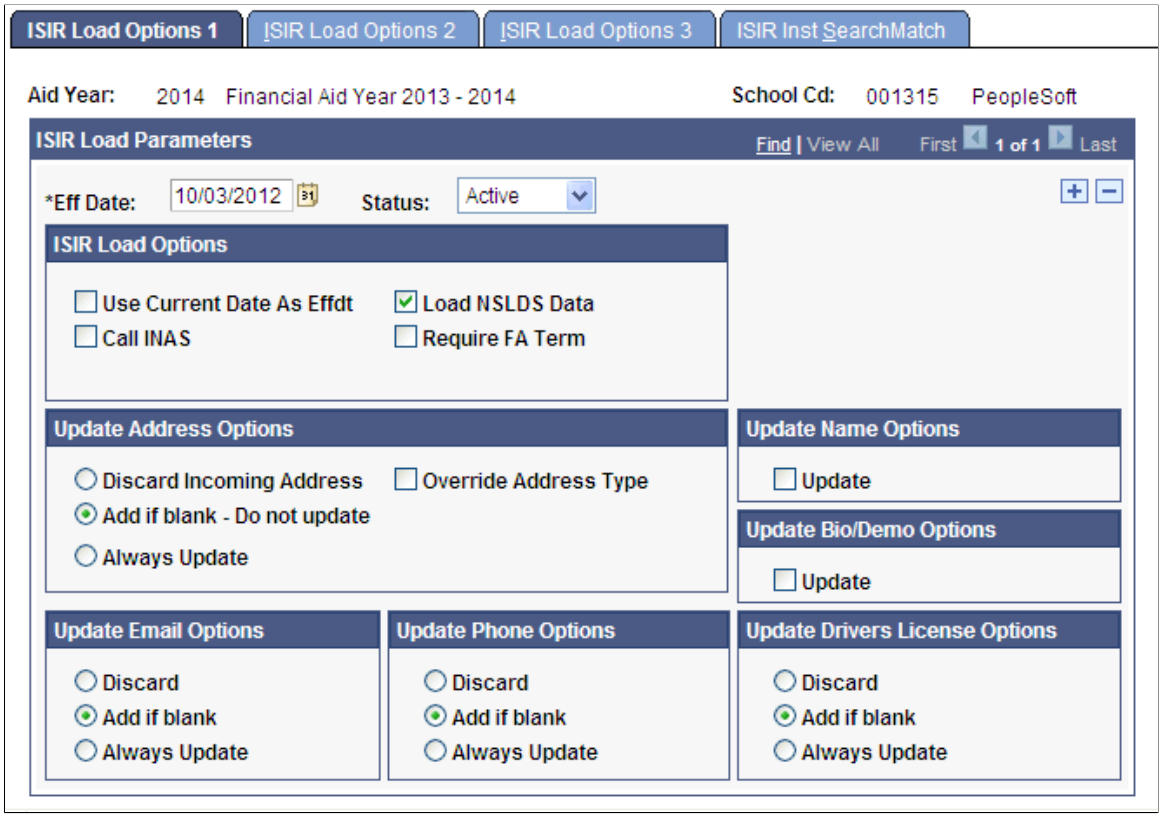
Copyright © 2017, Oracle and/or its affiliates. All rights reserved. 

# Defining ISIR Data Load Options 1

Access the ISIR Load Options 1 page (Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Load Options 1).

**Image: ISIR Load Options 1 page**

This example illustrates the fields and controls on the ISIR Load Options 1 page. You can find definitions for the fields and controls later on this page.




These load parameters are for processing all initial ISIR records and system-generated ISIRs.

The system displays the aid year, school code, effective date, and status.

## ISIR Load Options

**Use Current Date as Effdt** (use current date as effective date)

Select to use the current date as the effective date of the ISIR information loaded into the ISIR Data Corrections component. If you do not select the check box, the system uses an effective date based on the CPS transaction processed date.

**Call INAS** (call Institutional Need Analysis System)

Select to enable any ISIR that is loaded to immediately run the INAS program using the current INAS options. If you do not select this check box, the ISIR is queued for Batch Need Analysis processing.

**Load NSLDS Data** (load National Student Loan Data System data)

Select this check box to direct the system to load new NSLDS data into the NSLDS tables when an ISIR is suspended or discarded—that is, skipped—and not loaded into the system.


Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

NSLDS data is loaded for suspended ISIRs under these conditions:

- Search Match must not be called by the ISIR load process; this occurs automatically if an ISIR has been previously loaded for the student (for any aid year).
- A current year ISIR must be previously loaded for the student.
- The Transaction Process Date on the ISIR must be greater than the current effective dated row on the NSLDS tables. If these dates are the same, the process compares the NSLDS Transaction Numbers.
- The NSLDS match flag cannot be *7* (match but no data provided) or *8* (record not sent to NSLDS).

**Require FA Term**

Select to require that at least one active FA Term record for the corresponding Aid Year exists in order for the record to be considered for addition to the ISIR Application tables.

---

**Note:** The option to use the CPS transaction processed date as the effective date for the loaded data is available only for initial ISIR records loaded for the aid year. When all corrected ISIRs are loaded, the system uses the current date as the effective date.

---

## Update Address Options

**Discard Incoming Address**

Select to prevent a student's address information from being updated in personal data when an ISIR is loaded.

**Add if blank - Do not update**

Select if, when the ISIR is loaded, the student has no active address in personal data that matches the address usage criteria.

**Always Update**

Select to always update the appropriate address when the ISIR is loaded.

**Override Address Type**

Select to force the ISIR address to be loaded into a specific address type rather than use the ISIR address usage parameters set in the Process Demo Setup page.

## Update Name Options

**Update**

Select if, when the ISIR is loaded, the student has no active name in personal data that matches name usage criteria, to update the data with the ISIR name.

## Update Bio/Demo Options

**Update**

Select to update these bio/demo fields when the ISIR is loaded:

- Date of Birth

Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

- Marital Status (and As of date)
- Gender
- Citizenship Status
- Visa Number

## Update Email Options

**Discard**

Select to prevent a student's email information from being updated in personal data when the system loads an ISIR.

**Add if blank**

Select if the student does not have an active email address in personal data that matches the defined usage criteria when the system loads an ISIR. The system creates an email address using the highest ranked email type defined in the usage criteria. If an existing matching address type exists, an update does not occur.

**Always Update**

Select to always update the appropriate email address when the system loads an ISIR. The system updates the highest ranked address and phone type defined in the usage criteria.

## Update Phone Options

**Discard**

Select to prevent a student's phone information from being updated in personal data when the system loads an ISIR.

**Add if blank**

Select if the student does not have an active phone number in personal data that matches the defined usage criteria when the system loads an ISIR. The system creates a phone number using the highest ranked phone type defined in the usage criteria. If an existing matching phone type exists, an update does not occur.

**Always Update**

Select to always update the appropriate phone number when the system loads an ISIR. The system updates the highest ranked phone type defined in the usage criteria.

## Update Drivers License Options

**Discard**

Select to prevent a student's driver's license information from being updated in personal data when the ISIR is loaded.

**Add if blank**

Select to enable the following to occur:

- If driver's license information exists for the student in the Campus Community records, the system does not load the ISIR information.
- If no driver's license information exists in the Campus Community records, the system loads the ISIR information.


Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

**Always Update**

Select to always update the driver's license fields when the ISIR is loaded. The system checks for an exact match of the driver's license number and driver's license state.

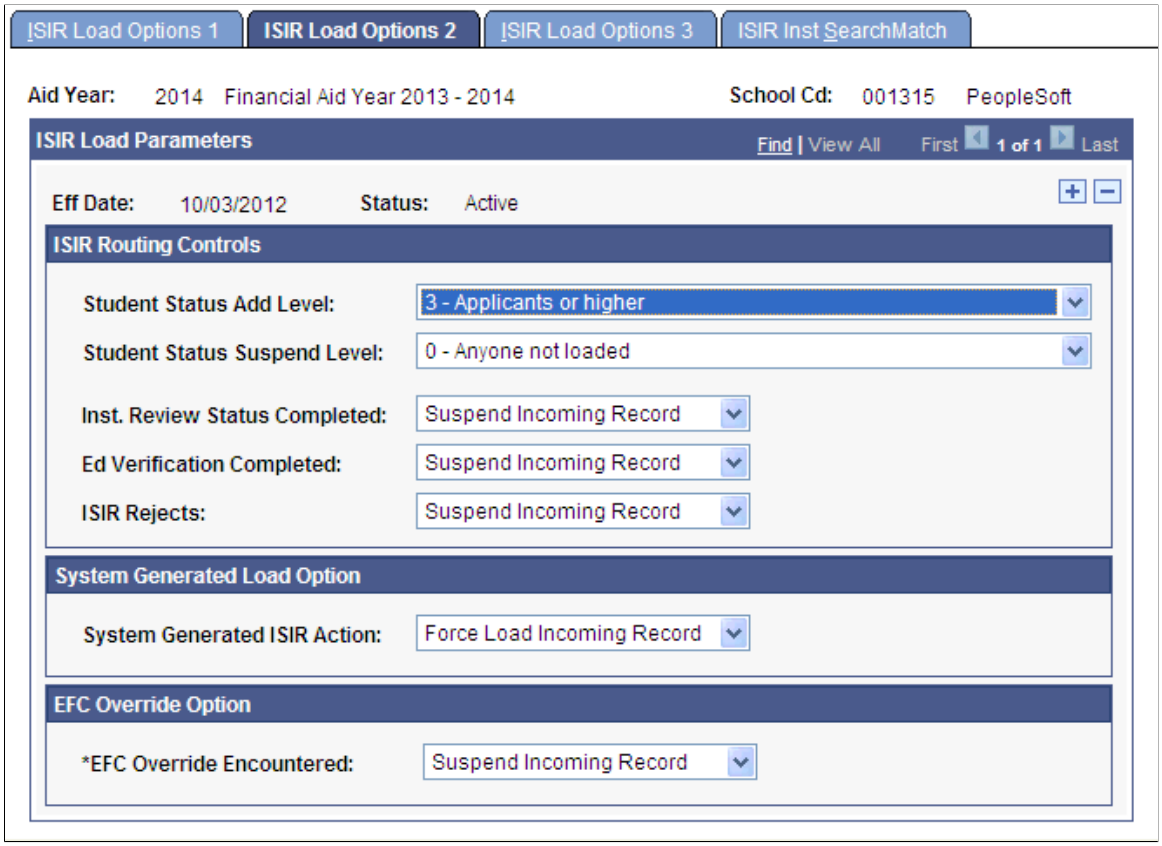
If the system cannot locate an exact match, it deletes any entries for the student in the driver's license table where either the state or the license number match, and then inserts a new row with the driver's license number and state from the ISIR.

## Defining ISIR Data Load Options 2

Access the ISIR Load Options 2 page (Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Load Options 2).

**Image: ISIR Load Options 2 page**

This example illustrates the fields and controls on the ISIR Load Options 2 page. You can find definitions for the fields and controls later on this page.




The system displays the aid year, school code, effective date, and status.

These load parameters are for processing all initial ISIR records and system-generated ISIR's.

During the ISIR Load process, the program processes these Data Load Parameters in the following order:

1. Inst. Review Status Completed
2. Ed Verification Completed

Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

3. ISIR Rejects
4. Add Admit Level/ Suspend Admit Level
5. EFC Override Encountered

The incoming ISIR record must meet the criteria defined at each processing step in order to be eligible to load.

## ISIR Routing Controls

**Student Status Add Level**

Select the minimum admit level that a student must have for the system to load the ISIR to the application tables. Values are:

*0 - Load Everyone*

*1 - Recruits or higher*

*2 - Inactive Admits or higher*

*3 - Applicants or higher*

*4 - Active Admits or higher*

*5 - Accepted/Continuing only*

**Student Status Suspend Level**

Select the minimum admit level that a student must have for the system to suspend the ISIR. Values include:

*0 - Anyone not loaded*

*1- Recruit or higher*

*2 - Inactive Admits or higher*

*3 - Applicants or higher*

*4 - Active Admits or higher*

*5 - Accepted/Continuing only*

**Inst. Review Status Completed** (institutional review status completed)

Select instructions for handling the ISIR if the institutional review status is complete. This status is maintained on the Packaging Status Summary page. Values are: *Discard Incoming Record, Load Record,* and *Suspend Incoming Record.*

**Ed Verification Completed** (educational verification completed)

Select the instructions for handling the ISIR if the educational verification is complete. This status is maintained on the Packaging Status Summary page. Values are: *Discard Incoming Record, Load Record,* and *Suspend Incoming Record.*

**ISIR Rejects**

Select the instructions for handling rejected ISIRs. Values are: *Discard Incoming Record, Load Record,* and *Suspend Incoming Record.*


Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

## System Generated Load Option

**System Generated ISIR Action**

Select the way in which system-generated ISIRs should be processed.

All system-generated ISIRs follow the same ISIR load options and routing control rules as regular, noncorrection ISIRs. Select from these values:

- *Discard Incoming Record:* Does not load the record; sets ISIR load status to Skip.
- *Force Load Record* Choosing this option bypasses the following Data Load Parameters when trying to load the ISIR record:
  - Inst. Review Status Completed
  - Ed Verification Completed
  - ISIR Rejects

  All other Data Load Parameters are still checked.
- *Load Record:* Processes the record and loads it if the load parameters are met.
- *Suspend Incoming Record:* Suspends ISIRs that are pending review and sets the ISIR load status to *Suspended.*

---

**Note:** Because these ISIRs can be generated for various reasons, you might suspend all records of this type and first review them in the Suspense Management page before loading them. The load process attempts to determine and assign the ID before the record is suspended.

---

## EFC Override Option

**EFC Override Encountered**

Select one of the following: *Ignore EFC Override Values, Suspend Incoming Record,* or *Use EFCs Values.*

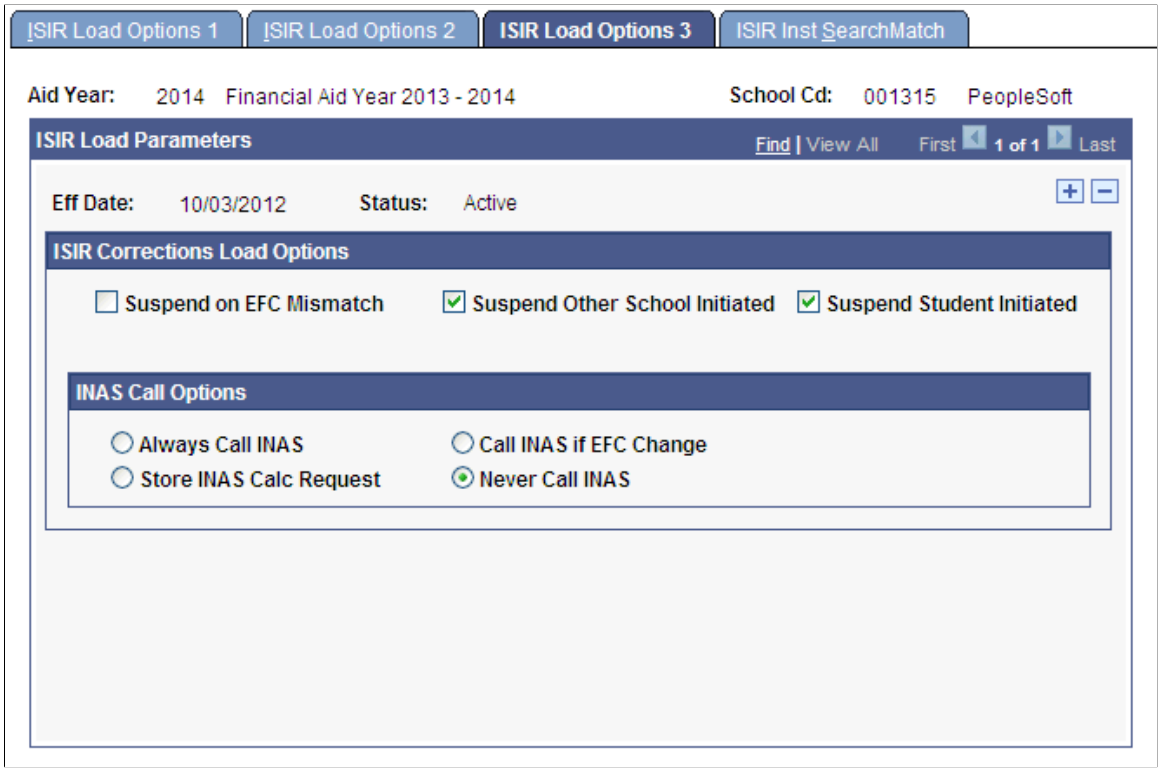
Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

# Defining ISIR Data Load Options 3

Access the ISIR Load Options 3 page (Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Load Options 3).

**Image: ISIR Load Options 3 page**

This example illustrates the fields and controls on the ISIR Load Options 3 page. You can find definitions for the fields and controls later on this page.




Use these load parameters for processing all corrected ISIRs. To identify ISIRs corrected by the recipient school, the ISIR ETI field value is checked and only those records with a value of 0, 2, 4, or 6 are selected. This indicates that the recipient school initiated the correction record, and you can process the ISIR normally. You can suspend any other ISIR ETI value, except blank, as a non-school initiated correction using the Suspend Other School Initiated and Suspend Student Initiated ISIR load options.

---

**Note:** The process of loading corrected ISIRs is not the same as for initial ISIRs. Refer to Processing INAS for details.

---

See Processing Inbound Files.

The system displays the aid year, school code, effective date, and status.

## ISIR Corrections Load Options

**Suspend on EFC Mismatch** (suspend on expected family contribution mismatch)

Select to suspend the corrected ISIR if the primary EFC on the ISIR does not match the last calculated primary EFC for the student stored in PS_ISIR_COMPUTED.PRIMARY_EFC.


Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

| | |
|---|---|
| **Suspend Other School Initiated** | Select to suspend ISIRs that are initiated by another school or the CPS. |
| **Suspend Student Initiated** | Select to suspend ISIRs that are initiated by the student. |

---

**Note:** A school-initiated correction is processed with the Suspend on EFC Mismatch load option set. If no previously loaded ISIR exists, the process treats the condition as an application ISIR and follows the application ISIR load parameter settings. This allows initially rejected ISIRs corrected by the school to load as initial application ISIRs.

---

Because a student has likely already been processed for financial aid when you receive the corrected ISIR, the system provides INAS options.

## INAS Call Options

| | |
|---|---|
| **Always Call INAS** (always call Institutional Need Analysis System) | Select to run the INAS calculation as the ISIR is loaded into the application tables. This is similar to the Call INAS check box on the ISIR Load Options 1 page. |
| **Store INAS Calc Request** (store Institutional Need Analysis System calculation request) | Select to store the ID and aid year of the record for later batch INAS processing. |
| **Call INAS if EFC Change** (call Institutional Need Analysis System if expected family contribution change) | Select to run an INAS calculation only if the primary EFC on the ISIR does not match the last calculated primary EFC. |
| **Never Call INAS** (never call Institutional Need Analysis System) | Select to disable the system from calling INAS when the ISIR is loaded. This feature does not support future batch INAS calculation. |

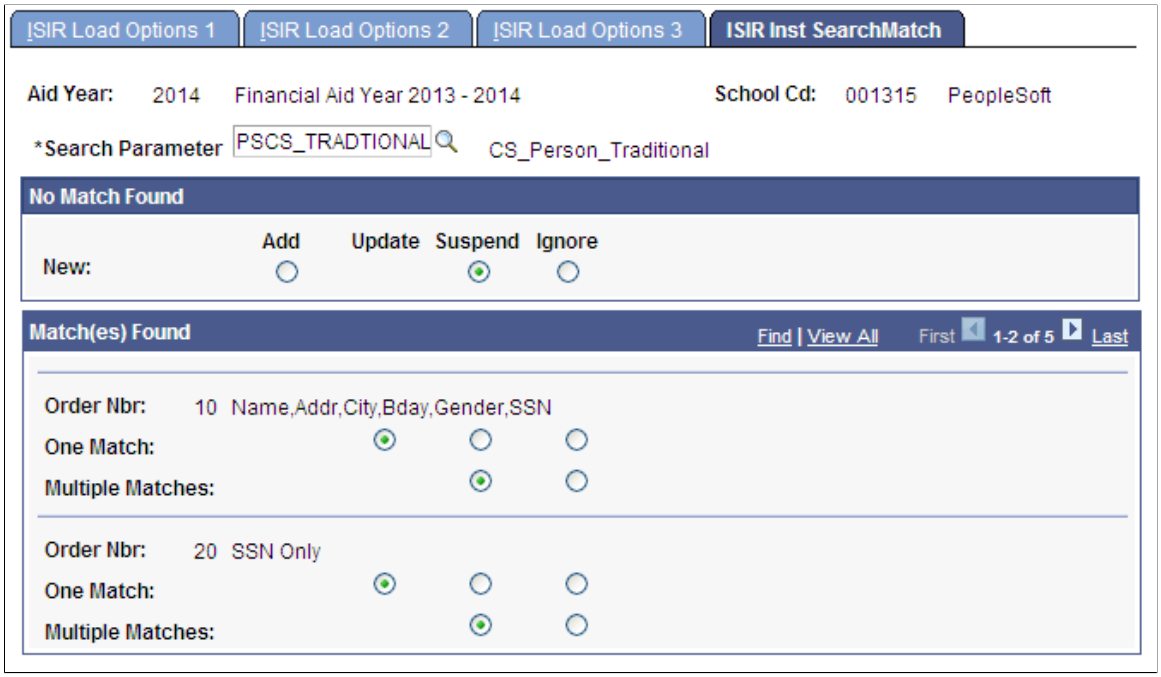
Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

## Defining ISIR Institutional Search Match

Access the ISIR Inst SearchMatch page (Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Inst SearchMatch).

**Image: ISIR Inst SearchMatch page**

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




You determine how restrictive to make the Matching process. The system searches on the match that you select by reviewing personal data until it finds a match. When the search and match process runs, the program starts with the first order number and moves through the order numbers until it finds a match. If the system finds no matches at any level, then the option that you selected in the No Match Found group box takes effect. To load all students into the system regardless of match, override the No Match Found level.

---

**Note:** The search match options apply only to ISIRs where no prior year ISIR was loaded into the database.

---

The system displays the aid year and school code.

**Search Parameter**

A search parameter is a set of one or more search rules that you order sequentially with the lowest (or first) search order level as the most restrictive, and the highest (or last) search order level as the least restrictive. A search parameter must be created even if it contains only one search rule.


Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

## No Match Found

**New**

Select an option to indicate the action the system takes when the Search Match process does not find a matching record. Values are:

*Add:* The system adds the record to your database and generates a new ID for the ISIR.

*Suspend:* The record is put in suspense.

*Ignore:* The system sets the load status to *Skipped;* the ISIR is not loaded and is ignored by the load process.

The Match(es) Found group box has one row for each search match criteria order defined by your institution. Use the scroll bar to scroll through the levels of search criteria.

## Match(es) Found

**Order Nbr** (order number)

Displays a separate listing for each order number level of search criteria. The number of search match levels depends on the Search Parameter you selected to use for the ISIR load process.

**One Match**

For each order number, select an option to determine how the system processes the record. Values are:

*Update:* The system updates the existing record with the matching record.

*Suspend:* The system assigns a suspended load status to the matching record.

*Ignore:* The system sets the load status to *Skipped.*

**Multiple Matches**

For each order number, select an option to determine what to do with the record. Values are:

*Suspend:* The system assigns a suspended load status to the matching record.

*Ignore:* The system sets the load status to *Skipped;* the ISIR is not loaded and is ignored by the load process.

******Parameters Refreshed******

The system displays this message in red text when the ISIR Institutional Search Match parameters are not saved or the global Search Match parameters are not changed since you last updated this page. If you change parameters and do not save the changes or if you make a change since the last changes were made, the system displays this message.

You may want to create a Financial Aid-specific Search Parameter that can perform the ISIR search match function more efficiently than the provided PSCS_TRADTIONAL. For example, you may want to create a search parameter that

Copyright © 2017, Oracle and/or its affiliates. All rights reserved. 

contains a single search match order that does a last name, Social Security number, and student birthdate match.

### Related Links

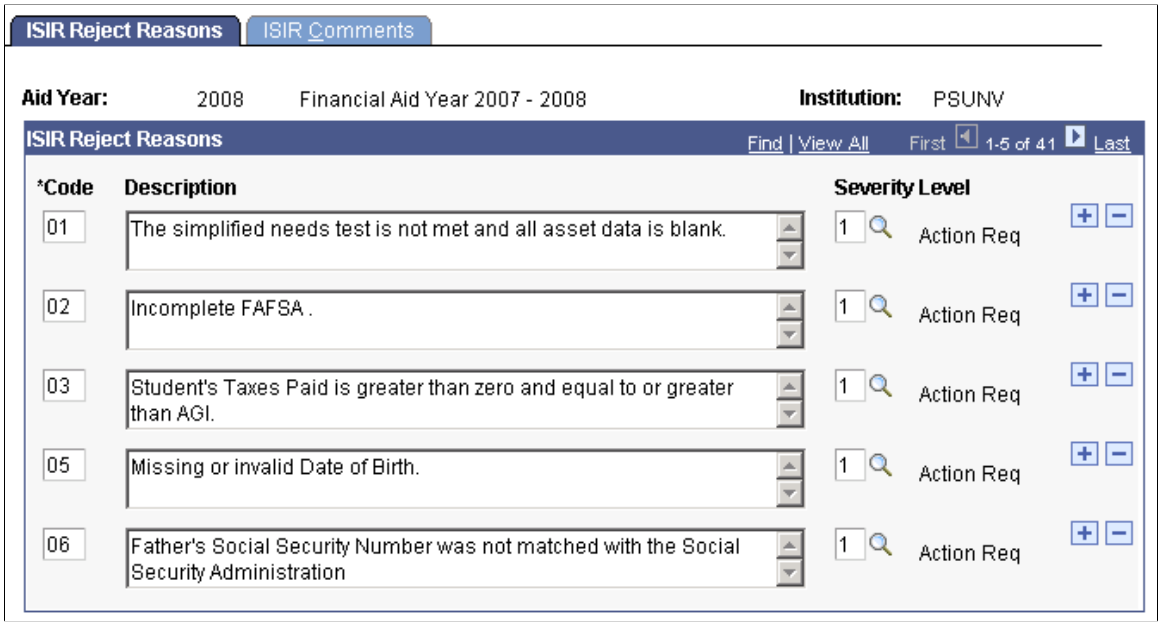
"Setting Up Search/Match" (PeopleSoft Campus Solutions 9.2: Campus Community)

## Setting Severity Levels for ISIR Reject Reasons

Access the ISIR Reject Reasons page (Set Up SACR, Product Related, Financial Aid, Application Processing, Maintain ISIR Comment Codes, ISIR Reject Reasons).

**Image: ISIR Reject Reasons page**

This example illustrates the fields and controls on the ISIR Reject Reasons page. You can find definitions for the fields and controls later on this page.




The ISIR Message Tables component enables you to review delivered ISIR messages and assign a level of severity to each reject reason and comment code, to indicate the action required by financial aid staff.

---

***Warning!*** ISIR reject reasons and ISIR comment codes are defined by the Department of Education and are delivered to your institution with each academic year release update. You can update the message tables if the CPS modifies the values after their initial release.

---

The system displays the aid year and institution. PSUNV is the default institution for the ISIR reject reasons. You do not need to create records for your institution values.

### ISIR Reject Reasons

**Code** Displays information assigned to the ISIR reject reason by the Department of Education. These codes appear on a student's SAR and ISIR.


Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

**Description** Displays the description, using the codes assigned to the ISIR reject reason by the Department of Education by default. The description and the accompanying code appear on a student's SAR and ISIR.

**Severity Level** Indicates the level of importance of the reject reason and whether action is required. You can design local ISIR workflow processes using this field as criteria for ISIR review or communication with the student. Select from these values:

*1 - Action Req:* Requires action.

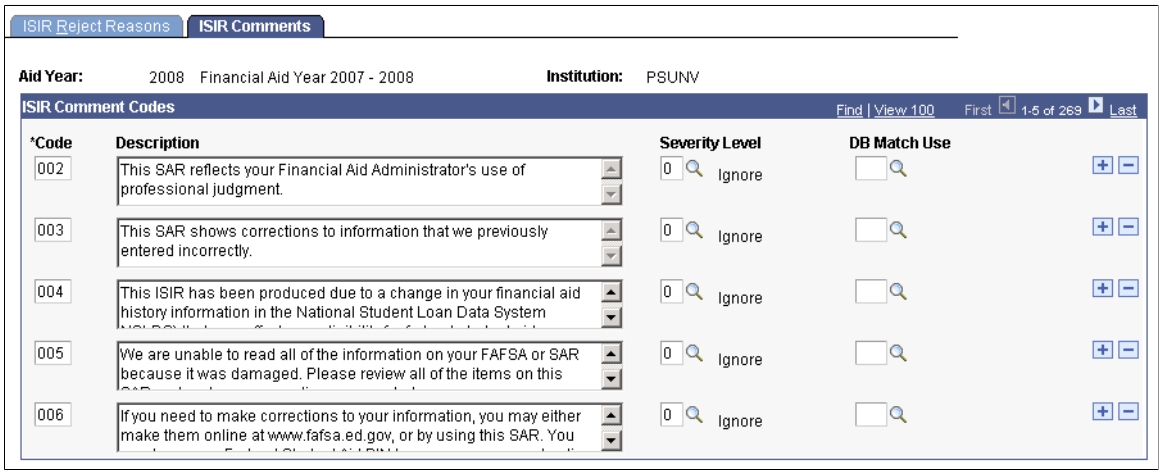
*0 - Ignore:* Requires no action.

## Setting Severity Levels for ISIR Comment Codes

Access the ISIR Comments page (Set Up SACR, Product Related, Financial Aid, Application Processing, Maintain ISIR Comment Codes, ISIR Comments).

**Image: ISIR Comments page**

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




The system displays the aid year and institution. PSUNV is the default institution for the ISIR comment codes. You do not need to create records for your institution values.

The Campus Solutions system compares ISIR comments on the student's record to the ISIR Comment table to evaluate eligibility for federal aid. Each comment is associated with a severity level. The severity level associated with the DB Match Use field triggers how the system handles the database match during packaging. As an administrator, you can reset the predefined severity level value assigned to each ISIR comment.

### ISIR Comment Codes

**Code** Displays codes from a table delivered by the Department of Education. These codes may appear in Part 1 of a student's SAR or ISIR.

Copyright © 2017, Oracle and/or its affiliates. All rights reserved. 

**Description**

Displays a description of the associated code from a table delivered by the Department of Education. The description may appear in Part 1 of a student's SAR or ISIR.

**Severity Level**

Indicates the level of importance that you want to attach to the comment code and whether action is required. You can design local ISIR workflow processes using this field as criteria for ISIR review or communication with the student. Select from these values:

*0 - Ignore:* Requires no action.

*1- Action Required:* DB Match problem requires action.

*2 - Action required.* SAR C Flag on file.

Based on these severity levels, if a student has an ISIR comment with a severity level 1 or 2 and the DB Match Use value is not blank, the system does not award the student federal aid until the errant condition, and therefore the corresponding ISIR comment, are resolved.

**DB Match Use**

The DB Match Use value corresponds to a U.S.E.D. database match.

---

**Note:** INAS Calc Type selection is restricted to *IM* for the latest available processing year until FM INAS is delivered.

---

**Note:** You can use the override option on the Database Matches page to override this functionality. For example, if the student has an ISIR comment with a severity level of 1 or 2, you can invoke the corresponding database match override to make the student eligible for federal aid.

---

See Reviewing the U.S.E.D. Database Match Process.

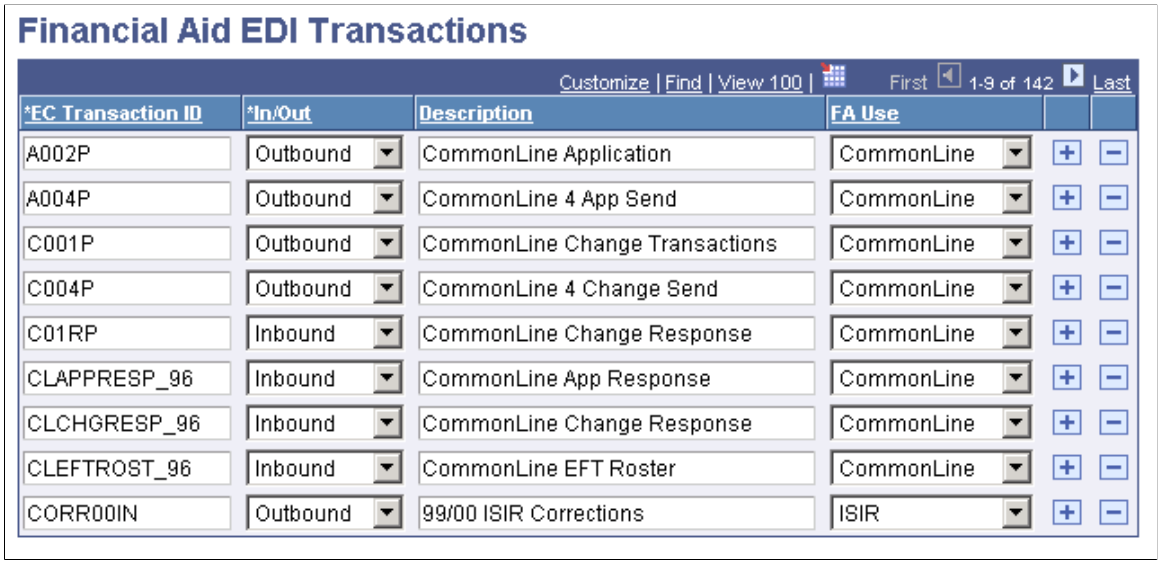
 Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

## Setting Up Financial Aid EDI Transactions

Access the Financial Aid EDI Transactions page (Set Up SACR, Product Related, Financial Aid, File Management, Maintain EDI Transactions, Financial Aid EDI Transactions).

**Image: Financial Aid EDI Transactions page**

This example illustrates the fields and controls on the Financial Aid EDI Transactions page. You can find definitions for the fields and controls later on this page.



Financial Aid EDI Transactions

Customize | Find | View 100 | First 1-9 of 142 Last

| *EC Transaction ID | *In/Out | Description | FA Use |
|---|---|---|---|
| A002P | Outbound | CommonLine Application | CommonLine |
| A004P | Outbound | CommonLine 4 App Send | CommonLine |
| C001P | Outbound | CommonLine Change Transactions | CommonLine |
| C004P | Outbound | CommonLine 4 Change Send | CommonLine |
| C01RP | Inbound | CommonLine Change Response | CommonLine |
| CLAPPRESP_96 | Inbound | CommonLine App Response | CommonLine |
| CLCHGRESP_96 | Inbound | CommonLine Change Response | CommonLine |
| CLEFTROST_96 | Inbound | CommonLine EFT Roster | CommonLine |
| CORR00IN | Outbound | 99/00 ISIR Corrections | ISIR |

**EC Transaction ID** (electronic commerce transaction ID) — Displays the electronic commerce name specified for the EDI file.

**In/Out** — Displays whether the file is inbound (to be loaded into the database) or outbound (generated by the system to be sent to an external trading partner).

**Description** — Displays the description of the EDI file.

**FA Use** (financial aid use) — Displays the financial aid business process that the EDI file supports. Values are: *Blank, CommonLine, Direct Lending, ISIR,* and *Pell.*

The system displays EDI transactions with FA Use value of ISIR in the ISIR EC Queue Review page and displays EDI transactions with FA Use value of CommonLine and Direct Lending on the Loan EC Queue Review page.

If you set the FA Use field to *blank,* the system does not display those EDI transactions review page. You might do this with prior year EDI transactions that you no longer want to appear.

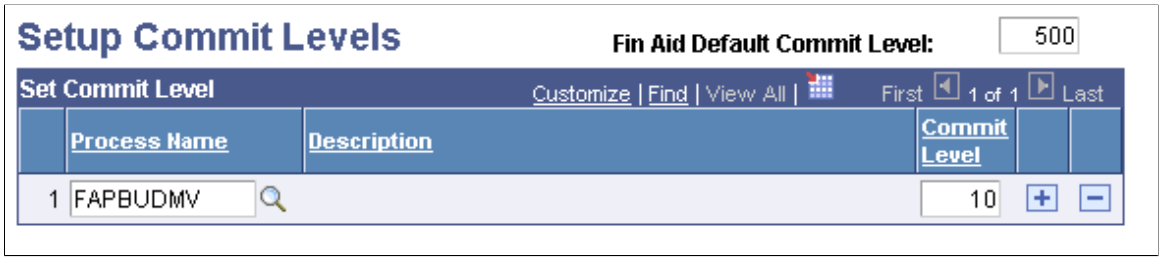
Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

## Setting Up Commit Levels for COBOL Processes

Access the Setup Commit Levels page (Set Up SACR, Product Related, Financial Aid, Define Commit Levels, Setup Commit Levels).

**Image: Setup Commit Levels page**

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




**Fin Aid Default Commit Level** (financial aid default commit level)

Enter the default commit level, which indicates to the system when to save records while processing for any process that does not have a specific commit level assigned to it on this page. For example, if you enter *50,* the system saves the processing after every 50 records that it processes. If you do not enter a value in this field, the default commit level is *0,* which directs the system to save after each record is processed.

**Process Name**

Enter or select the process name for which you want to set commit levels. Insert additional rows for each process for which you want to set a commit level.

**Commit Level**

Enter a numeric value for the commit level for each process. The commit level instructs the system when to save records while it is running a process. For example, if you enter *50,* the system saves the processing after every 50 records that it processes.

---

**Note:** The appropriate commit levels to use depend on your production environment, such as the type of database, size of database, and hardware. Commit levels should be set by knowledgeable technical staff only.

---

# Reviewing Cross-References

To set up cross-references, use the ISIR/SAR Cross Reference component (ISIR_SAR_XREF) and the Institutional Cross Reference component (INST_XREF).

This section discusses how to:

- Review ISIR SAR cross-references.
- Review institutional application cross-references.


Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

## Pages Used to Review Cross-References

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| ISIR SAR Cross-reference | ISIR_SAR_XREF | Set Up SACR, Product Related, Financial Aid, Application Processing, ISIR/SAR Cross Reference, ISIR SAR Cross-reference | Review ISIR/SAR cross-references. This page is used by several background processes and online pages to link the ISIR/FAFSA field number and ISIR record field number to the table and column name in the Campus Solutions system. It cross-references the field name and description to the ISIR/FAFSA record field number. |
| Institutional Cross Reference | INST_XREF | Set Up SACR, Product Related, Financial Aid, Application Processing, Institutional Cross Reference | Review institutional application cross-references and audit changes to the institutional application pages. Several background processes and online pages use this table to link the institutional application field number and record field number to the table and column name in the Campus Solutions database. It cross-references the field name and description to the institutional record field number. |

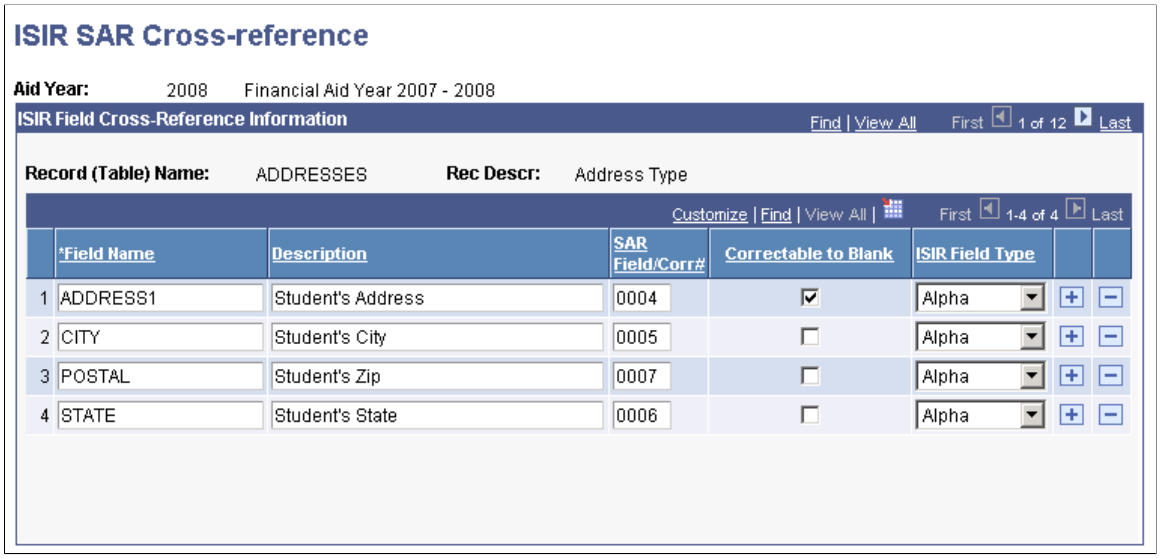
Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

## Reviewing ISIR SAR Cross-References

Access the ISIR SAR Cross-reference page (Set Up SACR, Product Related, Financial Aid, Application Processing, ISIR/SAR Cross Reference, ISIR SAR Cross-reference).

**Image: ISIR SAR Cross-reference page**

This example illustrates the fields and controls on the ISIR SAR Cross-reference page. You can find definitions for the fields and controls later on this page.




***Warning!*** The ISIR SAR Cross-reference page is delivered annually with preloaded values and should not be changed or modified in any way.

The system displays the aid year, record (table) name, and record description.

**Field Name** Displays the names of the valid fields in the Financial Aid system for the table.

**SAR #** Displays the CPS field reference number used for correcting ISIRs and identifying highlighted fields on the ISIR/SAR for the aid year.

**Correctable to Blank** If selected, indicates that the field can be reported as a blank value in the ISIR correction record.

**ISIR Field Type** Displays the description for the ISIR field type:

*Alpha:* Alpha Numeric

*MMDDYY:* Date (MMDDYY)

*MMYY:* Date (MMYY)

*Numeric*

*Signed Num:* Signed Numeric

 Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

*Batch Year:* Date (Batch Year)

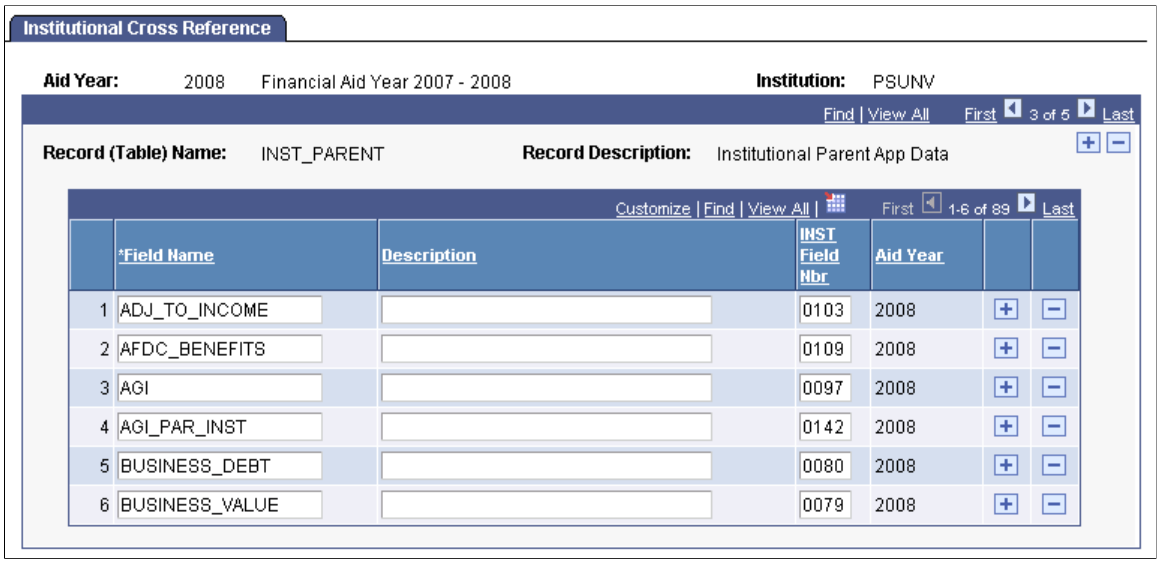
*Mixed Case*

## Reviewing Institutional Application Cross-References

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

**Image: Institutional Cross Reference page**

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




***Warning!*** The Institutional Cross Reference page is delivered annually with preloaded values. These values should not be changed in any way.

The system displays the aid year, academic institution, record (table) name, and record description.

**Field Name** Displays the names of fields in the Financial Aid system for the table.

**Description** Displays the field contents.

**INST Field Nbr** (institutional application field number) Displays the institutional application field number that corresponds to the field in the Financial Aid system.

**Aid Year** Displays the aid year of the institutional application field number.

Copyright © 2017, Oracle and/or its affiliates. All rights reserved. 

# Setting Up PROFILE Data Load Parameters

To set up PROFILE data load parameters, use the PROFILE Load Parameters component (INST_LOAD_CONTROL).

## Page Used to Set Up PROFILE Data Load Parameters

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| PROFILE Data Load Parameters | INST_LOAD_CNTRL | Set Up SACR, Product Related, Financial Aid, File Management, PROFILE Load Parameters, PROFILE Data Load Parameters | Set up the PROFILE application parameters for your institution. PeopleSoft Campus Solutions supports the College Board *CSS PROFILE* application. |

## Setting Up PROFILE Data Load Parameters

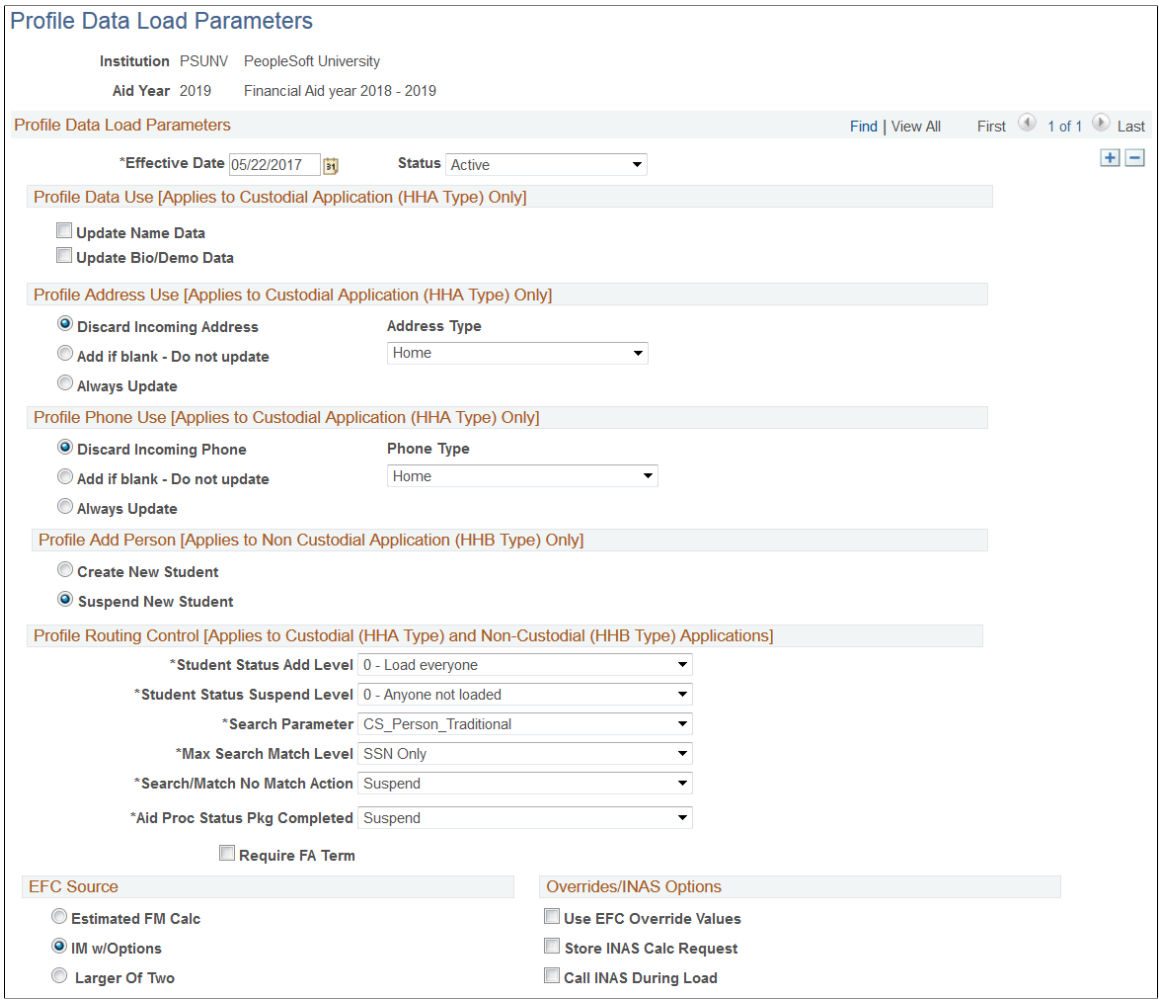
Bundle 46: Updated this setup to manage the introduction of additional non custodial parent information collected by the College Board.

 Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

Access the PROFILE Data Load Parameters page Set Up SACR, Product Related, Financial Aid, File Management, PROFILE Load Parameters).

**Image: PROFILE Data Load Parameters page**

This example illustrates the fields and controls on the PROFILE Data Load Parameters page. You can find definitions for the fields and controls later on this page.




**Note:** When this page opens an error message might display such as "Fields Parameter Code and Max Search Match Level reset to blank. (14404,413) The Search Match Criteria has been modified more recently than the effective date on this page. Please insert a new effective-dated row on this page or update the current effective data to the present day. Then reenter the value for the field(s) mentioned above." This error message displays when the Search Match parameter criteria was set up after the effective date of this run control. By adding a new effective-dated row and resetting the fields mentioned in the error message, the PROFILE load process uses valid search match criteria.

Bundle 46: Added new note.

**Note:** Some setup information applies to only custodial parent application data (HHA), only non custodial parent application data (HHB), or both. Each section notes the applicability of the setup.

Copyright © 2017, Oracle and/or its affiliates. All rights reserved. 

| | |
|---|---|
| **Effective Date** | Select an effective date for this aid year. |
| **Status** | Select a status for this aid year. |

## PROFILE Data Use

**Note:** These fields only apply to custodial parent application data (HHA).

| | |
|---|---|
| **Update Name Data** | Select to enable PROFILE name data to update Campus Community data. |
| **Update Bio/Demo Data** (update biographical and demographic data) | Select to enable PROFILE biographical and demographic data to update Campus Community data. Updated fields include Marital Status, Gender, DOB, Citizenship, and Visa |

## PROFILE Address Use

**Note:** These fields only apply to custodial parent application data (HHA).

| | |
|---|---|
| **Discard Incoming Address** | Select if you do not want to update Campus Community address information. |
| **Add if blank - Do not update** | Select to have the system add the address from the file with the address type that appears in the Address Type field when there is no Campus Community address information.<br><br>For example, if *PERM* appears in the Address Type field, the system identifies and adds the address as a permanent address type. |
| **Always Update** | Select to always update Campus Community address information. When selected, the designated address is updated with the value specified in the Address Type field. |
| **Address Type** | Select the Address Type to be used when either adding or updating an address. |

## PROFILE Phone Use

**Note:** These fields only apply to custodial parent application data (HHA).

| | |
|---|---|
| **Discard Incoming Phone** | Select if you do not want to update Campus Community phone number information. |
| **Add if blank - Do not update** | Select to have the system add the phone number from the file with the phone type that appears in the Phone Type field when there is no Campus Community phone information.<br><br>For example, if *Mobile* appears in the Phone Type field, the system identifies and adds the address as a mobile phone type. |


Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

**Always Update** Select to always update Campus Community phone information. When selected, the designated phone number is updated with the value specified in the Phone Type field.

**Phone Type** Select the Phone Type to be used when either adding or updating a phone number.

## PROFILE Add Person

Bundle 46: Added new control for creating or suspending new students using Non Custodial Parent PROFILE (HHB) information.

**Note:** These fields only apply to non custodial parent application data (HHB).

**Create New Student** Select to *create* a new student based on data in the Non Custodial Parent PROFILE (HHB) application under the following conditions:

- The student doesn't exist in the system.
- The Non Custodial Parent PROFILE (HHB) application is received before the Custodial Parent PROFILE (HHA) application.
- The student passes all requisite PROFILE Routing Controls.

**Suspend New Student** Select to *suspend* a new student based on data in the Non Custodial Parent PROFILE (HHB) application under the following conditions:

- The student doesn't exist in the system.
- The Non Custodial Parent PROFILE (HHB) application is received before the Custodial Parent PROFILE (HHA) application.
- The student passes all requisite PROFILE Routing Controls.

## PROFILE Routing Control

Bundle 46: Added new note.

**Note:** These fields apply to both custodial parent and non custodial parent application data (HHA and HHB).

**Student Status Add Level** Select an add level to define the students for whom you want to process PROFILE data. This is where you see the numeric hierarchy affect admit levels. Values are:

*0 - Load Everyone*

Copyright © 2017, Oracle and/or its affiliates. All rights reserved. 

*1 - Recruits or higher*

*2 - Inactive Admits or higher*

*3 - Applicants or higher*

*4 - Active Admits or higher*

*5 - Accepted/Continuing only*

**Student Status Suspend Level**

Select a level to define the PROFILE records to retain in the PROFILE Suspense table. You can select these students again in future data loads. Values are:

*0 - Anyone not loaded*

*1- Recruits or higher*

*2 - Inactive Admits or higher*

*3 - Applicants or higher*

*4 - Active Admits or higher*

*5 - Accepted/Continuing only*

**Search Parameter**

A search parameter is a set of one or more search rules that you order sequentially with the lowest (or first) search order level as the most restrictive, and the highest (or last) search order level as the least restrictive. A search parameter must be created even if it contains only one search rule. The delivered Campus Solutions search Parameter is called PSCS_TRADTIONAL.

**Max Search Match Level**

Select a maximum search match level, which determines how restrictive the Matching process should be. The values in this field depend on the value selected in the Search Parameter field. The system searches on the match level that you select, plus the more restrictive matches that come before it. For example, if you select a match of *20* (SSN Only in PSCS_TRADTIONAL), the search process first uses the more restrictive match of *10*—or any match number less than *20*—that you set up in the system.

Values are:

*Name, Adddr, City, Bday, Gender, SSN*

*SSN Only*

*Name, Bday, Gender*

*Name, Gender*

*Name Only*

**Search/Match No Match Action**

Select the action to take when a record fails the Search/Match criteria designated in the Search Parameter

 Copyright © 2017, Oracle and/or its affiliates. All rights reserved.

Values are:

*Suspend* — Move the record into the Suspense Management table

*Allow Add if Eligible* — Consider the record for the Add Level Rules and/or Suspense Level Rules.

**Aid Proc Status Pkg Completed** (aid processing status is packaging completed)

Select the action to take when the process encounters a record for a student whose Aid Processing Status is *Packaging Completed.*

Values are:

*Suspend* — Move the record into the Suspense Management table. The Aid Processing Status remains *Packaging Completed.*

*Load/Reset Status to Applied* — Load the record and reset the Aid Processing Status to *Applied.*

**Require FA Term** (require financial aid term)

Select to require that at least one FA Term record for the corresponding Aid Year must exist in order for the record to be considered for addition to the Institutional Application tables.

---

**Note:** Other PROFILE Routing Controls must be met whether Require FA Term is selected or not for a record to be considered to be added to the Institutional Application tables.

---

## EFC Source

Indicate the source to use by selecting Estimated FM Calc (estimated Federal methodology calculation) IM w/Options (institutional methodology with options), or Larger of two.

## Overrides/INAS Options

**Use EFC Override Values** (used expected family contribution override values)

Select to enable the Load Program and the Suspense/Move Program to evaluate the activation of the Use EFC Override Value check box on the INAS Institutional Extension pages and load those values into the Contribution for Student row of the Computation Data page. The override values are identified with an O on the Computation Data page.

**Store INAS Calc Request** (store institutional need analysis system calculation request)

Select to insert the student into the INAS Calculation Request (INAS_CALC_RECS) table during the PROFILE Load. The batch INAS calculation process calculates an EFC for any student found on the INAS Calculation Request (INAS_CALC_RECS) table. Defaults to selected.

**Call INAS During Load** (call institutional need analysis system during load)

Select to perform INAS calculation, based on the INAS Global Policy options for the corresponding Aid Year, during PROFILE Data Load.

Copyright © 2017, Oracle and/or its affiliates. All rights reserved. 