# Processing and Using Institutional Financial Aid Applications

## Maintaining Institutional Financial Aid Applications

Your institution can gather additional resource information about students and their families by using the College Board PROFILE application which is electronically supported by the System or by entering your institutional application on the pages in this component.

**Note:** The College Board PROFILE and institutional application data share the same pages. You might unintentionally create multiple institutional aid records for a student from these three sources, which could cause unintended INAS calculation results.

**Note:** Question marks or blanks on College Board PROFILE data files are converted or appear as zeros in currency based numeric fields.

For further information about the fields in this component, please refer to The College Board's *PROFILE User's Guide,* available to College Board PROFILE subscribers.

Bundle 46: Added Non Custodial Parent page. Currency Information, Explanation/Certification, and Family Member Listing moved from Miscellaneous Data page to the Parent pages.

This section lists common elements and discusses how to:

- Review student information.
- Review custodial parent information.
- Review non custodial parent information.
- Review currency information, family information, and institutional questions.
- Review all computed data for student and parents.

### Related Links

Loading and Managing PROFILE Records
Using INAS Batch Calculations

## Common Elements Used in This Section

| | |
|---|---|
| **Need Summary** | Click to access the Need Summary page, where you can review the student's federal and institutional need calculations. |

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**FM** (federal methodology) — Click to access the INAS Fed Extension page, where you can override INAS Local Policy Options for federal data.

**IM** (institutional methodology) — Click to access the Institutional Need Calculation Extension 1 page, where you can override INAS Local Policy Options for institutional data.

**INAS** (institutional need analysis system) — Click to calculate an unofficial federal and institutional Expected Family Contribution (EFC) by using the College Board's Institutional Need Analysis System (INAS). A COBOL program is used to perform the INAS calculation.

Bundle 46: Added “HouseHold Type” and “HHB Indicated” fields to the common page header for PROFILE review.

The system displays the student's name, ID, HouseHold Type (HHA for Custodial Parent, HHB for Non Custodial Parent, HHA/HHB for both Custodial and Non Custodial Parent), institution, dependency status, application source, and aid year at the top of each review page. These two terms also appear at the top of each review page:

**HouseHold Type** (household type) — Displays the type of PROFILE application received:

- *HHA/HHB* – both custodial parent and non custodial parent applications received.
- *HHA* – only custodial parent application received.
- *HHB* – only non custodial parent application received.

**HHB Indicated** (non custodial parent PROFILE application received indicator) — Displays whether or not a non custodial parent PROFILE application is indicated or can exist for a custodial parent household.

- *Yes* – non custodial parent PROFILE application is indicated or can exist for a custodial parent household.
- *No* – non custodial parent PROFILE application *not* indicated or *cannot* exist for a custodial parent household.

### Related Links

Defining Federal and Institutional Methodologies
Overriding Expected Family Contribution (EFC)

## Pages Used for Institutional Applications

**Note:** The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years with valid INAS calculations. Earlier aid year institutional application data is available for display only at Financial Aid, Financial Aid History, View Archived Application Data, Institutional Application.


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| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Student Data | INST_STUDENT_nn | Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Student Data | View or enter student information. |
| Custodial Parent Data | INST_PARENT_nn | Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Custodial Parent Data | View or enter custodial parent information. |
| Non Custodial Parent Data | INST_NCPARENT_nn | Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Non Custodial Parent Data | View or enter non custodial parent information. |
| Miscellaneous Data | INST_MISC_nn | Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Miscellaneous Data | View or enter signature, family member, school selection, and institutional question (the College Board PROFILE Section Q) information. You can also view FNAR messages on this page. |
| Computation Summary | INST_COMP_SUMM_nn | Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Computation Summary | View or enter computed parent and student income, allowance, and asset information using your institutional and federal methodology. The computed values appear here. |

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# Reviewing Student Information

Access the Student Data page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Student Data).

**Image: Maintain Institutional Application, Student Data tab (page 1 of 3)**

This example illustrates the fields and controls on the Maintain Institutional Application, Student Data tab (page 1 of 3). You can find definitions for the fields and controls later on this page.

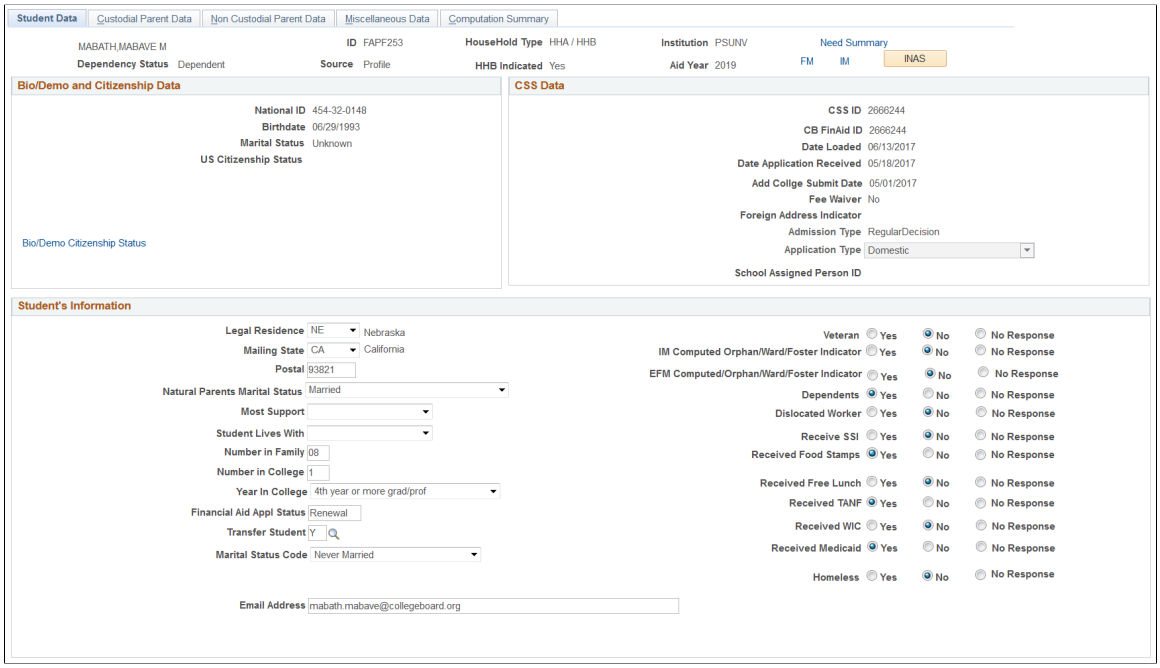


**Image: Maintain Institutional Application, Student Data tab (page 2 of 3)**

This example illustrates the fields and controls on the Maintain Institutional Application, Student Data tab (page 2 of 3). You can find definitions for the fields and controls later on this page.

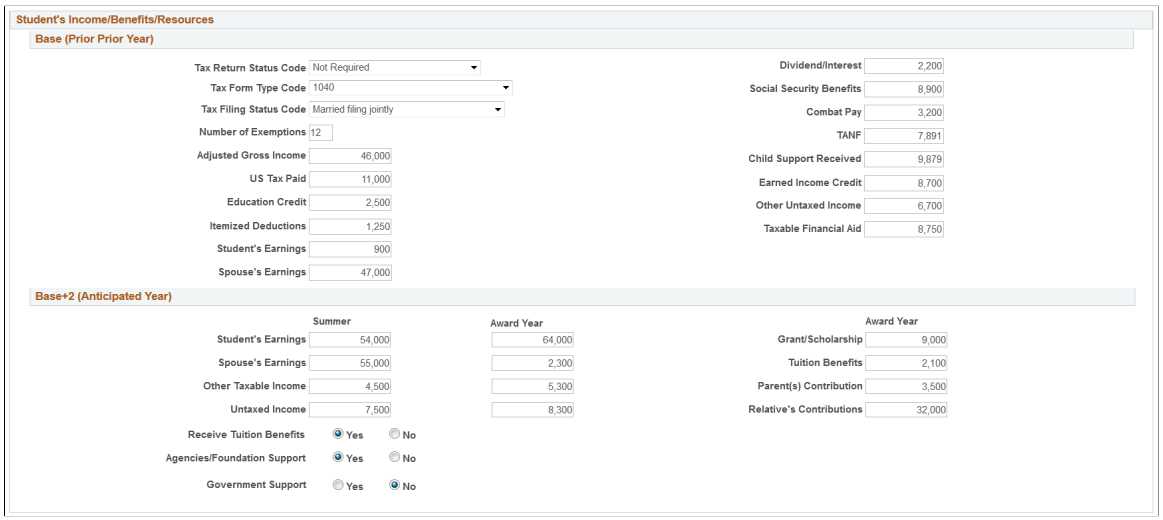



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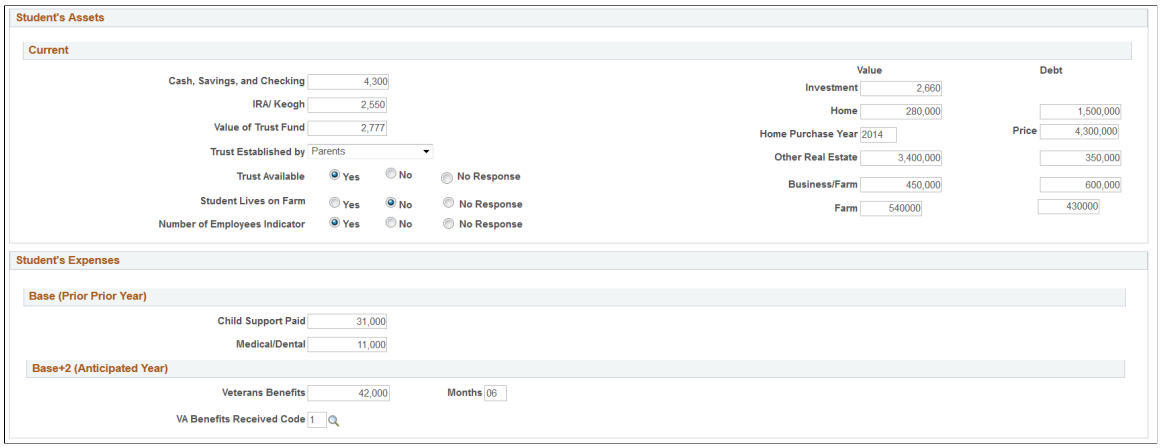
**Image: Maintain Institutional Application, Student Data tab (page 3 of 3)**

This example illustrates the fields and controls on the Maintain Institutional Application, Student Data tab (page 3 of 3). You can find definitions for the fields and controls later on this page.




## Bio/Demo and Citizenship Data

The data for the fields in this group box are populated from Campus Community Bio/Demo data.

**National ID**

Displays the student's National ID.

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**Note:** If the PROFILE Application type = 4 (International PROFILE) and the National ID is blank, the student is loaded into PROFILE Staging with XXX-XX-XXXX. This permits Search/Match to take place and potentially load the student into the Institutional Application tables with the NID rendered as XXX-XX-XXXX.

---

**Reported Country**

Displays the student's *reported* country if not United States of America.

**Bio/Demo Citizenship Status**

Click this link to access the Campus Community Citizenship/ Passport page to confirm the citizenship status of the student's Biographic/ Demographic data against the values in the Reported Country and Reported Status fields.

## CSS Data

Bundle 46: Added CB FinAid ID field; a new unique lifetime ID assigned to the student's record by the PROFILE system.

**CSS ID** (college scholarhship service ID)

Displays the student's unique identifying number assigned by College Board to ensure both privacy and quick retrieval of records. When you call the College Board inquiry number with questions about specific records, it is helpful to know the student's College Board ID number.

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**CB FinAid ID** (college board financial aid ID) — Displays a unique lifetime ID assigned to the student's record by the PROFILE system.

**Application Type** — Displays:

- *1* if the application is a Domestic PROFILE.
- *2* if the application is a Canadian PROFILE.
- *3* if the application is an International PROFILE.

## Student's Information

**Financial Aid Status** — Enter the student's status as it relates to receiving financial aid.

**Marital Status Code** — Select the marital status to be used for financial aid purposes. This marital status can differ from the Bio/Demo Data page marital status.

## Student's Income/Benefits/Resources – Base (Prior Prior Year)

These fields are items from the United States federal income tax forms or data gathered from other applicable sources such as an institutional application or a third party source.

## Student's Income/Benefits/Resources – Base+2 (Anticipated Year)

**Receive Tuition Benefits** — Indicate whether or not the student receives tuition benefits from the parents' employers.

**Agencies/Foundation Support** — Indicate whether the student expects to receive from agencies or foundations to pay for educational expenses during any year of attendance.

**Government Support** — Indicate whether the student expects to receive from her government to pay for educational expenses during any year of attendance.

## Student's Assets – Current

**Price** — Enter purchase price of the student's home.

## Student's Expenses – Base+1 (Recent Year)

**Child Support Paid** — Enter the child support *paid by* the student.

**Medical/Dental** — Enter the medical and/or dental out of pocket expenses *paid by* the student.

**Veterans Benefits** — Enter the monthly amount of VA Benefits *received by* the student.


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| | |
|---|---|
| **Months** | Enter the number of months the veterans benefits were *received* in the calendar year. |

## Reviewing Custodial Parent Information

Bundle 46: Moved Currency Information, Explanation/Certification, and Family Member Listing from Miscellaneous Data page to the Parent pages.

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Access the Custodial Parent Data page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Custodial Parent Data).

**Image: Maintain Institutional Application, Custodial Parent Data tab (page 1 of 6)**

This example illustrates the fields and controls on the Maintain Institutional Application, Custodial Parent Data tab (page 1 of 6). You can find definitions for the fields and controls later on this page.

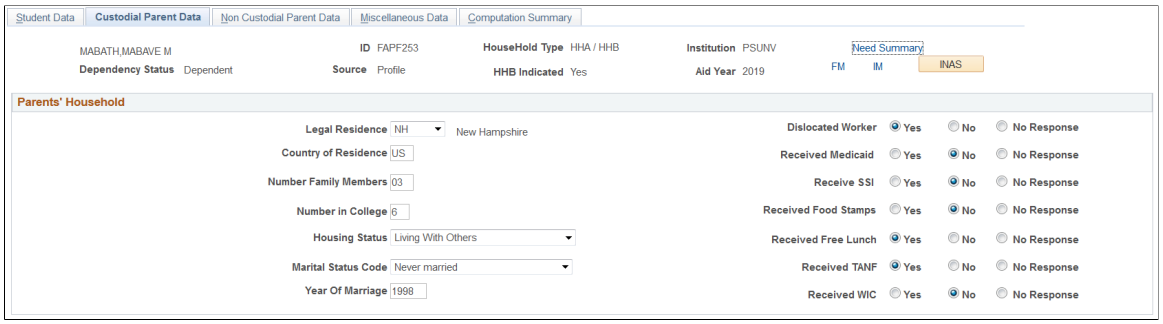
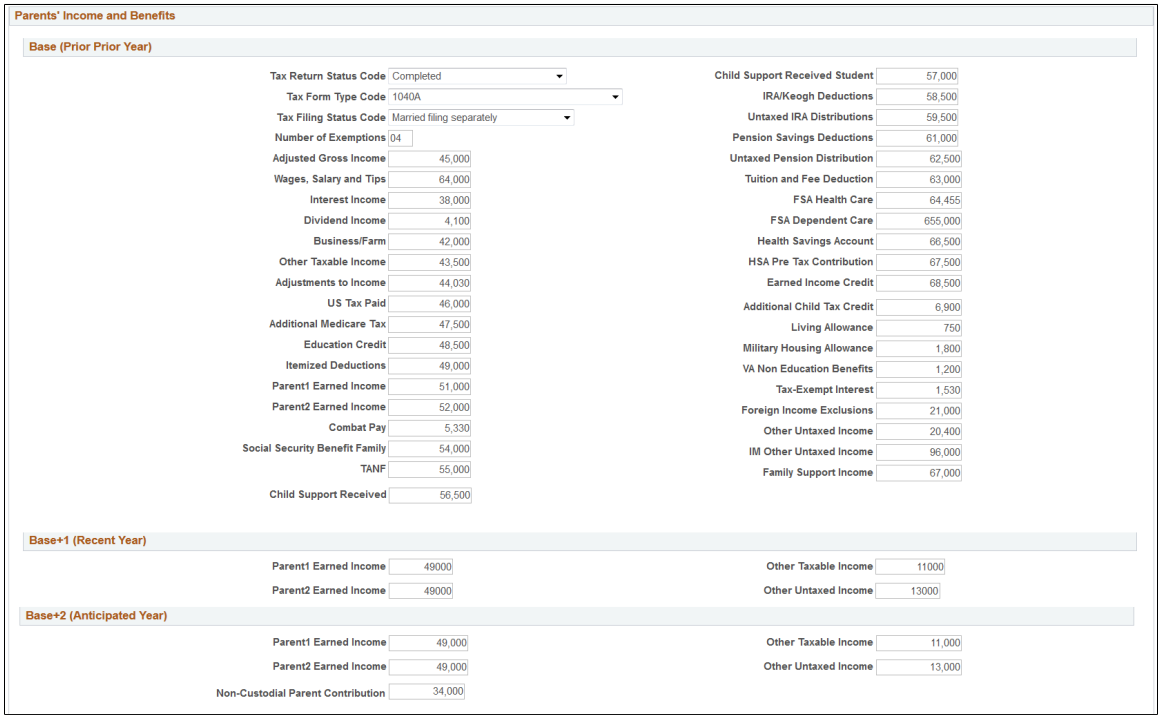



**Image: Maintain Institutional Application, Custodial Parent Data tab (page 2 of 6)**

This example illustrates the fields and controls on the Maintain Institutional Application, Custodial Parent Data tab (page 2 of 6). You can find definitions for the fields and controls later on this page.

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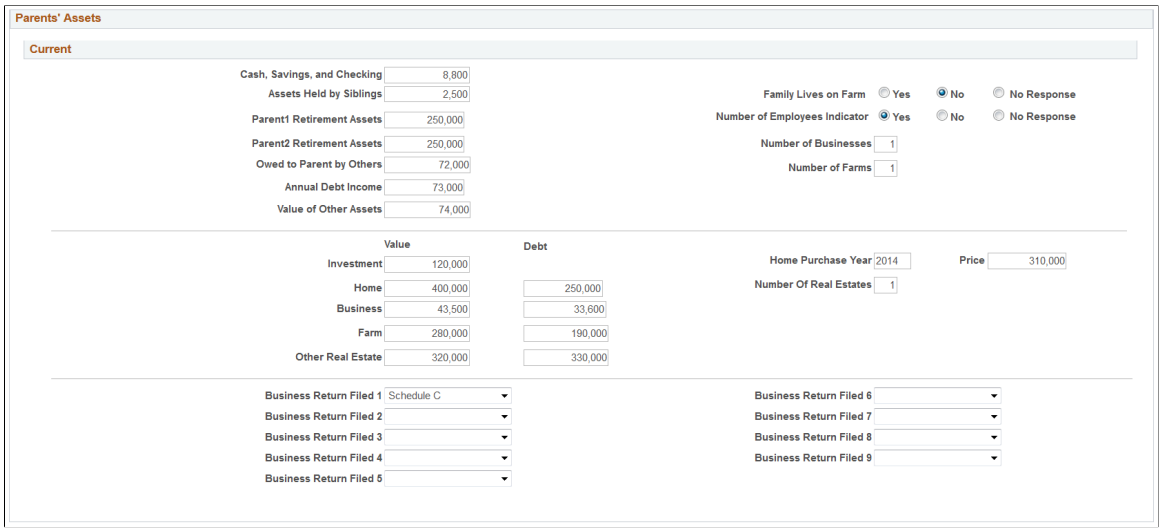
### Image: Maintain Institutional Application, Custodial Parent Data tab (page 3 of 6)

This example illustrates the fields and controls on the Maintain Institutional Application, Custodial Parent Data tab (page 3 of 6). You can find definitions for the fields and controls later on this page.




### Image: Maintain Institutional Application, Custodial Parent Data tab (page 4 of 6)

This example illustrates the fields and controls on the Maintain Institutional Application, Custodial Parent Data tab (page 4 of 6). You can find definitions for the fields and controls later on this page.

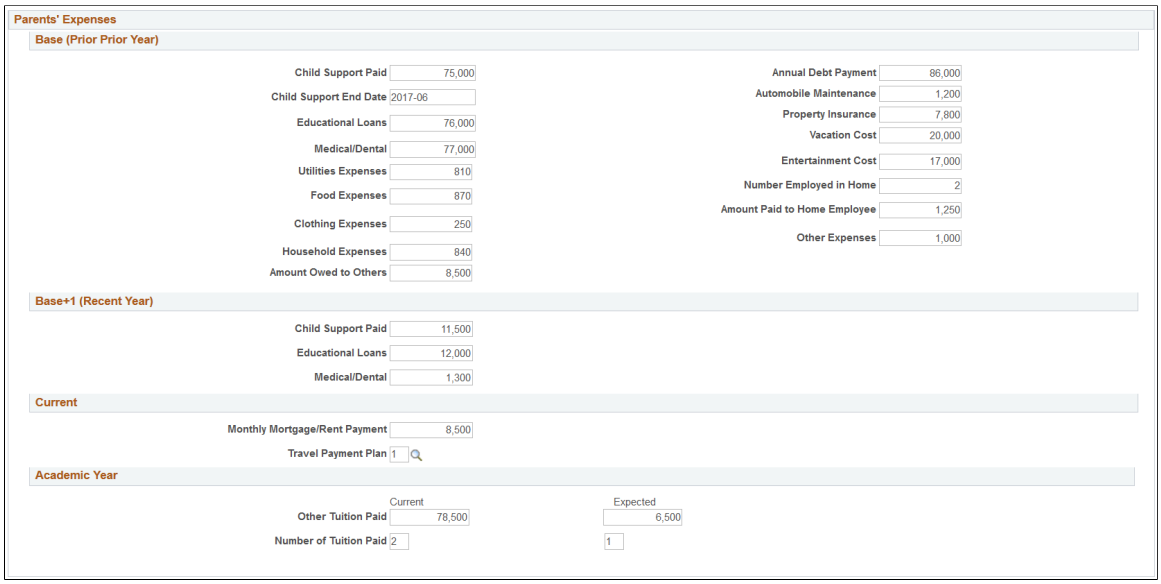



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**Image: Maintain Institutional Application, Custodial Parent Data tab (page 5 of 6)**

This example illustrates the fields and controls on the Maintain Institutional Application, Custodial Parent Data tab (page 5 of 6). You can find definitions for the fields and controls later on this page.

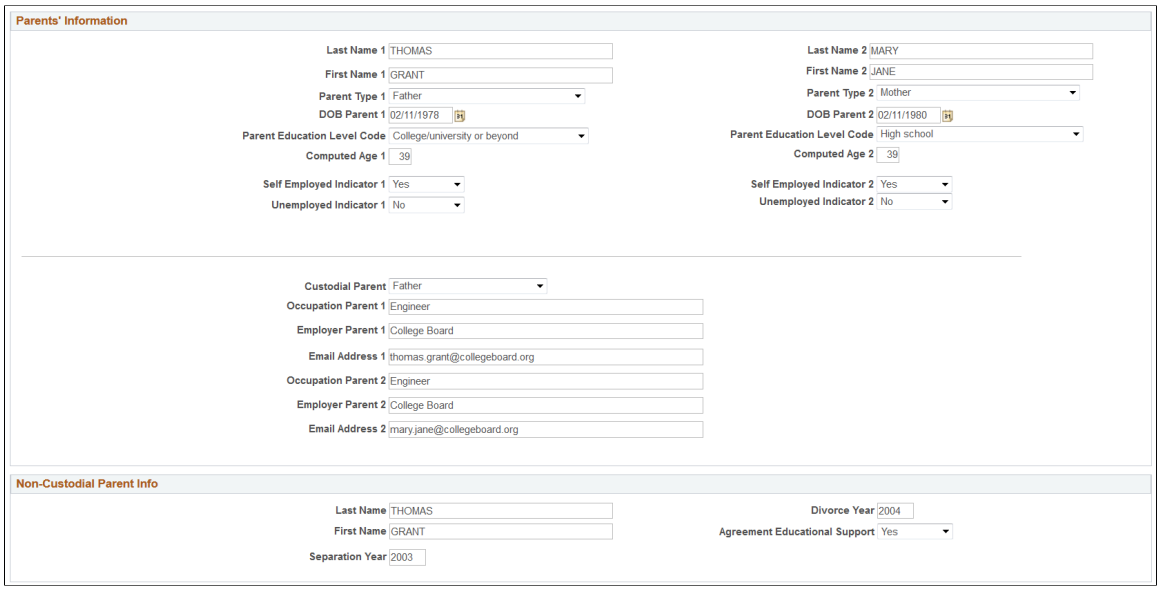
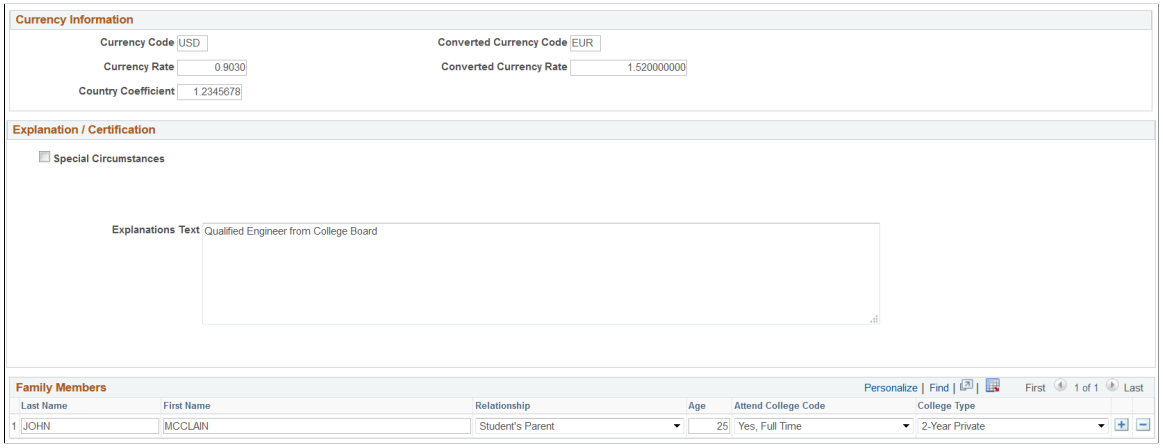



**Image: Maintain Institutional Application, Custodial Parent Data tab (page 6 of 6)**

This example illustrates the fields and controls on the Maintain Institutional Application, Custodial Parent Data tab (page 6 of 6). You can find definitions for the fields and controls later on this page.




## Parent's Household

**Date of Remarriage** Displays the date the parent remarried if the Marital Status Code is *Remarried*.

## Parent's Income and Benefits – Base (Prior Prior Year)

These fields are items from the United States federal income tax forms or data gathered from other applicable sources such as an institutional application or a third party source.

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**Child Support Received Student** Enter child support received by the parents for their dependent children.

## Parent's Income and Benefits – Base+1 (Recent Year)

These fields are items from the United States federal income tax forms or data gathered from other applicable sources such as an institutional application or a third party source.

## Parent's Income and Benefits – Base+2 (Anticipated Year)

These fields are items from the United States federal income tax forms or data gathered from other applicable sources such as an institutional application or a third party source.

**Non-Custodial Parent Contribution** The amount the non-custodial parent has offered to pay for the student's educational expenses.

## Parent's Assets – Current

**Owed to Parent by Others** Enter the amount owed to parents by others

**Annual Debt Income** The annual income realized by the parents from debts owed to them.

**Value of Other Assets** Enter the value of any assets not already reported.

**Price** Enter purchase price of the parents' home.

**Real Estate Purchase Year** Enter purchase year of any other real estate.

**Price** Enter purchase price of any other real estate.

## Parents' Expenses – Base (Prior Prior Year)

Enter the parents' expenses from the Base Year for these fields.

**Other Expenses** Enter the cost of any parental expenses not reported anywhere else on the PROFILE.

## Parents' Expenses – Base+1 (Recent Year)

Enter the parents' expenses from the Recent Year for these fields.

## Academic Year

**Other Tuition Paid** The amount of private elementary/secondary tuition expected to be paid by the parents during the academic year.

**Number of Tuition Paid** The number of children for which private elementary/secondary tuition is expected to be paid by the parents during the academic year.

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### Parents' Information

| | |
|---|---|
| **Parent Type 1** and **Parent Type 2** | Select the type of parent providing information on the PROFILE and assigned to the traditional father (1) or mother (2) position. |
| **Computed Age 1** and **Computed Age 2** | Indicates the calculated age for the parent. |
| **Custodial Parent** | Identifies a dependent student's custodial parent when the biological/adoptive parents are separated, divorced, or were never married. Values include: *Father* and *Mother*. |

### Currency Information

| | |
|---|---|
| **Currency Code** | Enter the currency in which the original data was reported by the student. |
| **Currency Rate** | Enter the currency conversion rate used to process the student's data. |
| **Country Coefficient** | Enter the country coefficient used to process the student's data. |
| **Converted Currency Code** | Enter the original currency converted into US dollars reported by citizens living abroad and Canadians. |
| **Converted Currency Rate** | Enter the rate the student used in converting their currency into US dollars. Reported by citizens living abroad and Canadians. |

### Explanation / Certification

| | |
|---|---|
| **Special Circumstances** | Select this check box to indicate that the student/family has notified the institution of Special Circumstances that may affect the calculation of financial need. The College Board PROFILE also uses the information listed in Section Q to set this indicator flag to inform the institution that modified institutional questions exist for the student. |
| **Explanations Text** | Displays the actual explanations and special circumstances text provided by the filer. |

## Reviewing Non Custodial Parent Information

Bundle 46: Added Non Custodial Parent page. See the “Reviewing Custodial Parent Information” section of this topic for similar screen shots and field descriptions.

Access the Non Custodial Parent Data page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Non Custodial Parent Data).

Please refer to the “Reviewing Custodial Parent Information” section of this topic for similar screen shots and field descriptions. Notable exceptions are in this section.


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### Parents' Expenses – Base (Prior Prior Year)

Enter the parents' expenses from the Base Year for these fields.

**Child Support Paid Student** Enter child support that the non custodial parent paid during the tax year for support of the student.

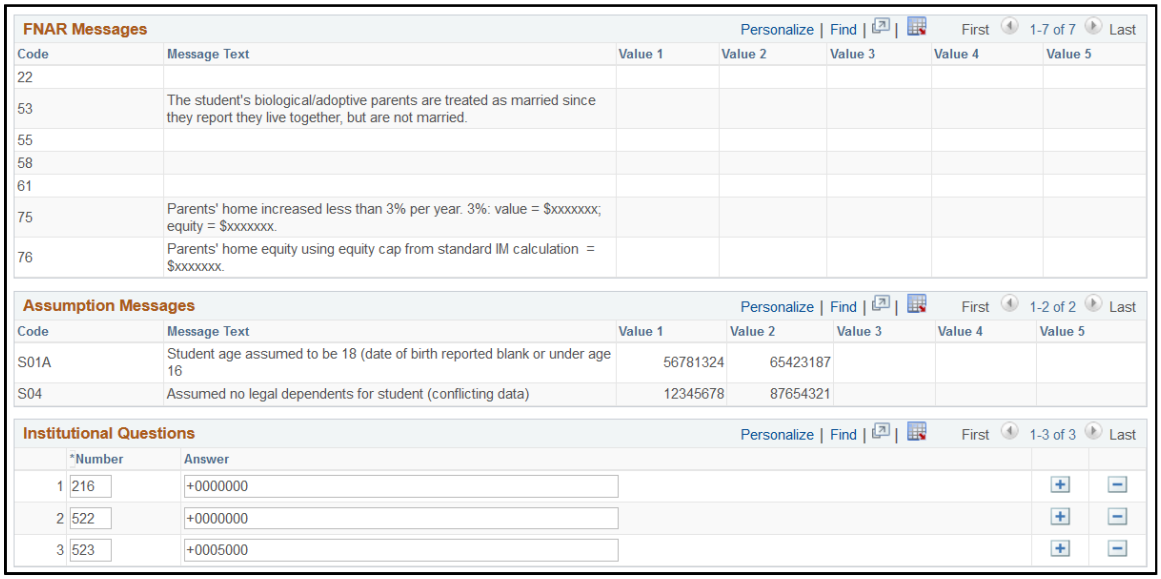
## Reviewing Processing Messages and Institutional Questions

Bundle 46: Moved Currency Information, Explanation/Certification, and Family Member Listing from Miscellaneous Data page to the Parent pages.

Access the Miscellaneous Data page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Miscellaneous Data).

**Image: Maintain Institutional Application, Miscellaneous Data tab**

This example illustrates the fields and controls on the Maintain Institutional Application, Miscellaneous Data tab. You can find definitions for the fields and controls later on this page.



FNAR Messages — Personalize | Find | First 1-7 of 7 Last

| Code | Message Text | Value 1 | Value 2 | Value 3 | Value 4 | Value 5 |
|---|---|---|---|---|---|---|
| 22 | | | | | | |
| 53 | The student's biological/adoptive parents are treated as married since they report they live together, but are not married. | | | | | |
| 55 | | | | | | |
| 58 | | | | | | |
| 61 | | | | | | |
| 75 | Parents' home increased less than 3% per year. 3%: value = $xxxxxxx; equity = $xxxxxxx. | | | | | |
| 76 | Parents' home equity using equity cap from standard IM calculation = $xxxxxxx. | | | | | |

Assumption Messages — Personalize | Find | First 1-2 of 2 Last

| Code | Message Text | Value 1 | Value 2 | Value 3 | Value 4 | Value 5 |
|---|---|---|---|---|---|---|
| S01A | Student age assumed to be 18 (date of birth reported blank or under age 16 | 56781324 | 65423187 | | | |
| S04 | Assumed no legal dependents for student (conflicting data) | 12345678 | 87654321 | | | |

Institutional Questions — Personalize | Find | First 1-3 of 3 Last

| | *Number | Answer |
|---|---|---|
| 1 | 216 | +0000000 |
| 2 | 522 | +0000000 |
| 3 | 523 | +0005000 |

### FNAR Messages

The system displays the Financial Need Analysis Report (FNAR) message number, message text, and message Values 1 through 5, if any. These College Board PROFILE messages inform you about processing exceptions to data received and assumptions that should be taken into consideration when reviewing the institutional application.

### Assumption Messages

The system displays the CSS INAS IM Assumptions alphanumeric code, message text, and value, if any. These are the INAS Assumptions triggered during the need analysis methodology and include the full text of the e-FNAR assumption generated by the PROFILE system and any corresponding values.

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## Institutional Questions

| | |
|---|---|
| **Number** | Number of an application question that the student/family believes warrants further explanation. This number may also refer to a series of additional questions that have been modified for the institution by College Board PROFILE. |
| **Answer** | Answer to the question shown in the Number field. |


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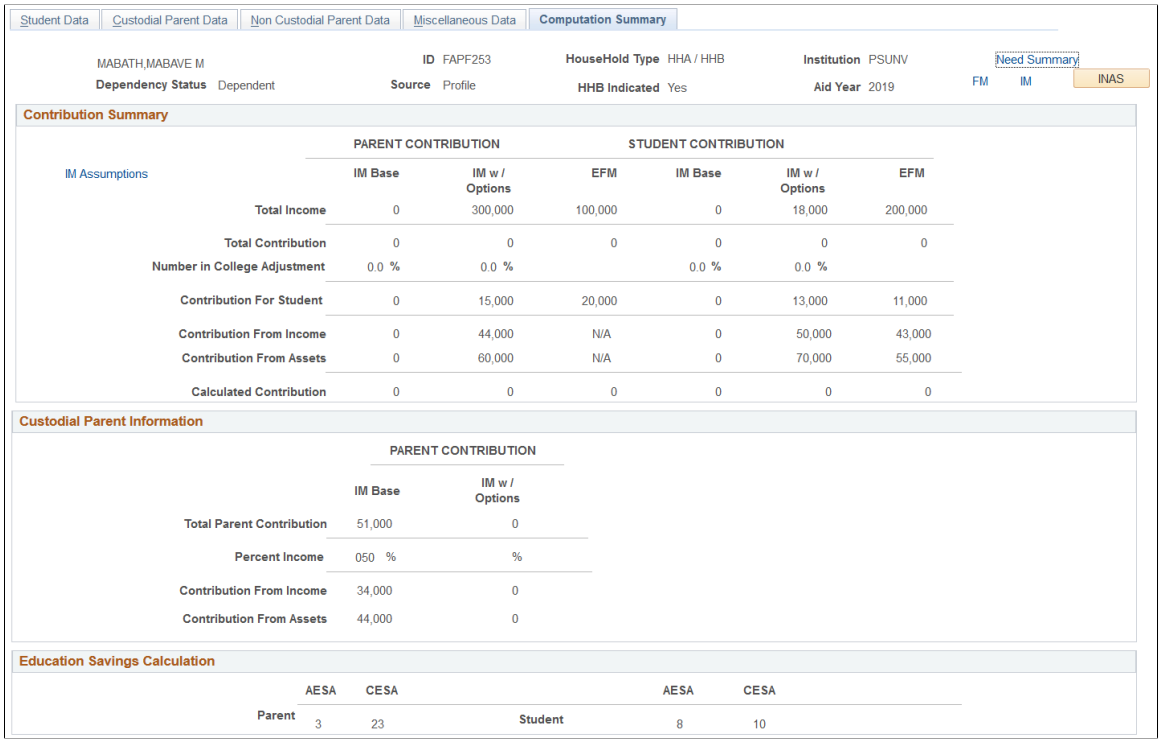
# Reviewing All Computed Data for Student and Parents

Access the Computation Summary page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Computation Summary).

**Image: Maintain Institutional Application, Computation Summary tab (page 1 of 4)**

This example illustrates the fields and controls on the Maintain Institutional Application, Computation Summary tab (page 1 of 4). You can find definitions for the fields and controls later on this page.



Student Data | Custodial Parent Data | Non Custodial Parent Data | Miscellaneous Data | Computation Summary

MABATH,MABAVE M
Dependency Status Dependent
ID FAPF253
Source Profile
HouseHold Type HHA / HHB
HHB Indicated Yes
Institution PSUNV
Aid Year 2019
Need Summary
FM IM INAS

Contribution Summary

| IM Assumptions | PARENT CONTRIBUTION IM Base | PARENT CONTRIBUTION IM w / Options | PARENT CONTRIBUTION EFM | STUDENT CONTRIBUTION IM Base | STUDENT CONTRIBUTION IM w / Options | STUDENT CONTRIBUTION EFM |
|---|---|---|---|---|---|---|
| Total Income | 0 | 300,000 | 100,000 | 0 | 18,000 | 200,000 |
| Total Contribution | 0 | 0 | 0 | 0 | 0 | 0 |
| Number in College Adjustment | 0.0 % | 0.0 % | | 0.0 % | 0.0 % | |
| Contribution For Student | 0 | 15,000 | 20,000 | 0 | 13,000 | 11,000 |
| Contribution From Income | 0 | 44,000 | N/A | 0 | 50,000 | 43,000 |
| Contribution From Assets | 0 | 60,000 | N/A | 0 | 70,000 | 55,000 |
| Calculated Contribution | 0 | 0 | 0 | 0 | 0 | 0 |

Custodial Parent Information

| | PARENT CONTRIBUTION IM Base | PARENT CONTRIBUTION IM w / Options |
|---|---|---|
| Total Parent Contribution | 51,000 | 0 |
| Percent Income | 050 % | % |
| Contribution From Income | 34,000 | 0 |
| Contribution From Assets | 44,000 | 0 |

Education Savings Calculation

| | AESA | CESA | | AESA | CESA |
|---|---|---|---|---|---|
| Parent | 3 | 23 | Student | 8 | 10 |

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### Image: Maintain Institutional Application, Computation Summary tab (page 2 of 4)

This example illustrates the fields and controls on the Maintain Institutional Application, Computation Summary tab (page 2 of 4). You can find definitions for the fields and controls later on this page.

**Income**

| | PARENT CONTRIBUTION | | | STUDENT CONTRIBUTION | | |
|---|---|---|---|---|---|---|
| | IM Base | IM w / Options | EFM | IM Base | IM w / Options | EFM |
| Taxable Income | 0 | 0 | 0 | 0 | 0 | 0 |
| Untaxed Income | 0 | 0 | 0 | 0 | 0 | 0 |
| Adjustments to Income | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Income | 0 | 300,000 | 100,000 | 0 | 18,000 | 200,000 |

**Allowances**

| | PARENT CONTRIBUTION | | | STUDENT CONTRIBUTION | | |
|---|---|---|---|---|---|---|
| | IM Base | IM w / Options | EFM | IM Base | IM w / Options | EFM |
| U.S. Income Tax | 0 | 0 | 0 | 0 | 0 | 0 |
| State Income Tax | 0 | 0 | 0 | 0 | 0 | 0 |
| FICA Taxes | 0 | 0 | 0 | 0 | 0 | 0 |
| Medical/Dental | 0 | 0 | 0 | 0 | 0 | 0 |
| Elementary/Secondary Tuition | 0 | 0 | 0 | 0 | 0 | 0 |
| Employment Allowance | 0 | 0 | 0 | 0 | 0 | 0 |
| Annual Education Savings | 0 | 0 | NA | 0 | 0 | NA |
| Income Protection Allowance/MMA | 0 | 0 | 0 | 0 | 0 | 0 |
| Total Allowances | 0 | 0 | 0 | 0 | 0 | 0 |
| Calculated Available Income | 0 | 0 | 0 | 0 | 0 | 0 |
| Available Income | 0 | 0 | 0 | 0 | 0 | 0 |
| Contribution From Income | 0 | 44,000 | N/A | 0 | 50,000 | 43,000 |

### Image: Maintain Institutional Application, Computation Summary tab (page 3 of 4)

This example illustrates the fields and controls on the Maintain Institutional Application, Computation Summary tab (page 3 of 4). You can find definitions for the fields and controls later on this page.

**Assets**

| | PARENT CONTRIBUTION | | | STUDENT CONTRIBUTION | | |
|---|---|---|---|---|---|---|
| | IM Base | IM w / Options | EFM | IM Base | IM w / Options | EFM |
| Cash Savings | 0 | 0 | 0 | 0 | 0 | 0 |
| IRA Value | NA | NA | 0 | 0 | 0 | 0 |
| Home Equity | 0 | 0 | 0 | 0 | 0 | 0 |
| Real Estate/Investment Equity | 0 | 0 | 0 | 0 | 0 | 0 |
| Adjusted Business/Farm Value | 0 | 0 | 0 | 0 | 0 | 0 |
| Sibling's Assets/Prepaid Tuition | 0 | 0 | NA | NA | NA | NA |
| Value of Trusts | 0 | 0 | NA | 0 | 0 | 0 |
| Net Worth | 0 | 0 | 0 | 0 | 0 | 0 |
| Emergency Reserve Allowance | 0 | 0 | NA | 0 | 0 | NA |
| Cumulative Education Savings | 0 | 0 | NA | 0 | 0 | NA |
| Low Income Asset Allowance | 0 | 0 | NA | 0 | 0 | NA |
| Discretionary Net Worth | 0 | 0 | 0 | 0 | 0 | 0 |
| Asset Protection Allowance | NA | NA | 0 | NA | NA | 0 |
| Conversion Percentage | NA | NA | 0.0 % | NA | NA | 0.0% |
| Income Supplement | NA | NA | 0 | NA | NA | 0 |
| Contribution From Assets | 0 | 60,000 | N/A | 0 | 70,000 | 55,000 |


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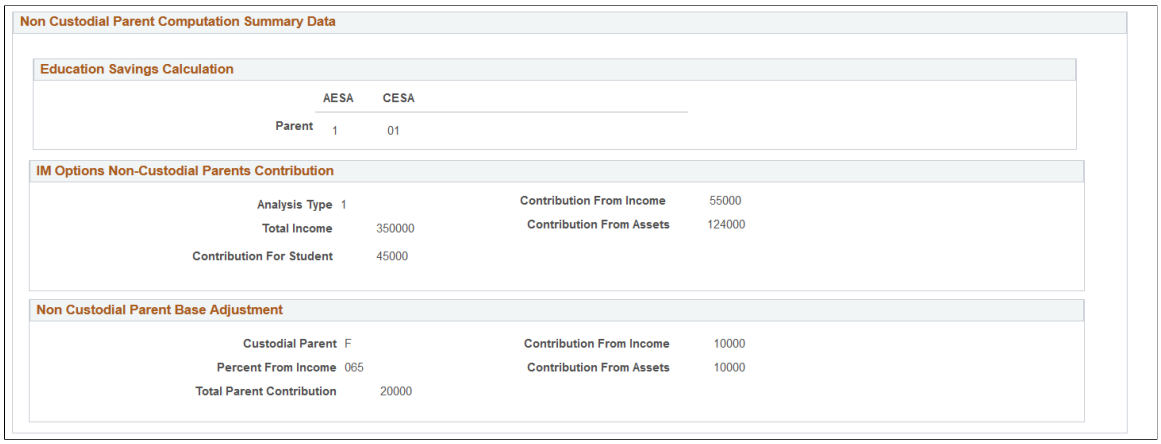
**Image: Maintain Institutional Application, Computation Summary tab (page 4 of 4)**

This example illustrates the fields and controls on the Maintain Institutional Application, Computation Summary tab (page 4 of 4). You can find definitions for the fields and controls later on this page.




This page is designed to display computed need analysis results based on both the parent's and student's information. Therefore, the page displays a Parent Contribution Section and a Student Contribution Section. The following sections describe what each column represents.

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**Note:** Computation tables display no intermediate values until the INAS calculation is called using batch or online calculation.

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**Note:** To more closely align interim calculation results with the Estimated Federal Methodology (EFM) computation worksheets from the College Board, the Computation Summary page displays an *N/A* value for several fields. For parents of dependent students and independent students with dependents, EFM calculations display *N/A* for From Income, From Assets, Total Contribution - Income and Total Contribution - Assets fields.

---

## Contribution Summary

The PARENT CONTRIBUTION section displays three columns: IM Base, IM w/Options, and EFM.

- The IM Base column displays standard base INAS calculations. Although the IM Base calculation is not delivered as part of the PROFILE record, Oracle supports calculating the College Board's IM Base calculation if INAS is invoked after the initial load of the PROFILE record.
- The IM w/Options column is the result of using the institutional options that you set up when you defined your institutional methodology. IM w/Options is delivered as part of the PROFILE record.
- The EFM column displays the estimated federal methodology amount. Financial aid administrators are reminded that the EFM is always estimated and never official.

The STUDENT CONTRIBUTION section displays three columns: IM Base, IM w/ Options, and EFM.

- The IM Base column displays standard base INAS calculations. Although the IM Base calculation is not delivered as part of the PROFILE record, Oracle supports calculating the College Board's IM Base calculation if INAS is invoked after the initial load of the PROFILE record.
- The IM w/Options column is the result of using the institutional options that you set up when you defined your institutional methodology. IM w/Options is delivered as part of the PROFILE record.

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- The EFM column displays the estimated federal methodology amount. Financial aid administrators are reminded that the EFM is always estimated and never official.

| | |
|---|---|
| **Total Income** | Indicates the custodial parent's total contribution for the student from the base IM computation. |

## Custodial Parent Information

The system displays the calculations for Total Income, Total Contribution, Number in College Adjustment, Contribution for Student, contribution From Income, and contribution From Assets for Parent's Contribution and Student's Contribution.

For the PARENT CONTRIBUTION IM Base:

| | |
|---|---|
| **Percent Income** | Indicates the custodial parent's percentage of total parents income from the base IM computation. |
| **Contribution From Income** | Indicates the custodial parent's contribution from income for the student from the base IM computation. |
| **Contribution From Assets** | Indicates the custodial parent's contribution from assets for the student from the base IM computation. |

For the PARENT CONTRIBUTION IM w/Options

| | |
|---|---|
| **Percent Income** | Indicates the custodial parent's percentage of total parental income from the option IM computation. |
| **Contribution From Income** | Indicates the custodial parent's contribution from income for the student from the option IM computation. |
| **Contribution From Assets** | Indicates the custodial parent's contribution from assets for the student from the options IM computation. |

## Education Savings Calculations

The system displays the Parent's and the Student's Annual Education Savings Allowance (AESA) and Cumulative Education Savings Allowance (CESA) calculations. These are PROFILE specific calculated values used in INAS calculations for Institutional Methodology.

## Income

The system displays the calculations for Taxable Income, Untaxed Income, Adjustments to Income, and Total Income for Parent's Contribution and Student's Contribution.

## Allowances

The system displays the calculations for U.S. Income Tax, FICA Taxes, Medical/Dental, Elementary/Secondary Tuition, Employment Allowance, Annual Education Savings, Income Protection Allowance/MMA, Total Allowances, Calculated Available Income, and Available Income for Parent's Contribution and Student's Contribution. The Total Contribution - Income amount is the sum of all the fields in the Allowances section.


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### Assets

The system displays the calculations for Cash Savings, IRA Value, Home Equity, Real Estate/Investment Equity, Adjusted Business/Farm Value, Sibling's Assets/Prepaid Tuition, Value of Trusts, and Net Worth for Parent's Contribution and Student's Contribution.

The system displays the calculations for Emergency Reserve Allowance, Cumulative Education Savings, Low Income Asset Allowance, Discretionary Net Worth, Asset Protection Allowance, Conversion Percentage, and Income Supplement for Parent's Contribution and Student's Contribution. The Total Contribution - Assets amount is the sum of all the fields in the Assets section.

### Non Custodial Parent Computation Summary Data

Bundle 46: Added Non Custodial Parent Computation Summary Data section.

- Education Saving Calculation – Displays the non custodial parents' Annual Education Savings Allowance (AESA) and Cumulative Education Savings Allowance (CESA) calculations. These are PROFILE specific calculated values used in INAS calculations for Institutional Methodology.
- IM Options Non Custodial Parents Contribution – Displays a logical grouping for the Non Custodial Parent Contribution results under the IM options computation.
- Non Custodial Parent Base Adjustment – Displays a logical grouping for the data elements for the biological/adoptive parent base computation results.

# Loading and Managing PROFILE Records

Before you begin loading applications, define all PROFILE data load parameters and set up your run control options using the Financial Aid Run Controls page. This section discusses how to:

- Load PROFILE records.
- View PROFILE load summaries.
- Manage suspended PROFILE records.
- Delete PROFILE records.

**Note:** Oracle supports the CSS / Financial Aid PROFILE File Layout (with corresponding school year) for PROFILE data received from the College Board.

## Pages Used to Load and Manage PROFILE Records

**Note:** Oracle supports two academic years of PROFILE data loads.

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Load Records | SFA_PF_RUNCNTL | Financial Aid, File Management, PROFILE Import, Load Records, Load Records | Import PROFILE records into the database. |

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| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Load Summary | SFA_PF_IN_LOAD | Financial Aid, File Management, PROFILE Import, Load Summary, Load Summary | From the PROFILE Staging Table, view the load status and other details of each record of a PROFILE load instance. |
| Suspense Management | SFA_PF_SUSP_CNTRL | Financial Aid, File Management, PROFILE Import, Suspense Management, Suspense Management | Process suspended or skipped PROFILE records. |

## Loading PROFILE Applications

Every time the PROFILE Load process is run, all records are inserted into the PROFILE Staging tables. Depending on your Search/Match, Add Level, and Suspense Level Rules, the student's record is inserted into either the Institutional Application (IM) tables or managed through the PROFILE Suspense Management component. As an example, your school may only admit 60 percent of those students who actually list your School Code on the PROFILE application. Instead of loading every student who has listed your school code on the PROFILE application, you can load only those students officially admitted.

Bundle 46: Added the “Load HHB Files” option.

Access the Profile Load page (Financial Aid, File Management, PROFILE Import, Load Records, Load Records).

**Load Option**

Select the Load Option.

- Load Only — Select this option to only load the specified PROFILE files. No suspended or skipped records are reevaluated for loading.
- Recycle Only — Select this option to only reevaluate suspended PROFILE records for loading.
- Load and Recycle — Select this option to both load the specified PROFILE files and reevaluate suspended PROFILE records.
- Load Unprocessed — Select this option to load all Unprocessed PROFILE records in the PROFILE Staging table. This skips records with a status of "Error Encountered. "

**Add Action**

Select the action to be taken for rows that can be loaded.

- Add New Record Only — Add ONLY new PROFILE records into the system; do not overwrite existing PROFILE records.

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- Overwrite Existing Record — Add new PROFILE records into the system AND update existing PROFILE records.

**Load HHB Files** (load non custodial parent data files)

Select *Yes* to load non custodial parent data files.

**Run Option**

Select one of the following:

- *Single:* Load only a single XML file
- *File List Driven:* If you have multiple XML files to load, you can combine them into a single load instance by using File List.

  Create a .TXT file that includes a list of the multiple XML files you want to load and their corresponding source path. The PROFILE Import process reads the .TXT file and searches for the listed XML files using the path defined in the file list. If an error is found for a file in the list file, the PROFILE Import process loads the previous files into the database and then stops processing. The files after the file in error are not processed. Use the message log to view the files that the system loaded successfully or unsuccessfully as well as any corresponding error messages.

  **Note:** The Process Monitor can display the run status as *Success* even when a problem occurs with the load process. To determine whether all files in a file list were successfully processed, open the date-stamped list file and verify that its content does not reflect an error in processing.

**Note:** Each PROFILE XML file must have a unique file name. If you attempt to load a record with a duplicate file name, the PROFILE load process fails.

### Related Links

Page Used to Set Up PROFILE Data Load Parameters
Setting Up PROFILE Data Load Parameters
Overriding Expected Family Contribution (EFC)

## Viewing PROFILE Load Summaries

Bundle 46: Added the “HouseHold Type” and “Merged HHA/HHB” fields.

The PROFILE Load Summary component displays the load status and other details of each record of the file selected to review from the PROFILE Staging Table.

Access the PROFILE Load Summary (Financial Aid, File Management, PROFILE Import, Load Summary , Load Summary).

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## PROFILE Batch Detail Records tab

**Image: PROFILE Load Summary page, Batch Detail Records tab**

This example illustrates the fields and controls on the PROFILE Load Summary page, Batch Detail Records tab. You can find definitions for the fields and controls later on this page.

Load Summary

Load Instance 43

Created Date 2017-05-31

PROFILE Load Batch Detail — Personalize | Find | First 1-30 of 30 Last

PROFILE Load Batch Detail | Student Information | Load Information | PROFILE Staging Table Data

| CSS ID | Load Status | ID | Student's Admit Level | Award Year | Application Type | Student Record Type | HouseHold Type | Merged HHA / HHB |
|---|---|---|---|---|---|---|---|---|
| 2009159 | Processed | FA1006 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | | HHB | Yes |
| 2049841 | Processed | FA1033 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | Original Data | HHB | Yes |
| 2062400 | Processed | FA1016 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | | HHB | Yes |
| 2062900 | Processed | FA1032 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | Duplicate Record | HHB | Yes |
| 2064037 | Processed | FA1024 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | Duplicate Record | HHB | Yes |
| 2066663 | Processed | FA1013 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | Duplicate Record | HHB | Yes |
| 2081116 | Processed | FA1014 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | Original Data | HHB | Yes |
| 2081989 | Processed | FA1039 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | Duplicate Record | HHB | Yes |

**CSS ID**

Displays the unique identifier assigned to student by the PROFILE system.

**Load Status**

Displays the Load Status of the record.

- *Unprocessed* — Record is loaded to PROFILE Staging table but is not loaded to Inst App tables.
- *Suspended* — Record failed Search/Match or PROFILE Add Level load rules.
- *Processed* — Record is loaded to application table.
- *User Delete* — PROFILE Application Record has been deleted by the user.
- *Discarded* — Record is not loaded because it is a Noncustodial PROFILE or Registration Only record.
- *Skipped* — Record meets Search/Match and PROFILE Add Level load rules, but there is an existing record and the load parameter is "Add New Record Only" or the Review Status is Complete on the Packaging Status Summary.
- *Error Encountered* — Scenarios in which status is set include: Data Load Parameters not set, missing or mismatched Aid Year, SSN invalid, SQL Error, and invalid data in Search/Match fields. Status can be set by user manually when an errant record is identified on the PROFILE XML file.

**Student's Admit Level**

Displays the student's admit level as associated with Academic Program Statuses in the Defining Application Processing


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Options, Working with Applications, Reviewing Admit Level Associations page.

The values are:

- *5 - Accepted/Continuing*
- *4 - Admitted*
- *3 - Applied/Pending*
- *2 - Inactive*
- *1 - Has Not Applied*

**Application Type**

Displays the PROFILE Application Type

- *Domestic PROFILE*
- *Noncustodial PROFILE*
- *Registration Only record*
- *International PROFILE*

**Student Record Type**

Displays the CSS Student Record Type

- *Original Data*
- *ACR* (Additional College Request)
- *Duplicate Record*

**HouseHold Type**

Displays the type of PROFILE application received:

- *HHA* – custodial parent application received.
- *HHB* – non custodial parent application received.

**Merged HHA/HHB**

Displays if custodial parent and non custodial parent PROFILE applications have been loaded:

- *Yes* – Both the HHA (custodial parent) and HHB (non custodial parent) PROFILE applications have been loaded.
- *No* – Only one parent PROFILE application has been loaded: HHA (custodial parent) *or* HHB (non custodial parent) as indicated by the HouseHold Type field.

**Update Status to Error**

Click this button to set the Load Status from *Unprocessed* to *Error Encountered.* Records with a Load Status of *Error Encountered* can be skipped during subsequent PROFILE Load attempts.

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## Student Information tab

**Image: PROFILE Load Summary page, Student Information tab**

This example illustrates the fields and controls on the PROFILE Load Summary page, Student Information tab. You can find definitions for the fields and controls later on this page.

Load Summary

Load Instance 43

Created Date 2017-05-31

PROFILE Load Batch Detail — Personalize | Find | First 1-30 of 30 Last

PROFILE Load Batch Detail | Student Information | Load Information | PROFILE Staging Table Data

| CSS ID | Load Status | ID | Student's Admit Level | Award Year | Application Type | Student Record Type | HouseHold Type | Merged HHA / HHB |
|---|---|---|---|---|---|---|---|---|
| 2009159 | Processed | FA1006 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | | HHB | Yes |
| 2049841 | Processed | FA1033 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | Original Data | HHB | Yes |
| 2062400 | Processed | FA1016 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | | HHB | Yes |
| 2062900 | Processed | FA1032 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | Duplicate Record | HHB | Yes |
| 2064037 | Processed | FA1024 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | Duplicate Record | HHB | Yes |
| 2066663 | Processed | FA1013 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | Duplicate Record | HHB | Yes |
| 2081116 | Processed | FA1014 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | Original Data | HHB | Yes |
| 2081989 | Processed | FA1039 | 5 - Accepted/Continuing | 2019 | Domestic PROFILE | Duplicate Record | HHB | Yes |

**National ID** For United States students, displays the Social Security Number. For non-United States students, displays the student's country and National Identifier or default National Identifier.

**Dependency Status** Displays *Dependent* or *Independent*

**Financial Aid Status**

- *First-time* – Either a first-time applicant entering student or a first-time applicant, continuing student
- *Renewal Applicant* — Continuing student

## Load Information tab

**Image: PROFILE Load Summary page, Load Information tab**

This example illustrates the fields and controls on the PROFILE Load Summary page, Load Information tab. You can find definitions for the fields and controls later on this page.

Load Summary

Load Instance 43

Created Date 2017-05-31

PROFILE Load Batch Detail — Personalize | Find | First 1-30 of 30 Last

PROFILE Load Batch Detail | Student Information | Load Information | PROFILE Staging Table Data

| CSS ID | Load Status | Suspend Reason | Skip Reason | HouseHold Type |
|---|---|---|---|---|
| 2009159 | Processed | | | HHB |
| 2049841 | Processed | | | HHB |
| 2062400 | Processed | | | HHB |
| 2062900 | Processed | | | HHB |
| 2064037 | Processed | | | HHB |
| 2066663 | Processed | | | HHB |
| 2081116 | Processed | | | HHB |
| 2081989 | Processed | | | HHB |

**Suspend Reason**

- *FA Term Not Built*– At least one FA Term record for the corresponding Year does not exist.


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- *Manual*– Load Status set to *Suspended* manually by the user.
- *Non-Unique Student ID Found* – More than one student meets the Search/Match criteria.
- *Packaging Completed*– Student's Aid Processing Status is *Packaging Completed*.
- *Student ID not Found*– No student met the specified Search/Match Rules criteria.
- *Student Not Admitted*– Student met the Maximum Search/Match Level but failed the Admit Level.
- *Student not at Load Level* – Student ID found, but student is not at the designated Admit Level.

**Skip Reason**

- *Final Review Flag Set* — Review Status is Complete
- *Student Already Exists* — PROFILE Load encountered a matching ID despite the Add Action = Add New Record Only; therefore, the student is suspended.
- *Student Not at Suspend Level* — Student fails Suspend Level rule.
- *Manual*—- Load Status set to Skipped manually by the user

**Alternate Institution**

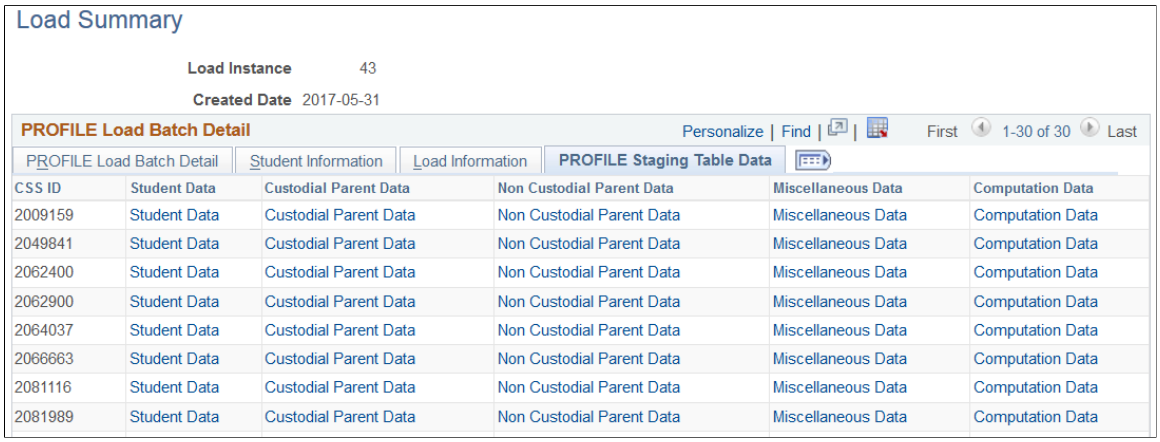
Displays the Alternate Institution for PROFILE records that were deleted by the user (status of *User Delete*) and reloaded ( status of *Processed*) to a different Institution than was originally loaded.

## PROFILE Staging Table Data tab

This tab displays links to view PROFILE data as it is received from the College Board.

**Image: PROFILE Load Summary page, PROFILE Staging Table Data**

This example illustrates the fields and controls on the PROFILE Load Summary page.

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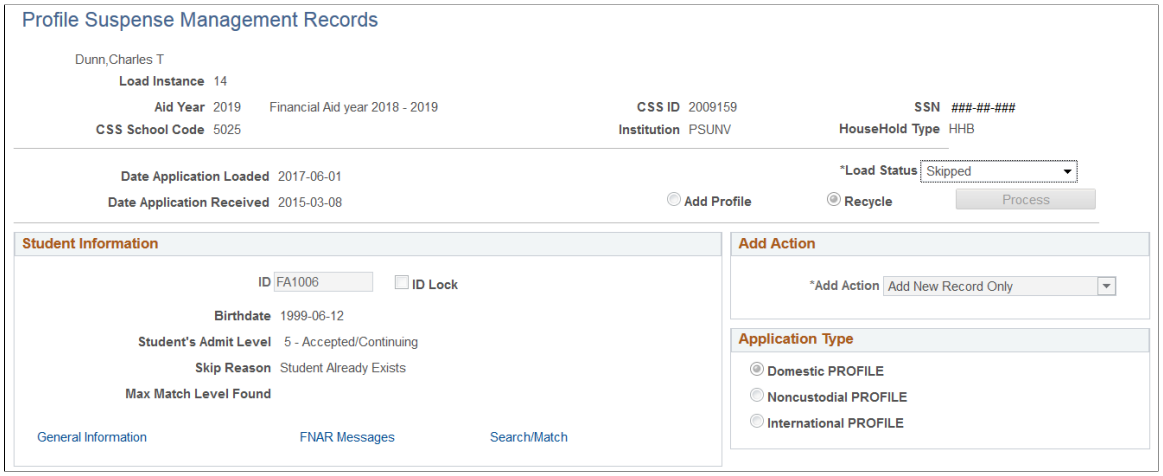
## Managing Suspended PROFILE Records

Access the Profile Suspense Management Records page (Financial Aid, File Management, PROFILE Import, Suspense Management, Profile Suspense Management).

**Image: PROFILE Suspense Management Records page**

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




Use the PROFILE Suspense Management Records page to review and manage unmatched, unprocessed, and deleted PROFILE records.

**Alternate Institution**

Enter an Alternate Institution code to reload a user-deleted PROFILE record (Load Status is *User Delete*) into the Institutional (IM) Application tables with a new Institution value.

See Deleting PROFILE Records.

**Load Status**

Displays the current status of the record. If the Load Status is *Skipped* or *Suspended,* the field can be updated. If the status is *Discarded* or *User Delete*, the field is view only.

---

**Note:** If you update the Load Status to *Discarded,* the Load Status cannot be updated again.

---

**Add Profile**

Select this radio button and click the Process button to load a suspended PROFILE record into the application table.

---

**Note:** Selecting Add Profile supersedes *any* Profile Routing Control setup. Add Profile always adds the student into the Institutional Application tables. Even if the student fails Search/Match, because the Add Profile option is selected, the student is added into the Institutional Application tables with a new system-generated ID.

---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**Note:** Please refer to the decision matrix after the attribute descriptions for this page to see how the ID, ID Lock, Add Profile, and Recycle attributes work together.

**Recycle**

Select this radio button and click the Process button to have the PROFILE records reconsidered by the PROFILE load process using the Profile Routing Control setup.

**Note:** Selecting Recycle always calls Search/Match. If Search/Match fails, then the "Search/Match No Match Action" defined in the Profile Routing Control is interrogated to determine the next step:
If "Allow Add if Eligible", a new ID is created if the student meets the criteria for adding a new record.
If "Suspend", the student's record remains in the Suspense Management table.

**Note:** Please refer to the decision matrix after the attribute descriptions for this page to see how the ID, ID Lock, Add Profile, and Recycle attributes work together.

**Process button**

After selecting the Add PROFILE or Recycle radio button, click this button to invoke a real-time action to load the PROFILE record into the Institutional Application (IM) tables.

**Add Action**

Select the action to be taken for rows that can be loaded.

- Add New Record Only — Add ONLY new PROFILE records into the system; do not overwrite existing PROFILE records.
- Overwrite Existing Record — Add new PROFILE records into the system AND update existing PROFILE records.

**ID**

Select the ID to use to load the PROFILE record into the application tables.

**Note:** Please refer to the decision matrix after the attribute descriptions for this page to see how the ID, ID Lock, Add Profile, and Recycle attributes work together.

**ID Lock**

Select this check box after the selecting the ID to force the PROFILE load process to use the ID as the matching person.

**Note:** Please refer to the decision matrix after the attribute descriptions for this page to see how the ID, ID Lock, Add Profile, and Recycle attributes work together.

**Max Match Level Found**

Displays the highest Search Match Level rule that was met for this PROFILE record.

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**General Information** Click this link to display general information about the student.

**FNAR Messages** Click this link to display FNAR messages.

**Search/Match** Click this link to access the Person Search Match page and search for a student ID to match to the PROFILE record.

The following table is a decision matrix explaining the results of different combinations of the ID, ID Lock, Add, and Recycle attributes on this page.

| *ID* | *ID Lock* | *Add* | *Recycle* | *Treatment* |
|---|---|---|---|---|
| blank | unchecked | selected | not selected | Call Search/Match. Assign record new ID if no match found. Record added. |
| blank | unchecked | not selected | selected | Call Search/Match. Based on PROFILE Routing Control parameters, record added or suspended. If added, assign new ID if no match found. |
| blank | checked | selected | not selected | Search/Match not called. Assign record new ID, warning given. Record added. |
| blank | checked | not selected | selected | Search/Match not called. Based on PROFILE Routing Control parameters, record added or suspended. If added, assign new ID, warning given. |
| not blank | unchecked | selected | not selected | Warning given before calling Search/Match. Record assigned new ID if no match found. Record added. |
| not blank | unchecked | not selected | selected | Warning given before calling Search/Match. Based on PROFILE Routing Control parameters, record added or suspended. If added, record assigned new ID if no match found. |
| not blank | checked | selected | not selected | Search/Match not called. Record added with specified ID. |

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| ID | ID Lock | Add | Recycle | Treatment |
|---|---|---|---|---|
| not blank | checked | not selected | selected | Search/Match not called. Based on PROFILE Routing Control parameters, record added or suspended. If added, record assigned with specified ID. |

# Reviewing Institutional Correction Audits

This section discusses how to view institutional correction audits.

## Page Used to Review Institutional Correction Audits

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Institutional Application Correction Audits | INST_CORR_AUDITS | Financial Aid, Institutional Application Data, View Correction Audits, Institutional Application Correction Audits | Review corrections made to a student's institutional application using the Maintain Institutional Application component. This page enables you to track certain limited changes that you make to a student's institutional application data. |
| PROFILE Application Delete | SFA_PF_DELETE | Access the PROFILE Application Delete page (Financial Aid, File Management, PROFILE Import, Delete PROFILE Records, PROFILE Delete Utility, PROFILE Application Delete). | Use this page to delete PROFILE applications. |

## Viewing Institutional Correction Audits

Access the Institutional Application Correction Audits page (Financial Aid, Institutional Application Data, View Correction Audits, Institutional Application Correction Audits).

The system displays the student's name, ID, Aid Year, and Institution.

The system displays the following information relating to a change made to a student's institutional application (PROFILE, Institutional, or Canadian): User ID of the person who made the change, the Date/Time of the change, the application Source for the Old Value, the record and field name of what changed, the original data—Old, and the changed data—New.

Changes are listed in reverse chronological order, by Record Name, then Field Name.

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## Deleting PROFILE Records

There are rare cases when a PROFILE record is accidentally loaded either to another student or to the wrong Institution. There can be also cases where you specified the wrong EmplID (or similar severe error) while manually adding a PROFILE application to the Institutional Application tables. You can use the PROFILE Application Delete process to delete these erroneously loaded records. Running this process deletes all corresponding Institutional application tables for the selected student for the specified Aid Year and Institution.

Access the PROFILE Application Delete page (Financial Aid, File Management, PROFILE Import, Delete PROFILE Records, PROFILE Delete Utility, PROFILE Application Delete).

You may delete PROFILE records for multiple students within an Aid Year in a single run of this process. This removes PROFILE records from the PROFILE Application Records table.

The corresponding staging table data is not deleted and is assigned a new Load Status of *User Delete*.

Using PROFILE Suspense Management, you can subsequently assign user-deleted PROFILE records (those with a Load Status of *User Delete*) to:

- a different ID within the same Institution.

  **Note:** If you assign a user-deleted PROFILE record to a different ID, be aware that the target ID's CSS ID is updated with the CSS ID of the source PROFILE XML record, and the target ID is always associated with that CSS ID moving forward. Also, the *Update Biographic/Demographic data* attribute on the PROFILE Data Load Parameters setup impacts whether or not the target ID's bio/demo data is updated in Campus Community.

- a different Institution.

  When you assign a PROFILE record to a different Institution, you designate an Alternate Institution, which is used as the key Institution when accessing the record in the Maintain Institutional Application component.

  **Note:** If you attempt to view or retrieve the original PROFILE record using the PROFILE Load Summary search, you must specify the original Institution to which that PROFILE record was loaded. However, the Load Summary > Load Information tab displays the (target) Alternate Institution.

Once a user-deleted PROFILE record is successfully processed (loaded into the Institutional Application tables) for the corresponding Institution and Aid Year, that PROFILE record is no longer accessible using PROFILE Suspense Management.

### Related Links

Managing Suspended PROFILE Records


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