Viewing ISIR Pages

This guide will cover:

- Navigating to the ISIR Pages (Correct 20xx-20xx ISIR records – where xx is the value of the aid year, i.e., 2015-2016) and the Hyperlinks on those pages.
- Understanding basic Financial Aid Data Elements available on the ISIR pages (Correct 20xx-20xx ISIR records).

Step One

Navigate to the following breadcrumb:

ISIR’s are Aid Year specific. Be sure to select the correct Aid Year.
Step Two
Complete the following fields in the Search Criteria:

1. Enter Student ID
2. Enter Academic Institution – UCINN
3. Click on Search

Step Three
View ISIR Data

- ISIR Data is located under four tabs with the top section repeated on each tab.
  - EFC
  - Transaction/Status
  - Hyperlinks
  - Add a Correction
  - INAS
  - Effective Date
Step Four
View ISIR Data Tab 1 - Student Information Bio and Background

Viewing the top section of the Student ISIR data: Note that the left hand side of the Bio/Demo Data is information from Catalyst and the right hand side is the student information from the FAFSA application.

In the Student Data – Background Info section: There are several items of interest here for the Financial Aid Staff. Examples: Selective Service Information and whether the student has indicated that they already have their first Bachelor’s degree.
Step Five
View ISIR Data Tab 1 Student Information – Student Financial Information

Viewing the Student’s Financial Information section will indicate the types of Tax Returns that have been filed, whether they are receiving federal benefits, Untaxed Income and the student’s Adjusted Gross Income, Taxes paid and exemptions claimed.
Step Six
View ISIR Data Tab 1 Student Information – Dependency Status and Independent Student Information

In the Dependency Status Information section you will see the student’s answer’s to the dependency questions, their marital status, citizenship status and their determined Dependency Status.

Under the Student Data – Independent Student Information section, you can view the independent student’s number of family member and number in college.
Step Seven
View ISIR Data Tab 2 Parent Information – Parent Data Background Information

Basic Biographical information concerning the Parents, highlighting verification items like Number in Family and Number in College.
Step Eight

View ISIR Data Tab 2 Parent Information – Parent Data Financial Information

Parent information in this section relating to Taxable and Untaxed Income. Highlighted area showing the Adjusted Gross Income, Taxes Paid and Exemptions indicated on the Parent’s Tax return, along with total Untaxed Income and Additional Financial support.

This information should be viewed along with the data on Tab 3 indicating whether or not the information is coming from the IRS database as a result of using the Data Retrieval Tool (DRT).
Step Nine
View ISIR Data Tab 3 Assumptions\School Codes – Miscellaneous Information

Highlighted sections show where Dependency Override checkbox is located along with Cancellation of the Dep Override, and Homeless indicator.

Box indicating that a Professional Judgment was done on this student’s ISIR is also highlighted.
Step Ten
View ISIR Data Tab 3 Assumptions\School Codes – Assumptions and Reject Overrides

If a student omits an answer to a question or the answer is inconsistent, CPS either assumes a response for the applicant or rejects the response. At this time UC will not be loading rejected ISIRs to the ISIR pages, however, the rejected ISIRs will be in the ISIR Suspense Files.

Use this page to override assumptions that CPS made, to update Code information in the Database Match screen and, if necessary, rejected ISIR information. Select the check box to perform the override. Clearing the check box indicates no change and the override is not performed.
Step Eleven
View ISIR Data Tab 3 Assumptions\School Codes – FAA Information and Student IRS Flags

Note the Dates highlighted above in the FAA Information Section, when the current ISIR was processed by CPS; when the ISIR listed was processed by the school and when the original FAFSA was received by CPS. Other data elements in this section can be helpful in determining changes that have been made to the most recent ISIR record.

In the Student and Parent IRS Flags sections: Displays the outcome of the IRS Data Retrieval process. This process enables students and parents to transfer financial information from the IRS into their FAFSA on the Web application.

**IRS Request data element** - Valid values include:
- **00** - Student/Parent was ineligible to use the IRS Data Retrieval Tool and was therefore not presented with the option to use it in FAFSA on the Web.
- **01** - Student/Parent was presented with the option to use the IRS Data Retrieval Tool in FAFSA on the Web and elected to use it, but did not transfer IRS data into the FAFSA.
- **02** - IRS data for the student/parent was transferred from the IRS and was not changed by the user prior to submission of an application or correction.
- **03** - IRS data for the student/parent was transferred from the IRS and changed by the user prior to submission of an application or correction.
- **04** - IRS data for the student/parent was transferred from the IRS and then changed by the user on a subsequent transaction.
- **05** - Student/Parent was presented with the option to use the IRS Data Retrieval Tool in FAFSA on the Web, but did not elect to use it.
- **06** - Student/Parent was presented with the option to use the IRS data retrieval process, transferred IRS data, and then made a change making them ineligible to use the IRS data retrieval process.
- **Blank** - IRS Data Retrieval Tool not available in the application method utilized by the student/parent (that is, paper FAFSA, EDE, or FAA Access)
IRS AGI or FIT Data Element Values are:
- 0 = IRS data not transferred (default value)
- 1 = IRS data was transferred and not changed by user
- 2 = IRS data was transferred and changed by user to a different value
- 3 = IRS Request flag is equal to 02, 03, or 04, and field has been corrected on this transaction
- 4 = IRS Request flag is equal to 02, 03, or 04, and field has been corrected on a previous transaction
- Blank

IRS Display Data (Student) Displays why the IRS Data Retrieval Tool (DRT) wasn’t presented to the student while using FAFSA on the Web.

- A = Dependent student skipped the income and asset questions – IRS DRT was not displayed.
- B = IRS DRT was displayed to student.
- C = Tax return status not equal to “Already completed” – IRS DRT was not displayed.
- D = Marital status date greater than or equal to January 2014 – IRS DRT was not displayed.
- E = First three digits of SSN are 666 – IRS DRT was not displayed.
- H = Student amended his/her tax return – IRS DRT was not displayed.
- J = Student filed a Puerto Rican or Foreign tax return – IRS DRT was not displayed.
- K = Student is married and tax return filing status is Married Filed Separate Return – IRS DRT was not displayed.
- L = Student is married and tax return filing status is Head of Household – IRS DRT was not displayed.
- M = Conflict between the student’s marital status and tax return filing status – IRS DRT was not displayed.
- Blank = IRS DRT not available (i.e. paper, EDE, or FAA Access).

IRS Display Data (Parent)

- A = Dependent student has special circumstances or independent student skipped the parent questions – IRS DRT was not displayed.
- B = IRS DRT was displayed to parent.
- C = Tax return status not equal to “Already completed” – IRS DRT was not displayed.
- D = Marital status date greater than or equal to January 2014 – IRS DRT was not displayed.
- E = First three digits of SSN are 666 – IRS DRT was not displayed.
- F = Non-married parent or both married parents entered all zeroes in SSN – IRS DRT was not displayed.
- G = Neither married parent entered a valid SSN – IRS DRT was not displayed.
- H = Parent amended his/her tax return – IRS DRT was not displayed.
- J = Parent filed a Puerto Rican or Foreign tax return – IRS DRT was not displayed.
- K = Parent is married and tax return filing status is Married Filed Separate Return – IRS DRT was not displayed.
- L = Parent is married and tax return filing status is Head of Household – IRS DRT was not displayed.
- M = Conflict between the parents' marital status and tax return filing status – IRS DRT was not displayed.
- N = Parents’ marital status is “Unmarried and both parents living together” – IRS DRT was not displayed.
- Blank = IRS DRT not available (i.e. paper, EDE, or FAA Access).

**Step Twelve**

*View ISIR Data Tab 3 Assumptions\School Codes – Reject Reasons and Comments*

**Reject Reasons**

<table>
<thead>
<tr>
<th>Reject Reason</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- UC, at this time of the Catalyst Implementation, is not going to load rejected ISIRs.
- However, if a rejected ISIR is loaded the Reject Reasons would appear here on the ISIR.

**Comments**

<table>
<thead>
<tr>
<th>Comment</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>001</td>
<td>WHAT YOU MUST DO NOW (Use the checklist below to make sure that all of your issues are resolved.): You must use your Federal Student Aid PIN to access your record online. If you need additional help with your SAR, contact your school’s financial aid office or visit <a href="http://www.fafsa.gov">www.fafsa.gov</a> and click the “Help” icon on the FAFSA home page. If your mailing address or e-mail address changes, you can make the correction online or send in the correction on your SAR.</td>
</tr>
<tr>
<td>006</td>
<td>If you need to make corrections to your information, you may either make them online at <a href="http://www.fafsa.gov">www.fafsa.gov</a>, or by using this SAR. You must use your Federal Student Aid PIN to access your record online. If you need additional help with your SAR, contact your school’s financial aid office or visit <a href="http://www.fafsa.gov">www.fafsa.gov</a> and click the “Help” icon on the FAFSA home page. If your mailing address or e-mail address changes, you can make the correction online or send in the correction on your SAR.</td>
</tr>
<tr>
<td>143</td>
<td>Your citizenship status has been confirmed by the Department of Homeland Security and you meet the citizenship requirements for federal student aid. Based on the information we have on record for you, your EFC is &lt;EFC&gt;. You may be eligible to receive a Federal Pell Grant and other federal student aid. Your school will use your EFC to determine your financial aid eligibility for federal grants, loans, and</td>
</tr>
<tr>
<td>149</td>
<td></td>
</tr>
</tbody>
</table>
Step Thirteen
View ISIR Data Tab 3 Assumptions\School Codes – Field Review

- This section will display the ISIR field number along with a description of the data elements that CPS requires the aid applicant to review for accuracy.
- On the student's printed SAR, these fields are clearly marked in boldface print.

Step Fourteen
View ISIR Data Tab 4 EFC\DB Matches\Corr – EFC Information

- The EFC page is designed to resemble the EFC information as it appears on the Student Aid Report (SAR).
- The fields display intermediate values derived from the federal methodology used to the student’s EFC. Highlighted in the screen shot above is Income Protection Allowance (IPA) which can be used when considering additional medical cost and Professional Judgment.
Monthly EFC – Clicking on the Monthly EFC hyperlink will bring up the Primary and Secondary EFC broken down into 12 months. The following screen shot displays the monthly EFC for a student whose EFC is 1331.

To prorate EFC, the system differentiates between the non-standard term as the header—summer, fall, spring—and the non-standard term as a trailer—fall, spring, summer. This affects how the EFC is apportioned:

- If the non-standard term is the header, then the non-standard EFC uses the months at the beginning of the monthly EFC.
- If the non-standard term is the trailer, it uses the months at the end of the monthly EFC.

The system determines the non-standard term as header or trailer by evaluating FA Term. If a term has been set up on Valid Terms for Career as non-standard with term start and end dates and it appears on FA Term, a comparison occurs. If the non-standard term has a start date before the earliest start date of an academic term, the non-standard term is determined to be the header. Conversely, if the non-standard term has a start date after the earliest start date of an academic term, the non-standard term is determined to be the trailer.
Step Fifteen
View ISIR Data Tab 4 EFC\DB Matches\Corr - Database Matches\Flags\Corrected Fields\Verified Fields

Department of Defense (DOD) Match:
Match with the Department of Defense to determine if the applicant's parent was a member of the Armed Forces who died as a result of service in Iraq or Afghanistan after 09/11/01. Values include:
- Y: Applicant's SSN included in the DOD Match file.
- Blank: No match.

DOD Parent Data of Death
The date that the parent of the applicant died.

Verification Tracking Flag
Displays the verification group that is associated with the ISIR record.
- V1 = Standard Verification Group
- V2 = For Federal Student Aid use only
- V3 = For Federal Student Aid use only
- V4 = Custom Verification Group
- V5 = Aggregate Verification Group
- V6 = Household Resources Verification Group
- Blank

High School Flag
Indicates if the high school that was reported for the student did not find a match on the valid high school file.
Step Sixteen
View ISIR Data Tab 4 EFC\DB Matches\Corr – Corrected/Verified Fields

- The system displays the Correction Source for the data, the ISIR Field Nbr (ISIR field number), and the associated Code. The Code indicates whether the field was corrected on this ISIR transaction or a previous ISIR transaction.

You have now completed the steps for Viewing ISIR Data for a student.