CHAPTER 1

Defining Application Processing Options

Bundle 15 / Bundle 22
Need Access support is available only for aid years prior to 2010–2011. Need Access will not be supported after the 2009–2010 aid year.

This chapter lists prerequisites and discusses how to:

• Work with applications.
• Set up financial aid processing.
• Review cross-references.
• Use financial aid run controls for PROFILE and Need Access processes.
• Set up Need Access and PROFILE data load parameters.

Note. Oracle supports only the short form for PROFILE data received from College Scholarship Services (CSS) and Need Access data from the Access Group.

Prerequisites

The College Board INAS User Manual, which is delivered with this application, describes most of the functionality discussed in this chapter.

The Financial Aid system provides predefined tables in compliance with federal regulations and enables you to use the INAS process, CSS PROFILE, and Access Group Need Access institutional applications. 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:

• National Association of Financial Aid Administrators (NASFAA): http://www.nasfaa.org
• The College Board: http://www.collegeboard.com
• Need Access Group: http://www.accessgroup.org

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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

Bundle 15 / Bundle 22
Need Access support is available only for aid years prior to 2010–2011. Need Access will not be supported after the 2009–2010 aid year.

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). Financial Aid supports the CSS PROFILE application and Access Group’s Need Access 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.

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 Enterprise Student Records. These levels enable you to filter requests for ISIRs, PROFILE, or Need Access applications based on a student’s admission level, such as accepted or continuing, admitted, applied, or inactive.

You define your ISIR, PROFILE, and Need Access 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 Enterprise 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

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Source Ranking</td>
<td>FA_APP_SOURCE_RANK</td>
<td>Set Up SACR, Product Related, Financial Aid, Budgets, Application Source Rank, Application Source Ranking</td>
<td>Define which application the Budget Assignment background process should use for Budget Formula and Budget Tree criteria.</td>
</tr>
<tr>
<td>Admit Level Associations</td>
<td>ADMIT_LVL_TBL</td>
<td>Set Up SACR, Product Related, Financial Aid, File Management, Assign Status to Admit Levels, Admit Level Associations</td>
<td>Review the admit designations set up by your institution.</td>
</tr>
<tr>
<td>Prospect Source X-Ref Setup (prospect source cross-reference setup)</td>
<td>PROSPECT_XREF_TBL</td>
<td>Set Up SACR, Product Related, Financial Aid, File Management, Define Careers for Prospects, Prospect Source X-Ref Setup</td>
<td>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.</td>
</tr>
</tbody>
</table>

Defining Application Source Rank

**Bundle 15 / Bundle 22**

*Need Access support is available only for aid years prior to 2010–2011. Need Access will not be supported after the 2009–2010 aid year.*

Access the Application Source Ranking page (Set Up SACR, Product Related, Financial Aid, Budgets, Application Source Rank, Application Source Ranking).
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 Canada Student Loan), Inst App (institutional application), NA (Need Access), 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).

<table>
<thead>
<tr>
<th>Admit Level Designation</th>
<th>Associated Admit Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>AC Active in Program</td>
<td>5 - Accepted/Continuing</td>
</tr>
<tr>
<td>AD Admitted</td>
<td>4 - Admitted</td>
</tr>
<tr>
<td>PM Preadmitted</td>
<td>4 - Admitted</td>
</tr>
<tr>
<td>AP Applicant</td>
<td>3 - Applied/Pending</td>
</tr>
<tr>
<td>WT Waitlisted</td>
<td>3 - Applied/Pending</td>
</tr>
<tr>
<td>CN Cancelled</td>
<td>2 - Inactive</td>
</tr>
<tr>
<td>DE Deceased</td>
<td>2 - Inactive</td>
</tr>
<tr>
<td>DM Dismissed</td>
<td>2 - Inactive</td>
</tr>
<tr>
<td>LA Leave of Absence</td>
<td>2 - Inactive</td>
</tr>
<tr>
<td>CM Completed Program</td>
<td>2 - Inactive</td>
</tr>
<tr>
<td>SP Suspended</td>
<td>2 - Inactive</td>
</tr>
<tr>
<td>DC Discontinued</td>
<td>2 - Inactive</td>
</tr>
</tbody>
</table>

### 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 Enterprise Student Records. Values are:

- 5 - Accepted/Continuing
- 4 - Admitted
- 3 - Applied/Pending
Setting Up Academic Career Assignments from the Financial Aid Application


**Prospect Source X-Ref Setup**

| Academic Institution: | PSUNV  
|                      | PeopleSoft University  
| Prospect Data Source: | PROF  
|                      | Profile Data  

**Career from External Source**

<table>
<thead>
<tr>
<th>*Ext Car</th>
<th>Description</th>
<th>Academic Career</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td></td>
<td>Technical</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td>Undergraduate</td>
</tr>
<tr>
<td>10</td>
<td></td>
<td>Technical</td>
</tr>
</tbody>
</table>

**Program from External Source**

<table>
<thead>
<tr>
<th>*Ext Prog</th>
<th>Description</th>
<th>Acad Prog</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td></td>
<td>CERT</td>
</tr>
<tr>
<td>02</td>
<td></td>
<td>LAU</td>
</tr>
</tbody>
</table>

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As part of the normal processing setup for a new financial aid year, set up the Prospect Cross Reference table for 2011 and create a prospect data source of ‘ISIR11’.

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.

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).
Program from External Source

This section is no longer used by any process.

Setting Up Financial Aid Processing

The ISIR updates outlined in this chapter are based on the August 2009 Draft 2010-2011 Record Layouts. Additional updates might be necessary when the final 2010-2011 EDE Technical Reference Guide is published (usually in October) and reviewed. Updates are normally delivered in the following bundle.

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.
• 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 LoadParms 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.

**Updating NSLDS History from the ISIR**

Schools receive system generated ISIRs whenever a change occurs in a student’s eligibility status in the National Student Loan Database System. The load process always loads the NSLDS history if the ISIR is a NSLDS post-screening transaction and updates the NSLDS match field displayed in the Packaging Status Summary component. NSLDS data that is loaded must also be pushed into the aggregate aid tables if you opt to allow awarding and packaging to directly access NSLDS when evaluating aid eligibility. A separate Push NSLDS to Aggregates setup option is available on the ISIR Data Load Options.

**Determining the ISIR Type During the ISIR Load**

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Beginning with the 2010-2011 award year and moving forward, a new System Generated Transaction Data Source/Type Code of ‘5X’ will be transmitted for ISIR records that have a CPS match with the Department of Defense.

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 *EDE Technical Manual.*

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

<table>
<thead>
<tr>
<th>ISIR Load Run Option</th>
<th>Transaction Data Source/Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applications</td>
<td>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</td>
</tr>
<tr>
<td>System Generated</td>
<td>5D, 5M, 5N, 5P, 5W, 5X</td>
</tr>
<tr>
<td>Corrections</td>
<td>1C, 2C, 3C, 4C, 6C</td>
</tr>
</tbody>
</table>

#### Pages Used to Set Up Financial Aid Processing

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISIR Load Options 1</td>
<td>ISIR_INST_CONTROL</td>
<td>Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Load Options 1</td>
<td>Define how ISIR data from the CPS is loaded into the system.</td>
</tr>
<tr>
<td>ISIR Load Options 2</td>
<td>ISIR_INST_CONTROL2</td>
<td>Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Load Options 2</td>
<td>Define how ISIR data from the CPS is loaded into the system.</td>
</tr>
<tr>
<td>ISIR Load Options 3</td>
<td>ISIR_INST_CONTROL3</td>
<td>Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Load Options 3</td>
<td>Define how corrected ISIR data from the CPS is loaded into the system.</td>
</tr>
<tr>
<td>ISIR Inst SearchMatch</td>
<td>ISIR_INST_SRCHMCH</td>
<td>Set Up SACR, Product Related, Financial Aid, File Management, ISIR Data Load Parameters, ISIR Inst Search Match, ISIR Inst SearchMatch</td>
<td>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.</td>
</tr>
<tr>
<td>ISIR Reject Reasons</td>
<td>ISIR_REJECT_TBL</td>
<td>Set Up SACR, Product Related, Financial Aid, Application Processing, Maintain ISIR Comment Codes, ISIR Reject Reasons</td>
<td>Review delivered ISIR reject reasons and set severity levels.</td>
</tr>
<tr>
<td>ISIR Comments</td>
<td>ISIR_COMMT_TBL</td>
<td>Set Up SACR, Product Related, Financial Aid, Application Processing, Maintain ISIR Comment Codes, ISIR Comments</td>
<td>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.</td>
</tr>
</tbody>
</table>
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).

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FM INAS for 2010-2011 is not yet available, so INAS calculations during ISIR Load will not occur. Until FM INAS is available you should not select the Call INAS check box. When FM INAS is delivered, all ISIRs loaded with this setting can be processed using the batch INAS Calculation process.

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)

NSLDS information from the ISIR is updated whenever an ISIR is loaded. 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.

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 NSLDS transaction number must be greater than the current loaded NSLDS data of the same aid year.
- The NSLDS match flag cannot be 7 (match but no data provided) or 8 (record not sent to NSLDS).

**Push NSLDS Aggregates**

Select to push loaded NSLDS aggregate aid totals and indicators into the aggregate aid table. This data is then optionally available to the Awarding and Packaging processes. Aggregate Area Translation must be defined for the Push process to work. If you choose not to push aggregate aid totals with the ISIR Load, an independent push process (Financial Aid, File Management, NSLDS, Update Aggregates with NSLDS) is available.

See Isfa, Setting Up Packaging Basics, Setting Up Aggregate Aid, Understanding Aggregate Aid.

**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 the bio/demo fields when the ISIR is loaded.

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.
**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).

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

**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*
### 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*.

### System Generated Load Option

**System Generated ISIR Action**

Controls 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.
- **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*.

### 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).
Chapter 1  Defining Application Processing Options

**ISIR Load Options 3 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 the chapter Processing INAS for details.

See lsfa, Processing INAS.

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

**ISIR Corrections Load Options**

<table>
<thead>
<tr>
<th>Suspending Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suspend on EFC Mismatch</td>
<td>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.</td>
</tr>
<tr>
<td>Suspend Other School Initiated</td>
<td>Select to suspend ISIRs that are initiated by another school or the CPS.</td>
</tr>
<tr>
<td>Suspend Student Initiated</td>
<td>Select to suspend ISIRs that are initiated by the student.</td>
</tr>
</tbody>
</table>

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.

**Defining ISIR Institutional Search Match**


<table>
<thead>
<tr>
<th>ISIR Load Options 1</th>
<th>ISIR Load Options 2</th>
<th>ISIR Load Options 3</th>
<th>ISIR Inst SearchMatch</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aid Year: 2008</td>
<td>Financial Aid Year 2007 - 2008</td>
<td>School Cd: 001315</td>
<td>PeopleSoft</td>
</tr>
<tr>
<td><em>Search Parameter</em></td>
<td>PSCS_TRADITIONAL</td>
<td>CS_Person_Tradiitional</td>
<td></td>
</tr>
</tbody>
</table>

**No Match Found**

<table>
<thead>
<tr>
<th>Add</th>
<th>Update</th>
<th>Suspend</th>
<th>Ignore</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Match(es) Found**

**Order Nbr:** 10 Name, Addr, City, Bday, Gender, SSN
**One Match:** ✔ ✔ ✔
**Multiple Matches:** ✔ ✔

**Order Nbr:** 20 SSN Only
**One Match:** ✔ ✔ ✔
**Multiple Matches:** ✔ ✔
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.

**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

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 TRADITIONAL. For example, you may want to create a search parameter that contains a single search match order that does a last name, Social Security number, and student birthdate match.

**See Also**
lscc, Setting Up Search, Match

**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).

<table>
<thead>
<tr>
<th>ISIR Reject Reasons</th>
<th>ISIR Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Aid Year:</strong></td>
<td>2008</td>
</tr>
<tr>
<td>Financial Aid Year</td>
<td>2007 - 2008</td>
</tr>
<tr>
<td><strong>Institution:</strong></td>
<td>PSUNY</td>
</tr>
<tr>
<td><strong>ISIR Reject Reasons</strong></td>
<td><strong>Severity Level</strong></td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
</tr>
<tr>
<td>01</td>
<td>The simplified needs test is not met and all asset data is blank.</td>
</tr>
<tr>
<td>02</td>
<td>Incomplete FAFSA.</td>
</tr>
<tr>
<td>03</td>
<td>Student’s Taxes Paid is greater than zero and equal to or greater than AID.</td>
</tr>
<tr>
<td>05</td>
<td>Missing or Invalid Date of Birth.</td>
</tr>
<tr>
<td>06</td>
<td>Father’s Social Security Number was not matched with the Social Security Administration</td>
</tr>
</tbody>
</table>

**Bundle 15 / Bundle 22**

At this time, the final 2010-11 ISIR Reject Reasons have not been officially published by the Department of Education. For this bundle, the 2010-11 ISIR Reject Reasons are delivered but are simply copied from the previous year. Once the 2010-11 Reject Reasons are published, Oracle will deliver an update to these setup values for 2010-11.

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.

**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).

**Bundle 15 / Bundle 22**

At this time, the final 2010-11 ISIR Comment Codes have not been officially published by the Department of Education. For this bundle, the 2010-11 ISIR Comment Codes are delivered but are simply copied from the previous year. Once the 2010-11 Comment Codes are published, Oracle will deliver an update to these setup values for 2010-11.

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Severity Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - Ignore:</td>
<td>Requires no action.</td>
</tr>
<tr>
<td>1- Action Required:</td>
<td>DB Match problem requires action.</td>
</tr>
<tr>
<td>2 - Action required.</td>
<td>SAR C Flag on file.</td>
</tr>
</tbody>
</table>

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.

**Bundle 15 / Bundle 22**

At this time, the final 2010-11 ISIR Reject Reasons and Comment Codes have not been officially published by the Department of Education. For this bundle, the pre-defined Severity Level and DB Match Use values are delivered but are simply copied from the previous year. Once the 2010-11 Reject Reasons and Comment Codes are published, Oracle will deliver an update to the Severity Level and DB Match Use values for 2010-11. Beginning with the 2010-2011 award year and moving forward, a new DB Match Use value of ‘11’ (Department of Defense Match) is available.

**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 Isfa, Preparing for Awarding and Packaging, Reviewing the Student’s Packaging Status, Reviewing the U.S.E.D. Database Match Process.
Setting Up Financial Aid EDI Transactions


Financial Aid EDI Transactions page

<table>
<thead>
<tr>
<th>EC Transaction ID</th>
<th>In/Out</th>
<th>Description</th>
<th>FA Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>A0C2P</td>
<td>Outbound</td>
<td>CommonLine Application</td>
<td>CommonLine</td>
</tr>
<tr>
<td>A0C4P</td>
<td>Outbound</td>
<td>CommonLine 4 App Send</td>
<td>CommonLine</td>
</tr>
<tr>
<td>C001P</td>
<td>Outbound</td>
<td>CommonLine Change Transactions</td>
<td>CommonLine</td>
</tr>
<tr>
<td>C004P</td>
<td>Outbound</td>
<td>CommonLine 4 Change Send</td>
<td>CommonLine</td>
</tr>
<tr>
<td>C01RP</td>
<td>Inbound</td>
<td>CommonLine Change Response</td>
<td>CommonLine</td>
</tr>
<tr>
<td>CLAPPRESP_96</td>
<td>Inbound</td>
<td>CommonLine App Response</td>
<td>CommonLine</td>
</tr>
<tr>
<td>CLCHGRESP_96</td>
<td>Inbound</td>
<td>CommonLine Change Response</td>
<td>CommonLine</td>
</tr>
<tr>
<td>CLEFTROST_96</td>
<td>Inbound</td>
<td>CommonLine EFT Roster</td>
<td>CommonLine</td>
</tr>
<tr>
<td>CORRC0IN</td>
<td>Outbound</td>
<td>99/00 ISIR Corrections</td>
<td>ISIR</td>
</tr>
</tbody>
</table>

Bundle 15 / Bnndle 22
A new EC Transaction ID of ‘CPS_ISIR_2011’ (2010/2011 Inbound ISIRs) is delivered.

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

In/Out
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
Description Displays the description of the EDI file.

FA Use (financial aid use)
FA 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.

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).
Setup Commit Levels 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.

### Understanding ISIR Data Load Parameters

This section describes the parameters for loading ISIR data.

### Reviewing Cross-References

**Bundle 15 / Bundle 22**

For this bundle, the 2010-11 ISIR SAR Cross-reference values are delivered but are simply copied from the previous year. Oracle will deliver an update to these setup values in a future bundle.

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.
### Pages Used to Review Cross-References

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISIR SAR Cross-reference</td>
<td>ISIR_SAR_XREF</td>
<td>Set Up SACR, Product Related, Financial Aid, Application Processing, ISIR/SAR Cross Reference, ISIR SAR Cross-reference</td>
<td>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.</td>
</tr>
<tr>
<td>Institutional Cross Reference</td>
<td>INST_XREF</td>
<td>Set Up SACR, Product Related, Financial Aid, Application Processing, Institutional Cross Reference</td>
<td>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.</td>
</tr>
</tbody>
</table>

### Reviewing ISIR SAR Cross-References

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
- *Batch Year:* Date (Batch Year)
- *Mixed Case*

**Reviewing Institutional Application Cross-References**
### Institutional Cross Reference

<table>
<thead>
<tr>
<th>Aid Year:</th>
<th>Financial Aid Year 2007 - 2008</th>
<th>Institution:</th>
<th>PSUNV</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Record (Table) Name:</th>
<th>INST_PARENT</th>
<th>Record Description:</th>
<th>Institutional Parent App Data</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
<th>INST Field Nbr</th>
<th>Aid Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 ADJ_TO_INCOME</td>
<td></td>
<td>0103</td>
<td>2008</td>
</tr>
<tr>
<td>2 AFDC_BENEFITS</td>
<td></td>
<td>0109</td>
<td>2008</td>
</tr>
<tr>
<td>3 AGI</td>
<td></td>
<td>0097</td>
<td>2008</td>
</tr>
<tr>
<td>4 AGI_PAR_INST</td>
<td></td>
<td>0142</td>
<td>2008</td>
</tr>
<tr>
<td>5 BUSINESS_DEBT</td>
<td></td>
<td>0003</td>
<td>2008</td>
</tr>
<tr>
<td>6 BUSINESS_VALUE</td>
<td></td>
<td>0079</td>
<td>2008</td>
</tr>
</tbody>
</table>

### 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**
- 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.

---

### Using Financial Aid Run Controls for PROFILE and Need Access Processes

**Bundle 15 / Bundle 22**

With the conversion of PROFILE data to an XML format beginning with the 2010–2011 aid year, the new processes that will load PROFILE records will no longer require setup of a run control. This section is only applicable for the 2009–2010 and prior aid years.

**Bundle 15 / Bundle 22**

Need Access support is available only for aid years prior to 2010–2011. Need Access will not be supported after the 2009–2010 aid year.

This section discusses how to define run controls for PROFILE and Need Access processes.
Defining Run Controls for PROFILE and Need Access Processes

Bundle 15 / Bundle 22

With the conversion of PROFILE data to an XML format beginning with the 2010–2011 aid year, the new processes that will load PROFILE records will no longer require setup of a run control. This section is only applicable for the 2009–2010 and prior aid years.

Bundle 15 / Bundle 22

Need Access support is available only for aid years prior to 2010–2011. Need Access will not be supported after the 2009–2010 aid year.

Access the PROFILE/Need Access Run Controls page (Financial Aid, File Management, PROFILE - Need Access Controls, PROFILE/Need Access Run Controls).

PROFILE/Need Access Run Controls page

The fields display for the process that you select. The Count of Records, Last Run Date, and Last Sequence Nbr (last sequence number) fields are display-only fields that appear for all of the processes. You can edit the Update Switch field for all of the processes.

Update Switch

Select No to run the process in simulation. When you select No, the process does not update any records or tables. You can then view the log file to see potential issues or the information that would have been updated. Select Yes to run the process and update the records or tables.

Count of Records

Displays the number of records generated from the export process.

Input/Output File Path

Enter the path to the location of the file.

Add Action

Select Add to Database (Replace) or Add (Do NOT Replace).
Setting Up PROFILE Data Load Parameters

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

Page Used to Set Up PROFILE Data Load Parameters

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROFILE Data Load Parameters</td>
<td>INST_LOAD_CNTRL</td>
<td>Set Up SACR, Product Related, Financial Aid, File Management, PROFILE Load Parameters, PROFILE Data Load Parameters</td>
<td>Set up the PROFILE application parameters for your institution. PeopleSoft Enterprise Campus Solutions supports the College Board CSS PROFILE application.</td>
</tr>
</tbody>
</table>

Setting Up PROFILE Data Load Parameters

Bundle 15 / Bundle 22
Added a PROFILE Phone Use group box, Search/Match No Match Action field, and Store INAS Calc Request field.

Access the PROFILE Data Load Parameters page (Set Up SACR, Product Related, Financial Aid, File Management, PROFILE Load Parameters).
Beginning with the 2010–2011 aid year, PROFILE supports the loading of an International PROFILE Application Type. Thus, all PROFILE-related tables may reflect the National ID (NID) of a foreign student. During the PROFILE Data Load, the system tests that the NID meets the format rules defined for the corresponding country in the PROFILE record. If the NID meets the test, a row is inserted into Person Data with the NID and NID Country. If the NID does not meet the test, then a row will be inserted into Person Data with the NID Country and that country's default NID.
Chapter 1  Defining Application Processing Options

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.

**Effective Date**
Select an effective date for this aid year.

**Status**
Select a status for this aid year.

**PROFILE Data Use**

**Update Name Data**
Select to enable PROFILE name data to update Campus Community data.

**Update Bio/Demo 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**

**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.

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.

**Bundle 15 / Bundle 22**
PROFILE Phone Use is a new group box.

**PROFILE Phone Use**

**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.

For example, if *Mobile* appears in the Phone Type field, the system identifies and adds the address as a mobile phone type.

**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 Routing Control

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
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
**Bundle 15 / Bundle 22**

**Search/Match No Match Action**

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

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.

**EFC Source**

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

**Overrides/INAS Options**

**Use EFC 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**

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.