CHAPTER 1

Processing and Using Institutional Financial Aid Applications

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 gives an overview of the management and processing of institutional financial aid application data, including College Board PROFILE and Need Access electronic data that is loaded into the system using an auto load process.

This chapter describes how to:

• Maintain institutional financial aid applications.
• Load and manage PROFILE processes.
• Load and manage Need Access processes.
• Use PROFILE suspense management.
• Review institutional correction audits.
• Use Need Access suspense management.

Maintaining Institutional Financial Aid Applications

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.

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

Note. The College Board PROFILE, Need Access, 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 or Need Access data files are converted or appear as zeros in currency based numeric fields.
This section lists common elements and discusses how to:

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

**See Also**

lsfa, Processing and Using Institutional Financial Aid Applications, Loading and Managing PROFILE Processes

lsfa, Processing and Using Institutional Financial Aid Applications, Loading and Managing Need Access Processes

lsfa, Processing INAS, 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.

**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.

**See Also**

lsfa, Processing INAS, Defining Federal and Institutional Methodologies

lsfa, Processing INAS, Overriding Expected Family Contribution (EFC)

**Pages Used for Institutional Applications**

**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.
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.

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Data</td>
<td>INST_STUDENT_nn</td>
<td>Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Student Data</td>
<td>View or enter all the information about the student.</td>
</tr>
<tr>
<td>Parent Data</td>
<td>INST_PARENT_nn</td>
<td>Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Parent Data</td>
<td>View or enter all the parent information.</td>
</tr>
<tr>
<td>Miscellaneous Data</td>
<td>INST_MISC_nn</td>
<td>Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Miscellaneous Data</td>
<td>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.</td>
</tr>
<tr>
<td>Computation Data</td>
<td>INST_COMP_SUMM_nn</td>
<td>Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Computation Data</td>
<td>View or enter computed parent and student income, allowance, and asset information using your institutional and federal methodology. The computed values appear here.</td>
</tr>
</tbody>
</table>

**Reviewing Student Information**

**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.

**Bundle 15 / Bundle 22**

The Student Data page layout has changed. Citizenship Info is now part of Bio/Demo and Citizenship Data. The Foreign Address Indicator and Application Type fields are added to the CSS Data group box. The VA Benefits Received Code, Receive Tuition Benefits, Agencies/Foundation Support, and Government Support fields are added to the Student's Expected Resources group box.

Access the Student Data page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Student Data).
### Student Data Page (1 of 3)

<table>
<thead>
<tr>
<th>Student Data</th>
<th>Parent Data</th>
<th>Miscellaneous Data</th>
<th>Completion Data</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OSWEGO JONAH</strong></td>
<td>ID: 1007</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Dependency Status:</strong> Dependent</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Bio/Demo and Citizenship Data

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Reported Country:</td>
<td>Reported Status: U.S. Citizen</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### CSS Data

<table>
<thead>
<tr>
<th>CSS ID:</th>
<th>Date Loaded: 8/7/2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Application Received:</td>
<td>Fee Waiver: Yes</td>
</tr>
<tr>
<td>AP Eligibility:</td>
<td>Foreign Address Indicator: N</td>
</tr>
<tr>
<td>Application Type:</td>
<td>Income Filter:</td>
</tr>
</tbody>
</table>

### Student's Information

<table>
<thead>
<tr>
<th>Legal Residence:</th>
<th>Mailing State:</th>
<th>Year in School:</th>
</tr>
</thead>
<tbody>
<tr>
<td>VA Virginia</td>
<td>VA Virginia</td>
<td>1st Year Never Attended</td>
</tr>
<tr>
<td>Postall: 22003</td>
<td>Email Address: <a href="mailto:alphat@alpha.com">alphat@alpha.com</a></td>
<td></td>
</tr>
<tr>
<td>Natural Parent Status: Married</td>
<td>Veteran: No</td>
<td></td>
</tr>
<tr>
<td>Most Support:</td>
<td>Orphan/Ward: No</td>
<td></td>
</tr>
<tr>
<td>Student Lives With:</td>
<td>Dependents:</td>
<td></td>
</tr>
<tr>
<td>Number in Family:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number in College:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Student's Income and Benefits

<table>
<thead>
<tr>
<th>Tax Filed Status: Completed</th>
<th>Student's Earnings: 4,500</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax Form Type:</td>
<td>Spouse's Earnings: 0</td>
</tr>
<tr>
<td>Number of Exemptions:</td>
<td>Dividend Interest: 620</td>
</tr>
<tr>
<td>Adjusted Gross Income:</td>
<td>Social Security Benefits: 0</td>
</tr>
<tr>
<td>US Tax Paid:</td>
<td>Combat Pay: 0</td>
</tr>
<tr>
<td>Hope Lifetime Learning Credit:</td>
<td>Welfare TANF: 0</td>
</tr>
<tr>
<td>Itemized Deductions:</td>
<td>Child Support Received: 0</td>
</tr>
<tr>
<td>Dislocated Worker:</td>
<td>Earned Income Credit: 0</td>
</tr>
<tr>
<td>Orphan Foster/ward after 13:</td>
<td>Other Unearned Income: 450</td>
</tr>
<tr>
<td>Means Tested Benefits:</td>
<td>Taxable Financial Aid: 1,850</td>
</tr>
<tr>
<td>Homeless:</td>
<td></td>
</tr>
</tbody>
</table>

### Student's Assets

| Cash, Savings, and Checking: 1,450 | Investment: 0 |
| IRA/KEOGH: 0 | Home: 0 |
| Self Employed: Yes/No | Home Purchase Year: 0 |
| Student Lives on Farm: Yes/No | Price: 0 |
| FTE Employees Greater Than 100: Yes/No | Other Real Estate: 0 |
| | Business/Farm: 0 |
The system displays the student’s name, ID, institution, dependency status, application source, and aid year.

Bio/Demo and Citizenship Data

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

NID (National ID)  Indicates the student’s National ID.

**Note.** PROFILE supports the loading of an International PROFILE Application Type, and PROFILE-related tables may reflect the National ID (NID) of a foreign student. During the PROFILE Data Load, the system tests if the student’s NID meets the format rules defined for the specified country. If the NID meets the test, then a row is inserted into Person Data with the NID and NID Country. If the NID does not meet the test, then a row is inserted into Person Data with the NID Country and that country’s default NID.

Birthdate  Indicates the student’s date of birth.

Marital Status  Indicates the student’s marital status.

US Citizenship Status  Displays the citizenship status for a US student.

Reported Country  Displays country if not United States of America.

Reported Status  Displays the reported citizenship status, which can be *U.S CITIZEN, ELIG NON-CITIZEN,* or blank

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

**CSS 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.

**Date Loaded**
Displays the date the College Board application was loaded into the system.

**Date Application Received**
Displays the date the application was received by College Board.

**Fee Waiver**
Displays Yes or No.

**AP Flag**
Displays a Y value from PROFILE only if student passed two or more AP classes with a test grade of 3 or higher. This field is blank if no information is available, the student does not give permission for information to be passed, or the student does not qualify for a Y value.

**Foreign Address Indicator**
Displays Y if the student has a foreign address. Displays N if the student does not have foreign address.

**Application Type**
Displays 1 if the application is a Domestic PROFILE and 4 of the application is an International PROFILE

Note. The following Application Types are not loaded into the system: 2 = Noncustodial PROFILE and 3 = Registration only record

**Lowest Income Filer**
Displays status identifying lowest income filers.

### Student’s Information

**Legal Residence**
Select the legal resident of the student. Values include US states, Canada (CN), or Mexico (MX).

**Mailing State**
Select the U.S. state in which the student is a resident.

**Postal**
Enter the postal code or zip code for the student’s state of residence.

**Natural Parent Status**
Optional. Select from Married, Separated, Divorced, Never Married Living Separate, Never Married Living Together, or Widowed.

**Most Support**
Select from: Father or Mother.

**Lives With**
Select from: Blank, Father, Mother, or Neither.

**Number in Family**
Enter the total number of people in the student’s household. The system displays 01 through 99 and blank for dependent students.

**Number in College**
Enter the total number of people in college from the student’s household. The system displays 1 through 9 and blank for dependent students.

**Year in School**
Enter the academic year for which the student is seeking financial aid.

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

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

**Email Address**
Enter the student’s email address.
Veteran
Select Yes, No or No Response to indicate whether the student is a veteran.

Orphan/Ward
Select Yes, No, or No Response to indicate whether the student is an orphan or ward of the state.

Dependents
Select Yes, No, or No Response to indicate whether the student has dependents.

Student's Income and Benefits

Tax Filed Status
Select from blank, Completed, Non Filer, or Will File.

Tax Form Type
Optional. Select from 1040, 1040A, 1040EZ, Canadian, Puerto Rican, Other US, or Other Non—US.

Exemptions
Select the number of exemptions the student claimed on their tax U.S. Federal tax form.

Combat Pay
Displays an amount or is blank.

Dislocated Worker
Select Yes, No, or N/R (not reported).

Means Tested Benefits
Select Yes, No, or N/R (not reported).

Orphan/Foster/Ward after 13
Select Yes, No, or N/R (not reported).

Homeless
Select Yes, No, or N/R (not reported).

The remaining fields refer directly to items on the U.S. federal tax form or data collected from applicable sources, such as an institutional application or other third-party sources. Enter the values from the student’s tax form in the appropriate fields.

Student's Assets

Cash, Savings, and Checking
Enter a value.

IRA/Keogh
Enter a value.

Self Employed
Select Yes or No.

Student Lives on Farm
Select Yes, No, or N/R (no response).

FTE Employees Greater Than 100
Select Yes, No, or N/R (Not Reported).

Investment
Enter the value and debt amounts.

Home
Enter the value and debt amounts.

Home Purchase Year
Enter year home was purchased.

Price
Enter the price of the home indicated in the Home Purchase Year field.

Other Real Estate
Enter the value and debt amounts.

Business/Farm
Enter the value and debt amounts.
**Student’s Trust Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value of Trust Fund</td>
<td>Enter the value of the trust in USD.</td>
</tr>
<tr>
<td>Trust Established by</td>
<td>Select <em>Other</em> or <em>Parents</em>.</td>
</tr>
<tr>
<td>Trust Available</td>
<td>Select <em>Yes</em>, <em>No</em>, or <em>N/R</em> (no response) to indicate the availability of the trust.</td>
</tr>
</tbody>
</table>

**Student’s Expenses**

Enter values from the student’s tax form.

**Student’s Expected Resources**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Veterans Benefits</td>
<td>Enter the amount of veterans benefits received. The system displays 00 through 12 or blank.</td>
</tr>
<tr>
<td>Months</td>
<td>Enter the number of months the veterans benefits were received in the year.</td>
</tr>
<tr>
<td>VA Benefits Received Code</td>
<td>Enter the VA Benefits received by the student. Valid values are:</td>
</tr>
<tr>
<td></td>
<td>• 1 = GI Bill - Active Duty (Ch 30)</td>
</tr>
<tr>
<td></td>
<td>• 2 = Post-9/11 GI Bill (Ch 33)</td>
</tr>
<tr>
<td></td>
<td>• 3 = GI Bill - Selective reserve (Ch 30)</td>
</tr>
<tr>
<td></td>
<td>• 4 = REAP (Ch 1607)</td>
</tr>
<tr>
<td></td>
<td>• 5 = Voc Rehab and Employment (Ch 31)</td>
</tr>
<tr>
<td></td>
<td>• 6 = DEAP (Ch 35)</td>
</tr>
<tr>
<td></td>
<td>• 7 = Any other type of VA educational benefits</td>
</tr>
<tr>
<td>Student’s Earnings</td>
<td>Enter for both summer and school year.</td>
</tr>
<tr>
<td>Spouse’s Earnings</td>
<td>Enter for both summer and school year.</td>
</tr>
<tr>
<td>Other Taxable Income</td>
<td>Enter for both summer and school year.</td>
</tr>
<tr>
<td>Untaxed Income</td>
<td>Enter for both summer and school year.</td>
</tr>
<tr>
<td>Grant/Scholarship</td>
<td>Enter a value.</td>
</tr>
<tr>
<td>Tuition Benefits</td>
<td>Enter a value.</td>
</tr>
<tr>
<td>Parent(s) Contribution</td>
<td>Enter a value.</td>
</tr>
<tr>
<td>Relatives Contributions</td>
<td>Enter a value.</td>
</tr>
<tr>
<td>Receive Tuition Benefits</td>
<td>Indicate whether or not the student receives tuition benefits from the parents’ employers.</td>
</tr>
<tr>
<td>Agencies/Foundation Support</td>
<td>Indicate whether the student expects to receive from agencies or foundations to pay for educational expenses during any year of attendance.</td>
</tr>
<tr>
<td>Government Support</td>
<td>Indicate whether the student expects to receive from her government to pay for educational expenses during any year of attendance.</td>
</tr>
</tbody>
</table>
Reviewing Parent Information

Bundle 15 / Bundle 22

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The Parent Data page layout has changed.

The Residence Code has been added to the Parents’ Household group box.

The Parent’s Expected Expenses group box has been added and includes 13 new fields.

The Owed to Parent by Others, Value of Other Assets, and Annual Debt Income have been added to the Parents’ Asset group box. The Other Real Estate Purchase Year has been relabeled to Real Estate Purchase Year.

The IRA Distributions, Untaxed Pensions, Educational Credits, Military/Clergy Allowance, IM Other Untaxed Income, and Family Support Income fields have been added to the Parents’ Income and Benefits group box.

The Parent Type 1, Attended College Code 1, College Type Code 1, Parent Type 2, Attended College Code 2, and College Type Code 2 fields are added to the Parents’ Information group box.

Access the Parent Data page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Parent Data).
Parent Data page (1 of 4)
### Parents' Assets

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
<th>Debt</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash, Savings, and Checking</td>
<td>42,500</td>
<td></td>
</tr>
<tr>
<td>Assets Held by Siblings</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Owed to Parent by Others</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Value of Other Assets</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Father Retirement Assets</td>
<td>70000</td>
<td></td>
</tr>
<tr>
<td>Mother Retirement Assets</td>
<td>45000</td>
<td></td>
</tr>
<tr>
<td>Annual Debt Income</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

### Prior Year Income

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
<th>Itemized Deductions</th>
<th>Untaxed Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age</td>
<td>75,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taxes Paid</td>
<td>14,500</td>
<td>5,400</td>
<td>0</td>
</tr>
</tbody>
</table>
The system displays the student’s name, ID, institution, dependency status, application source, and aid year.
**Parent’s Household**

- **Legal Residence**: Select the legal residence of the parent. Values include US states, Canada (CN), or Mexico (MX).
- **Residence Code**: Enter the code for the parents’ country of residence.
- **Number Family Members**: Number of family members in the parent’s household. The system displays 01 through 99 and blank for dependent students.
- **Number in College**: Number of dependents in college that are part of the parent’s household. This number does not include parents who may be in college. The system displays 1 through 9 and blank for dependent students.
- **Housing Status**: Select Living with Others, Own Home, Provided by Employer, or Rent.
- **Marital Status**: Select: Divorced, Married, Never Married, Remarried, Separated, Widowed or blank.
- **Date of Remarriage**: Displays the date for which the parent remarried.
- **Means Tested Benefits**: Select Yes, No, or N/R (Not Reported).

**Parents’ Expenses**

Enter both the Current and Expected parents’ expenses for these fields.

**Parent’s Expected Expenses**

- **Utilities Expenses**: Enter the amount the parents report as the annual utility expenses of the family.
- **Food Expenses**: Enter the amount the parents report as the annual food expenses of the family.
- **Clothing Expenses**: Enter the amount the parents report as the annual clothing expenses of the family.
- **Household Expenses**: Enter the amount the parents report as the annual household expenses of the family.
- **Amount Owed to Others**: Enter the amount the parents report as owed to others.
- **Annual Debt Payment**: Enter the amount the parents report as their annual payments against their total debt.
- **Automobile Maintenance**: Enter the amount the parents report as their annual automobile expenses.
- **Property Insurance**: Enter the amount the parents report as the cost of their property insurance.
- **Vacation Cost**: Enter the amount the parents report as spending on vacation costs.
- **Entertainment Cost**: Enter the amount the parents report as spending on entertainment costs.
- **Number Employed in Home**: Enter number of people the parents report as employed in the home.
- **Amount Paid to Home Employee**: Enter the amount the parents report is paid to the employees who work in the home.
- **Other Expenses**: Enter the cost of any parental expenses not reported anywhere else on the PROFILE.
## Monthly Mortgage/Rent Payment
Enter the parents’ monthly mortgage or rent payment.

### Parent’s Assets

**Cash, Savings, and Checking**
Enter a value.

**Assets Held by Siblings**
Enter a value.

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

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

**Father Retirement Assets**
Can be blank or a number from 0000000 to 9999999.

**Mother Retirement Assets**
Can be blank or a number from 0000000 to 9999999.

**Investment**
Enter both the Value and Debt for this item and all the following items.

**Home**
Enter a value.

**Home Purchase Year**
Purchase year of the parent’s home.

**Price**
Purchase price of the parents’ home.

**Self Employed:**
Select Yes, No, or N/R (no response).

**Family Lives on Farm**
Select Yes, No, or N/R (no response).

**FTE Employees Greater Than 100:**
Select Yes, No, or N/R (no response).

**Business**
Enter value and debt amounts for the business.

**Farm**
Enter value and debt amounts for the farm.

**Other Real Estate**
Enter value and debt amounts for other real estate.

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

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

**Number of Businesses**
Enter a number 0 to 9 or leave blank.

**Number of Farms**
Enter a number 0 to 9 or leave blank.

### Prior Year Income

**AGI**
Adjusted gross income from the prior year’s tax form.

**Taxes Paid**
Enter a value.

**Itemized Deductions**
Total of the prior year’s itemized deductions.

**Untaxed Income**
Enter a value.

### Parent’s Income and Benefits
Many fields in this group box refer to items on the U.S. federal tax form or data collected from applicable sources, such as your institution’s financial aid application or other third-party sources.
Tax Filed Status
Select from blank, Completed, Non Filer, or Will File.

Tax Form Type
Optional. Select from 1040, 1040A, 1040EZ, Canadian, Puerto Rican, Other US, or Other Non—US.

Number of Exemptions
Select the number of exemptions the parents claimed on their tax U.S. federal tax form.

Social Security Benefit Family
Enter untaxed social security benefits.

Other Untaxed Income
Enter other untaxed income.

Receive TANF
Select Yes, No, or N/R (no response).

Receive SSI
Select Yes, No, or N/R (no response).

The remaining fields refer directly to items on the U.S. federal tax form or data collected from applicable sources, such as an institutional application or other third-party sources. Enter the values from the Parent’s tax form in the appropriate fields.

Parents’ Expected Income
Enter values from the parents’ tax form.

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.

- 1 = Father
- 2 = Mother
- 3 = Stepfather
- 4 = Stepmother
- 5 = Legal guardian
- 8 = Other

DOB Parent 1 and DOB Parent 2
Indicates the reported parents’ dates of birth. The information is reported as MM/DD/YYYY or the field may be blank.

Occupation Parent 1 and Occupation Parent 2
Indicates the occupation and can be blank.

Employer Parent 1 and Employer Parent 2
Indicates the employer and can be blank.

Attended College Code 1 and Attended College Code 2
Indicates if the parent attended college and if on a full-time or part-time basis.

College Type Code 1 and College Type Code 2
Indicates the type of college the parent attended.

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.
Dislocated Worker
Select Yes, No, or N/R (not reported).

Email Address
Displays the parents’ preferred email address. This field can be blank or contain up to 35 characters.

Combat Pay
Displays an amount or is blank.

Non-Custodial Parent Info

Separation Year
Enter the year of the separation.

Divorce Year
Enter the year of the divorce.

Non-Custodial Parent’s Contribution
Enter the financial contribution to the student by the non-custodial parent.

See Also
Isfa, Setting Up Auto Packaging and Mass Packaging, Using Equation Engine in Packaging

Reviewing Currency Information, Family Information, and Institutional Questions

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

Bundle 15 / Bundle 22
The Parent Data page layout has changed.
The Currency Information group box has been added and includes 5 new fields.
The FNAR Message Text and FNAR Message Values 1 through 5 are added to the FNAR Messages group box.

Access the Miscellaneous Data page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Miscellaneous Data).
The system displays the student’s name, ID, institution, dependency status, application source, and aid year.

### 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.

Family Members

Relationship
Select the relationship to the student.

Age
Enter the family member’s age.

Attend College
Select blank, Yes, Full-Time, Yes, Half-Time, or No, Will Not Attend.

College Type
Select a college type.

School Selection

CSS Code
This is the institution’s code number as reported by the student on the PROFILE application. Each school the student selected to receive their application is listed.

Housing Code
This is the type of housing the student expects to have.

FNAR Messages

The system displays the Financial Need Analysis Report 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.

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.

Reviewing All Computed Data for Student and Parents

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

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

<table>
<thead>
<tr>
<th></th>
<th>Parent Contribution</th>
<th>Student Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Income</strong></td>
<td>IM 149,750</td>
<td>IM 1,800</td>
</tr>
<tr>
<td></td>
<td>IM w / Options 149,750</td>
<td>Estimated 2,000</td>
</tr>
<tr>
<td></td>
<td>EFM 149,250</td>
<td>IM 1,900</td>
</tr>
<tr>
<td></td>
<td></td>
<td>IM w / Options 1,900</td>
</tr>
<tr>
<td><strong>Total Contribution</strong></td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Number in College Adjustment</strong></td>
<td>0.0 %</td>
<td>0.0 %</td>
</tr>
<tr>
<td><strong>Contribution for Student</strong></td>
<td>31,068</td>
<td>1,568</td>
</tr>
<tr>
<td><strong>From Income</strong></td>
<td>23,986</td>
<td>1,560</td>
</tr>
<tr>
<td><strong>From Assets</strong></td>
<td>7,082</td>
<td>38</td>
</tr>
<tr>
<td><strong>Calculated Contribution</strong></td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

### Custodial Parent Information

<table>
<thead>
<tr>
<th></th>
<th>Parent Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Income</strong></td>
<td>IM 0</td>
</tr>
<tr>
<td></td>
<td>IM w / Options 0</td>
</tr>
<tr>
<td><strong>Percent Income</strong></td>
<td>%</td>
</tr>
<tr>
<td><strong>From Income</strong></td>
<td>0</td>
</tr>
<tr>
<td><strong>From Assets</strong></td>
<td>0</td>
</tr>
</tbody>
</table>

### Education Savings Calculation

<table>
<thead>
<tr>
<th>AESA</th>
<th>CESA</th>
<th>AESA</th>
<th>CESA</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>15</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Student: 15
### Income

<table>
<thead>
<tr>
<th></th>
<th>PARENT CONTRIBUTION</th>
<th>STUDENT CONTRIBUTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>IM</td>
<td>IM w/ Options</td>
</tr>
<tr>
<td>Taxable Income:</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Untaxed Income:</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Adjustments to Income:</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total Income:</strong></td>
<td>149,750</td>
<td>149,750</td>
</tr>
</tbody>
</table>

### Allowances

<table>
<thead>
<tr>
<th></th>
<th>PARENT CONTRIBUTION</th>
<th>STUDENT CONTRIBUTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>IM</td>
<td>IM w/ Options</td>
</tr>
<tr>
<td>U.S. Income Tax:</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>State Income Tax:</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>FICA Taxes:</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Medical/Dental:</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Elementary/Secondary Tuition:</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Employment Allowance:</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Annual Education Savings:</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Income Protection Allowance/MMA:</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total Allowances:</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Calculated Available Income:</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Available Income:</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total Contribution - Income:</strong></td>
<td>23,936</td>
<td>23,936</td>
</tr>
</tbody>
</table>
Chapter 1  Processing and Using Institutional Financial Aid Applications

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

The system displays the student’s name, ID, institution, dependency status, application source, and aid year. 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’s Contribution Section and a Student’s Contribution Section. The following sections describe what each column represents. For further information about the fields and sections in this component, please refer to the College Board PROFILE User’s Guide, which is only available to College Board PROFILE subscribers.

Note. To more closely align interim calculation results with the Estimated Federal Methodology (EFM) computation worksheets from the College Board, the Computation Data 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’S CONTRIBUTION section displays three columns: IM, IM w/Options, and EFM.

- The IM column displays standard base INAS calculations. Oracle supports the College Board defaulted options at the time of initial load.
- The IM w/Options column is the result of using the institutional options that you set up when you defined your institutional methodology.
• 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’S CONTRIBUTION section displays four columns: IM, IM w/ Options, IM Estimated, and EFM.

• The IM column displays standard base INAS calculations. PeopleSoft supports the College Board defaulted options at the time of initial load.

• The IM w/Options column is the result of using the institutional options that you set up when you defined your institutional methodology.

• The IM Estimated column displays an estimated calculation for the student’s contribution. The IM Estimated result is based on using the estimated summer and academic year data. The FNAR computations for this section are based on nine-month calculation regardless of the student’s dependency status.

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

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’S CONTRIBUTION IM:

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

**Percent Income**
- Indicates the custodial parent’s percentage of total parent’s income from the base IM computation.

**From Income**
- Indicates the custodial parent’s contribution from income for the student from the base IM computation.

**From Assets**
- Indicates the custodial parent’s contribution from assets for the student from the base IM computation.

For the PARENT’S CONTRIBUTION IM w/Options

**Total Income**
- Indicates the custodial parent’s total contribution for the student from the options IM computation.

**Percent Income**
- Indicates the custodial parent’s percentage of total parental income from the option IM computation.

**From Income**
- Indicates the custodial parent’s contribution from income for the student from the option IM computation.

**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.

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.

See Also

Instructions provided with the College Board PROFILE or Need Access applications.

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**Bundle 15 / Bundle 22**

Loading PROFILE Records has changed beginning with the 2010–2011 aid year. See the Loading and Managing PROFILE Processes for the 2010–2011 and Future Aid Years section of this chapter for more information.

**Loading and Managing PROFILE Processes for the 2009–2010 Aid Year**

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 applications.
- Recycle PROFILE suspense records.
- Process PROFILE suspense move.

**Note.** Oracle supports the CSS / Financial Aid PROFILE Data Reporting Layout (with corresponding school year) for PROFILE data received from the College Board.
## Pages Used to Load and Manage PROFILE Processes

**Note.** The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports two academic years of PROFILE data loads.

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Load nn/nn</td>
<td>RUNCTL_FAPFIN01</td>
<td>Financial Aid, File Management, PROFILE Import, Load Records 20nn-20nn, Profile Load nn/nn</td>
<td>Import PROFILE applications into the database.</td>
</tr>
<tr>
<td>Profile Suspense Move nn/nn</td>
<td>RUNCTL_FAMVPF01</td>
<td>Financial Aid, File Management, PROFILE Import, Move Suspense 20nn-20nn, Profile Suspense Move nn/nn</td>
<td>Process suspended PROFILE records that have been marked as add or delete on the Profile Data Load Parameters page.</td>
</tr>
</tbody>
</table>

### Loading PROFILE Applications

Your Search/Match, Add Level, and Suspense Level Rules determine whether the student’s PROFILE is inserted into either the Institutional Application (IM_*) tables or the PROFILE Suspense Management tables. As an example, your school may only admit 60 percent of those students who actually list your School Code on the PROFILE or Need Access application. Instead of loading every student who has listed your school code on the PROFILE or Need Access application, you can load only those students officially admitted.

Access the Profile Load nn/nn page (Financial Aid, File Management, PROFILE Import, Load Records 20nn-20nn, Profile Load nn/nn).

---

**Profile Load 07/08**

- **Run Control ID:** PS
- **Academic Institution:** PeopleSoft University
- **Process Name:** FAPFIN08
- **Input/Output file:** \BJRSGA01\rat02\INAS and Fell files_2008\IM_2008.dat
- **Last Run Date:** 02/29/2007
- **Last Sequence Nbr:** 1
The system displays the Run Control ID. The system displays the Process Name, Input/Output file, and Update values that you set in the Financial Aid Run Controls page. The system also displays the Last Run Date and the Last Sequence Number of the process.

When you run any of the processes, an SQR Log is created that lists each student and what action was taken regarding their record.

This process job runs two processes, the PROFILE Load process and the Automated Batch Publish process. If the PROFILE Load process fails, the Automated Batch Publish process stays in pending status and the job errors.

**Overriding Contributions with PROFILE Load Processing**

Use the Override Institutional EFC link and page to make a professional judgement adjustment to the academic or nonstandard Parent Contribution, and Student Contribution. If the Use EFC Override Value check box is selected on the INAS Institutional Extension pages when the PROFILE Load and Suspense/Move processes run, the PROFILE load evaluates and incorporates the EFC override values. The evaluation process occurs only if the Use EFC Override Values option is selected on the Profile Data Load Parameters page (Set Up SACR, Product Related, Financial Aid, File Management, PROFILE Load Parameters). After the PROFILE Load and Suspense/Move process evaluates and loads the student record, the EFC override values display on the Contribution for Student row on the Computation Data page. The system marks the values with an O on the Computation Data page.

**Recycling PROFILE Suspense Records**

Access the Profile Suspense Recycle nn/nn page (Financial Aid, File Management, PROFILE Import, Recycle Suspense 20nn-20nn, Profile Suspense Recycle nn/nn).

### Profile Suspense Recycle 07/08

<table>
<thead>
<tr>
<th>Run Control ID:</th>
<th>P8</th>
<th>Report Manager:</th>
<th>Process Monitor:</th>
<th>Run</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Academic Institution:</em></td>
<td>PeopleSoft University</td>
<td>Update:</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Process Name:</td>
<td>Add to Database (Replace)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Run Date:</td>
<td>0</td>
<td>Last Sequence Nbr:</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Profile Suspense Recycle nn/nn page

The PROFILE Suspense Recycle process reviews PROFILE suspense records and attempts to load any application currently meeting PROFILE data load parameters of Add Level, Suspense Level or Search/Match Level. The process uses current parameters, not the parameters used for the initial load. A system review enables a selection process of initially suspended PROFILE records that now meet the conditions of the data load parameters.
For example, a student’s record did not meet the condition of being admitted during the initial load process. Two days later the student is admitted and now meets the condition of being admitted. To process these records in batch, you can run the PROFILE Suspense Recycle process as a scheduled routine, which automatically sets the Processing Action Status on the Profile Suspense Management page to the Add Action value defined in the Suspense Recycle Run Control.

**Processing PROFILE Suspense Move**


**Profile Suspense Move 07/08**

<table>
<thead>
<tr>
<th>Run Control ID:</th>
<th>PS</th>
<th>Report Manager</th>
<th>Process Monitor</th>
<th>Run</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Institution:</td>
<td>FSUNV PeopleSoft University</td>
<td>Update: No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Process Name:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Run Date:</td>
<td>Last Sequence Nbr:</td>
<td>0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Profile Suspense Move nn/nn page

The PROFILE Suspense Move process ignores the PROFILE data load parameters and loads the marked records. You first set the Processing Action Status on the Profile Suspense Management page through the suspense recycle process, or manually set the Processing Action Status. The Processing Action Status values include Add - Replace, Add, Do NOT Replace, or Delete for individually suspended records. The flagged records are selected and the appropriate action, load or delete, is applied to the Application Tables by the Suspense Move background process.

This process job runs two processes, the PROFILE Suspense Move process and the Automated Batch Publish process. If the PROFILE Suspense Move process fails, the Automated Batch Publish process remains in pending status and the job errors.

**Bundle 15 / Bundle 22**

Loading and managing PROFILE records has changed beginning with the 2010–2011 aid year.

**Loading and Managing PROFILE Processes for the 2010–2011 Aid Year**

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.

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

## Pages Used to Load and Manage PROFILE Records

**Note.** The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports two academic years of PROFILE data loads.

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Load Summary 20nn-20nn</td>
<td>SFA_PF_IN_LOAD</td>
<td>Financial Aid, File Management, PROFILE Import, Load Summary 20nn-20nn, Load Summary 20nn-20nn</td>
<td>From the PROFILE Staging Table, view the load status and other details of each record of a PROFILE load instance.</td>
</tr>
</tbody>
</table>

### 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.

Load Records 2010-2011

Run Control ID: PROF_TEST

Load Option: Load Only

Academic Institution: PeopleSoft University

Aid Year: 2011

Add Action: Add New Record Only

File Parameters

Run Option: Single File

File Path: C:\temp\FILE_LOAD_ADDRESS_ADD_FA901

PROFILE Load Records 20nn-20nn

Load Option

Select the Load Option.

- Load Only — Select this option to only load the specified PROFILE files. No suspended or skipped records are re-evaluated for loading.
- Recycle Only — Select this option to only re-evaluate suspended PROFILE records for loading.
- Load and Recycle — Select this option to both load the specified PROFILE files and re-evaluate suspended PROFILE records.

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.

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.

See Also

Defining Application Options, Setting Up Need Access and PROFILE Data Load Parameters, Setting Up PROFILE Data Load Parameters.

Processing INAS, Overriding Expected Family Contribution (EFC).
Viewing PROFILE Load Summaries

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.


PROFILE Batch Detail Records tab

![PROFILE Load Summary 2010-2011 Table]

<table>
<thead>
<tr>
<th>CSS ID</th>
<th>Load Status</th>
<th>EmpID</th>
<th>Student’s Admit Level</th>
<th>Award Year</th>
<th>Application Type</th>
<th>Student Record Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>3003173</td>
<td>Processed</td>
<td>FAPF004</td>
<td>4 - Admitted</td>
<td>2011</td>
<td>Domestic PROFILE</td>
<td>Duplicate Record</td>
</tr>
<tr>
<td>3010500</td>
<td>Processed</td>
<td>FAPF008</td>
<td>4 - Admitted</td>
<td>2011</td>
<td>Domestic PROFILE</td>
<td>Original Data</td>
</tr>
<tr>
<td>3012186</td>
<td>Processed</td>
<td>FAPF005</td>
<td>5 - Accepted/Continuing</td>
<td>2011</td>
<td>Domestic PROFILE</td>
<td>Original Data</td>
</tr>
<tr>
<td>3013332</td>
<td>Processed</td>
<td>FAPF002</td>
<td>2 - Inactive</td>
<td>2011</td>
<td>Domestic PROFILE</td>
<td>Original Data</td>
</tr>
<tr>
<td>3021110</td>
<td>Skipped</td>
<td>FAPF002</td>
<td>5 - Accepted/Continuing</td>
<td>2011</td>
<td>Domestic PROFILE</td>
<td>ACR</td>
</tr>
<tr>
<td>3025777</td>
<td>Processed</td>
<td>FAPF007</td>
<td>3 - Applied/Pending</td>
<td>2011</td>
<td>Domestic PROFILE</td>
<td>ACR</td>
</tr>
<tr>
<td>3607103</td>
<td>Processed</td>
<td>FAPF001</td>
<td>1 - Has Not Applied</td>
<td>2011</td>
<td>Domestic PROFILE</td>
<td>Original Data</td>
</tr>
</tbody>
</table>

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

Load Status
Displays the Load Status of the record.

- **Suspended** — Record failed Search/Match or PROFILE Add Level load rules.
- **Processed** — Record is loaded to application table.
- **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

Student’s Admit Level
Displays the student’s admit level as associated with Academic Program Statuses in the Defining Application Processing 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

### Student Information tab

<table>
<thead>
<tr>
<th>National ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Birthdate</th>
<th>Dependency Status</th>
<th>Financial Aid Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>454-31-9875</td>
<td>DEMELLO</td>
<td>VIRGIN</td>
<td></td>
<td>1989-01-04</td>
<td>Dependent</td>
<td>First-time</td>
</tr>
<tr>
<td>454-31-9877</td>
<td>SCHUMACER</td>
<td>KUMAR</td>
<td>K</td>
<td>1989-01-06</td>
<td>Dependent</td>
<td>First-time</td>
</tr>
<tr>
<td>454-31-9876</td>
<td>PEREZ</td>
<td>ASHLEY</td>
<td>R</td>
<td>1989-01-05</td>
<td>Dependent</td>
<td>First-time</td>
</tr>
<tr>
<td>454-31-9873</td>
<td>BRAND</td>
<td>DANIA</td>
<td>S</td>
<td>1989-01-02</td>
<td>Dependent</td>
<td>First-time</td>
</tr>
<tr>
<td>454-31-9874</td>
<td>COCKRELL</td>
<td>ANDREW</td>
<td>S</td>
<td>1989-01-03</td>
<td>Dependent</td>
<td>First-time</td>
</tr>
<tr>
<td>454-31-9878</td>
<td>ANISTON</td>
<td>KATE</td>
<td>K</td>
<td>1989-01-07</td>
<td>Dependent</td>
<td>First-time</td>
</tr>
<tr>
<td>454-31-9872</td>
<td>FROST</td>
<td>MICKY</td>
<td></td>
<td>1981-07-05</td>
<td>Dependent</td>
<td>First-time</td>
</tr>
</tbody>
</table>

**Load Summary 2010-2011**

<table>
<thead>
<tr>
<th>Load Instance</th>
<th>34</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created Date</td>
<td>2009-08-24</td>
</tr>
</tbody>
</table>

**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

#### Load Summary 2010-2011

<table>
<thead>
<tr>
<th>CSS ID</th>
<th>Load Status</th>
<th>Suspend Reason</th>
<th>Skip Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>3003173</td>
<td>Processed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3010500</td>
<td>Processed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3012166</td>
<td>Processed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3016332</td>
<td>Processed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3021110</td>
<td>Skipped</td>
<td>Student Already Exists</td>
<td></td>
</tr>
<tr>
<td>3025777</td>
<td>Processed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3507103</td>
<td>Processed</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**PROFILE Load Summary 20nn-20nn page, Load Information tab**

**Suspend Reason**
- **Student ID not Found** — No student met the specified Search/Match Rules criteria.
- **Student not at Load Level** — Student ID found, but student is not at the designated Admit Level.
- **Non-Unique Student ID Found** — More than one student meets the Search/Match criteria.

**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.

### PROFILE Staging Table Data tab

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


**Profile Suspense Management Records**

<table>
<thead>
<tr>
<th>Load Instance:</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aid Year:</td>
<td>2011</td>
</tr>
<tr>
<td>CSS School Code:</td>
<td>9990</td>
</tr>
<tr>
<td>CSS ID:</td>
<td>3699663</td>
</tr>
<tr>
<td>SSN:</td>
<td>454-31-9566</td>
</tr>
<tr>
<td>Institution:</td>
<td>PSU000</td>
</tr>
</tbody>
</table>

**Date Application Loaded:** 2009-09-21

**Load Status:**
- Skipped
- Suspended
- Discarded

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

**Recycle**
Select this radio button and click the Process button to have the PROFILE records reconsidered by the PROFILE load process using the Global Add Level and Suspend Level rules.

**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.

**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*, the field is view only.

**Note.** If you update the Load Status to *Discarded*, the Load Status cannot be updated again.
• 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.
If the field is left blank and the ID Lock is unchecked, the process calls Search/Match to attempt to assign an ID.
If the field is left blank, the ID Lock is checked, and Add PROFILE is selected, the process assigns a new ID based on the Last ID assigned.

**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.
If the ID field is blank, the ID Lock field is selected, the Load Action is either Add PROFILE, and the student does not exist in the system (new record), the system assigns a new ID based on the Last ID assigned.
When Recycle is selected, if ID Lock is checked then the ID field is always expected to be populated.
If the ID field is blank, the ID Lock field is NOT selected, the Load Action is Recycle, and the student does not exist in the system (new record), the system calls Search/Match to attempt to assign an ID.
When Add PROFILE is selected ID Lock is always expected to be checked.

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

**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.

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**Loading and Managing Need Access Processes**

*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.

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

• Load Need Access applications.
• Recycle Need Access suspense records.
• Process Need Access suspense moves.
**Note.** Oracle supports loading Need Access records into your institution’s database. Oracle supports the CSS/Financial Aid PROFILE Data Reporting Layout (with corresponding school year) for Need Access data received from the Access Group.

You can perform a valid institutional methodology (IM) INAS calculation if your global policy options (Set Up SACR, Product Related, Financial Aid, Application Processing, INAS 20nn–20nn Global Options, Global and Federal Options) are defined for Need Access.

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### Pages Used to Load and Manage Need Access Processes

**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.**

**Note.** The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports two academic years of Need Access data loads.

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need Access Load nn/nn</td>
<td>RUNCTFL_FAMVNA01</td>
<td>Financial Aid, File Management, Need Access Import, Load Records</td>
<td>Import Need Access applications into the database.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>20nn-20nn, Need Access Load nn/nn</td>
<td></td>
</tr>
<tr>
<td>Recycle nn/nn</td>
<td></td>
<td>20nn-20nn, Need Access Suspense Recycle nn/nn</td>
<td></td>
</tr>
<tr>
<td>Need Access Move</td>
<td>RUNCTFL_FAMVNA01</td>
<td>Financial Aid, File Management, Need Access Import, Need Access Move</td>
<td>Process suspended Need Access records that have been marked as add or delete on the Need Access Data Load Parameters page.</td>
</tr>
<tr>
<td>Suspense nn-nn</td>
<td></td>
<td>Suspense nn-nn</td>
<td></td>
</tr>
</tbody>
</table>

---

### Loading Need Access Applications

**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.**

Chapter 1 Processing and Using Institutional Financial Aid Applications

Data not loaded to the Need Access tables can be loaded to a staging table. As an example, your school may only admit 60 percent of those students who actually list your School Code on the Need Access or PROFILE Application. Instead of loading every student with your school code on their application, you can load only those students officially admitted.

This job process runs two processes, Need Access Load process and the Automated Batch Publish process. If the Need Access Load process fails, the Automated Batch Publish process remains in pending status and the job errors.

The system displays the Process Name, Input/Output file, and Update indicator values that you set in the Financial Aid Run Controls page and displays the last run date and the last sequence number of the process.

When you run any of the processes, an SQR log lists each student and what action was taken regarding their record.

Recycling Need Access Suspense Records

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.

The Need Access Suspense Recycle reviews Need Access suspense records and attempts to load any application currently meeting Need Access data load parameters of Add Level, Suspense Level, or Search/Match Level. The process uses current parameters, not parameters used for the initial load. A system review enables a selection process of initially suspended Need Access records that now meet the conditions of the data load parameters.

For example, a student’s record did not meet the condition of being admitted during the initial load process. Two days later the student is admitted and now meets the condition of being admitted. To process these records in batch, you can run the Need Access Suspense Recycle process as a scheduled routine, which automatically sets the Processing Action Status on the Suspense Control page to the Add Action value defined in the Suspense Recycle Run Control.

Note. After the initial load has been run, you can reset the data load parameters, to move records from suspense to the application tables for students who did not meet your first load criteria.

The system displays the Process Name, Input/Output File, and Update indicator values that you set in the Financial Aid Run Controls page and displays the add action, last run date, and the last sequence number of the process.

Processing Need Access Suspense Moves

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.

The Need Access Suspense Move process ignores the Need Access data load parameters and loads the marked records. You either set the Processing Action Status on the Need Access Suspense Management page through the suspense Recycle process or manually set the Processing Action Status. The Processing Action Status values include *Add- Replace*, *Add*, *Do NOT Replace* and *Delete* for individually suspended records. The process selects the flagged records applies the appropriate action, load or delete, to the Application Tables.

Using PROFILE Suspense Management (for use with Aid Years prior to 2010–2011 only)

*Bundle 15 / Bundle 22)*

This section is only applicable for the 2009–2010 and prior aid years.

This section discusses how to use PROFILE suspense control.
Pages Used to Manage PROFILE Applications

Note. The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports two academic years of PROFILE data loads.

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Suspense Management</td>
<td>PROF_SUSP_CNTRL_nn</td>
<td>Financial Aid, File Management, PROFILE Import, Suspended Records 20nn-20nn, Profile Suspense Management</td>
<td>Manage the PROFILE applications you choose not to load during an incoming application process.</td>
</tr>
<tr>
<td>General Information</td>
<td>PROF_SUSP_INFO_SEC</td>
<td>Click the General Information link on the Profile Suspense Management page.</td>
<td>View the general information for a student whose record is in suspense.</td>
</tr>
<tr>
<td>FNAR Messages</td>
<td>PROF_SUSP_FNAR_SEC</td>
<td>Click the FNAR Messages link on the Profile Suspense Management page.</td>
<td>View the FNAR messages for a student whose record is in suspense.</td>
</tr>
</tbody>
</table>

Using PROFILE Suspense Control

Access the Profile Suspense Management page (Financial Aid, File Management, PROFILE Import, Suspended Records 20nn-20nn, Profile Suspense Management).

Profile Suspense Management page

The system displays the student’s name, aid year, CSS ID, CSS School Code, Institution, SSN (Social Security Number), Date Application Loaded, and Date Application Received.

Student Information

The system displays the student’s Date of Birth, Admit Level, and Suspend Reason.
ID

Use to search for a student’s ID to confirm whether one already exists in the database. For example, a student may fail your application load process due to a misspelled name or SSN error, but still be in your database.

Note. Be thorough when searching for a possible existing ID for a student so that you do not risk creating more than one ID for a student.

General Information
Click to access the General Information page.

FNAR Messages
Click to access the FNAR Messages page.

Processing Action

Add to Database (Replace) Select to move this student from suspense into the database and replace an existing record with the same ID number.

Add to Database (Do NOT Replace) Select to move this student from suspense into the database and not replace an existing record with the same ID number.

Delete from Database Select to remove the student from suspense and from your database.

Reporting Type

1st Time Application Select to see first time applicant records.

Subsequent Application Select to see subsequent applicant records.

Registration Only Registration only records do not load into the database.

Reviewing Institutional Correction Audits

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 view institutional correction audits.

Page Used to Review Institutional Correction Audits

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institutional Application Correction Audits</td>
<td>INST_CORR_AUDITS</td>
<td>Financial Aid, Institutional Application Data, View Correction Audits, Institutional Application Correction Audits</td>
<td>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.</td>
</tr>
</tbody>
</table>
Viewing Institutional 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.