

FOREIGN SCHOOLS #1

Importing ISIRs Into EDExpress for Foreign Schools

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INTRODUCTION

- This session will describe the benefits of foreign schools using Institutional Student Information Records (ISIRs) to determine student eligibility, instead of relying on Student Aid Reports (SARs)
- The EDExpress for Windows software package provided by Federal Student Aid will be introduced as a tool schools can use to manage processed Free Application for Federal Student Aid (FAFSA®) data sent to the school as ISIRs

AGENDA

- Benefits of ISIRs
- EDExpress Software
- Training and Resources

BENEFITS OF ISIRS



WHAT IS AN ISIR?

- There are two primary output documents when a student's FAFSA is processed
 - The SAR is designed for students
 - The ISIR is designed for schools
- The Department sends ISIRs to all schools whose Federal School Code appears on the student's FAFSA
 - The ISIRs are sent to each schools Student Aid Information Gateway (SAIG) mailbox
 - Foreign school's have SAIG mailboxes and are receiving ISIR files
 - The Department considers schools to have received ISIRs when they are placed in the school's SAIG mailbox and the school is then responsible for all the information on that ISIR

COMPARING ISIRS AND SARS

- There is information available to school officials on the ISIR that does not appear on the SAR
 - NSLDS loan history detail
 - Application processing detail
 - Source of correction
 - Pushed ISIR flag
 - Reprocessed Reason Code
 - Reject and Assumption Override Codes
 - SAR C Change Flag
 - EFC Change Flag
 - Rejected Status Change Flag
 - DOD Match Flag

ISIR EXAMPLE

OFFICE INFORMATION

Primary EFC Type	9	Source of Correction	XXXXXXXXXX
Secondary EFC Type	9	Federal School Code Indicator	999999
Transaction Processed Date	MM/DD/20YY		
Transaction Data Source/Type	XX		
Reject Override Codes			
A: X B: X C: X G: X J: X K: X N: X W: X 3: X 12: X 20: X 21: X			
Assumption Override Codes			
1: X 2: X 3: X 4: X 5: X 6: X			
FAA Information			
Date ISIR Received	MM/DD/20YY	CPS Pushed ISIR	XXX
Verification Flag	X	Rejects Met	99,99,99,99,99,99,99
Professional Judgment Flag	XXXXXX	Verification Tracking Flag	XXXX
Transaction Receipt Date	MM/DD/20YY	Dependency Override Indicator	XXXXXXXXXX
Reprocessed Reason Code	XX	ETI	9
Processed Record Type	X	Correction # Applied To	99
		Application Receipt Date	MM/DD/20YY

ISIR EXAMPLE (CONT.)

IRS Data Flags

Flag	Student	Parent	Flag	Student	Parent
Req	X	X	AGI	X	X
Display	X	X	Taxes Paid	X	X
IRA Deductions	X	X	Tax Return Type	X	X
Tax-Exempt Int. Income	X	X	Return Filing Status	X	X
Untaxed IRA Dist. & Pension Portions	X	X	Education Credits	X	X
Filed Schedule 1?	X	X			
CFH Indicator		X			
Duplicate SSN Flag		XXX	Verification Selection Flag		X
Address Only Correction		X	EFC Change Flag		XXXXXXXXX
SAR C Change Flag		X	Special Circumstance Flag		X
High School Flag		X	Auto Zero EFC Flag		XXX
Rejected Status Change Flag		X	SNT Flag		XXX
Match Flags					
SSN 9 SSA 9 DHS 9 SS 9 NSLDS 9 VA 9			DHS Sec. Conf. X	Parent 1 SSN 9	Parent 2 SSN 9 DOD X
DHS Verification #		9999999999999999	SS Registration Flag		X
NSLDS Transaction Number		9	NSLDS Database Results Flag		9
Comments:		999,999,999,999,999,999			



PUSHED ISIRS

- ISIRs that are pushed are automatically sent to schools
- Examples of transactions automatically pushed to schools include
 - Transaction is system-generated
 - EFC Change Flag is set
 - Reject Status Change Flag is set
 - SAR C Flag changes between transactions
- The SAR does not show if a transaction was pushed
- ISIRs are pushed if a student's eligibility changes, such as defaulting on a federal student loan

PUSHED ISIRS (CONT.)

- The date that a pushed ISIR is sent to the school's SAIG mailbox is when the Department considers the school to have received the ISIR
- Schools are responsible for reviewing all ISIRs sent to the school
- If the pushed ISIR is sent as a result of a change in the student's eligibility, the school is responsible for taking appropriate action at the time it receives the ISIR

ISIR GUIDE

2022–2023 ISIR Guide (Updated Oct. 4, 2021)

POSTED DATE: July 12, 2021

SUBJECT: 2022–2023 ISIR Guide (Updated Oct. 4, 2021)

Note

On Oct. 4, 2021, this document was updated to correct the second description of a blank field value on page 38. The second description now reads “No match conducted if SSN Match Flag does not equal 4.” The previous description of “Blank (Match not performed)” has been removed.

We are pleased to announce the posting of the 2022–2023 ISIR Guide. The ISIR Guide assists financial aid administrators (FAAs) in interpreting information displayed on the *Institutional Student Information Record* (ISIR). ISIRs contain processed student information reported on the *Free Application for Federal Student Aid* (FAFSA[®]) form, as well as key processing results and National Student Loan Data System (NSLDS[®]) financial aid history information. ISIRs are sent electronically to institutions by the Central Processing System (CPS).

Attachments

2022–2023 ISIR Guide in PDF Format, 120 Pages, 2MB

<https://fsapartners.ed.gov/knowledge-center/library/handbooks-manuals-or-guides/2021-07-12/2022-2023-isir-guide>

EDEXPRESS SOFTWARE



EDEXPRESS SOFTWARE (CONT.)

- EExpress for Windows is a fully integrated software package provided by Federal Student Aid that enables schools to process, package and manage student financial aid records electronically in an easy-to-use Windows format
- There is a version of EExpress for each award year
- EExpress modules include
 - Application Processing – for managing FAFSA data
 - Packaging
 - Direct Loan – for processing William D. Ford Federal Direct Loan (Direct Loan) origination and disbursement data
 - Pell Grant
 - TEACH Grant

APPLICATION PROCESSING MODULE

- Import, review and print ISIR records that are generated when
 - Students submit FAFSAs
 - Students correct FAFSAs
 - Schools make corrections to student FAFSA data using FAA Access to CPS Online
 - ISIRs are pushed to the school as a result of changes to student eligibility
- All ISIRs received by a school are stored in the EDEXpress database
 - Complies with regulatory requirement to retain student application data in the format in which it was received
- EDEXpress interfaces with FAA Access to CPS Online so you can enter and submit data directly to CPS

PRINTING ISIRS

- To see all the fields on an ISIR, you must “print” the ISIR, however this does not require the printing of a paper ISIR
- ISIRs can be saved electronically as a PDF file, printed to file, or printed on paper
- Schools can choose to print all SAR comment codes and/or NSLDS information
- Schools can print a single ISIR, or they can print multiple ISIRs

DOWNLOADING EDEXPRESS

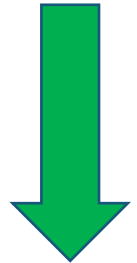
- The 2022-2023 version of EDExpress can be downloaded from the Partner Connect website
- <https://fsapartners.ed.gov/knowledge-center/topics/software-and-other-tools/edexpress/2022-2023>
- There are multiple releases of the software each year starting with setup and application processing, followed by Pell Grant and Direct Loan processing

TRAINING AND RESOURCES



EDEXPRESS TRAINING

- EDEExpress training can be found under systems training on the FSA Training website
- <https://fsatraining.ed.gov/>



EDEXPRESS TRAINING



The EDExpress for Windows software, produced and provided by Federal Student Aid, is a free PC application that processes, packages, and manages Title IV student financial aid records. This series of instructional videos and reference guides is designed for anyone who wants to learn how to use the EDExpress for Windows software. Each module in the series explores a different part of the software and includes multiple lessons on related topics.

EDEXPRESS TRAINING

[View a video update of the 2022–23 EDEXpress release 1.0](#)

[View a video update of the 2022–23 EDEXpress release 2.0](#)

[View the Electronic Announcement for the 2022–23 EDEXpress release 3.0](#)

EDEXPRESS TRAINING

SOFTWARE SETUP



EDEXPRESS BASICS



PACKAGING AID



WORKING WITH ISIRS



PELL GRANT
ORIGINATION AND
DISBURSEMENTS



DIRECT LOAN
ORIGINATION AND
DISBURSEMENTS








TEACH GRANT
ORIGINATION AND
DISBURSEMENTS







RESOURCES




EDEXPRESS SOFTWARE SETUP

-  Security Groups, User ID, and Password Setup
-  Assumed School Setup
-  Prior Year Import
-  File Management and EDconnect
-  FAA Access Setup
-  Application Processing System Setup
-  Pell, Direct Loan, and TEACH Grant – COD Setup (System)
-  Pell Grant – COD Setup (School)
-  Direct Loan – COD Setup (School)
-  TEACH Grant – COD Setup (School)
-  COD Setup - Disbursement Profile Codes
-  COD Setup - CIP and Program Profiles Codes

EDEXPRESS BASICS AND WORKING WITH ISIRS

-  Navigating EDEXpress
-  Queries in EDEXpress
-  Verification in EDEXpress
-  Document Tracking in EDEXpress

-  Importing an ISIR
-  Printing ISIRs

DIRECT LOAN ORIGINATION AND DISBURSEMENTS

-  Creating DL Records through Manual Entry
-  Creating DL Records by Importing ISIRs
-  Creating DL Records from External Import
-  DL Disbursement Records - Manual Entry
-  DL Disbursement Records - Multiple Entry
-  Exporting DL Records to COD
-  Importing DL Records from COD
-  Making Changes to a Direct Loan Award
-  Adjusting DL Actual Disbursements and Inactivating a Loan
-  Booking Direct Loans

EDEXPRESS RESOURCES

EDEExpress 2022-2023

To view prior releases for EDEExpress 2022-2023, click [here](#).

 Print

Documentation

- [2021-08-19](#) - Subject: EDEExpress 2022-2023 Packaging Technical Reference
- [2021-09-27](#) - Subject: EDEExpress 2022-2023 Installation Guide
- [2022-06-10](#) - Subject: Updated EDEExpress 2022-2023 Release 1.0 Desk Reference
- [2022-04-29](#) - Subject: EDEExpress 2022-2023 Release 2.0 Cover Letter
- [2022-04-29](#) - Subject: EDEExpress 2022-2023 Release 2.0 Desk Reference

EDEXPRESS SOFTWARE QUESTIONS

- For any questions about the EDExpress software contact CPS/SAIG Technical Support
 - CPSSAIG@ed.gov
 - 1-800-330-5947 (toll free)
 - 1-307-459-2495 (if unable to dial toll free number)
 - Office hours are 8:00 a.m. to 8:00 p.m. U.S. Eastern Time Monday through Friday

QUESTIONS?

<https://fsapartners.ed.gov/help-center/contact-customer-support>

OR

FSA.Foreign.Schools.Team@ed.gov

SCHOOL ELIGIBILITY AND OVERSIGHT SERVICES GROUP (SEOSG)

Martina Fernandez-Rosario – Director, School Eligibility and Oversight Services Group

415-486-5605

School Eligibility and Oversight Services Group General Number: 202-377-3173 or email: CaseTeams@ed.gov

Or call/email the appropriate School Participation Division team below for information and guidance on audit resolution, financial analysis, program reviews, school and program eligibility/recertification, and school closure information.

New York/Boston School Participation Division

Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont, New Jersey, New York, Puerto Rico, Virgin Islands

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Chicago/Denver School Participation Division

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San Francisco/Seattle School Participation Division

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