

**DRAFT (8-14-02)**

**SPECIFICATIONS FOR NEED ANALYSIS SERVICES**

**ACADEMIC YEAR 2003-2004**

**VERSION 1.0**

**August 15, 2002**

The processing edits included in this specification package have been developed using a priority processing logic. Some steps in the process are contingent upon or use data from previous steps. It is therefore necessary that the processing edits be performed in the sequence in which they are presented in these specifications. That sequence is as follows:

1. Valid Field Definitions (11 pages)
2. Model Determination (5 pages)
3. Complete Assumptions (13 pages)
4. Simplified Needs Test (4 pages)
5. Complete Reject Edits (7 pages)
6. Determination of Formula Type (4 pages)
7. Expected Family Contribution Formula Calculation (43 pages)
8. Alternate EFC Calculations (6 pages)

All edits or formula steps that are additions or revisions to the prior year's specifications have been marked with an exclamation mark (!) next to the edit number, step, or field.

All values that are variables, and subject to change during the year, are marked with an @.

Unless otherwise specified, all calculations should be carried to 3 decimal places and then rounded to the nearest whole number (upward from .500 and downward from .499).

For example, 4.500 would be rounded to 5; 4.499 would be rounded to 4; -4.500 would be rounded to -5.

Do not process applications dated prior to 1/1/2002.

The Department of Education will provide a test file for use by each servicer in self-testing of their NAS system. Expected results will be included on the file for 100% of the test cases. The Department is not testing or certifying NAS systems for 2003-2004 and therefore will not accept test results for review.

The test data will be provided in Social Security Number (SSN) order and in the 2003-2004 Institutional Student Information Record (ISIR) format. The ISIR record layout is included in the Appendix following the specifications.

If you have questions related to the specifications package or the test data, please call Dan Staples, ORC Macro International, at (301) 572-0272, or e-mail at [Daniel.A.Staples@orcmacro.com](mailto:Daniel.A.Staples@orcmacro.com).

For the 2003-2004 cycle, there are several significant changes to the specifications. All changes to edits, text or formula steps are marked with an exclamation mark (!). All tables in the formulas have been updated to account for inflation. The following is a general summary of the substantive changes that have been made to each section of the specifications.

#### Valid Field Definitions

- Veteran's Benefits Amount increased to 4 digits.
- Parents' Marital Status Date added

#### Model Determination

- Dates have been updated in the applicable edits.

#### Complete Assumptions

- No changes have been made to the Complete Assumption edits.

#### Simplified Needs Test

- Parameter for Auto Zero EFC edits changed to \$15,000.

#### Complete Reject Edits

- Dates incremented in rejects A and B and SSN Match Flag check added to condition.
- Condition for reject C revised.
- Edits for rejects R, 9, and 12 have been added.

#### Formula Calculations

- Updated SST, IPA, EA, ANW, APA, and AAI rates and tables

## 2003-2004 NAS VALID FIELD DEFINITIONS AND EDITING SPECIFICATIONS

Version 1.0  
08/15/2002

FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
01 Last Name	16	Valid characters for name: Alpha/numeric (A-Z) (0-9) . (period) ' (apostrophe) - (dash)	First position must be A through Z. Correct by left justifying last name if present.
02 First Name	12	Blank or characters listed above.	Correct by replacing first name as it appears on application or set to blank. Left justify.
03 Middle Initial	1	Blank or Alpha (A-Z).	Correct by replacing middle initial as it appears on application or set to blank. Left justify.
04 Street Address (student permanent mailing address)	35	Blank or valid characters for address: Alpha/numeric (A-Z) (0-9) . (period) ' (apostrophe) - (dash) / (slash) # (number) @ (at) % (percent or care of) & (ampersand) , (comma)	For street address and city: Set non-valid characters to blank. Left justify.
05 City (student permanent mailing address)	16	Blank or characters listed above.	Left Justify
06 Mailing State (mailing address)	2	Blank or valid alpha code. For specific State codes, see list that follows these edits.	If numeric, invalid, or illegible, set to blank.
07 Zip Code	5	All blank or all numeric.	
08 Social Security Number	9	All numeric (except all zeroes). 001-01-0001 - 999-99-9999	
09 Date of Birth	8	All blank or all numeric in CCYYMMDD format where MM = 01-12, DD = 01-31, CC = 19, YY = 00-99.	Set DOB to blank if month, day, century or year is blank, illegible, or invalid.
10 Student's Telephone Number	10	All blank or all numeric.	If less than 10 digits, invalid, or illegible, set to blank.

## 2003-2004 NAS VALID FIELD DEFINITIONS AND EDITING SPECIFICATIONS

Version 1.0  
08/15/2002

FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
11 Student's Driver's License Number	20	All blank or valid characters: Alpha/numeric (A-Z) (0-9) - (dash), or * (asterisk)	If less than 20 characters, left justify. Set invalid characters to blank.
12 Student's Driver's License State	2	Blank or valid alpha code. For specific State codes, see list that follows these edits.	If blank, numeric, invalid, or illegible, set to blank.
13 Citizenship	1	Blank, 1, 2, or 3. 1 = U. S. Citizen 2 = Eligible non-citizen 3 = Neither 1 or 2	Set multiple responses to blank.
14 Alien Registration Number	9	Blank or 000000001 - 999999999.	If number is less than 7 digits or greater than 9 digits, set it to blank. If number is 7 digits, add two preceding zeroes. If number is 8 digits, add one preceding zero. Set 000000000 to blank.
15 Student's Marital Status	1	Blank, 1, 2 or 3. 1 = (unmarried) 2 = (married/remarried) 3 = (separated)	Set multiple response to blank.
16 Student's Marital Status Date	6	All blank or all numeric in CCYYMM format where MM = 01-12, CC = 19-20, YY = 00-99.	Set to blank if month, century or year is blank, illegible, or invalid.
17 Summer '03 Enrollment Status	1	Blank, 1, 2, 3, 4, or 5. 1 = Full time/Not sure 2 = 3/4 time 3 = 1/2 time 4 = Less than 1/2 time 5 = Not attending	Set multiple responses to blank.
18 Fall '03 Enrollment Status	1	Blank, 1, 2, 3, 4, or 5. 1 = Full time/Not sure 2 = 3/4 time 3 = 1/2 time 4 = Less than 1/2 time 5 = Not attending	Set multiple responses to blank.

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FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
19 Winter '04 Enrollment Status	1	Blank, 1, 2, 3, 4, or 5. 1 = Full time/Not sure 2 = 3/4 time 3 = 1/2 time 4 = Less than 1/2 time 5 = Not attending	Set multiple responses to blank.
20 Spring '04 Enrollment Status	1	Blank, 1, 2, 3, 4, or 5. 1 = Full time/Not sure 2 = 3/4 time 3 = 1/2 time 4 = Less than 1/2 time 5 = Not attending	Set multiple responses to blank.
21 Summer '04 Enrollment Status	1	Blank, 1, 2, 3, 4, or 5. 1 = Full time/Not sure 2 = 3/4 time 3 = 1/2 time 4 = Less than 1/2 time 5 = Not attending	Set multiple responses to blank.
22 Father's Educational Level	1	Blank, 1, 2, 3, or 4. 1 = Middle School/Jr. High 2 = High School 3 = College 4 = Unknown	Set multiple responses to blank.
23 Mother's Educational Level	1	Blank, 1, 2, 3, or 4. 1 = Middle School/Jr. High 2 = High School 3 = College 4 = Unknown	Set multiple responses to blank.
24 Student's State of Legal Residence	2	Blank or valid alpha code. See attached list.	If numeric, invalid, or illegible, set to blank.
25 Student Legal Resident Before 1/1/97	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
26 Student's Legal Residence Date	6	All blank or all numeric in CCYYMM format where	Set to blank if month, century or year is blank,

FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
		MM = 01-12, CC = 19-20, YY = 00-99.	illegible, or invalid.
27 Are You Male	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
28 Selective Service Registration	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
29 Degree/Certificate	1	Blank, 1, 2, 3, 4, 5, 6, 7, 8 or 9. For specific codes see list that follows these edits.	Set multiple responses to blank.
30 Grade Level in College	1	Blank, 0, 1, 2, 3, 4, 5, 6 or 7. 0 = 1st, never attended 1 = 1st, attended before 2 = 2nd 3 = 3rd 4 = 4th 5 = 5th year or more undergraduate 6 = 1st year graduate 7 = continuing graduate	Set multiple responses to blank.
31 High School Diploma or GED Received	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
32 Bachelor's Degree	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
33 Interested in Student Loans	1	Blank 1, or 2. 1 = Yes 2 = No	Set multiple responses to blank.
34 Interested in Work Study	1	Blank 1, or 2. 1 = Yes 2 = No	Set multiple responses to blank.
35 Drug Conviction Eligibility	1	Blank, 1, 2, or 3 1 = Eligible	

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FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
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		2 = Part-year Eligibility 3 = Ineligible/Don't Know	
36 Student's Tax Return Status	1	Blank, 1, 2, or 3. 1 = Already completed 2 = Will file 3 = Will not file	Set multiple responses to blank.
37 Student's Type of Tax Return	1	Blank, 1, 2, 3 or 4 1 = 1040 2 = 1040A/EZ/TEL 3 = Foreign tax return 4 = Trust Territory tax return	Set multiple responses to blank.
38 Student Eligible for 1040A/EZ	1	Blank, 1, 2, or 3 1 = Yes 2 = No 3 = Don't know	Set multiple responses to blank.
39 Student's AGI	6	Blank or 000000 - 999999, or (-).	
40 Student's Taxes Paid	5	Blank or 00000 - 99999.	Set to positive if negative is given.
41 Student's Exemptions	2	Blank or 00 - 99.	Set to positive if negative is given. If greater than 99, set to 99.
42 Student's Income	6	Blank or 000000 - 999999, or (-).	
43 Spouse's Income	6	Blank or 000000 - 999999, or (-).	
44 Student's Income from Worksheet A 5		Blank or 00000 - 99999.	Set to positive if negative is given.
45 Student's Income from Worksheet B 5		Blank or 00000 - 99999.	Set to positive if negative is given.
46 Student's Income from Worksheet C 5		Blank or 00000 - 99999.	Set to positive if negative is given.
47 Student's Real Estate/Investment Net Worth	6	Blank or 000000 - 999999.	Set to positive if negative is given.



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FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
48 Student's Business/Farm Net Worth	6	Blank or 000000 - 999999.	Set to positive if negative is given.
49 Student's Cash, Savings, and Checking	6	Blank or 000000 - 999999.	Set to positive if negative is given.
50 Veteran's Benefits Months	2	Blank or 00 - 12.	If greater than 12, set to 12.
51 Veteran's Benefits Amount	4	Blank or 0000 - 9999.	
52 Born Before 1/1/80	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
53 Graduate or Professional Student	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
54 Is Student Married	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
55 Do You Have Children	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
56 Dependents Other Than Spouse	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
57 Orphan or Ward	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
58 Veteran Status	1	Blank, 1 or 2. 1 = Yes 2 = No	Set multiple responses to blank.
59 Parents' Marital Status	1	Blank, 1, 2, 3 or 4 1 = (married/remarried) 2 = (single) 3 = (separated/divorced) 4 = (widowed)	Set multiple responses to blank.

## 2003-2004 NAS VALID FIELD DEFINITIONS AND EDITING SPECIFICATIONS

Version 1.0  
08/15/2002

FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
60 Parents' Marital Status Date	6	All blank or all numeric in CCYYMM format where MM = 01-12, CC = 19-20, YY = 00-99.	Set to blank if month, century or year is blank, illegible, or invalid.
61 Father's SSN	9	Blank or all numeric 000-00-0000 - 999-99-9999	
62 Father's Last Name	16	Valid characters for name: Alpha/numeric (A-Z) (0-9) . (period) ' (apostrophe) - (dash)	First position must be A through Z. Correct by left justifying last name if present.
63 Mother's SSN	9	Blank or all numeric 000-00-0000 - 999-99-9999	
64 Mother's Last Name	16	Valid characters for name: Alpha/numeric (A-Z) (0-9) . (period) ' (apostrophe) - (dash)	First position must be A through Z. Correct by left justifying last name if present.
65 Parents' Number of Family Members 2		Blank or 01 - 99.	Set to positive if negative is given. If greater than 99, set to 99.
66 Parents' Number in College	1	Blank or 1 - 9.	Set to positive if negative is given. If greater than 9, set to 9.
67 Parents' State of Legal Residence	2	Blank or valid alpha code. For specific State codes, see list that follows these edits.	Determine from application.
68 Parents Legal Residents Before 1/1/98	1	Blank, 1 or 2.	Set multiple responses to blank.
69 Parents' Legal Residence Date	6	All blank or all numeric in CCYYMM format where MM = 01-12, CC= 19-20, YY = 00-99.	Set to blank if month, century or year is blank, illegible or invalid.
70 Age of Older Parent	2	Blank or 00 - 99.	
71 Parents' Tax Return Status	1	Blank, 1, 2 or 3. 1 = Already completed	Set multiple responses to blank.

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Version 1.0  
08/15/2002

FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
		2 = Will file 3 = Will not file	
72 Parents' Type of Tax Return	1	Blank, 1, 2, 3 or 4 1 = 1040 2 = 1040A/EZ/TEL 3 = Foreign tax return 4 = Trust Territory tax return	Set multiple responses to blank.
73 Parents' Eligible for 1040A/EZ	1	Blank, 1, 2, or 3 1 = Yes 2 = No 3 = Don't know	Set multiple responses to blank.
74 Parents' AGI	6	Blank or 000000 - 999999, or (-).	
75 Parents' Taxes Paid	6	Blank or 000000 - 999999.	Set to positive if negative is given.
76 Parents' Exemptions	2	Blank or 00 - 99.	Set to positive if negative is given. If greater than 99, set to 99.
77 Father's Income	6	Blank or 000000 - 999999, or (-).	
78 Mother's Income	6	Blank or 000000 - 999999, or (-).	
79 Parents' Income From Worksheet A	5	Blank or 00000 - 99999.	Set to positive if negative is given.
80 Parents' Income From Worksheet B	5	Blank or 00000 - 99999.	Set to positive if negative is given.
81 Parents' Income From Worksheet C	5	Blank or 00000 - 99999.	Set to positive if negative is given.
82 Parents' Real Estate/Investment Net Worth	6	Blank or 000000 - 999999.	Set to positive if negative is given.
83 Parents' Business/Farm Net Worth	6	Blank or 000000 - 999999.	Set to positive if negative is given.
84 Parents' Cash, Savings, and Checking	6	Blank or 000000 - 999999.	Set to positive if negative is given.
85 Student's Number of Family Members	2	Blank or 00 - 99.	Set to positive if negative is given. If greater than 99, set to 99.
86 Student's Number in College	1	Blank or 0 - 9.	Set to positive if negative is given.

## 2003-2004 NAS VALID FIELD DEFINITIONS AND EDITING SPECIFICATIONS

Version 1.0  
08/15/2002

FIELD NUMBER/NAME	LENGTH	VALID FIELD CONTENT	EDIT PROCEDURES
			If greater than 9, set to 9.
100 Date Completed	8	Blank or all numeric in CCYYMMDD format, where MM = 01-12, DD = 01-31, CC = 20, YY = 03-04.	Set to blank if multiple responses checked in year.
101 Signed By	1	Blank, A, P or B. A = Signed by Applicant P = Signed by Parent B = Signed by Applicant and Parent	Determine from application.

## FORMAT INSTRUCTIONS

Key only the dollar amount of any financial field, subject to right justify and left zero fill.

Set to negative nines (-99999) when a negative amount is given that is larger than what the field allows.

Set to positive nines (99999) when a positive amount is given that is larger than what the field allows.

2003-2004 NAS VALID FIELD DEFINITIONS AND EDITING SPECIFICATIONS

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STATE CODES

Alabama	AL	Mississippi	MS	Military Location Code	AA*
Alaska	AK	Missouri	MO	Military Location Code	AE*
American Samoa	AS	Montana	MT	Military Location Code	AP*
Arizona	AZ	Mexico	MX		
Arkansas	AR	Nebraska	NE		
California	CA	Nevada	NV		
Canada	CN	New Hampshire	NH		
Colorado	CO	New Jersey	NJ		
Connecticut	CT	New Mexico	NM		
Delaware	DE	New York	NY		
District of Columbia DC		North Carolina	NC		
Foreign Country	FC	North Dakota	ND		
Federated States of	FM	Ohio	OH		
Micronesia		Oklahoma	OK		
Florida	FL	Oregon	OR		
Georgia	GA	Pennsylvania	PA		
Guam	GU	Puerto Rico	PR		
Hawaii	HI	Republic of Palau	PW		
Idaho	ID	Rhode Island	RI		
Illinois	IL	South Carolina	SC		
Indiana	IN	South Dakota	SD		
Iowa	IA	Tennessee	TN		
Kansas	KS	Texas	TX		
Kentucky	KY	Utah	UT		
Louisiana	LA	Vermont	VT		
Maine	ME	Virgin Islands	VI		
Mariana Islands	MP	Virginia	VA		
Marshall Islands	MH	Washington	WA		
Maryland	MD	West Virginia	WV		
Massachusetts	MA	Wisconsin	WI		
Michigan	MI	Wyoming	WY		
Minnesota	MN				

\* Codes are valid for mailing state only.

## DEGREE/CERTIFICATE CONVERSIONS

Degree/Certificate Code	Literal
<hr/>	
1	1ST BA
2	2ND BA
3	ASSOC. TECHNICAL
4	ASSOC. GENERAL
5	CERT/DIPLOMA
6	CERT/DIPLOMA 2 YR
7	TEACHING
8	GRAD/PROF
9	OTHER

The result of completing the model determination edits is to determine if applicants are dependent on their parents for financial support or if they can be considered independent from their parents. The determination of dependency status is critical to the rest of the application process; therefore, it is essential to perform this step first.

When performing the following edits to determine model, use reported data only. No assumptions should be made except those included in these edits. If multiple responses are given for a data element, set the field to blank.

Invalid date of birth is defined as follows:

- Month is less than 01 or greater than 12
- Day is out of following range:

Month Valid Day Range

01	01-31
02	01-28 (unless year is divisible by 4 when 01-29 is valid)
03	01-31
04	01-30
05	01-31
06	01-30
07	01-31
08	01-31
09	01-30
10	01-31
11	01-30
12	01-31

Date of Birth year equal to current year is considered valid for these edits.

EDIT 1001 !

Condition: Born Before 1/1/80 is blank or "No", and Date of Birth is not blank or invalid and is less than 1/1/80

Procedure: Assume "Yes" for Born Before 1/1/80.

EDIT 1002 !

Condition: Born Before 1/1/80 is blank or "Yes" and Date of Birth is not blank or invalid and is greater than 12/31/79.

Procedure: Assume "No" for Born Before 1/1/80.

EDIT 1003

Condition: Born Before 1/1/80 is blank, and Date of Birth is blank or invalid.

Procedure: Assume "No" for Born Before 1/1/80.

EDIT 1004

Condition: Is Student Married is blank or "No," and Student's Marital Status is married or separated.

Procedure: Assume Yes for Is Student Married.

EDIT 1005

Condition: Is Student Married is blank or "Yes," and Student's Marital Status is unmarried.

Procedure: Assume No for Is Student Married.



EDIT 1006

Condition: Is Student Married is blank, or "Yes," Student's Marital Status is blank and Student's Number of Family Members is 01, zero or blank.

Procedure: Assume No for Is Student Married.

EDIT 1007

Condition: Is Student Married is blank, Student's Marital Status is blank, Student's Number of Family Members is 02, Do You Have Children is "No", and Legal Dependents Other Than A Spouse is "No."

Procedure: Assume Yes for Is Student Married.

EDIT 1008

Condition: Is Student Married is blank or "Yes," Student's Marital Status is blank, Student's Family Members is 02, and (Do You Have Children is "Yes") or (Legal Dependents Other Than A Spouse is "Yes").

Procedure: Assume No for Is Student Married.

EDIT 1009

Condition: Is Student Married is blank or "No," Student's Marital Status is blank, Student's Family Members is 02, Do You Have Children is blank, Legal Dependents Other Than A Spouse is blank, and Spouse's Income is non-blank and non-zero.

Procedure: Assume Yes for Is Student Married.

EDIT 1010

Condition: Is Student Married is blank or "Yes," Student's Marital Status is blank, Student's Family Members is 02, Do You Have Children is blank, Legal Dependents Other Than A Spouse is blank, and Spouse's Income is blank or zero.

Procedure: Assume No for Is Student Married.

EDIT 1011

Condition: Is Student Married is blank or "No" Student's Marital Status is blank, Student's Family Members is greater than 02, and Spouse's Income is non-blank and non-zero.

Procedure: Assume Yes for Is Student Married.

EDIT 1012

Condition: Is Student Married is blank or "Yes," Student's Marital Status is blank, Student's Family Members is greater than 02, and Spouse's Income is blank or zero.

Procedure: Assume No for Is Student Married.

EDIT 1013

Condition: (Do You Have Children is "Yes") or (Legal Dependents is "Yes") and Student's Number Family Members is blank, 0 or 1.

Procedure: Assume No for Do You Have Children and/or Legal Dependents, whichever field was reported as "Yes".

EDIT 1014

Condition: Veteran Status is "Yes" and VA Match flag is 2 or 3.

Procedure: Assume No for Veteran Status.

Condition: Any one of Born Before 1/1/80, Veteran Status, Graduate or Professional Student, Is Student Married, Orphan or Ward, Do You Have Children, or Legal Dependents Other Than Spouse is "Yes".

Procedure: Set application model to Independent.

#### EDIT 1016

Condition: For records not meeting the above edit.

Procedure: Set application model to Dependent.

#### EDIT 1017

Condition: Application model is Dependent and Dependency Override code is set to 1.

Procedure: Set application model to Independent.

## COMPLETE ASSUMPTIONS FOR FORMULA CALCULATIONS

Assumption edits should be performed in the order presented below. Once a value has been assumed for a data field, the assumed value should be used for subsequent edits, which use that data field.

### PARENTS' DATA ELEMENTS

#### EDIT 2001

Condition: Parents' Marital Status is blank and Parents' Number of Family Members is 3 or greater.

Procedure: Assume Parents' Marital Status is married.

#### EDIT 2002

Condition: Parents' Marital Status is blank and Parents' Number of Family Members is 2.

Procedure: Assume Parents' Marital Status is single.

#### EDIT 2003

Condition: Parents' Number of Family Members is blank, 1, or 2 and Parents' Marital Status is married.

Procedure: Assume Parents' Number of Family Members is 3.

#### EDIT 2004

Condition: Parents' Number of Family Members is blank or 1 and Parents' Marital Status is single, separated/divorced, or widowed.

Procedure: Assume Parents' Number of Family Members is 2.

EDIT 2005

Condition: Parents' Number in College is blank or zero.

Procedure: Assume Parents' Number in College is 1.

EDIT 2006

Condition: Parents' Number in College is equal to Parents' Number of Family Members, both are greater than 1, and FAA Adjustment Flag is not set to 1.

Procedure: Assume Parents' Number in College is 1.

EDIT 2007

Condition: Parents' Number in College is greater than 6.

Procedure: Assume Parents' Number in College is 1.

EDIT 2008

Condition: Parents' Number in College re-entered as greater than 6 on correction record.

Procedure: Make no assumption for Parents' Number in College.

EDIT 2009

Condition: Parents' Number in College is greater than Parents' Number of Family Members.

Procedure: Assume Parent's Number in College is 1.

EDIT 2010

- Condition: Parents' Number in College is greater than Parents' Number of Family Members minus 2, Parents' Marital Status is married, and FAA Adjustment Flag is not set to 1.
- Procedure: Assume Parents' Number in College is equal to Parents' Number of Family Members minus 2.

EDIT 2011

- Condition: Parents' AGI is blank or zero, ((Parents' Type of Tax Return is non-blank) or (Type of Tax Return is blank and Parents' Tax Return Status is filed or will file)), and Father's Income or Mother's Income is positive or negative.
- Procedure: Assume Parents' AGI is equal to sum of Father's Income plus Mother's Income. (If sum of earnings is greater than 6 digits, use 999999 or -999999.)

EDIT 2012

- Condition: Parents' AGI is re-entered as zero on a correction record.
- Procedure: Make no assumption for Parents' AGI.

EDIT 2013

- Condition: Parents' AGI is positive, Parents' Tax Return Status is will not file, and Father's Income and Mother's Income are blank or zero.
- Procedure: Assume Father's Income is equal to Parents' AGI.

**Determination of tax filing status:**

EDIT 2014

- Condition: Parents' Type of Tax Return is non-blank.
- Procedure: Assume parents' tax filing status is tax filer.

EDIT 2015

Condition: Parents' Tax Return Status is filed or will file and Parents' Type of Tax Return is blank.

Procedure: Assume parents' tax filing status is tax filer.

EDIT 2016

Condition: Parents' AGI is positive, negative, or zero, Parents' Tax Return Status is blank, and Parents' Type of Tax Return is blank.

Procedure: Assume parents' tax filing status is tax filer.

EDIT 2017

Condition: Parents' Tax Return Status is will not file and Parents' Type of Tax Return is blank.

Procedure: Assume parents' tax filing status is non-tax filer.

EDIT 2018

Condition: Parents' AGI is blank, Parents' Tax Return Status is blank, and Parents' Type of Tax Return is blank.

Procedure: Assume parents' tax filing status is non-tax filer.

EDIT 2019

Condition: Parents' Taxes Paid is blank and Parents' tax filing status is tax filer.

Procedure: Assume zero for Parents' Taxes Paid.

EDIT 2020

Condition: Father's Income is blank, Mother's Income is blank or zero, and Parents' AGI is non-blank and non-zero.

Procedure: Assume Father's Income equals Parents' AGI.

EDIT 2021

Condition: Mother's Income is blank, Father's Income is zero, and Parents' AGI is non-blank and non-zero.

Procedure: Assume Mother's Income equals Parents' AGI.

EDIT 2022

Condition: Father's Income is negative and parents' tax filing status is non-tax filer.

Procedure: Assume positive value for Father's Income.

EDIT 2023

Condition: Mother's Income is negative and parents' tax filing status is non-tax filer.

Procedure: Assume positive value for Mother's Income.

EDIT 2024

Condition: Parents' Income from Worksheet C is greater than zero, and greater than 90% of the sum\* of:  
(Parents' AGI plus Parents' Income from Worksheet A plus Parents' Income from Worksheet B if Parents' Tax Filling Status is tax filer)  
or  
(Father's Income plus Mother's Income plus Parents' Income from Worksheet A plus Parents' Income from Worksheet B if Parents' Tax Filling Status is non-tax filer)

\* use zero if any value in the calculation is negative or blank.



Procedure: Assume zero for Parents' Income from Worksheet C.  
EDIT 2025

Condition: Parents' Income from Worksheet C re-entered as greater than 90% of the sum of total income on a correction record.

Procedure: Make no assumption for Parents' Income from Worksheet C.

#### STUDENT & SPOUSE DATA ELEMENTS

EDIT 2026

Condition: Citizenship is blank and Alien Registration Number is non-blank and valid.

Procedure: Assume Citizenship is eligible non-citizen.

EDIT 2027

Condition: Citizenship is ((blank) or (eligible non-citizen and Alien registration number is blank)) and (SSN Match Flag is 4 and SSA citizenship status code is A or blank).

Procedure: Assume Citizenship is citizen.

EDIT 2028

Condition: Independent, Student's Marital Status is blank, and Student's Number of Family Members is 1.

Procedure: Assume Student's Marital Status is unmarried.

EDIT 2029

Condition: Independent, Student's Marital Status is blank, Student's Number of Family Members is 2, Do You Have Children is "No", and Legal Dependents Other Than Spouse is "No".

Procedure: Assume Student's Marital Status is married.

EDIT 2030

Condition: Independent, Student's Marital Status is blank, Student's Number of Family Members is 2, (Do You Have Children is "Yes") or (Legal Dependents Other Than Spouse is "Yes").

Procedure: Assume Student's Marital Status is unmarried.

EDIT 2031

Condition: Independent, Student's Marital Status is blank, Student's Number of Family Members is 2, and Spouse's Income is non-blank and non-zero.

Procedure: Assume Student's Marital Status is married.

EDIT 2032

Condition: Independent, Student's Marital Status is blank, Student's Number of Family Members is 2, and Spouse's Income is blank or zero.

Procedure: Assume Student's Marital Status is unmarried.

EDIT 2033

Condition: Independent, Student's Marital Status is blank, Student's Number of Family Members is greater than 2, and Spouse's Income is non-blank and non-zero.

Procedure: Assume Student's Marital Status is married.

EDIT 2034

Condition: Independent, Student's Marital Status is blank, Student's Number of Family Members is greater than 2, and Spouse's Income is blank or zero.

Procedure: Assume Student's Marital Status is unmarried.



EDIT 2035

Condition: Independent, Student's Number of Family Members is blank or zero, and Student's Marital Status is married.

Procedure: Assume Student's Number of Family Members is 2.

EDIT 2036

Condition: Independent, Student's Number of Family Members is blank or zero, and Student's Marital Status is unmarried or separated.

Procedure: Assume Student's Number of Family Members is 1.

EDIT 2037

Condition: Independent, Student's Number of Family Members is 1, Student's Marital Status is married, and Spouse's Income is non-blank and non-zero.

Procedure: Assume Student's Number of Family Members is 2.

EDIT 2038

Condition: Independent, Student's Number of Family Members is greater than 1, Student's Marital Status is not married, Do You Have Children is "No", and Legal Dependents Other Than Spouse is "No".

Procedure: Assume Student's Number of Family Members is 1.

EDIT 2039

Condition: Independent and Student's Number in College is blank or zero.

Procedure: Assume Student's Number in College is 1.

EDIT 2040

Condition: Independent, Student's Number in College is equal to Student's Number of Family Members, and both are greater than 2.

Procedure: Assume Student's Number in College is 1.

EDIT 2041

Condition: Student's Number in College and Student's Number of Family Members re-entered as equal and both greater than 2 on a correction record.

Procedure: Make no assumption for Student's Number in College.

EDIT 2042

Condition: Independent, Student's Number in College is greater than Student's Number of Family Members.

Procedure: Assume Student's Number in College is 1.

EDIT 2043

Condition: Dependent, Student's Marital Status is blank.

Procedure: Assume Student's Marital Status is unmarried.

EDIT 2044

Condition: Dependent, Spouse's Income is non-blank and non-zero, and Student's Marital Status is unmarried.

Procedure: Assume zero for Spouse's Income.

EDIT 2045

Condition: Student's AGI is blank or zero, ((Student's Type of Tax Return is non-blank) or (Type of Tax Return is blank and Student's Tax Return Status is filed or will file)), and Student's Income or Spouse's Income is positive or negative.

Procedure: Assume Student's AGI is equal to Student's Income plus Spouse's Income. (If sum of earnings is greater than 6 digits, use 999999 or -999999.)

EDIT 2046

Condition: Student's AGI re-entered as zero on a correction record.

Procedure: Make no assumption for Student's AGI.

EDIT 2047

Condition: Student's AGI is positive, Student's Tax Return Status is will not file, and Student's Income and Spouse's Income are blank or zero.

Procedure: Assume Student's Income is equal to Student's AGI.

**Determination of tax filing status:**

EDIT 2048

Condition: Student's Type of Tax Return is non-blank.

Procedure: Assume student's tax filing status is tax filer.

EDIT 2049

Condition: Student's Tax Return Status is filed or will file and Student's Type of Tax Return is blank.

Procedure: Assume student's tax filing status is tax filer.

EDIT 2050

Condition: Student's AGI is positive, negative, or zero, Student's Tax Return Status is blank, and Student's Type of Tax Return is blank.

Procedure: Assume student's tax filing status is tax filer.

EDIT 2051

Condition: Student's Tax Return Status is will not file and Student's Type of Tax Return is blank.

Procedure: Assume student's tax filing status is non-tax filer.

EDIT 2052

Condition: Student's AGI is blank, Student's Tax Return Status is blank, and Student's Type of Tax Return is blank.

Procedure: Assume student's tax filing status is non-tax filer.

EDIT 2053

Condition: Student's Taxes Paid is blank and student's tax filing status is tax filer.

Procedure: Assume zero for Student's Taxes Paid.

EDIT 2054

Condition: Dependent, Student's Income is blank, and Student's AGI is non-blank and non-zero.

Procedure: Assume Student's Income equals Student's AGI.

EDIT 2055

Condition: Independent, Student's Income is blank, Spouse's Income is blank or zero, and Student's AGI is non-blank and non-zero.

Procedure: Assume Student's Income equals Student's AGI.

EDIT 2056

Condition: Student's Income is negative and student's tax filing status is non-tax filer.

Procedure: Assume positive value for Student's Income.

EDIT 2057

Condition: Independent, Spouse's Income is blank, Student's Income is zero, Student's Marital Status is married, and AGI is non-blank and non-zero.

Procedure: Assume Spouse's Income is equal to AGI.

EDIT 2058

Condition: Independent, Spouse's Income is negative and student's tax filing status is non-tax filer.

Procedure: Assume positive value for Spouse's Income.

EDIT 2059

Condition: Independent, Student's Income from Worksheet C is greater than zero, and equal to or greater than the sum\* of:  
(Student's AGI plus Student's Income from Worksheet A plus Student's Income from Worksheet B if Student's Tax Filing Status is tax filer)

or

(Student's Income plus Spouse's Income plus Student's Income from Worksheet A plus Student's Income from Worksheet B if Student's Tax Filing Status is non-tax filer)

\* use zero, if any value in the calculation is negative or blank.

Procedure: Assume zero for Student's Income from Worksheet C.



EDIT 2060

Condition: Student's Income from Worksheet C re-entered as equal to or greater than the sum of total income.

Procedure: Make no assumption for Student's Income from Worksheet C.

EDIT 2061

Condition: Dependent, Student's Income from Worksheet C is greater than zero, and equal to or greater than the sum\* of:  
(Student's AGI plus Student's Income from Worksheet A plus Student's Income from Worksheet B if Student's Tax Filing Status is tax filer)  
or  
(Student's Income plus Spouse's Income plus Student's Income from Worksheet A plus Student's Income from Worksheet B if Student's Tax Filing Status is non-tax filer)  
\* use zero, if any value in the calculation is negative or blank.

Procedure: Assume zero for Student's Income from Worksheet C.

EDIT 2062

Condition: Student's Income from Worksheet C re-entered as equal to or greater than the sum of total income.

Procedure: Make no assumption for Student's Income from Worksheet C.

## **SIMPLIFIED NEEDS TEST**

Perform the appropriate simplified needs analysis calculation if one of the following conditions is met. Place the results of the calculations in the primary EFC field. Also perform the full data calculation if supplemental data that matches the model is provided and place the results in the secondary EFC field.

If a value has been assumed for a data field, then the assumed value should be used for the edits that use that data field, unless otherwise stated in the edit. If an income field is blank, use zero for the calculations in these edits.

### **DEPENDENT MODEL**

If the Parents' AGI, Father's Income, Mother's Income, Parents' Income from Worksheet A, and Parents' Income from Worksheet B are all blank, do not perform simplified needs test.

#### **EDIT 3001**

**Condition:** If parents' type of tax return is 1040A/EZ or Trust Territory (2 or 4) and [(student's type of tax return is 1040A/EZ or Trust Territory (2 or 4)) or (student eligible for 1040A is Yes) or (student's tax return status is will not file and student's type of tax return is blank)], and parents' AGI is less than \$50,000@.

**Procedure:** Set simplified needs.

#### **EDIT 3002**

**Condition:** If parents' tax return status is will not file, parents' type of tax return is blank, and [(student's type of tax return is 1040A/EZ or Trust Territory (2 or 4)) or (student eligible for 1040A is Yes) or (student's tax return status is will not file and student's type of tax return is blank)], and father's income plus mother's income is less than \$50,000@.

**Procedure:** Set simplified needs.

@ These values are variables.

EDIT 3003

Condition: If parents eligible for 1040A is Yes, and [(student's type of tax return is 1040A/EZ or Trust Territory (2 or 4)) or (student eligible for 1040A is Yes) or (student's tax return status is will not file and student's type of tax return is blank)], parents' AGI is non-blank and less than \$50,000@.

Procedure: Set simplified needs.

EDIT 3004 !

Condition: If parents' type of tax return is 1040A/EZ or Trust Territory (2 or 4), [(student's type of tax return is 1040A/EZ or Trust Territory (2 or 4)) or (student eligible for 1040A is Yes) or (student's tax return status is will not file and student's type of tax return is blank)], parents' AGI is \$15,000@ or less.

Procedure: Set Automatic Zero EFC flag.

EDIT 3005 !

Condition: If parents' tax return status is will not file, parents' type of tax return is blank, [(student's type of tax return is 1040A/EZ or Trust Territory (2 or 4)) or (student eligible for 1040A is Yes) or (student's tax return status is will not file and student's type of tax return is blank)], and father's income plus mother's income is \$15,000@ or less.

Procedure: Set Automatic Zero EFC flag.

EDIT 3006 !

Condition: If parents eligible for 1040A is Yes, [(student's type of tax return is 1040A/EZ or Trust Territory (2 or 4)) or (student eligible for 1040A is Yes) or (student's tax return status is will not file and student's type of tax return is blank)], parents' AGI is non-blank and \$15,000@ or less.

Procedure: Set Automatic Zero EFC flag.

@ These values are variables.

#### INDEPENDENT MODEL

If Student's AGI, Student's Income, Spouse's Income, Student's Income from Worksheet A, and Student's Income from Worksheet B are all blank, do not perform simplified needs test.

#### EDIT 3007

Condition: If student's type of tax return is 1040A/EZ or Trust Territory (2 or 4) and student's AGI is less than \$50,000@.

Procedure: Set simplified needs.

#### EDIT 3008

Condition: If student's tax return status is will not file, student's type of tax return is blank, and student's income plus spouse's income is less than \$50,000@.

Procedure: Set simplified needs.

#### EDIT 3009

Condition: If student eligible for 1040A is Yes, student's AGI is non-blank and less than \$50,000@.

Procedure: Set simplified needs.

#### EDIT 3010 !

Condition: If student's marital status is married, student's number of family members is greater than 2, student's type of tax return is 1040A/EZ or Trust Territory (2 or 4), and student's AGI is \$15,000@ or less.

Procedure: Set Automatic Zero EFC flag.

@ These values are variables.

EDIT 3011 !

Condition: If student's marital status is married, student's number of family members is greater than 2, student's tax return status is will not file, student's type of tax return is blank, and student's income plus spouse's income is \$15,000@ or less.

Procedure: Set Automatic Zero EFC flag.

EDIT 3012 !

Condition: If student's marital status is married, student's number of family members is greater than 2, student eligible for 1040A is Yes, student's AGI is non-blank and \$15,000@ or less.

Procedure: Set Automatic Zero EFC flag.

EDIT 3013 !

Condition: If student's marital status is unmarried or separated, student's number of family members is greater than 1, student's type of tax return is 1040A/EZ or Trust Territory (2 or 4), and student's AGI is \$15,000@ or less.

Procedure: Set Automatic Zero EFC flag.

EDIT 3014 !

Condition: If student's marital status is unmarried or separated, student's number of family members is greater than 1, student's tax return status is will not file, student's type of tax return is blank, and student's income plus spouse's income is \$15,000@ or less.

Procedure: Set Automatic Zero EFC flag.

EDIT 3015 !

Condition: If student's marital status is unmarried or separated, student's number of family members is greater than 1, student eligible for 1040A is Yes, and student's AGI is non-blank and \$15,000@ or less.

Procedure: Set Automatic Zero EFC flag.  
@ These values are variables.

### COMPLETE REJECT EDIT SPECIFICATIONS

Reject reason codes are alphabetic and numeric. The codes are listed below in priority order. When an application has been rejected for more than one reason, use the highest priority code.

If a value has been assumed for a data field, then the assumed value should be used for the reject edits that use that data field unless otherwise stated in the reject edit.

### 2003-2004 REJECT CODES AND REASONS

Code	Edit	Reason
2	4001 4002	All income questions blank
1	4003 4004	Family does not qualify for simplified needs test and didn't complete supplemental data
17	4005	Citizenship status blank or not eligible
13	4006	Name totally blank
N	4007	First or last name blank
18	4009	SSN not on SSA database
R	4010	SSN match but no Date of Birth match
8	4012	SSN match with Date of Death
5	4013	Date of birth blank or invalid
A	4014	Date of birth year is 1900 through 1928
B	4016	Independent status in question because of student's age
12	4018 4019	Taxes paid greater than or equal to AGI

C	4020 4022	Taxes paid greater than or equal to 40% of AGI
---	--------------	--

Code	Edit	Reason
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10	4024 4025	Marital status and family members blank
----	--------------	---

W	4026 4028	Number of family member appears high
---	--------------	--------------------------------------

11	4030 4031	Marital status inconsistent with base year income
----	--------------	---

15	4032	Parent's signature missing
----	------	----------------------------

14	4033	Student's signature missing
----	------	-----------------------------

9	4034	Dependent, Father's and Mother's SSN blank
---	------	--

EDIT 4001

Condition: Dependent, and reported values for Parents' AGI, Father's Income, Mother's Income, Parents' Income from Worksheet A, and Parents' Income from Worksheet B are all blank.

Procedure: Set reject reason 2.

EDIT 4002

Condition: Independent, and reported values for Student's AGI, Student's Income, Spouse's Income, Student's Income from Worksheet A, and Student's Income from Worksheet B are all blank.

Procedure: Set reject reason 2.

EDIT 4003

Condition: Dependent, simplified needs test is not met, automatic zero EFC flag is not set, and all of reported values for supplemental data fields for parent and student are blank.

Supplemental data is defined as follows:

Parents'/Student's Cash, Savings and Checking, Parents'/Student's Real Estate/Investment Net Worth, Parents'/Student's Business/Farm Net Worth.

Procedure: Set reject reason 1.

EDIT 4004

Condition: Independent, simplified needs test is not met, automatic zero EFC flag not set, and all of reported data for supplemental data fields for students are blank.

Supplemental data is defined as follows:

Student's Cash, Savings and Checking, Student's Real Estate/Investment Net Worth, Student's Business/Farm Net Worth.

Procedure: Set reject reason 1.



EDIT 4005

Condition: Citizenship is blank or not eligible.

Procedure: Set reject reason 17.

EDIT 4006

Condition: First Name and Last Name are blank.

Procedure: Set reject reason 13.

EDIT 4007

Condition: One of First Name or Last Name is blank.

Procedure: Set reject reason N.

EDIT 4008

Condition: One of First Name or Last Name is re-entered as blank on a correction record.

Procedure: Suppress reject N.

EDIT 4009

Condition: SSN Match Flag equals 1.

Procedure: Set reject reason 18.

EDIT 4010 !

Condition: SSN Match Flag equals 2.

Procedure: Set reject reason R.

EDIT 4011 !

Condition: SSN is re-entered as same value on a correction record.

Procedure: Suppress reject R.

EDIT 4012

Condition: SSN Match Flag equals 5.

Procedure: Set reject reason 8.

EDIT 4013

Condition: Date of Birth is blank or day is out of range.

Month Valid Day Range (inclusive)

01	01-31
02	01-28 (unless year is divisible by 4 when 01-29 is valid)
03	01-31
04	01-30
05	01-31
06	01-30
07	01-31
08	01-31
09	01-30
10	01-31
11	01-30
12	01-31

Procedure: Set reject reason 5.

EDIT 4014 !

Condition: Date of Birth year is equal to 1900 through 1928 and SSN Match Flag is not equal to

4.

Procedure: Set reject reason A.

EDIT 4015 !

Condition: Date of Birth year is re-entered as same value of 1900 through 1928 on a correction record.

Procedure: Suppress reject A.

EDIT 4016 !

Condition: Independent, Date of Birth is 09/01/87 or greater and not out of range, answer to Orphan or Ward is "No" or blank, and SSN Match Flag is not equal to 4.

Procedure: Set reject reason B.

EDIT 4017

Condition: Date of Birth is re-entered as same value on a correction record.

Procedure: Suppress reject B.

EDIT 4018 !

Condition: Dependent and Parents' Taxes Paid is greater than zero and equal to or greater than Parents' AGI.

Procedure: Set reject reason 12.

EDIT 4019 !

Condition: Independent and Student's Taxes Paid is greater than zero and equal to or greater than Student's AGI.

Procedure: Set reject reason 12.



EDIT 4020 !

Condition: Dependent and Parents' Taxes Paid is greater than zero, not equal to or greater than Parents' AGI, greater than or equal to 40% of Parents' AGI, and FAA Adjustment Flag is not set to 1.

Procedure: Set reject reason C.

EDIT 4021

Condition: Parents' Taxes Paid is re-entered as same value on a correction record.

Procedure: Suppress reject C.

EDIT 4022 !

Condition: Independent and Student's Taxes Paid is greater than zero, not equal to or greater than Student's AGI, greater than or equal to 40% of Student's AGI, and FAA Adjustment Flag is not set to 1.

Procedure: Set reject reason C.

EDIT 4023

Condition: Student's Taxes Paid is re-entered as same value on a correction record.

Procedure: Suppress reject C.

EDIT 4024

Condition: Dependent, Parents' Marital Status is blank, and Parents' Number of Family Members is blank, zero, or 1.

Procedure: Set reject reason 10.

EDIT 4025

Condition: Independent, Student's Marital Status is blank, and Student's Family Members is blank or zero.

Procedure: Set reject reason 10.

EDIT 4026

Condition: Dependent, Parents' Number of Family Members is 15 or more, and FAA Adjustment Flag is not set to 1.

Procedure: Set reject reason W.

EDIT 4027

Condition: Parents' Number of Family Members is re-entered as the same value on a correction record.

Procedure: Suppress reject W.

EDIT 4028

Condition: Independent, Student's Number of Family Members is 15 or more, and FAA Adjustment Flag is not set to 1.

Procedure: Set reject reason W.

EDIT 4029

Condition: Student's Number of Family Members is re-entered as the same value on a correction record.

Procedure: Suppress reject W.

EDIT 4030

Condition: Dependent, Father's Income and Mother's Income are both non-zero and non-blank, Parents' Marital Status is single, separated/divorced, or widowed, and FAA Adjustment Flag is not set to 1.

Procedure: Set reject reason 11.

EDIT 4031

Condition: Independent, Spouse's Income is non-blank and non-zero, Student's Marital Status is separated or unmarried, and FAA Adjustment Flag is not set to 1.

Procedure: Set reject reason 11.

EDIT 4032

Condition: Dependent and parent did not sign application.

Procedure: Set reject reason 15.

EDIT 4033

Condition: Student did not sign application.

Procedure: Set reject reason 14.

EDIT 4034 !

Condition: Dependent and Father's SSN and Mother's SSN are blank.

Procedure: Set reject reason 9.

The specifications in this section define which EFC formula should be used for the primary or secondary calculations.

Two calculations, a primary and a secondary, will be performed if an applicant has met the simplified needs test and has reported supplemental data that matches their model.

For dependent applicants, supplemental data is defined as follows:

Parents'/Student's Cash, Savings and Checking, Parents'/Student's Real Estate/Investment Net Worth, Parents'/Student's Business/Farm Net Worth.

For independent applicants, supplemental data is defined as follows:

Student's Cash, Savings and Checking, Student's Real Estate/Investment Net Worth, Student's Business/Farm Net Worth.

When the simplified needs test is met, the simplified calculation will always be the primary number.

If the automatic zero EFC flag is set to Y, set the primary EFC to 0 (calculate formula type, Total Income (TI), Student Total Income (STI) and FISAP Total Income (FTI) only and carry on the record). Do not calculate a secondary EFC.

For all other records, calculate the primary EFC and secondary EFC as described below.

Primary EFC

If the simplified needs test is met.	Use the simplified calculation (formula type 4, 5, or 6).
--------------------------------------	--

If the simplified needs test is not met.	Use the full data calculation (formula type 1, 2, or 3).
--	---

Secondary EFC

If the simplified needs test is met and the supplemental data has been completed	Use the full data calculation (formula type 1,2, or 3).
--	--



Determination of EFC Formula Type

- Formula #1 - Dependent
- Formula #2 - Independent Without Dependents Other Than A Spouse
- Formula #3 - Independent With Dependents Other Than A Spouse
- Formula #4 - Simplified Dependent
- Formula #5 - Simplified Independent Without Dependents Other Than A Spouse
- Formula #6 - Simplified Independent With Dependents Other Than A Spouse

For full application data filers:

EDIT 5001

Condition: If model is D.

Procedure: Use Formula #1.

EDIT 5002

Condition: If model is I, and Student's Marital Status is married, and Student's Number of Family Members is less than or equal to 2.

Procedure: Use Formula #2.

EDIT 5003

Condition: If model is I, and Student's Marital Status is unmarried or separated, and Student's Number of Family Members equals 1.

Procedure: Use Formula #2.

EDIT 5004

Condition: If model is I, and Student's Marital Status is married, and Student's Number of Family Members is greater than 2.

Procedure: Use Formula #3.

EDIT 5005

Condition: If model is I, and Student's Marital Status is unmarried or separated, and Student's Number of Family Members is greater than 1.

Procedure: Use Formula #3.

EDIT 5006

Condition: If model is I and the following fields are non-blank:

- One of Parents' AGI, Father's Income, Mother's Income, Parents' Income from Worksheet A, Parents' Income from Worksheet B
- Parents' Marital Status
- Parents' Number of Family Members
- Parents' Number in College

Procedure: Calculate Parents' Contribution (PC) using Formula #1, Steps 1-8. If Parents' AGI is non-blank, assume status is tax filer. If Parents' AGI is blank, assume status is non-tax filer. If any financial field is blank, assume zero for calculation.

For filers meeting simplified needs test:

EDIT 5007

Condition: If model is D.

Procedure: Use Formula #4.

EDIT 5008

Condition: If model is I, Student's Marital Status is married, and Student's Number of Family Members is less than or equal to 2.

Procedure: Use Formula #5.

EDIT 5009

Condition: If model is I, Student's Marital Status is unmarried or separated, and Student's Number of Family Members equals 1.

Procedure: Use Formula #5.

EDIT 5010

Condition: If model is I, Student's Marital Status is married, and Student's Number of Family Members is greater than 2.

Procedure: Use Formula #6.

EDIT 5011

Condition: If model is I, Student's Marital Status is unmarried or separated, and Student's Number of Family Members is greater than 1.

Procedure: Use Formula #6.

EDIT 5012

Condition: If model is I and the following fields are non-blank:

- One of Parents' AGI, Father's Income, Mother's Income, Parents' Income from Worksheet A, Parents' Income from Worksheet B
- Parents' Marital Status
- Parents' Number of Family Members
- Parents' Number in College

Procedure: Calculate Parents' Contribution (PC) using Formula #4, Steps 1-5. If Parents' AGI is non-blank, assume status is tax filer. If Parents' AGI is blank, assume status is non-tax filer. If any financial field is blank, assume zero for calculation.

## 2003-2004 EFC Formula Specifications

### Guidelines for Computations

1. Use the amounts assumed as values for the fields referred to. If no amount is assumed, use the reported amount.
2. If any field referred to is blank and has no assumed value, use zero for computation purposes.
3. Set any negative amounts on the input data to zero for computation purposes.
4. Unless otherwise specified, all calculations should be carried to 3 decimal places and then rounded to the nearest whole numbers (upward from .500 and downward from .499). Rounding should be performed after each calculation in the formula. The intermediate value that is the result of each step will not have any decimal digits.

For example, 4.5 would be rounded to 5; 4.499 would be rounded to 4; -4.5 would be rounded to -5.

EFC FORMULA #1 - DEPENDENT

STEP 1: Total Income (TI)

If parents' tax filing status is tax filer, then sum the following parents' data:

$(\text{Parents' AGI} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

If parents' tax filing status is non-tax filer, then sum the following parents' data:

$(\text{Father's Income} + \text{Mother's Income} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

STEP 2: Allowances Against Total Income (ATI)

a) State and Other Tax Allowance (STX):

Appropriate rate from table = ST%

Use Parents' State of Legal Residence. If blank or invalid, use Student's State of Legal Residence. If both fields are blank or invalid, use Mailing State. If all three fields are blank or invalid, use rates for blank or invalid State.

## 2003-2004 State and Other Tax Allowance

State	Total Income	
	0 - 14,999	15,000 or more
AK, NV, TN, TX, WY	3%	2%
FL, LA, SD, WA	4%	3%
AL, MS	5%	4%
AR, AZ, CT, IL, IN, MO, ND, NM, OK ,WV	6%	5%
CO, GA, ID, KS, KY, NH, PA	7%	6%
CA, DE, HI, IA, MT, NC, NE, NJ, OH, SC, UT,VA, VT	8%	7%
MA, MD, ME, MI MN, RI	9%	8%
DC, OR, WI	10%	9%
NY	11%	10%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI	4%	3%

$$ST\% \times TI = STX$$

If STX is less than zero, set it to zero.

## EFC FORMULA 1 - Page 3

## ! b) Social Security Tax (SST):

Calculation from table using Father's Income = Father's SST (FSST)

Calculation from table using Mother's Income = Mother's SST (MSST)

## SST Calculation Table

Income	Social Security Tax
0 – 84,900	7.65% of income
84,901 or greater	6,494.85 + 1.45% of amount over 84,900

FSST + MSST = SST

SST will never be less than zero.

## ! c) Income Protection Allowance (IPA):

Value from table = PIPA (Preliminary IPA)

Family Size (including student)	Parents' Number in College				
	1	2	3	4	5
2.....	13,470	11,160			
3.....	16,770	14,480	12,170		
4.....	20,710	18,410	16,120	13,810	
5.....	24,440	22,130	19,840	17,540	15,240
6.....	28,580	26,280	23,990	21,680	19,390

For each additional family member add 3,230. For each additional college student subtract 2,290.

If Parents' Number in College is 5 or less, IPA = PIPA.

If Parents' Number in College is 6 or more, IPA = PIPA for 5 in college - (2,290 x (Parents' Number in College - 5)).

NOTE: IPA will never be less than zero.

d) Employment Allowance (EA):

If Parents' Marital Status is "married" and:

- 1) Father's Income and Mother's Income are both greater than zero, then  $.35 \times (\text{the lesser of Father's Income or Mother's Income}) = \text{EA}$
- 2) Father's Income and Mother's Income are not both greater than zero,  $0 = \text{EA}$ .

If Parents' Marital Status is "single", "separated/divorced", or "widowed" and:

- 1) One of Father's Income or Mother's Income is greater than zero, then  $.35 \times \text{Father's Income or Mother's Income (whichever is greater than zero)} = \text{EA}$ .
- 2) Neither Father's Income nor Mother's Income is greater than zero, then  $0 = \text{EA}$ .

If EA is greater than 3,000, set to 3,000.

NOTE: EA will never be less than zero.

e) If parents' tax filing status is tax filer:

$$\text{Parents' Taxes Paid} + \text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$

If parents' tax filing status is non-tax filer:

$$\text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$



## EFC FORMULA 1 - Page 5

STEP 3: Available Income (AI)

$$TI - ATI = AI$$

AI may be less than zero.

STEP 4: Discretionary Net Worth (DNW)

! a) Adjusted Net Worth of Business/Farm (ANW):

Calculation from table = ANW

## Business &amp; Farm Net Worth Adjustment

Net Worth of Business/Farm	Adjusted Net Worth
Less than 1	0
1 – 95,000	40% of Net Worth of Business/Farm
95,001 – 290,000	38,000 plus 50% of excess over 95,000
290,001 – 480,000	135,500 plus 60% of excess over 290,000
480,001 or more	249,500 plus 100% of excess over 480,000

b) Net Worth (NW):

$$ANW + \text{Parents' Real Estate/Investment Net Worth} + \text{Parents' Cash, Savings, and Checking} = NW$$

! c) Education Savings and Asset Protection Allowance (APA):

Amount from table = APA

NOTE: If Age of Older Parent is blank, use age 45 on table.

If Age of Older Parent is less than 25, use age 25 on table.

If Age of Older Parent is greater than 65, use age 65 on table.

## EFC FORMULA 1 - Page 6

## Education Savings and Asset Protection Allowance

Age of Older Parent	Allowance - Married	Allowance - Single
25 or less 0	0	0
26	2,500	1,200
27	5,000	2,500
28	7,500	3,700
29	9,900	5,000
30	12,400	6,200
31	14,900	7,400
32	17,400	8,700
33	19,900	9,900
34	22,400	11,200
35	24,900	12,400
36	27,400	13,600
37	29,800	14,900
38	32,300	16,100
39	34,800	17,400
40	37,300	18,600
41	38,200	19,000
42	39,200	19,400
43	40,200	19,800
44	41,200	20,300
45	42,200	20,700
46	43,300	21,100
47	44,300	21,600
48	45,400	22,200
49	46,600	22,600
50	47,700	23,100
51	49,200	23,700
52	50,400	24,200
53	51,700	24,800
54	53,200	25,400
55	54,500	26,200
56	56,200	26,800
57	57,900	27,400
58	59,600	28,200
59	61,400	28,900
60	63,200	29,700

## EFC FORMULA 1 - Page 7

Age of Older Parent	Allowance - Married	Allowance – Single
61	65,100	30,500
62	67,300	31,200
63	69,200	32,100
64	71,600	33,100
65 or over	74,000	34,100

## d) Discretionary Net Worth (DNW):

$$NW - APA = DNW$$

DNW may be less than zero.

## STEP 5: Parents Contribution From Assets (PCA)

$$DNW \times 12\% = PCA$$

If PCA is less than zero, set it to zero.

## STEP 6: Adjusted Available Income (AAI)

$$AI + PCA = AAI$$

AAI may be less than zero.

## EFC FORMULA 1 - Page 8

## STEP 7: ! Total Parents' Contribution (TPC)

Calculation from table = TPC

## AAI Taxation Rates

Parents' AAI	Parents' Contribution
-3,410 or less	-750
-3,409 - 12,000	22% of AAI
12,001 – 15,100	2,640 + 25% of AAI over 12,000
15,101 – 18,200	3,415 + 29% of AAI over 15,100
18,201 – 21,200	4,314 + 34% of AAI over 18,200
21,201 – 24,300	5,334 + 40% of AAI over 21,200
24,301 or more	6,574 + 47% of AAI over 24,300

If TPC is less than zero, set it to zero.

## STEP 8: Parents' Contribution (PC)

TPC / Parents' Number in College = (PC)

## STEP 9: Student's Total Income (STI)

If the student's tax filing status is tax filer, sum the following student data:

(Student's AGI + Income From Worksheet A + Income From Worksheet B) - Income From Worksheet C = STI

If the student's tax filing status is non-tax filer, sum the following student data:

(Student's Income + Income From Worksheet A + Income From Worksheet B) - Income From Worksheet C = STI

## EFC FORMULA 1 - Page 9

## STEP 10: Student Allowances Against Total Income (SATI)

## a) State and Other Tax Allowance (STX):

Appropriate rate from table = ST%

Use Student's State of Legal Residence. If Student's State of Legal Residence is blank or invalid, use Mailing State. If Mailing State is blank or invalid, use Parents' State of Legal Residence. If all three fields are blank or invalid, use rates for blank or invalid State.

## 2003-2004 State and Other Tax Allowance:

## State

AK, NV, SD, TN, TX, WA, WY	0%
FL, NH	1%
CT, IL, LA, ND	2%
AL, AZ, MO, MS, NJ, PA	3%
AR, CO, GA, IN, KS, MI, NE, NM, OK, RI, VA, VT, WV	4%
CA, DE, IA, ID, KY, MA, ME, MT, NC, OH, SC, UT, WI	5%
HI, MD, MN, OR	6%
DC, NY	7%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI	2%

$$STI \times ST\% = STX$$

If STX is less than zero, set it to zero.

## ! b) Social Security Tax (SST):

Calculation from table using Student's Income = Student's SST (FSST)

## SST Calculation Table

Income	Social Security Tax
0 – 84,900	7.65% of income
84,901 or greater	6,494.85 + 1.45% of amount over 84,900

SST will never be less than zero.

## c) Negative Adjusted Available Income Offset (AIO)

If Parents' AAI is negative, set to positive value = AIO

If Parents' AAI is zero or positive, zero = AIO

## ! d) If student's tax filing status is tax filer:

$$\text{Student's Taxes Paid} + \text{SST} + \text{STX} + \text{AIO} + 2,380 = \text{SATI}$$

If student's tax filing status is non-tax filer:

$$\text{SST} + \text{STX} + \text{AIO} + 2,380 = \text{SATI}$$

## STEP 11: Student's Income Contribution (SIC)

$$(\text{STI} - \text{SATI}) \times .5 = \text{SIC}$$

If SIC is less than zero, set it to zero.

EFC FORMULA 1 - Page 11

STEP 12: Discretionary Net Worth of Student (SDNW)

a) Student's Real Estate/Investment Net Worth + Student's Business/Farm Net Worth + Student's Cash, Savings, and Checking = SDNW

STEP 13: Student Contribution From Assets (SCA)

$$\text{SDNW} \times .35 = \text{SCA}$$

STEP 14: Expected Family Contribution (EFC)

$$\text{PC} + \text{SIC} + \text{SCA} = \text{EFC}$$

If EFC is greater than 99,999, set it to 99,999.

STEP 15: FISAP Total Income (FTI)

$$\text{TI} + \text{STI} = \text{FTI}$$

EFC FORMULA 2 - INDEPENDENT WITHOUT DEPENDENTS OTHER THAN A SPOUSE

STEP 1: Total Income (TI)

If student's tax filing status is tax filer sum the following student data:

$(\text{Student's AGI} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

If student's tax filing status is non-tax filer sum the following student data:

$(\text{Student's Income} + \text{Spouse's Income} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

STEP 2: Allowance Against Total Income (ATI)

a) State and Other Tax Allowance (STX):  
Appropriate rate from table = ST%.

Use Student's State of Legal Residence to find State. If Student's State of Legal Residence is blank or invalid, use Mailing State. If both fields are blank or invalid, use rates for blank or invalid State.



## EFC FORMULA 2 - Page 2

## 2003-2004 State and Other Tax Allowance

AK, NV, SD, TN, TX, WA, WY	0%
FL, NH	1%
CT, IL, LA, ND	2%
AL, AZ, MO, MS, NJ, PA	3%
AR, CO, GA, IN, KS, MI, NE, NM, OK, RI, VA, VT, WV	4%
CA, DE, IA, ID, KY, MA, ME, MT, NC, OH, SC, UT, WI	5%
HI, MD, MN, OR	6%
DC, NY	7%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI	2%

$$TI \times ST\% = STX$$

If STX is less than zero, set it to zero.

! b) Social Security Taxes (SST)

Calculation from table using Student's Income = Student's SST (FSST)

Calculation from table using Spouse's Income = Spouse's SST (MSST)

$$FSST + MSST = SST$$

SST Calculation Table

Income	Social Security Tax
0 – 84,900	7.65% of income
84,901 or greater	6,494.85 + 1.45% of amount over 84,900

SST will never be less than zero.

## EFC FORMULA 2 - Page 3

## ! c) Income Protection Allowance (IPA):

If Student's Marital Status is "married" and number in college equals 2, then  $IPA = 5,400$ .

If Student's Marital Status is "married" and number in college is less than 2, then  $IPA = 8,640$ .

If Student's Marital Status is "unmarried" or "separated", then  $IPA = 5,400$ .

NOTE: IPA will never be less than zero.

## d) Employment Allowance (EA):

If Student's Marital Status is "married" and:

1) Student's Income and Spouse's Income are both greater than zero, then  $.35 \times (\text{the lesser of the Student's Income or Spouse's Income}) = EA$ .

2) Student's Income and Spouse's Income are not both greater than zero, then  $EA = 0$ .

If Student's Marital Status is "unmarried" or "separated", then  $EA = 0$ .

If EA is greater than 3,000, set to 3,000.

NOTE: EA will never be less than zero.

## e) If Student's tax filing status is tax filer:

$$\text{Student's Taxes Paid} + \text{STX} + \text{SST} + \text{IPA} + \text{EA} = \text{ATI}$$

If Student's tax filing status is non-tax filer:

$$\text{STX} + \text{SST} + \text{IPA} + \text{EA} = \text{ATI}$$

## STEP 3: Available Income (AI)

$$TI - \text{ATI} = \text{AI}$$

AI may be less than zero.

## EFC FORMULA 2 - Page 4

## STEP 4: Contribution from Available Income (CAI)

$$AI \times .5 = CAI$$

CAI may be less than zero.

## STEP 5: Net Worth (NW)

## ! a) Adjusted Net Worth of Business and Farm (ANW):

Calculation from table = ANW

Business/Farm Net Worth Adjustment

Net Worth of Business/Farm	Adjusted Net Worth
Less than 1	0
1 – 95,000	40% of Net Worth of Business/Farm
95,001 – 290,000	38,000 plus 50% of excess over 95,000
290,001 – 480,000	135,500 plus 60% of excess over 290,000
480,001 or more	249,500 plus 100% of excess over 480,000

## b) Net Worth (NW):

ANW + Student's Real Estate/Investment Net Worth + Student's Cash, Savings, and Checking =  
NW

## STEP 6: ! Asset Protection Allowance (APA)

Amount from table = APA

## EFC FORMULA 2 - Page 5

## Asset Protection Allowance

Student's Age as of 12/31/2003	Allowance - Married	Allowance - Single
25 or less 0	0	0
26	2,500	1,200
27	5,000	2,500
28	7,500	3,700
29	9,900	5,000
30	12,400	6,200
31	14,900	7,400
32	17,400	8,700
33	19,900	9,900
34	22,400	11,200
35	24,900	12,400
36	27,400	13,600
37	29,800	14,900
38	32,300	16,100
39	34,800	17,400
40	37,300	18,600
41	38,200	19,000
42	39,200	19,400
43	40,200	19,800
44	41,200	20,300
45	42,200	20,700
46	43,300	21,100
47	44,300	21,600
48	45,400	22,200
49	46,600	22,600
50	47,700	23,100
51	49,200	23,700
52	50,400	24,200
53	51,700	24,800
54	53,200	25,400
55	54,500	26,200
56	56,200	26,800
57	57,900	27,400
58	59,600	28,200
59	61,400	28,900
60	63,200	29,700

## EFC FORMULA 2 - Page 6

Student's Age as of 12/31/2003	Allowance - Married	Allowance – Single
61	65,100	30,500
62	67,300	31,200
63	69,200	32,100
64	71,600	33,100
65 or over	74,000	34,100

## STEP 7: Discretionary Net Worth (DNW)

$$NW - APA = DNW$$

DNW may be less than zero.

## STEP 8: Student's Contribution From Assets (SCA)

$$DNW \times .35 = SCA$$

If SCA is less than zero, set it to zero.

## STEP 9: Expected Family Contribution (EFC)

$$(CAI + SCA) / \text{Student's Number in College} = EFC$$

If EFC is less than zero, set it to zero.

If EFC is greater than 99,999, set it to 99,999.

## STEP 10: FISAP Total Income (FTI)

$$TI = FTI$$

EFC FORMULA #3 - INDEPENDENT WITH DEPENDENTS OTHER THAN A SPOUSE

STEP 1: Total Income (TI)

If student's tax filing status is tax filer sum the following data:

$(\text{Student's AGI} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

If student's tax filing status is non-tax filer sum the following data:

$(\text{Student's Income} + \text{Spouse's Income} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

STEP 2: Allowances Against Total Income (ATI)

a) State and Other Tax Allowance (STX):

Appropriate rate from table = ST%

Use Student's State of Legal Residence. If Student's State of Legal Residence is blank or invalid, use Mailing State. If both fields are blank or invalid, use rates for blank or invalid State.

## 2003-2004 State and Other Tax Allowance

State	Total Income	
	0 - 14,999	15,000 or more
AK, NV, TN, TX, WY	3%	2%
FL, LA, SD, WA	4%	3%
AL, MS	5%	4%
AR, AZ, CT, IL, IN, MO, ND, NM, OK ,WV	6%	5%
CO, GA, ID, KS, KY, NH, PA	7%	6%
CA, DE, HI, IA, MT, NC, NE, NJ, OH, SC, UT,VA, VT	8%	7%
MA, MD, ME, MI MN, RI	9%	8%
DC, OR, WI	10%	9%
NY	11%	10%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI	4%	3%

$$ST\% \times TI = STX$$

If STX is less than zero, set it to zero.

## EFC FORMULA 3 - Page 3

## ! b) Social Security Tax (SST):

Calculation from table using Student's Income = Student's SST (FSST)

Calculation from table using Spouse's Income = Spouse's SST (MSST)

## SST Calculation Table

Income	Social Security Tax
0 – 84,900	7.65% of income
84,901 or greater	6,494.85 + 1.45% of amount over 84,900

$$\text{FSST} + \text{MSST} = \text{SST}$$

SST will never be less than zero.

## ! c) Income Protection Allowance (IPA):

Value from table = PIPA (Preliminary IPA)

Family Size (including student)	Student's Number in College				
	1	2	3	4	5
2.....	13,470	11,160			
3.....	16,770	14,480	12,170		
4.....	20,710	18,410	16,120	13,810	
5.....	24,440	22,130	19,840	17,540	15,240
6.....	28,580	26,280	23,990	21,680	19,390

For each additional family member add 3,230. For each additional college student subtract 2,290.

If Student's Number in College is 5 or less, IPA = PIPA.

If Student's Number in College is 6 or more, IPA = PIPA for 5 in college - (2,290 x (Student's Number in College - 5)).

NOTE: IPA will never be less than zero.



## EFC FORMULA 3 - Page 4

## d) Employment Allowance (EA):

If Student's Marital Status is "married":

$$.35 \times (\text{the lesser of Student's Income or Spouse's Income}) = \text{EA}$$

If Student's Marital Status is "unmarried" or "separated":

$$.35 \times \text{Student's Income} = \text{EA.}$$

If EA is greater than 3,000, set to 3,000.

NOTE: EA will never be less than zero.

## e) If student's tax filing status is tax filer:

$$\text{Student's Taxes Paid} + \text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$

If student's tax filing is non-tax filer:

$$\text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$

## STEP 3: Available Income (AI)

$$\text{TI} - \text{ATI} = \text{AI}$$

AI may be less than zero.

## STEP 4: Discretionary Net Worth (DNW)

## ! a) Adjusted Net Worth of Business and Farm (ANW):

$$\text{Calculation from table} = \text{ANW}$$

## EFC FORMULA 3 - Page 5

## Business/Farm Net Worth Adjustment

Net Worth of Business/Farm	Adjusted Net Worth
Less than 1	0
1 – 95,000	40% of Net Worth of Business/Farm
95,001 – 290,000	38,000 plus 50% of excess over 95,000
290,001 – 480,000	135,500 plus 60% of excess over 290,000
480,001 or more	249,500 plus 100% of excess over 480,000

## b) Net Worth (NW):

ANW + Student's Real Estate/Investment Net Worth + Student's Cash, Savings, and Checking =  
NW

## ! c) Asset Protection Allowance (APA):

Amount from table = APA

## EFC FORMULA 3 - Page 6

## Asset Protection Allowance

Student's Age as of 12/31/2003	Allowance - Married	Allowance - Single
25 or less 0	0	0
26	2,500	1,200
27	5,000	2,500
28	7,500	3,700
29	9,900	5,000
30	12,400	6,200
31	14,900	7,400
32	17,400	8,700
33	19,900	9,900
34	22,400	11,200
35	24,900	12,400
36	27,400	13,600
37	29,800	14,900
38	32,300	16,100
39	34,800	17,400
40	37,300	18,600
41	38,200	19,000
42	39,200	19,400
43	40,200	19,800
44	41,200	20,300
45	42,200	20,700
46	43,300	21,100
47	44,300	21,600
48	45,400	22,200
49	46,600	22,600
50	47,700	23,100
51	49,200	23,700
52	50,400	24,200
53	51,700	24,800
54	53,200	25,400
55	54,500	26,200
56	56,200	26,800
57	57,900	27,400
58	59,600	28,200
59	61,400	28,900
60	63,200	29,700

## EFC FORMULA 3 - Page 7

Student's Age as of 12/31/2003	Allowance – Married	Allowance – Single
61	65,100	30,500
62	67,300	31,200
63	69,200	32,100
64	71,600	33,100
65 or over	74,000	34,100

d) Discretionary Net Worth (DNW):

$$NW - APA = DNW$$

DNW may be less than zero.

STEP 5: Student's Contribution from Assets (SCA)

$$DNW \times 12\% = SCA$$

If SCA is less than zero, set it to zero.

STEP 6: Adjusted Available Income (AAI)

$$AI + SCA = AAI$$

AAI may be less than zero.

## EFC FORMULA 3 - Page 8

## STEP 7: ! Total Student's Contribution (TSC)

Calculation from table = TSC

## AAI Taxation Rates

Student's AAI	Student's Contribution
-3,410 or less	-750
-3,409 - 12,000	22% of AAI
12,001 - 15,100	2,640 + 25% of AAI over 12,000
15,101 - 18,200	3,415 + 29% of AAI over 15,100
18,201 - 21,200	4,314 + 34% of AAI over 18,200
21,201 - 24,300	5,334 + 40% of AAI over 21,200
24,301 or more	6,574 + 47% of AAI over 24,300

If TSC is less than zero, set it to zero.

## STEP 8: Expected Family Contribution (EFC)

$TSC / \text{Student's Number in College} = EFC$

If EFC is greater than 99,999, set it to 99,999.

## STEP 9: FISAP Total Income (FTI)

$TI = FTI$

EFC FORMULA #4 - SIMPLIFIED DEPENDENT

STEP 1: Total Income (TI)

If parents' tax filing status is tax filer, then sum the following parents data:

$(\text{Parents' AGI} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

If parents' tax filing status is non-tax filer, then sum the following parents data:

$(\text{Father's Income} + \text{Mother's Income} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

STEP 2: Allowances Against Total Income (ATI)

State and Other Tax Allowance (STX):

Appropriate rate from table = ST%.

Use Parents' State of Legal Residence. If Parents' Legal State of Residence is blank or invalid, use Student's State of Legal Residence. If both fields are blank or invalid, use Mailing State. If all three fields are blank or invalid, use rates for blank or invalid State.

## 2003-2004 State and Other Tax Allowance

State	Total Income	
	0 - 14,999	15,000 or more
AK, NV, TN, TX, WY	3%	2%
FL, LA, SD, WA	4%	3%
AL, MS	5%	4%
AR, AZ, CT, IL, IN, MO, ND, NM, OK ,WV	6%	5%
CO, GA, ID, KS, KY, NH, PA	7%	6%
CA, DE, HI, IA, MT, NC, NE, NJ, OH, SC, UT,VA, VT	8%	7%
MA, MD, ME, MI MN, RI	9%	8%
DC, OR, WI	10%	9%
NY	11%	10%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI	4%	3%

$$ST\% \times TI = STX$$

If STX is less than zero, set it to zero.

## EFC FORMULA 4 - Page 3

## ! b) Social Security Tax (SST):

Calculation from table using Father's Income = Father's SST (FSST)

Calculation from table using Mother's Income = Mother's SST (MSST)

## SST Calculation Table

Income	Social Security Tax
0 – 84,900	7.65% of income
84,901 or greater	6,494.85 + 1.45% of amount over 84,900

$$\text{FSST} + \text{MSST} = \text{SST}$$

SST will never be less than zero.

## ! c) Income Protection Allowance (IPA):

Value from table = PIPA (Preliminary IPA)

Family Size (including student)	Parents' Number in College				
	1	2	3	4	5
2.....	13,470	11,160			
3.....	16,770	14,480	12,170		
4.....	20,710	18,410	16,120	13,810	
5.....	24,440	22,130	19,840	17,540	15,240
6.....	28,580	26,280	23,990	21,680	19,390

For each additional family member add 3,230. For each additional college student subtract 2,290.

If Parents' Number in College is 5 or less, IPA = PIPA.

If Parents' Number in College is 6 or more, IPA = PIPA for 5 in college - (2,290 x (Parents' Number in College - 5)).

NOTE: IPA will never be less than zero.



## EFC FORMULA 4 - Page 4

## d) Employment Allowance (EA):

If Parents' Marital Status is "married" and:

- 1) Father's Income and Mother's Income are both greater than zero, then  $.35 \times (\text{the lesser of Father's Income or Mother's Income}) = \text{EA}$
- 2) Father's Income and Mother's Income are not both greater than zero, then  $0 = \text{EA}$ .

If Parents' Marital Status is "single," "separated/divorced," or "widowed" and:

- 1) One of Father's Income or Mother's Income is greater than zero, then  $.35 \times \text{Father's Income or Mother's Income (whichever is greater than zero)} = \text{EA}$ .
- 2) Neither Father's Income nor Mother's Income is greater than zero, then  $0 = \text{EA}$ .

If EA is greater than 3,000, set to 3,000.

NOTE: EA will never be less than zero.

## e) If parents' tax filing status is tax filer:

$$\text{Parents' Taxes Paid} + \text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$

If parents' tax filing status is non-tax filer:

$$\text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$

## STEP 3: Available Income (AI)

$$\text{TI} - \text{ATI} = \text{AI}$$

AI may be less than zero.

## EFC FORMULA 4 - Page 5

## STEP 4: ! Total Parents' Contribution (TPC)

Calculation from table = TPC

AAI Taxation Rates

NOTE: AI = AAI

Parents' AAI	Parents' Contribution
-3,410 or less	-750
-3,409 - 12,000	22% of AAI
12,001 - 15,100	2,640 + 25% of AAI over 12,000
15,101 - 18,200	3,415 + 29% of AAI over 15,100
18,201 - 21,200	4,314 + 34% of AAI over 18,200
21,201 - 24,300	5,334 + 40% of AAI over 21,200
24,301 or more	6,574 + 47% of AAI over 24,300

If TPC is less than zero, set it to zero.

## STEP 5: Parents' Contribution (PC)

TPC / Parents' Number in College = PC

## STEP 6: Student's Total Income (STI)

If student's tax filing status is tax filer, sum the following student data:

(Student's AGI + Income From Worksheet A + Income From Worksheet B) - Income From Worksheet C = STI

If student's tax filing status is non-tax filer, sum the following student data:

(Student's Income + Income From Worksheet A + Income From Worksheet B) - Income From Worksheet C = STI

## EFC FORMULA 4 - Page 6

## STEP 7: Student Allowances Against Total Income (SATI)

## a) State and Other Tax Allowance (STX):

Appropriate rate from table = ST%

Use Student's State of Legal Residence. If Student's State of Legal Residence is blank or invalid, use Mailing State. If Mailing State is blank or invalid, use Parents' State of Legal Residence. If all three fields are blank or invalid, use rates for blank or invalid State.

## 2003-2004 State and Other Tax Allowance:

## State

AK, NV, SD, TN, TX, WA, WY	0%
FL, NH	1%
CT, IL, LA, ND	2%
AL, AZ, MO, MS, NJ, PA	3%
AR, CO, GA, IN, KS, MI, NE, NM, OK, RI, VA, VT, WV	4%
CA, DE, IA, ID, KY, MA, ME, MT, NC, OH, SC, UT, WI	5%
HI, MD, MN, OR	6%
DC, NY	7%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI	2%

$$STI \times ST\% = STX$$

If STX is less than zero, set it to zero.

## EFC FORMULA 4 - Page 7

## ! b) Social Security Tax (SST):

Calculation from table using Student's Income = Student's SST

## SST Calculation Table

Income	Social Security Tax
0 – 84,900	7.65% of income
84,901 or greater	6,494.85 + 1.45% of amount over 84,900

SST will never be less than zero.

## ! c) Negative Available Income Offset (AIO)

If Parents' AI is negative, set to positive value = AIO

If Parents' AI is zero or positive, zero = AIO

## d) If student's tax filing status is tax filer:

$$\text{Student's Taxes Paid} + \text{SST} + \text{STX} + \text{AIO} + 2,380 = \text{SATI}$$

If student's tax filing status is non-tax filer:

$$\text{SST} + \text{STX} + \text{AIO} + 2,380 = \text{SATI}$$

## STEP 8: Student's Income Contribution (SIC)

$$(\text{STI} - \text{SATI}) \times .5 = \text{SIC}$$

If SIC is less than zero, set it to zero.

EFC FORMULA 4 - Page 8

STEP 9: Expected Family Contribution (EFC)

$$PC + SIC = EFC$$

If EFC is greater than 99,999, set it to 99,999.

STEP 10: FISAP Total Income (FTI)

$$TI + STI = FTI$$

EFC FORMULA 5 - SIMPLIFIED INDEPENDENT WITHOUT DEPENDENTS OTHER THAN A SPOUSE

STEP 1: Total Income (TI)

If student's tax filing status is tax filer sum the following student data:

$(\text{Student's AGI} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

If student's tax filing status is non-tax filer sum the following student data:

$(\text{Student's Income} + \text{Spouse's Income} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

STEP 2: Allowances Against Total Income (ATI)

a) State and Other Tax Allowance (STX):

Appropriate rate from table = ST%

Use Student's State of Legal Residence to find State. If Student's State of Legal Residence is blank or invalid, use Mailing State. If both fields are blank or invalid, use rates for blank or invalid State.

## EFC FORMULA 5 - Page 2

## 2003-2004 State and Other Tax Allowance:

## State

AK, NV, SD, TN, TX, WA, WY	0%
FL, NH	1%
CT, IL, LA, ND	2%
AL, AZ, MO, MS, NJ, PA	3%
AR, CO, GA, IN, KS, MI, NE, NM, OK, RI, VA, VT, WV	4%
CA, DE, IA, ID, KY, MA, ME, MT, NC, OH, SC, UT, WI	5%
HI, MD, MN, OR	6%
DC, NY	7%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI	2%

$$TI \times ST\% = STX$$

If STX is less than zero, set it to zero.

## EFC FORMULA 5 - Page 3

## ! b) Social Security Taxes (SST)

Calculation from table using Student's Income = Student's SST (FSST)

Calculation from table using Spouse's Income = Spouse's SST (MSST)

$$\text{FSST} + \text{MSST} = \text{SST}$$

## SST Calculation Table

Income	Social Security Tax
0 – 84,900	7.65% of income
84,901 or greater	6,494.85 + 1.45% of amount over 84,900

SST will never be less than zero.

## ! c) Income Protection Allowance (IPA)

- 1) If Student's Marital Status is "unmarried" or "separated", then  $\text{IPA} = 5,400$ .
- 2) If Student's Marital Status is "married" and number in college equals 2, then  $\text{IPA} = 5,400$ .
- 3) If Student's Marital Status is "married" and number in college is less than 2, then  $\text{IPA} = 8,640$ .

NOTE: IPA will never be less than zero.



## EFC FORMULA 5 - Page 4

## d) Employment Allowance (EA)

If Student's Marital Status is "married" and:

1) Student's Income and Spouse's Income are both greater than zero, then  $.35 \times (\text{the lesser of Student's Income or Spouse's Income}) = \text{EA}$ .

2) If Student's Income and Spouse's Income are not both greater than zero, then  $\text{EA} = 0$ .

If Student's Marital Status is "unmarried," or "separated," then  $\text{EA} = 0$ .

If EA is greater than 3,000, set to 3,000.

NOTE: EA will never be less than zero.

## e) If student's tax filing status is tax filer:

$$\text{Student's Taxes Paid} + \text{STX} + \text{SST} + \text{IPA} + \text{EA} = \text{ATI}$$

If student's tax filing status is non-tax filer:

$$\text{STX} + \text{SST} + \text{IPA} + \text{EA} = \text{ATI}$$

## STEP 3: Available Income (AI)

$$\text{TI} - \text{ATI} = \text{AI}$$

AI may be less than zero.

## STEP 4: Contribution from Available Income (CAI)

$$\text{AI} \times .5 = \text{CAI}$$

CAI may be less than zero.

## STEP 5: Expected Family Contribution (EFC)

$$\text{CAI} / \text{Student's Number in College} = \text{EFC}$$

If EFC is less than zero, set it to zero.

If EFC is greater than 99,999, set it to 99,999.

STEP 6: FISAP Total Income (FTI)  
TI = FTI

EFC FORMULA #6 SIMPLIFIED INDEPENDENT WITH DEPENDENTS OTHER THAN A SPOUSE

STEP 1: Total Income (TI)

If student's tax filing status is tax filer sum the following student data:

$(\text{Student's AGI} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

If student's tax filing status is non-tax filer sum the following student data:

$(\text{Student's Income} + \text{Spouse's Income} + \text{Income From Worksheet A} + \text{Income From Worksheet B}) - \text{Income From Worksheet C} = \text{TI}$

STEP 2: Allowances Against Total Income (ATI)

a) State and Other Tax Allowance (STX):

Appropriate rate from table = ST%.

Use Student's State of Legal Residence. If Student's State of Legal Residence is blank or invalid, use Mailing State. If both fields are blank or invalid, use rates for blank or invalid State.

## EFC FORMULA 6 - Page 2

## 2003-2004 State and Other Tax Allowance

State	Total Income	
	0 - 14,999	15,000 or more
AK, NV, TN, TX, WY	3%	2%
FL, LA, SD, WA	4%	3%
AL, MS	5%	4%
AR, AZ, CT, IL, IN, MO, ND, NM, OK ,WV	6%	5%
CO, GA, ID, KS, KY, NH, PA	7%	6%
CA, DE, HI, IA, MT, NC, NE, NJ, OH, SC, UT,VA, VT	8%	7%
MA, MD, ME, MI MN, RI	9%	8%
DC, OR, WI	10%	9%
NY	11%	10%
BLANK OR INVALID STATE, AA, AE, AP, AS, CN, FC, FM, GU, MH, MP, MX, PR, PW, VI	4%	3%

$$ST\% \times TI = STX$$

If STX is less than zero, set it to zero.

## EFC FORMULA 6 - Page 3

## ! b) Social Security Tax (SST):

Calculation from table using Student's Income = Student's SST (FSST)

Calculation from table using Spouse's Income = Spouse's SST (MSST)

## SST Calculation Table

Income	Social Security Tax
0 – 84,900	7.65% of income
84,901 or greater	6,494.85 + 1.45% of amount over 84,900

FSST + MSST = SST

SST will never be less than zero.

## ! c) Income Protection Allowance (IPA):

Value from table = PIPA (Preliminary IPA)

Family Size (including student)	Student's Number in College				
	1	2	3	4	5
2.....	13,470	11,160			
3.....	16,770	14,480	12,170		
4.....	20,710	18,410	16,120	13,810	
5.....	24,440	22,130	19,840	17,540	15,240
6.....	28,580	26,280	23,990	21,680	19,390

For each additional family member add 3,230. For each additional college student subtract 2,290.

If Student's Number in College is 5 or less, IPA = PIPA.

If Student's Number in College is 6 or more, IPA = PIPA for 5 in college - (2,290 x (Student's Number in College - 5)).

NOTE: IPA will never be less than zero.

## EFC FORMULA 6 - Page 4

## d) Employment Allowance (EA):

If Student's Marital Status is "married":

$$.35 \times (\text{the lesser of Student's Income or Spouse's Income}) = \text{EA}$$

If Student's Marital Status is "unmarried" or "separated":

$$.35 \times \text{Student's Income} = \text{EA}.$$

If EA is greater than 3,000, set to 3,000.

NOTE: EA will never be less than zero.

## e) If student's tax filing status is tax filer:

$$\text{Student's Taxes Paid} + \text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$

If student's tax filing status is non-tax filer:

$$\text{SST} + \text{STX} + \text{EA} + \text{IPA} = \text{ATI}$$

## STEP 3: Available Income (AI)

$$\text{TI} - \text{ATI} = \text{AI}$$

AI may be less than zero.

## EFC FORMULA 6 - Page 5

## STEP 4: ! Total Student Contribution (TSC)

Calculation from table = TSC

AAI Taxation Rates

NOTE: AI = AAI

Student's AAI	Student's Contribution
-3,410 or less	-750
-3,409 - 12,000	22% of AAI
12,001 - 15,100	2,640 + 25% of AAI over 12,000
15,101 - 18,200	3,415 + 29% of AAI over 15,100
18,201 - 21,200	4,314 + 34% of AAI over 18,200
21,201 - 24,300	5,334 + 40% of AAI over 21,200
24,301 or more	6,574 + 47% of AAI over 24,300

If TSC is less than zero, set it to zero.

## STEP 5: Expected Family Contribution (EFC)

$$\text{TSC} / \text{Student's Number in College} = \text{EFC}$$

If EFC is greater than 99,999, set it to 99,999.

## STEP 6: FISAP Total Income (FTI)

$$\text{TI} = \text{FTI}$$

## ALTERNATE EFC CALCULATIONS

Use primary EFC formula type and values to calculate alternate primary EFC's, and secondary formula type and values to calculate alternate secondary EFC's.

## ALTERNATE EFC FORMULA #1 - DEPENDENT

STEP 1: EFC's for less than 9 months

$$PC / 9 = \text{Monthly PC}$$

$$SIC/9 = \text{Monthly SIC}$$

$$\text{Monthly PC} + \text{Monthly SIC} + SCA = EFC1$$

$$(\text{Monthly PC} \times 2) + (\text{Monthly SIC} \times 2) + SCA = EFC2$$

$$(\text{Monthly PC} \times 3) + (\text{Monthly SIC} \times 3) + SCA = EFC3$$

$$(\text{Monthly PC} \times 4) + (\text{Monthly SIC} \times 4) + SCA = EFC4$$

$$(\text{Monthly PC} \times 5) + (\text{Monthly SIC} \times 5) + SCA = EFC5$$

$$(\text{Monthly PC} \times 6) + (\text{Monthly SIC} \times 6) + SCA = EFC6$$

$$(\text{Monthly PC} \times 7) + (\text{Monthly SIC} \times 7) + SCA = EFC7$$

$$(\text{Monthly PC} \times 8) + (\text{Monthly SIC} \times 8) + SCA = EFC8$$

STEP 2: EFC's for greater than 9 months

! a) Alternate AAI =  $3,730 + AAI$

b) Alternate TPC = Calculation from table in EFC Formula 1, STEP 7 using Alternate AAI

c) Alternate TPC / Parents' Number in College = Alternate PC

d)  $(\text{Alternate PC} - PC) / 12 = \text{Monthly PC}$

e)  $\text{Monthly PC} + PC + SIC + SCA = EFC10$

$(\text{Monthly PC} \times 2) + PC + SIC + SCA = EFC11$

$(\text{Monthly PC} \times 3) + PC + SIC + SCA = EFC12$



ALTERNATE EFC FORMULA #2 - INDEPENDENT WITHOUT DEPENDENTS OTHER THAN A SPOUSE

If EFC is 0, alternate EFC for 1-12 will be the same as EFC.

$$\text{EFC} / 9 = \text{Monthly EFC}$$

$$\text{Monthly EFC} = \text{EFC1}$$

$$\text{Monthly EFC} \times 2 = \text{EFC2}$$

$$\text{Monthly EFC} \times 3 = \text{EFC3}$$

$$\text{Monthly EFC} \times 4 = \text{EFC4}$$

$$\text{Monthly EFC} \times 5 = \text{EFC5}$$

$$\text{Monthly EFC} \times 6 = \text{EFC6}$$

$$\text{Monthly EFC} \times 7 = \text{EFC7}$$

$$\text{Monthly EFC} \times 8 = \text{EFC8}$$

$$\text{EFC} = \text{EFC10}$$

$$\text{EFC} = \text{EFC11}$$

$$\text{EFC} = \text{EFC12}$$

ALTERNATE EFC FORMULA #3 - INDEPENDENT WITH DEPENDENTS OTHER THAN A SPOUSE

If EFC is 0, alternate EFC for 1-12 will be the same as EFC.

$$\text{EFC} / 9 = \text{Monthly EFC}$$

$$\text{Monthly EFC} = \text{EFC1}$$

$$\text{Monthly EFC} \times 2 = \text{EFC2}$$

$$\text{Monthly EFC} \times 3 = \text{EFC3}$$

$$\text{Monthly EFC} \times 4 = \text{EFC4}$$

$$\text{Monthly EFC} \times 5 = \text{EFC5}$$

$$\text{Monthly EFC} \times 6 = \text{EFC6}$$

$$\text{Monthly EFC} \times 7 = \text{EFC7}$$

$$\text{Monthly EFC} \times 8 = \text{EFC8}$$

$$\text{EFC} = \text{EFC10}$$

$$\text{EFC} = \text{EFC11}$$

$$\text{EFC} = \text{EFC12}$$

ALTERNATE EFC FORMULA #4 - SIMPLIFIED DEPENDENT

STEP 1: EFC's for less than 9 months

$$PC / 9 = \text{Monthly PC}$$

$$SIC/9 = \text{Monthly SIC}$$

$$\text{Monthly PC} + \text{Monthly SIC} = \text{EFC1}$$

$$(\text{Monthly PC} \times 2) + (\text{Monthly SIC} \times 2) = \text{EFC2}$$

$$(\text{Monthly PC} \times 3) + (\text{Monthly SIC} \times 3) = \text{EFC3}$$

$$(\text{Monthly PC} \times 4) + (\text{Monthly SIC} \times 4) = \text{EFC4}$$

$$(\text{Monthly PC} \times 5) + (\text{Monthly SIC} \times 5) = \text{EFC5}$$

$$(\text{Monthly PC} \times 6) + (\text{Monthly SIC} \times 6) = \text{EFC6}$$

$$(\text{Monthly PC} \times 7) + (\text{Monthly SIC} \times 7) = \text{EFC7}$$

$$(\text{Monthly PC} \times 8) + (\text{Monthly SIC} \times 8) = \text{EFC8}$$

STEP 2: EFC's for greater than 9 months

! a)  $\text{Alternate AAI} = \text{AI} + 3,730$

b)  $\text{Alternate TPC} = \text{Calculation from table in EFC Formula 4, STEP 4, using Alternate AAI}$

c)  $\text{Alternate TPC} / \text{Parents' Number in College} = \text{Alternate PC}$

d)  $(\text{Alternate PC} - \text{PC}) / 12 = \text{Monthly PC}$

e)  $\text{Monthly PC} + \text{PC} + \text{SIC} = \text{EFC10}$

$(\text{Monthly PC} \times 2) + \text{PC} + \text{SIC} = \text{EFC11}$

$(\text{Monthly PC} \times 3) + \text{PC} + \text{SIC} = \text{EFC12}$

ALTERNATE EFC FORMULA #5 - SIMPLIFIED INDEPENDENT WITHOUT DEPENDENTS OTHER THAN A SPOUSE

If EFC is 0, alternate EFC for 1-12 will be the same as EFC.

$$\text{EFC} / 9 = \text{Monthly EFC}$$

$$\text{Monthly EFC} = \text{EFC1}$$

$$\text{Monthly EFC} \times 2 = \text{EFC2}$$

$$\text{Monthly EFC} \times 3 = \text{EFC3}$$

$$\text{Monthly EFC} \times 4 = \text{EFC4}$$

$$\text{Monthly EFC} \times 5 = \text{EFC5}$$

$$\text{Monthly EFC} \times 6 = \text{EFC6}$$

$$\text{Monthly EFC} \times 7 = \text{EFC7}$$

$$\text{Monthly EFC} \times 8 = \text{EFC8}$$

$$\text{EFC} = \text{EFC10}$$

$$\text{EFC} = \text{EFC11}$$

$$\text{EFC} = \text{EFC12}$$

ALTERNATE EFC FORMULA #6 - SIMPLIFIED INDEPENDENT WITH DEPENDENTS OTHER THAN A SPOUSE

If EFC is 0, alternate EFC for 1-12 will be the same as EFC.

$$\text{EFC} / 9 = \text{Monthly EFC}$$

$$\text{Monthly EFC} = \text{EFC1}$$

$$\text{Monthly EFC} \times 2 = \text{EFC2}$$

$$\text{Monthly EFC} \times 3 = \text{EFC3}$$

$$\text{Monthly EFC} \times 4 = \text{EFC4}$$

$$\text{Monthly EFC} \times 5 = \text{EFC5}$$

$$\text{Monthly EFC} \times 6 = \text{EFC6}$$

$$\text{Monthly EFC} \times 7 = \text{EFC7}$$

$$\text{Monthly EFC} \times 8 = \text{EFC8}$$

$$\text{EFC} = \text{EFC10}$$

$$\text{EFC} = \text{EFC11}$$

$$\text{EFC} = \text{EFC12}$$

## APPENDIX

### INSTITUTIONAL STUDENT INFORMATION RECORD (ISIR) FORMAT

**DRAFT****ISIR Record Description/Data Dictionary**

<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
1		1	1	1	Batch Year	4, Will always be '4' (for 2003-2004)	Left
2	112	2	2	1	Student Last Name/ SSN Change Flag  Indicates whether the student's last name and/or Social Security Number (SSN) have been changed.	N = Last Name change S = Social Security Number change B = Social Security Number and last name change Blank = No change	Left
3		3	11	9	Original Social Security Number  The student's original SSN as initially processed by the CPS.	001010001 to 999999999	Right
4		12	13	2	Original Name ID  First two letters of the last name as they were on the initial application, regardless of any corrections to the last name.	Uppercase A to Z Space(s) (period) ' (apostrophe) (dash) Blank	Left
5		14	15	2	Transaction Number  The CPS transaction number of this ISIR.	01 to 99	Right

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
6	008	16	24	9	Student's Current Social Security Number  Student's SSN on this transaction. It will be different from the student's original SSN only if it has been corrected or changed.	001010001 to 999999999	Right
7	001	25	40	16	Student's Last Name	0 to 9 Uppercase A to Z Space(s) (period) ' (apostrophe) (dash) Blank	Left
8	002	41	52	12	Student's First Name	0 to 9 Uppercase A to Z Space(s) (period) ' (apostrophe) (dash) Blank	Left
9	003	53	53	1	Middle Initial	Uppercase A to Z Blank	Left
10	004	54	88	35	Permanent Mailing Address	0 to 9 Uppercase A to Z (Period) ' (apostrophe) (Dash) (Comma) (Number) (At) (Percent or care of) (Ampersand) (Slash) Space(s) Blank	Left



<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
11	005	89	104	16	Student's Permanent City	0 to 9 Uppercase A to Z . (Period) ' (apostrophe) - (Dash) , (Comma) # (Number) @ (At) % (Percent or care of) & (Ampersand) / (Slash) Space(s)	Left
12	006	105	106	2	Student's Permanent State	Uppercase A to Z Valid postal code See State/Country/ Jurisdiction Codes Blank	Left
13	007	107	111	5	Student's Permanent Zip Code	00000 to 99999 Blank	Right
14	009	112	119	8	Student's Date of Birth	Format is CCYYMMDD 19000101 to 19991231 Blank	Left
15	010	120	129	10	Student's Permanent Phone Number	0000000000 to 9999999999 Blank	Right
16	011	130	149	20	Student's Driver's License Number	0 to 9 Uppercase A to Z Space(s) - (dash) * (asterisk) Blank	Left
17	012	150	151	2	Student's Driver's License State Code	Valid two letter postal code See State/Country/ Jurisdiction Codes Blank	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
18	013	152	152	1	Student's Citizenship Status  The value the student reported for citizenship.	1 = U.S. citizen (or U.S. national) 2 = Eligible non-citizen 3 = Neither 1 or 2, Not eligible Blank	Left
19	014	153	161	9	Student's Alien Registration Number	000000001 to 999999999 Blank	Left
20	015	162	162	1	Student's Marital Status	1 = Unmarried (single, divorced, or widowed) 2 = Married/Remarried 3 = Separated Blank	Left
21	016	163	168	6	Student's Marital Status Date	Format is CCYYMM 190001 to 200412 Blank	Left
22	017	169	169	1	Summer 2003?	1 = Full time/Not Sure 2 = $\frac{3}{4}$ time 3 = $\frac{1}{2}$ time 4 = Less than $\frac{1}{2}$ time 5 = Not attending Blank	Left
23	018	170	170	1	Fall 2003?	1 = Full time/Not Sure 2 = $\frac{3}{4}$ time 3 = $\frac{1}{2}$ time 4 = Less than $\frac{1}{2}$ time 5 = Not attending Blank	Left
24	019	171	171	1	Winter 2003-2004?	1 = Full time/Not Sure 2 = $\frac{3}{4}$ time 3 = $\frac{1}{2}$ time 4 = Less than $\frac{1}{2}$ time 5 = Not attending Blank	Left
25	020	172	172	1	Spring 2004?	1 = Full time/Not Sure 2 = $\frac{3}{4}$ time 3 = $\frac{1}{2}$ time 4 = Less than $\frac{1}{2}$ time 5 = Not attending Blank	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
26	021	173	173	1	Summer 2004?	1 = Full time/Not Sure 2 = ¾ time 3 = ½ time 4 = Less than ½ time 5 = Not attending Blank	Left
27	022	174	174	1	Father's Highest Grade Level Completed	1 = Middle School/Jr. High 2 = High School 3 = College or Beyond 4 = Other/Unknown Blank	Left
28	023	175	175	1	Mother's Highest Grade Level Completed	1 = Middle School/Jr. High 2 = High School 3 = College or Beyond 4 = Other/Unknown Blank	Left
29	024	176	177	2	Student's State of Legal Residence	Uppercase A to Z Valid postal code See State/Country/ Jurisdiction Codes Blank	Left
30	025	178	178	1	Student Legal Resident Before 01-01-1998?	1 = Yes 2 = No Blank	Left
31	026	179	184	6	Student's Legal Residence Date	Format is CCYYMM 190001 to 200412 Blank CPS will accept: CCYYMM CCYY with blank MM Blank CCYY with MM Blank CCYYMM	Left
32	027	185	185	1	Are You Male?	1 = Yes 2 = No Blank	Left
33	028	186	186	1	Do you want Selective Service to register you?	1 = Yes 2 = No Blank	Left

ISIR Record Description/Data Dictionary (Continued)							
Field #	SAR Field	Start	End	Length	Field Name	Valid Content	Justify Signed
34	029	187	187	1	Degree/Certificate	1 = 1st Bachelor's Degree 2 = 2nd Bachelor's Degree 3 = Associate Degree (occupational or technical program) 4 = Associate Degree (general education or transfer program) 5 = Certificate or diploma for completing an occupational, technical, or educational program of less than two years 6 = Certificate or Diploma for completing an occupational, technical, or educational program of at least two years 7 = Teaching Credential Program (non-degree program) 8 = Graduate or Professional Degree 9 = Other/Undecided Blank	Right

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
35	030	188	188	1	Grade Level in College in 2003-2004	0 = 1st year, never attended college 1 = 1st year, attended college before 2 = 2nd year/sophomore 3 = 3rd year/junior 4 = 4th year/senior 5 = 5th year/other undergraduate 6 = 1st year graduate/professional 7 = Continuing graduate/professional Blank	Left
36	031	189	189	1	HS Diploma or GED Received?	1 = Yes 2 = No Blank	Left
37	032	190	190	1	First Bachelor's Degree By 07-01-2003?	1 = Yes 2 = No Blank	Left
38	033	191	191	1	Interested in Student Loans?	1 = Yes 2 = No Blank	Left
39	034	192	192	1	Interested in Work-Study?	1 = Yes 2 = No Blank	Left
40	035	193	193	1	Drug Conviction Affecting Eligibility	1 = No 2 = Yes (Part year) 3 = Yes/Don't Know Blank	Left
41	036	194	194	1	Student's Tax Return Completed?	1 = Already Completed 2 = Will File 3 = Will Not File Blank	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
42	037	195	195	1	Student's Type of 2002 Tax Form Used?	1 = IRS 1040 2 = IRS 1040A, 1040 EZ, 1040 Telefile 3 = Foreign Tax Return 4 = Tax return from Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Marshall Islands, the Federated States of Micronesia, or Palau Blank	Left
43	038	196	196	1	Student Eligible to file 1040A or 1040EZ?	1 = Yes 2 = No 3 = Don't Know Blank	Left
44	039	197	202	6	Student's Adjusted Gross Income from IRS form	-999999 to 999999 Blank	Right Signed
45	040	203	207	5	Student's U.S. Income Tax Paid	00000 to 99999 Blank	Right
46	041	208	209	2	Student's Exemptions Claimed	00 to 99 Blank	Right
47	042	210	215	6	Student's Income Earned from Work	-999999 to 999999 Blank	Right Signed
48	043	216	221	6	Spouse's Income Earned from Work	-999999 to 999999 Blank	Right Signed
49	044	222	226	5	Student's Total Amount from Worksheet A	00000 to 99999 Blank	Right
50	045	227	231	5	Student's Total Amount from Worksheet B	00000 to 99999 Blank	Right
51	046	232	236	5	Student's Total Amount from Worksheet C	00000 to 99999 Blank	Right
52	047	237	242	6	Student's Investment Net Worth	000000 to 999999 Blank	Right
53	048	243	248	6	Student's Business and/or Investment Farm Net Worth	000000 to 999999 Blank	Right
54	049	249	254	6	Student's Cash, Savings, and Checking	000000 to 999999 Blank	Right

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
55	050	255	256	2	No. of Months Veterans Education Benefits Received	00 to 12 Blank	Right
56	051	257	260	4	Monthly Veterans Education Benefits	0000 to 9999 Blank	Right
57	052	261	261	1	Born Before 01-01-1980?	1 = Yes 2 = No Blank	Left
58	053	262	262	1	Working on a Master's or Doctorate Program in 2003-2004?	1 = Yes 2 = No Blank	Left
59	054	263	263	1	Is Student Married?	1 = Yes 2 = No Blank	Left
60	055	264	264	1	Have Children you support?	1 = Yes 2 = No Blank	Left
61	056	265	265	1	Have Legal Dependents Other than Children or Spouse?	1 = Yes 2 = No Blank	Left
62	057	266	266	1	Orphan or Ward of Court?	1 = Yes 2 = No Blank	Left
63	058	267	267	1	Veteran of U.S. Armed Forces?	1 = Yes 2 = No Blank	Left
64	059	268	268	1	Parent's Marital Status	1 = Married/Remarried 2 = Single 3 = Divorced/ Separated 4 = Widowed Blank	Right
65	061	269	277	9	Father's/Stepfather's Social Security Number	000000000 to 999999999 Blank	Right

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
66	062	278	293	16	Father's/Stepfather's Last Name	0 to 9 Uppercase A to Z Space(s) (period) ' (apostrophe) - (dash) Blank	Left
67	063	294	302	9	Mother's/Stepmother's Social Security Number	000000000 to 999999999 Blank	Right
68	064	303	318	16	Mother's/Stepmother's Last Name	0 to 9 Uppercase A to Z Space(s) (period) ' (apostrophe) - (dash) Blank	Left
69	065	319	320	2	Parents' Number of Family Members	01 to 99 Blank	Right
70	066	321	321	1	Parents' Number in College 2003-2004 (Parents' excluded)	1 to 9 Blank	Right
71	067	322	323	2	Parents' State of Legal Residence	Uppercase A to Z Valid postal code See State/Country/Jurisdiction Codes Blank	Left
72	068	324	324	1	Parents Legal Residents before 01-01-1998?	1 = Yes 2 = No Blank	Left
73	069	325	330	6	Parents' Legal Residence Date	Format is CCYYMM 190001 to 200412 Blank CPS will accept: CCYYMM CCYY with blank MM Blank CCYY with MM Blank CCYYMM	Left
74	070	331	332	2	Age of Older Parent	00 to 99 Blank	Left



<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
75	071	333	333	1	Parents' Tax Return Completed?	1 = Already Completed 2 = Will File 3 = Will Not File Blank	Left
76	072	334	334	1	Parents' Type of 2002 Tax Form Used?	1 = IRS 1040 2 = IRS 1040A, 1040 EZ, 1040 Telefile 3 = Foreign Tax Return 4 = Tax return from Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Marshall Islands, the Federated States of Micronesia, or Palau Blank	Left
77	073	335	335	1	Parents' Eligible to file 1040A or 1040EZ?	1 = Yes 2 = No 3 = Don't Know Blank	Left
78	074	336	341	6	Parents' Adjusted Gross Income from IRS form	-999999 to 999999 Blank	Right Signed
79	075	342	347	6	Parents' U.S. Income Tax Paid	000000 to 999999 Blank	Right
80	076	348	349	2	Parents' Exemptions Claimed	00 to 99 Blank	Right
81	077	350	355	6	Father's/Stepfather's Income Earned from Work	-999999 to 999999 Blank	Right Signed
82	078	356	361	6	Mother's/Stepmother's Income Earned from Work	-999999 to 999999 Blank	Right Signed
83	079	362	366	5	Parents' Total Amount from Worksheet A	00000 to 99999 Blank	Right
84	080	367	371	5	Parents' Total Amount from Worksheet B	00000 to 99999 Blank	Right
85	081	372	376	5	Parents' Total Amount from Worksheet C	00000 to 99999 Blank	Right

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
86	082	377	382	6	Parents' Investment Net Worth	000000 to 999999 Blank	Right
87	083	383	388	6	Parents' Business and/or Investment Farm Net Worth	000000 to 999999 Blank	Right
88	084	389	394	6	Parents' Cash, Savings, and Checking	000000 to 999999 Blank	Right
89	085	395	396	2	Student's Number of Family Members	00 to 99 Blank	Right
90	086	397	397	1	Student's Number in College 2003-2004	0 to 9 Blank	Right
91	087	398	403	6	Federal School Code #1	X00000 to X99999 Blank Valid characters for the first position are 0 (zero), B, E, or G	Left
92	088	404	404	1	Federal School Code #1 Housing Plans	1 = On Campus 2 = Off Campus 3 = With Parent Blank	Left
93	089	405	410	6	Federal School Code #2	X00000 to X99999 Blank Valid characters for the first position are 0 (zero), B, E, or G.	Left
94	090	411	411	1	Federal School Code #2 Housing Plans	1 = On Campus 2 = Off Campus 3 = With Parent Blank	Left
95	091	412	417	6	Federal School Code #3	X00000 to X99999 Blank Valid characters for the first position are 0 (zero), B, E, or G.	Left
96	092	418	418	1	Federal School Code #3 Housing Plans	1 = On Campus 2 = Off Campus 3 = With Parent Blank	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
97	093	419	424	6	Federal School Code #4	X00000 to X99999 Blank Valid characters for the first position are 0 (zero), B, E, or G.	Left
98	094	425	425	1	Federal School Code #4 Housing Plans	1 = On Campus 2 = Off Campus 3 = With Parent Blank	Left
99	095	426	431	6	Federal School Code #5	X00000 to X99999 Blank Valid characters for the first position are 0 (zero), B, E, or G.	Left
100	096	432	432	1	Federal School Code #5 Housing Plans	1 = On Campus 2 = Off Campus 3 = With Parent Blank	Left
101	097	433	438	6	Federal School Code #6	X00000 to X99999 Blank Valid characters for the first position are 0 (zero), B, E, or G.	Left
102	098	439	439	1	Federal School Code #6 Housing Plans	1 = On Campus 2 = Off Campus 3 = With Parent Blank	Left

ISIR Record Description/Data Dictionary (Continued)							
Field #	SAR Field	Start	End	Length	Field Name	Valid Content	Justify Signed
103	099	440	489	50	Student's E-mail Address	<p>One and only one '@' at-sign allowed.</p> <p>Before @:</p> <ul style="list-style-type: none"> <li>at least one valid character</li> <li>all characters in the range of ASCII 33-126, except for the following 12 characters &lt; &gt; ( ) [ ] \ , ; : " ' @</li> <li>period '.' cannot be first, last or adjacent to another period</li> </ul> <p>After @:</p> <ul style="list-style-type: none"> <li>at least one valid character</li> <li>only letters, digits, hyphen, underscore, and period (A-Z, a-z, 0-9, -, _, .)</li> <li>hyphen, underscore, and period cannot be first, last, or adjacent to a period</li> </ul>	Left
104	100	490	497	8	Date Application Completed	<p>Format is CCYYMMDD</p> <p>20030101 to 20041231</p> <p>Blank</p>	Left
105	101	498	498	1	<p>Signed By</p> <p>Indicates if only the applicant, or only the parent, or both applicant and parent signed the transaction.</p>	<p>A = Applicant Only</p> <p>B = Applicant and Parent</p> <p>P = Parent only</p> <p>Blank = No signatures</p>	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
106	102	499	507	9	Preparer's Social Security Number  Preparer's SSN provided on the transaction.	000000000 to 999999999 Blank	Right
107	103	508	516	9	Preparer's Employer Identification Number (EIN)	000000000 to 999999999 Blank	Right
108	104	517	517	1	Preparer's Signature  Indicates that a preparer signed the transaction.	1 = Yes Blank	Left
109	105	518	525	8	Transaction Receipt Date  Date the transaction was received by the MDE or School for data entry or the date the student entered record on the Web.	Format is CCYYMMDD 20030101 to 20041231	Left
110	106	526	526	1	Dependency Override Indicator  Indicates that a Dependency Override was requested on this transaction.	1 = Dependent to Independent 2 = Dependent to Independent Override Canceled 3 = Dependency Override request failed Blank = Dependency override not requested	Left
111	108	527	532	6	FAA Federal School Code  Indicates the Federal School Code that requested a dependency override or Adjusted Calculation request.	X00000 to X99999 Valid characters for first position are 0 (zero), B, E, or G Blank = No Dependency Override or FAA EFC Adjustment done	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
112		533	533	1	Filler	For ED Use Only	Left
113	107	534	534	1	FAA Adjustment  Indicates whether a FAA requested an EFC adjustment and if it was processed.	1 = EFC Adjustment processed 2 = EFC Adjustment request failed Blank = no EFC Adjustment requested	Left
114		535	535	1	Input Record Type	C = Correction Application D = Duplicate Request H = Correction Q= EDE Quick Correction R = Renewal FAFSA on the Web or Paper Renewal FAFSA S = Web Signatures V = EDE Verification Corrections Blank = Initial Application	Left
115		536	540	5	Serial Number  Sequential position of the ISIR in the batch, except in SARA files.	00001 to 99999	Right

ISIR Record Description/Data Dictionary (Continued)							
Field #	SAR Field	Start	End	Length	Field Name	Valid Content	Justify Signed
116		541	563	23	Batch Number  Sample EDE batch number- #X4000000CCYYM MDDhhmmss  Sample IDC batch number- PI4ppppppppppppbbb bbbbbb	EDE batch numbers consist of the following: 2 characters for ISIR Batch Type: #A = Electronic App #C = Correction/ Duplicate #F = FDR #G = CPS System Generated #I =YTD #K = State Agency Non-Resident #L = Full State Agency Resident #Y = Reprocessed Records #Z = CPS System Generated 1 digit Cycle Year = 4 6 characters for Federal School Code or State Agency Code 8 digits for current date in CCYYMMDD format 6 digits for current time in HHMMSS format  IDC batch numbers consist of the following: PI - stands for Packet ID 1 digit Cycle Year = 4 12-digit Packet ID from IDC 8 blank spaces	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
117	113	564	564	1	Early Analysis Flag  Used to indicate a student who is requesting Early Admission to your school.	1 = Early Analysis Applicant Blank	Left
118		565	565	1	Electronic Application Entry Source Code  Indicates the origin of the electronic application	2 = FAA Entry 6 = Spanish FAFSA on the Web 7 = Renewal FAFSA on the Web 8 = English FAFSA on the Web 9 = FAA Access	Right
119		566	571	6	Filler	For ED Use Only	Left
120		572	578	7	ETI Destination Number  TG number assigned by SAIG.	'TGXXXXX' where XXXXX is the 5-digit numeric code assigned by SAIG Blank	Left
121		579	579	1	Reject Override A- Date of Birth year is 1900 to 1928.	1 = Yes Blank	
122		580	580	1	Reject Override B- Date of Birth since September 1, 1987	1 = Yes Blank	Left
123		581	581	1	Reject Override C- Taxes paid is greater than zero and greater than or equal to 40% of the AGI, but not equal to or greater than AGI.	1 = Yes Blank	
124		582	582	1	Reject Override N- Missing first or last name	1 = Yes Blank	Left
125		583	583	1	Reject Override W- Questionable number of family members.	1 = Yes Blank	Left



ISIR Record Description/Data Dictionary (Continued)							
Field #	SAR Field	Start	End	Length	Field Name	Valid Content	Justify Signed
126		584	584	1	Assumption Override 1- Parents' Number in College assumed to be 1 when the number in college is greater than 6.	1 = Yes Blank	Left
127		585	585	1	Assumption Override 2- Parents' AGI assumed equal to sum of father and mother earned income portions. Allow AGI to be zero or blank as entered.	1 = Yes Blank	Left
128		586	586	1	Assumption Override 3- Student's Number in College assumed to be 1 when number in college equals number in the household and both are greater than 2.	1 = Yes Blank	Left
129		587	587	1	Assumption Override 4- Student's AGI assumed equal to the sum of student and spouse earned income portions. Allow AGI to be zero or blank as entered.	1 = Yes Blank	Left
130		588	588	1	Assumption Override 5- Parents' Total from Worksheet C assumed to be zero. Allow parents' income from Worksheet C to be greater than zero and greater than a fixed percentage of the parents' total income.	1 = Yes Blank	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
131		589	589	1	Assumption Override 6- Student's Total from Worksheet C assumed to be zero. Allow student's income from Worksheet C to be greater than zero, and equal or greater than student's total income.	1 = Yes Blank	Left
132		590	590	1	Dependency Status  Determined by CPS based on Dependency Status data provided.	D = Dependent, calculated EFC provided I = Independent, calculated EFC provided X = Dependent rejected, no EFC calculated Y = Independent rejected, no EFC calculated	Left
133		591	598	8	Application Receipt Date  Date the application was received by the IDC or School for data entry or the date the student entered record on the Web.	Format is CCYYMMDD 20030101 to 20041231	Left
134		599	599	1	Processed Record Type	C = Correction Application H = Correction/ Duplicate Blank = Initial Application	Left
135		600	601	2	Correction Applied against Transaction Number	01 to 99 Blank = Transaction not a result of a correction	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
136		602	602	1	System Generated Indicator  Transaction initiated by the CPS with no input from the applicant.	A = Applicant released from Drug Enforcement hold D = Duplicate request I = INS Secondary confirmation L = Duplicate request and NSLDS match data has changed N = NSLDS post-screening transaction Z = Reprocessed transaction Blank = Not a system generated transaction	Left
137		603	603	1	Duplicate Request Indicator  Indicates this transaction is a result of a duplicate request.	D = Duplicate request Blank	Left
138		604	604	1	Source of Correction	A = Applicant D = CPS S = School Blank	Left
139		605	605	1	Parents' Calculated 2002 Tax Status  CPS determination of tax filing status.	1, 2, or 3 = Tax Filer 4 or 5 = Non-Tax Filer Blank	Left
140		606	606	1	Student's Calculated 2002 Tax Status  CPS determination of tax filing status.	1, 2, or 3 = Tax Filer 4 or 5 = Non-Tax Filer Blank	Left
141		607	607	1	Graduate Flag	Y = Yes response to BA question and/or Graduate status question Blank = Graduate Flag not set	Left

ISIR Record Description/Data Dictionary (Continued)							
Field #	SAR Field	Start	End	Length	Field Name	Valid Content	Justify Signed
142		608	608	1	Automatic Zero EFC  Zero EFC is automatically set if simplified needs test met and taxable income is \$15,000 or less.	Y = EFC set to zero based on income criteria Blank = Flag not set	Left
143		609	609	1	EFC Change Flag  Indicates if the EFC has gone up or down from the transaction being applied against.	1 = EFC increase 2 = EFC decrease Blank = No change	Left
144		610	610	1	SAR C Flag	Y = C flag set, resolution required on one or more match results Blank = No flag set	Left
145		611	611	1	Simplified Needs Test (SNT)  Applicant meets certain criteria for tax filing status and income level and is not required to provide asset information.	Y = SNT met N = SNT not met or insufficient information to determine SNT eligibility Blank	Left
146		612	625	14	Reject Reason Codes  Alpha/numeric character indicating why an application or correction has been rejected.  See Processing Codes section for specific code tables and details.	A to Z 01 to 99 Blank = Applicant not rejected  Up to seven 2-character codes	Left

ISIR Record Description/Data Dictionary (Continued)							
Field #	SAR Field	Start	End	Length	Field Name	Valid Content	Justify Signed
147		626	626	1	Selective Service Match Flag  Results from SS Match for applicants who met criteria to be sent to match.	Y = Registration status confirmed N = Registration status not confirmed T = Temporarily Exempt Blank = Record not sent to Selective Service	Left
148		627	627	1	Selective Service Registration Flag  Results from student's request to be registered with Selective Service.	Y = Registration completed N = Registration not completed T = Temporarily Exempt Blank = Record not sent to Selective Service.	Left
149		628	628	1	INS Match Flag  Results from INS match for applicants who met criteria to be sent to match.	Y = Citizenship confirmed N = Citizenship not confirmed Blank = Record not sent to INS	Left
150		629	643	15	INS Verification Number  Identification # provided by the Immigration and Naturalization Service indicating that primary verification was performed.	0000000000000000 to 9999999999999999 Blank	Left

ISIR Record Description/Data Dictionary (Continued)							
Field #	SAR Field	Start	End	Length	Field Name	Valid Content	Justify Signed
151		644	644	1	Secondary INS Match Flag  Results from INS Confirmation for applicants who failed Primary Confirmation.	C = INS has not yet confirmed eligible non-citizen status N = INS did not confirm eligible non-citizen status P = Pending Results of Secondary Confirmation X = INS did not have enough information to confirm eligible non-citizen status Y = Citizenship status confirmed by INS Blank = N/A	Left
152		645	659	15	Filler	For ED Use Only	Left
153		660	660	1	SSN Match Flag  Results from SSN Match with Social Security Administration.	1 = No match on SSN 2 = SSN and name match, no match on DOB 3 = SSN match, no match on name 4 = SSN, Name, and DOB match 5 = SSN, name, DOB match with Date of Death 8 = Record not sent to SSA	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
154		661	661	1	SSA Citizenship Flag  Results from Citizenship Match with Social Security Administration.	A = U.S. citizen B = Legal alien, eligible to work C = Legal alien, not eligible to work D = Other E = Alien, student restricted, work authorized F = Conditionally legalized alien N = Unable to verify citizenship due to no match on SSN, name or date of birth * = Foreign Blank = Domestic born (U.S. Citizen)	Left
155		662	669	8	SSN Date of Death  Date of Death provided for this SSN from the Social Security Administration.	CCYYMMDD 19000101 to 20041231 Blank	Left
156		670	670	1	NSLDS Match Flag  Results of the NSLDS Match.	1 = Eligible for Title IV Aid 2 = Default 3 = Overpayment 4 = Default and Overpayment 7 = Match but no data provided 8 = Record not sent to NSLDS	Right

ISIR Record Description/Data Dictionary (Continued)							
Field #	SAR Field	Start	End	Length	Field Name	Valid Content	Justify Signed
157		671	676	6	NSLDS Post-Screening Reason Code  The student's eligibility has changed since the previous prescreening.  This field can contain up to 3 reason codes at 2-bytes each.	01 = Default added 02 = Overpayment added 03 = Default resolved 04 = Overpayment resolved 05 = Master Promissory Note status change 06 = Loan went into Discharged status 07 = Loan out of Discharged status 08 = Closed school 09 = Exceeded Subsidized loan limit 10 Exceeded Combined loan limit 11 = No longer exceeding subsidized loan status 12 = No longer exceeding combined loan limit 13 = Change in type of discharged loan 99 = Other Blank = Not an NSLDS postscreening transaction	Left



ISIR Record Description/Data Dictionary (Continued)							
Field #	SAR Field	Start	End	Length	Field Name	Valid Content	Justify Signed
158		677	677	1	VA Match Flag  Results of the Veterans Affairs Match.	1 = Veteran status confirmed 2 = Record found on VA database but not a qualifying Veteran 3 = Record not found on VA database 4 = Record found on VA database but applicant on active duty 8 = Record not sent to VA Blank	Left
159		678	678	1	Filler	For ED Use Only	Left
160		679	680	2	Verification Tracking Flag	Numeric value = Selected Blank = Not selected	Left
161		681	681	1	Student is selected for Verification	Y = Selected N = Not Selected * = A subsequent transaction was selected for verification	Left
162		682	682	1	Subsequent Application Flag  Indicates that an initial application with the same SSN and name ID as a transaction already on the CPS database was submitted.	Y = Subsequent application from student Blank = Not a subsequent application	Left

ISIR Record Description/Data Dictionary (Continued)							
Field #	SAR Field	Start	End	Length	Field Name	Valid Content	Justify Signed
163		683	684	2	Application Data Source/Type Code  Indicates the origin of the initial application.	11 = Electronic App 51 = Paper Application 52 = Paper Renewal Application 55 = Paper Spanish Application 61 = FAFSA on the Web 62 = Renewal FAFSA on the Web 65 = Easy FAFSA on the Web	Left

ISIR Record Description/Data Dictionary (Continued)							
Field #	SAR Field	Start	End	Length	Field Name	Valid Content	Justify Signed
164		685	686	2	Transaction Data Source/Type Code  Indicates the origin of the transaction.	11 = Electronic App 31 = Electronic Full SAR Correction 32 = Electronic Signature 33 = Electronic Quick Correction 34 = Electronic Verification Worksheet Correction 51 = Paper Application 52 = Paper Renewal Application 53 = Paper Correction 55 = Paper Spanish Application 56 = Paper Signature Page 61 = FAFSA on the Web 62 = Renewal FAFSA on the Web 63 = Corrections on the Web 64 = FAA Corrections on the Web 65 = Easy FAFSA on the Web 72 = CPS System Generated 73 = CPS NSLDS Post-Screening 74 = CPS FDR and YTD 75 = CPS Signature Correction 76 = CPS INS Secondary Confirmation 81 = PIC	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
165		687	690	4	Data Release Number (DRN)  Will only be included when the transaction was initiated as an Electronic Application at the destination number.	0000 to 9999 Blank = Transaction not in response to electronic application	Left
166		691	698	8	Transaction Processed Date  Date that CPS computed this transaction.	Format is CCYYMMDD 20030101 to 20041231	Left
167		699	701	3	Compute Batch Number	000 to 999	Left
168		702	821	120	FAFSA Data Verify Flags  See the Field Name and Position Cross-Reference Table in section 4  Each FAFSA Data Verify flag byte corresponds to a specific SAR field and indicates fields corrected to the same value on the transaction being corrected.	0 = Not corrected to the same value 1 = Corrected to the same value 2 = Asked to be verified	Right

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
169		822	941	120	<p>Correction Flags</p> <p>See the Field Name and Position Cross-Reference Table in section 4</p> <p>Each correction flag byte corresponds to a specific SAR field and indicates fields that have been corrected.</p>	<p>0 = No Correction Made</p> <p>1= Field Corrected on this transaction</p> <p>2 = Field Corrected on previous transaction</p>	Right
170		942	1061	120	<p>Highlight Flags</p> <p>See the Field Name and Position Cross-Reference Table in section 4.</p> <p>Each highlight flag byte corresponds to a specific SAR field and indicates fields highlighted in boldface on the SAR.</p>	<p>0 = No Highlight Made</p> <p>1 = Field Highlighted</p> <p>Each highlight flag byte corresponds to a specific SAR field</p>	Right
171		1062	1066	5	<p>Paid EFC</p> <p>Primary or Secondary EFC, whichever is lower.</p>	<p>00000 to 99999</p> <p>Blank = None Calculated</p>	Left
172		1067	1071	5	<p>Primary EFC</p> <p>The primary 9 month EFC calculated. FNT, unless SNT met.</p>	<p>00000 to 99999</p> <p>Blank = None Calculated</p>	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
173		1072	1076	5	Secondary EFC  The secondary 9 month EFC calculated. FNT provided only if SNT is met and asset information is provided.	00000 to 99999 Blank = None Calculated	Left
174		1077	1077	1	Federal Pell Grant Paid EFC Type  Identifies which EFC was placed in Paid EFC.	P = Primary EFC S = Secondary EFC Blank = None Calculated	Left
175		1078	1078	1	Primary EFC Type  Identifies formula type used to calculate the primary EFC.  Full Needs Test (FNT)  Simplified Needs Test (SNT)	1 = FNT: Dependent 2 = FNT: Independent without dependents other than a spouse 3 = FNT: Independent with dependents other than a spouse 4 = SNT: Dependent 5 = SNT: Independent without dependents other than a spouse 6 = SNT: Independent with dependents other than a spouse Blank = None Calculated	Left

ISIR Record Description/Data Dictionary (Continued)							
Field #	SAR Field	Start	End	Length	Field Name	Valid Content	Justify Signed
176		1079	1079	1	Secondary EFC Type  Identifies formula type used to calculate secondary EFC.  Full Needs Test (FNT)  Simplified Needs Test (SNT)	1 = FNT: Dependent 2 = FNT: Independent without dependents other than a spouse 3 = FNT: Independent with dependents other than a spouse 4 = SNT: Dependent 5 = SNT: Independent without dependents other than a spouse 6 = SNT: Independent with dependents other than a spouse Blank = None Calculated	Left
177		1080	1084	5	Primary Alternate Month 1  The primary alternate EFC used by FAO in determining eligibility based on periods of time other than 9 months.	00000 to 99999 Blank = None Calculated	Left
178		1085	1089	5	Primary Alternate Month 2	00000 to 99999 Blank = None Calculated	Left
179		1090	1094	5	Primary Alternate Month 3	00000 to 99999 Blank = None Calculated	Left
180		1095	1099	5	Primary Alternate Month 4	00000 to 99999 Blank = None Calculated	Left
181		1100	1104	5	Primary Alternate Month 5	00000 to 99999 Blank = None Calculated	Left
182		1105	1109	5	Primary Alternate Month 6	00000 to 99999 Blank = None Calculated	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
183		1110	1114	5	Primary Alternate Month 7	00000 to 99999 Blank = None Calculated	Left
184		1115	1119	5	Primary Alternate Month 8	00000 to 99999 Blank = None Calculated	Left
185		1120	1124	5	Primary Alternate Month 10	00000 to 99999 Blank = None Calculated	Left
186		1125	1129	5	Primary Alternate Month 11	00000 to 99999 Blank = None Calculated	Left
187		1130	1134	5	Primary Alternate Month 12	00000 to 99999 Blank = None Calculated	Left
188		1135	1139	5	Secondary Alternate Month 1  The secondary alternate EFC used by FAO in determining eligibility based on periods of time other than 9 months.	00000 to 99999 Blank = None Calculated	Left
189		1140	1144	5	Secondary Alternate Month 2	00000 to 99999 Blank = None Calculated	Left
190		1145	1149	5	Secondary Alternate Month 3	00000 to 99999 Blank = None Calculated	Left
191		1150	1154	5	Secondary Alternate Month 4	00000 to 99999 Blank = None Calculated	Left
192		1155	1159	5	Secondary Alternate Month 5	00000 to 99999 Blank = None Calculated	Left
193		1160	1164	5	Secondary Alternate Month 6	00000 to 99999 Blank = None Calculated	Left



<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
194		1165	1169	5	Secondary Alternate Month 7	00000 to 99999 Blank = None Calculated	Left
195		1170	1174	5	Secondary Alternate Month 8	00000 to 99999 Blank = None Calculated	Left
196		1175	1179	5	Secondary Alternate Month 10	00000 to 99999 Blank = None Calculated	Left
197		1180	1184	5	Secondary Alternate Month 11	00000 to 99999 Blank = None Calculated	Left
198		1185	1189	5	Secondary Alternate Month 12	00000 to 99999 Blank = None Calculated	Left
199		1190	1196	7	TI: Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
200		1197	1203	7	ATI: Allowances Against Total Income	0000000 to 9999999 Blank = None Calculated	Left
201		1204	1210	7	STX: State and Other Tax Allowance	-9999999 to 9999999 Blank = None Calculated	Right Signed
202		1211	1217	7	EA: Employment Allowance	0000000 to 9999999 Blank = None Calculated	Left
203		1218	1224	7	IPA: Income Protection Allowance	0000000 to 9999999 Blank = None Calculated	Left
204		1225	1231	7	AI: Available Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
205		1232	1238	7	CAI: Contribution From Available Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
206		1239	1247	9	DNW: Discretionary Net Worth	-999999999 to 999999999 Blank = None Calculated	Right Signed

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
207		1248	1256	9	NW: EFC Net Worth	000000000 to 999999999 Blank = None Calculated	Left
208		1257	1265	9	APA: Asset Protection Allowance	000000000 to 999999999 Blank = None Calculated	Left
209		1266	1272	7	PCA: Parents' Contribution from Assets	-9999999 to 9999999 Blank = None Calculated	Right Signed
210		1273	1279	7	AAI: Adjusted Available Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
211		1280	1286	7	TSC: Total Student Contribution	0000000 to 9999999 Blank = None Calculated	Left
212		1287	1293	7	TPC: Total Parent Contribution	0000000 to 9999999 Blank = None Calculated	Left
213		1294	1300	7	PC: Parents' Contribution	0000000 to 9999999 Blank = None Calculated	Left
214		1301	1307	7	STI: Student's Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
215		1308	1314	7	SATI: Student's Allowance against Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
216		1315	1321	7	SIC: Dependent Students' Income Contribution	0000000 to 9999999 Blank = None Calculated	Left
217		1322	1330	9	SDNW: Student's Discretionary Net Worth	-999999999 to 999999999 Blank = None Calculated	Right Signed
218		1331	1337	7	SCA: Student's Contribution from Assets	-9999999 to 9999999 Blank = None Calculated	Right Signed

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
219		1338	1344	7	FTI: FISAP Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
220		1345	1351	7	SEC TI: Secondary Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
221		1352	1358	7	SEC ATI: Secondary Allowances Against Total Income	0000000 to 9999999 Blank = None Calculated	Left
222		1359	1365	7	SEC STX: Secondary State Tax Allowance	-9999999 to 9999999 Blank = None Calculated	Right Signed
223		1366	1372	7	SEC EA: Secondary Employment Allowance	0000000 to 9999999 Blank = None Calculated	Left
224		1373	1379	7	SEC IPA: Secondary Income Protection Allowance	0000000 to 9999999 Blank = None Calculated	Left
225		1380	1386	7	SEC AI: Secondary Available Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
226		1387	1393	7	SEC CAI: Secondary Contribution From Available Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
227		1394	1402	9	SEC DNW: Secondary Discretionary Net Worth	-999999999 to 999999999 Blank = None Calculated	Right Signed
228		1403	1411	9	SEC NW: Secondary Net Worth	000000000 to 999999999 Blank = None Calculated	Left
229		1412	1420	9	SEC APA: Secondary Asset Protection Allowances	000000000 to 999999999 Blank = None Calculated	Left
230		1421	1427	7	SEC PCA: Secondary Parents' Contribution from Assets	-9999999 to 9999999 Blank = None Calculated	Right Signed

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
231		1428	1434	7	SEC AAI: Secondary Adjusted Available Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
232		1435	1441	7	SEC TSC: Secondary Total Student Contribution	0000000 to 9999999 Blank = None Calculated	Left
233		1442	1448	7	SEC TPC: Secondary Total Parent Contribution	0000000 to 9999999 Blank = None Calculated	Left
234		1449	1455	7	SEC PC: Secondary Parents' Contribution	0000000 to 9999999 Blank = None Calculated	Left
235		1456	1462	7	SEC STI: Secondary Student's Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
236		1463	1469	7	SEC SATI: Secondary Student's Allowance Against Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
237		1470	1476	7	SEC SIC: Secondary Student's Dependent Income Contribution	0000000 to 9999999 Blank = None Calculated	Left
238		1477	1485	9	SEC SDNW: Secondary Student's Discretionary Net Worth	-999999999 to 999999999 Blank = None Calculated	Right Signed
239		1486	1492	7	SEC SCA: Secondary Student's Contribution from Assets	-9999999 to 9999999 Blank = None Calculated	Right Signed
240		1493	1499	7	SEC FTI: Secondary FISAP Total Income	-9999999 to 9999999 Blank = None Calculated	Right Signed
241		1500	1500	1	Assumed Citizenship	1 = Assumed student is a citizen 2 = Assumed student is an eligible non-citizen Blank = No assumption	Left
242		1501	1501	1	Assumed Student's Marital Status	1 = Assumed unmarried 2 = Assumed married/remarried Blank = No assumption	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
243		1502	1507	6	Assumed Student's AGI	-999999 to 999999 Blank = No assumption	Right Signed
244		1508	1512	5	Assumed Student's U.S. Tax Paid	00000 to 99999 Blank = No assumption	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
245		1513	1518	6	Assumed Student's Income from Work	-999999 to 999999 Blank = No assumption	Right Signed
246		1519	1524	6	Assumed Spouse's Income from Work	-999999 to 999999 Blank = No assumption	Right Signed
247		1525	1529	5	Assumed Student's Total from Worksheet C	00000 to 99999 Blank = No assumption	Left
248		1530	1530	1	Assumed Date of Birth Prior	1 = Assumed Yes 2 = Assumed No Blank = No assumption	Left
249		1531	1531	1	Assumed Student Is Married/Remarried	1 = Assumed Yes 2 = Assumed No Blank = No assumption	Left
250		1532	1532	1	Assumed Have Children You Support?	1 = Assumed Yes 2 = Assumed No Blank = No assumption	Left
251		1533	1533	1	Assumed Have Legal Dependents Other than Children or Spouse?	2 = Assumed no legal dependents Blank = No assumption	Left
252		1534	1534	1	Assumed VA Status	2 = Assumed not a Veteran Blank = No assumption	Left
253		1535	1536	2	Assumed Student's # in Family	00 to 99 Blank = No assumption	Left
254		1537	1537	1	Assumed Student's # in College	0 to 9 Blank = No assumption	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
255		1538	1538	1	Assumed Parents' Marital Status	1 = Assumed married/remarried 2 = Assumed single Blank = No assumption	Left
256		1539	1547	9	Assumed Father's/Stepfather's SSN	000000000 to 999999999 Blank	Right
257		1548	1556	9	Assumed Mother's/Stepmother's SSN	000000000 to 999999999 Blank	Right
258		1557	1558	2	Assumed Parents' # in Family	00 to 99 Blank = No assumption	Left
259		1559	1559	1	Assumed Parents' # in College	0 to 9 Blank = No assumption	Left
260		1560	1565	6	Assumed Parents' AGI	-999999 to 999999 Blank = No assumption	Right Signed
261		1566	1571	6	Assumed Parents' U.S. Tax Paid	000000 to 999999 Blank = No assumption	Left
262		1572	1577	6	Assumed Father's/Stepfather's Income Earned from Work	-999999 to 999999 Blank = No assumption	Right Signed
263		1578	1583	6	Assumed Mother's/Stepmother's Income Earned from Work	-999999 to 999999 Blank = No assumption	Right Signed
264		1584	1588	5	Assumed Parents' Total from Worksheet C	00000 to 99999 Blank = No assumption	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
265		1589	1648	60	Comment Codes  Comments provided by CPS to further communicate important results and processing information.	Twenty 3-digit numeric comment codes. (See ISIR Comment Code Text.) Unused positions contain all zeroes.	Right
266		1649	1668	20	SAR Acknowledge-ment Comment Codes  Codes are entered from left to right by the CPS and the unused positions are filled with zeros.	Ten 2-digit codes for comments appearing on the SAR Acknowledgement.	Right
267		1669	1669	1	Pell Grant Eligibility Flag  Indicates transaction has been determined eligible for a Federal Pell Grant by the CPS.	Y = This transaction determined eligible for a Federal Pell Grant. Blank = This transaction determined ineligible for a Federal Pell Grant	Left



ISIR Record Description/Data Dictionary (Continued)							
Field #	SAR Field	Start	End	Length	Field Name	Valid Content	Justify Signed
268		1670	1671	2	Reprocessed Reason Code  The code indicating why an ISIR was reprocessed by the CPS. An electronic message will be sent to destination numbers identifying definition of the code.	01 to 99 Blank = Not a reprocessed transaction	Left
269		1672	1679	8	Duplicate Date  CPS Process Date of the duplicate transaction requested.	Format is CCYYMMDD 20030101 to 20041231 Blank	Left
270		1680	1680	1	Duplicate SSN Indicator  Indicates if another filer is using this original SSN in their original SSN field.	Y = Another filer also using this SSN Blank = N/A	Left
271		1681	1681	1	ISIR Transaction Type  ISIR batch type that this ISIR was received in.	0 = Electronic initial application 1 = Automatic ISIR generated 2 = Electronic correction 3 = Electronic duplicate request	Right

ISIR Record Description/Data Dictionary (Continued)							
Field #	SAR Field	Start	End	Length	Field Name	Valid Content	Justify Signed
272		1682	1682	1	Electronic Federal School Code Indicator  For schools, it will identify your school code.  For state agencies it will identify one of the colleges listed in ISIR fields 91, 93, 95, 97, 99 or 101 that caused this transaction to be sent in the ESNF- non-resident file.	1 = Federal School Code #1 2 = Federal School Code #2 3 = Federal School Code #3 4 = Federal School Code #4 5 = Federal School Code #5 6 = Federal School Code #6 Blank = No Federal School Code	Left
273		1683	1688	6	Multi School Code Flags  Each byte of this field corresponds to the 6 Federal School Code choices. If the second byte of this field has a Y, then the Federal School Code listed in Federal School Code #2 is associated with the destination number.	Y or Blank is valid in any one of the 6 positions.  There may be more than 1 Y in the case of a servicer.  Will never be entirely blank, except on State Agency ISIRs.	Left
274	060	1689	1694	6	Parent's Marital Status Date	Format is CCYYMM 190001 to 200412 Blank	
275		1695	1706	12	Filler	For ED Use Only	Left
276		1707	1708	2	NSLDS Transaction Number  Reflects the latest transaction number for which NSLDS updated information. Will never be blank.	01 to 99	Right

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
277		1709	1709	1	NSLDS Database Results Flag	1 = Record matched, data sent 2 = SSN match, no name or date of birth match-no data sent 3 = SSN not found in NSLDS 4 = Full match, no relevant data to send 5 = Real-time transaction not sent to NSLDS Blank = Record not sent, all NSLDS fields will be blank	Left
278		1710	1710	1	NSLDS Flag  For NSLDS Use Only	Y N Blank	Left
279		1711	1711	1	NSLDS Pell Overpayment Flag	D = Deferred N = N/A S (Satisfactory Repayment Arrangements) W = Waived Y = Overpayment	Left
280		1712	1719	8	NSLDS Pell Overpayment Contact	Numeric school code N/A Y (more than one)	Right
281		1720	1720	1	NSLDS SEOG Overpayment Flag	D = Deferred N = N/A S (Satisfactory Repayment Arrangements) W = Waived Y = Overpayment	Left
282		1721	1728	8	NSLDS SEOG Overpayment Contact	Numeric school code N/A Y (more than one)	Right

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
283		1729	1729	1	NSLDS Perkins Overpayment Flag	D = Deferred N = N/A S (Satisfactory Repayment Arrangements) W = Waived Y = Overpayment	Left
284		1730	1737	8	NSLDS Perkins Overpayment Contact	Numeric school code N/A Y (more than one)	Left
285		1738	1738	1	NSLDS Defaulted Loan Flag	Y or N	Left
286		1739	1739	1	NSLDS Discharged Loan Flag	C = Conditional D = Death M = Multiple N = None P = Permanent R = Reaffirmed	Left
287		1740	1740	1	NSLDS Loan Satisfactory Repayment Flag	Y or N	Left
288		1741	1741	1	Active Bankruptcy Flag	Y or N	Left
289		1742	1747	6	NSLDS Aggregate Subsidized Outstanding Principal Balance	Numeric N/A	Right
290		1748	1753	6	NSLDS Aggregate Unsubsidized Outstanding Principal Balance	Numeric N/A	Right
291		1754	1759	6	NSLDS Aggregate Combined Outstanding Principal Balance	Numeric N/A	Right
292		1760	1765	6	NSLDS Aggregate Consolidated Outstanding Principal Balance	Numeric N/A	Right
293		1766	1771	6	NSLDS Aggregate Subsidized Pending Disbursement	Numeric N/A	Right

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
294		1772	1777	6	NSLDS Aggregate Unsubsidized Pending Disbursement	Numeric N/A	Right
295		1778	1783	6	NSLDS Aggregate Combined Pending Disbursement	Numeric N/A	Right
296		1784	1789	6	NSLDS Aggregate Subsidized Total	Numeric N/A	Right
297		1790	1795	6	NSLDS Aggregate Unsubsidized Total	Numeric N/A	Right
298		1796	1801	6	NSLDS Aggregate Combined Total	Numeric N/A	Right
299		1802	1807	6	NSLDS Aggregate Consolidated Total	Numeric N/A	Right
300		1808	1813	6	NSLDS Perkins Principal Balance	Numeric N/A	Right
301		1814	1819	6	NSLDS Perkins Current Year Loan Amount	Numeric N/A	Right
302		1820	1820	1	NSLDS Defaulted Loan Change Flag	# N	Left
303		1821	1821	1	NSLDS Discharged Loan Change Flag	# N	Left
304		1822	1822	1	NSLDS Satisfactory Repayment Change Flag	# N	Left
305		1823	1823	1	NSLDS Active Bankruptcy Change Flag	# N	Left
306		1824	1824	1	NSLDS Overpayments Change Flag	# N	Left
307		1825	1825	1	NSLDS Aggregate Loan Change Flag	# N	Left
308		1826	1826	1	NSLDS Perkins Loan Change Flag	# N	Left
309		1827	1827	1	NSLDS Pell Payment Change Flag	# N	Left
310		1828	1828	1	NSLDS Additional Pell Flag	Y or N	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
311		1829	1829	1	NSLDS Additional Loans Flag	Y or N	Left
312		1830	1830	1	Direct Loan Master-Prom Note Flag	A = Active C = Closed I = Inactive N = No MPN on file U = Unavailable Blank = No data from NSLDS	Left
313		1831	1831	1	Direct Loan Plus Master Prom Note Flag	A = Active C = Closed I = Inactive N = No MPN on file U = Unavailable Blank = No data from NSLDS	Left
314		1832	1833	2	NSLDS Pell Sequence Number (1)	01 to 03 Blank	Left
315		1834	1836	3	NSLDS Pell Verification Flag (1)	Alpha field N/A	Left
316		1837	1842	6	NSLDS Pell EFC (1)	000000 to 999999 Blank	Left
317		1843	1850	8	NSLDS Pell School Code (1)	Numeric Blank	Right
318		1851	1852	2	NSLDS Pell Transaction Number (1)	Numeric Blank	Right
319		1853	1860	8	NSLDS Pell Last Update Date (1)	Numeric (CCYYMMDD) N/A Blank	Left
320		1861	1866	6	NSLDS Pell Scheduled Amount (1)  Whole dollar amount with leading zeros	Numeric Blank	Right

ISIR Record Description/Data Dictionary (Continued)							
Field #	SAR Field	Start	End	Length	Field Name	Valid Content	Justify Signed
321		1867	1872	6	NSLDS Pell Amount Paid to Date (1)  Whole dollar amount with leading zeros	Numeric Blank	Left
322		1873	1877	5	NSLDS Pell Percent Scheduled Award Used (1)  Whole percent with leading zeros i.e. 50% = 00050	Numeric Blank	Right
323		1878	1883	6	NSLDS Pell Award Amount (1)  Whole dollar amount with leading zeros	Numeric Blank	Right
324		1884	1885	2	NSLDS Pell Sequence Number (2)	01 to 03 Blank	Left
325		1886	1888	3	NSLDS Pell Verification Flag (2)	Alpha field N/A	Left
326		1889	1894	6	NSLDS Pell EFC (2)	000000 to 999999 Blank	Left
327		1895	1902	8	NSLDS Pell School Code (2)	Numeric Blank	Right
328		1903	1904	2	NSLDS Pell Transaction Number (2)	Numeric Blank	Right
329		1905	1912	8	NSLDS Pell Last Update Date (2)	Numeric (CCYYMMDD) N/A Blank	Left
330		1913	1918	6	NSLDS Pell Scheduled Amount (2)  Whole dollar amount with leading zeros	Numeric Blank	Right

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
331		1919	1924	6	NSLDS Pell Amount Paid to Date (2)  Whole dollar amount with leading zeros	Numeric Blank	Left
332		1925	1929	5	NSLDS Pell Percent Scheduled Award Used (2)  Whole percent with leading zeros i.e. 50% = 00050	Numeric Blank	Right
333		1930	1935	6	NSLDS Pell Award Amount (2)  Whole dollar amount with leading zeros	Numeric Blank	Right
334		1936	1937	2	NSLDS Pell Sequence Number (3)	01 to 03 Blank	Left
335		1938	1940	3	NSLDS Pell Verification Flag (3)	Alpha field N/A	Left
336		1941	1946	6	NSLDS Pell EFC (3)	000000 to 999999 Blank	Left
337		1947	1954	8	NSLDS Pell School Code (3)	Numeric Blank	Right
338		1955	1956	2	NSLDS Pell Transaction Number (3)	Numeric Blank	Right
339		1957	1964	8	NSLDS Pell Last Update Date (3)	Numeric (CCYYMMDD) N/A Blank	Left
340		1965	1970	6	NSLDS Pell Scheduled Amount (3)  Whole dollar amount with leading zeros	Numeric Blank	Right



<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
341		1971	1976	6	NSLDS Pell Amount Paid to Date (3)  Whole dollar amount with leading zeros	Numeric Blank	Left
342		1977	1981	5	NSLDS Pell Percent Scheduled Award Used (3)  Whole percent with leading zeros i.e. 50% = 00050	Numeric Blank	Right
343		1982	1987	6	NSLDS Pell Award Amount (3)  Whole dollar amount with leading zeros	Numeric Blank	Right
344		1988	1989	2	NSLDS Loan (1) Sequence Number	01 to 06 Blank	Left
345		1990	1990	1	NSLDS Loan (1) Type Code	D = Defaulted R = Recent T = Discharged Blank	Left
346		1991	1991	1	NSLDS Loan (1) Change Flag	# N Blank	Left
347		1992	1993	2	NSLDS Loan (1) Program Code	See NSLDS Loan Program Codes Table	Left
348		1994	1999	6	NSLDS Loan (1) Net Amount	000000 to 999999 Blank	Right
349		2000	2001	2	NSLDS Loan (1) Current Status Code	See NSLDS Loan Current Status Codes Table	Left
350		2002	2009	8	NSLDS Loan (1) Current Status Date	Format is CCYYMMDD Blank	Left
351		2010	2015	6	NSLDS Loan (1) Aggregate Principal Balance	000000 to 999999 N/A Blank	Right

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
352		2016	2023	8	NSLDS Loan (1) Aggregate Principal Balance Date	Numeric (CCYYMMDD) N/A Blank	Left
353		2024	2031	8	NSLDS Loan (1) Begin Date	Numeric (CCYYMMDD) N/A Blank	Left
354		2032	2039	8	NSLDS Loan (1) End Date	Numeric (CCYYMMDD) N/A Blank	Left
355		2040	2042	3	NSLDS Loan (1) GA Code	Numeric N/A Blank	Left
356		2043	2045	3	NSLDS Loan (1) Contact Type	Alpha N/A Blank	Left
357		2046	2053	8	NSLDS Loan (1) School Code	Numeric N/A Blank	Left
358		2054	2061	8	NSLDS Loan (1) Contact Code	Numeric N/A Blank	Left
359		2062	2064	3	NSLDS Loan (1) Grade Level	Alpha/Numeric N/A Blank	Left
360		2065	2065	1	NSLDS Loan (1) Additional Unsubsidized Loan Flag	P = PLUS denial H = Health Professional B = Both N = Neither	Left
361		2066	2066	1	NSLDS Loan (1) Capitalized Interest Flag	Y = Yes N = No	Left
362		2067	2072	6	NSLDS Loan (1) Amount of Last Disbursement	000000 to 999999 N/A Blank	Right

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
363		2073	2080	8	NSLDS Loan (1) Date of Last Disbursement	Numeric (CCYYMMDD) N/A Blank	Left
364		2081	2082	2	NSLDS Loan (2) Sequence Number	01 to 06 Blank	Left
365		2083	2083	1	NSLDS Loan (2) Type Code	D = Defaulted R = Recent T = Discharged Blank	Left
366		2084	2084	1	NSLDS Loan (2) Change Flag	# N Blank	Left
367		2085	2086	2	NSLDS Loan (2) Program Code	See NSLDS Loan Program Codes Table	Left
368		2087	2092	6	NSLDS Loan (2) Net Amount	000000 to 999999 Blank	Right
369		2093	2094	2	NSLDS Loan (2) Current Status Code	See NSLDS Loan Current Status Codes Table	Left
370		2095	2102	8	NSLDS Loan (2) Current Status Date	Format CCYYMMDD Blank	Left
371		2103	2108	6	NSLDS Loan (2) Aggregate Principal Balance	000000 to 999999 N/A Blank	Right
372		2109	2116	8	NSLDS Loan (2) Aggregate Principal Balance Date	Numeric (CCYYMMDD) N/A Blank	Left
373		2117	2124	8	NSLDS Loan (2) Begin Date	Numeric (CCYYMMDD) N/A Blank	Left
374		2125	2132	8	NSLDS Loan (2) End Date	Numeric (CCYYMMDD) N/A Blank	Left
375		2133	2135	3	NSLDS Loan (2) GA Code	Numeric N/A Blank	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
376		2136	2138	3	NSLDS Loan (2) Contact Type	Alpha N/A Blank	Left
377		2139	2146	8	NSLDS Loan (2) School Code	Numeric N/A Blank	Left
378		2147	2154	8	NSLDS Loan (2) Contact Code	Numeric N/A Blank	Left
379		2155	2157	3	NSLDS Loan (2) Grade Level	Alpha/Numeric N/A Blank	Left
380		2158	2158	1	NSLDS Loan (2) Additional Unsubsidized Loan Flag	P = PLUS denial H = Health Professional B = Both N = Neither	Left
381		2159	2159	1	NSLDS Loan (2) Capitalized Interest Flag	Y = Yes N = No	Left
382		2160	2165	6	NSLDS Loan (2) Amount of Last Disbursement	000000 to 999999 N/A Blank	Right
383		2166	2173	8	NSLDS Loan (2) Date of Last Disbursement	Numeric (CCYYMMDD) N/A Blank	Left
384		2174	2175	2	NSLDS Loan (3) Sequence Number	01 to 06 Blank	Left
385		2176	2176	1	NSLDS Loan (3) Type Code	D = Defaulted R = Recent T = Discharged Blank	Left
386		2177	2177	1	NSLDS Loan (3) Change Flag	# N Blank	Left
387		2178	2179	2	NSLDS Loan (3) Program Code	See NSLDS Loan Program Codes Table	Left
388		2180	2185	6	NSLDS Loan (3) Net Amount	000000 to 999999 Blank	Right

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
389		2186	2187	2	NSLDS Loan (3) Current Status Code	See NSLDS Loan Current Status Codes Table	Left
390		2188	2195	8	NSLDS Loan (3) Current Status Date	Format is CCYYMMDD Blank	Left
391		2196	2201	6	NSLDS Loan (3) Aggregate Principal Balance	000000 to 999999 N/A Blank	Right
392		2202	2209	8	NSLDS Loan (3) Aggregate Principal Balance Date	Numeric (CCYYMMDD) N/A Blank	Left
393		2210	2217	8	NSLDS Loan (3) Begin Date	Numeric (CCYYMMDD) N/A Blank	Left
394		2218	2225	8	NSLDS Loan (3) End Date	Numeric (CCYYMMDD) N/A Blank	Left
395		2226	2228	3	NSLDS Loan (3) GA Code	Numeric N/A Blank	Left
396		2229	2231	3	NSLDS Loan (3) Contact Type	Alpha N/A Blank	Left
397		2232	2239	8	NSLDS Loan (3) School Code	Numeric N/A Blank	Left
398		2240	2247	8	NSLDS Loan (3) Contact Code	Numeric N/A Blank	Left
399		2248	2250	3	NSLDS Loan (3) Grade Level	Alpha/Numeric N/A Blank	Left
400		2251	2251	1	NSLDS Loan (3) Additional Unsubsidized Loan Flag	P = PLUS denial H = Health Professional B = Both N = Neither	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
401		2252	2252	1	NSLDS Loan (3) Capitalized Interest Flag	Y = Yes N = No	Left
402		2253	2258	6	NSLDS Loan (3) Amount of Last Disbursement	000000 to 999999 N/A Blank	Right
403		2259	2266	8	NSLDS Loan (3) Date of Last Disbursement	Numeric (CCYYMMDD) N/A Blank	Left
404		2267	2268	2	NSLDS Loan (4) Sequence Number	01 to 06 Blank	Left
405		2269	2269	1	NSLDS Loan (4) Type Code	D = Defaulted R = Recent T = Discharged Blank	Left
406		2270	2270	1	NSLDS Loan (4) Change Flag	# N Blank	Left
407		2271	2272	2	NSLDS Loan (4) Program Code	See NSLDS Loan Program Codes Table	Left
408		2273	2278	6	NSLDS Loan (4) Net Amount	000000 to 999999 Blank	Right
409		2279	2280	2	NSLDS Loan (4) Current Status Code	See NSLDS Loan Current Status Codes Table	Left
410		2281	2288	8	NSLDS Loan (4) Current Status Date	Format is CCYYMMDD Blank	Left
411		2289	2294	6	NSLDS Loan (4) Aggregate Principal Balance	000000 to 999999 N/A Blank	Right
412		2295	2302	8	NSLDS Loan (4) Aggregate Principal Balance Date	Numeric (CCYYMMDD) N/A Blank	Left
413		2303	2310	8	NSLDS Loan (4) Begin Date	Numeric (CCYYMMDD) N/A Blank	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
414		2311	2318	8	NSLDS Loan (4) End Date	Numeric (CCYYMMDD) N/A Blank	Left
415		2319	2321	3	NSLDS Loan (4) GA Code	Numeric N/A Blank	Left
416		2322	2324	3	NSLDS Loan (4) Contact Type	Alpha N/A Blank	Left
417		2325	2332	8	NSLDS Loan (4) School Code	Numeric N/A Blank	Left
418		2333	2340	8	NSLDS Loan (4) Contact Code	Numeric N/A Blank	Left
419		2341	2343	3	NSLDS Loan (4) Grade Level	Alpha/Numeric N/A Blank	Left
420		2344	2344	1	NSLDS Loan (4) Additional Unsubsidized Loan Flag	P = PLUS denial H = Health Professional B = Both N = Neither	Left
421		2345	2345	1	NSLDS Loan (4) Capitalized Interest Flag	Y = Yes N = No	Left
422		2346	2351	6	NSLDS Loan (4) Amount of Last Disbursement	000000 to 999999 N/A Blank	Right
423		2352	2359	8	NSLDS Loan (4) Date of Last Disbursement	Numeric (CCYYMMDD) N/A Blank	Left
424		2360	2361	2	NSLDS Loan (5) Sequence Number	01 to 06 Blank	Left
425		2362	2362	1	NSLDS Loan (5) Type Code	D = Defaulted R = Recent T = Discharged Blank	Left

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
426		2363	2363	1	NSLDS Loan (5) Change Flag	# N Blank	Left
427		2364	2365	2	NSLDS Loan (5) Program Code	See NSLDS Loan Program Codes Table	Left
428		2366	2371	6	NSLDS Loan (5) Net Amount	000000 to 999999 Blank	Right
429		2372	2373	2	NSLDS Loan (5) Current Status Code	See NSLDS Loan Current Status Codes Table	Left
430		2374	2381	8	NSLDS Loan (5) Current Status Date	Format is CCYYMMDD Blank	Left
431		2382	2387	6	NSLDS Loan (5) Aggregate Principal Balance	000000 to 999999 N/A Blank	Right
432		2388	2395	8	NSLDS Loan (5) Aggregate Principal Balance Date	Numeric (CCYYMMDD) N/A Blank	Left
433		2396	2403	8	NSLDS Loan (5) Begin Date	Numeric (CCYYMMDD) N/A Blank	Left
434		2404	2411	8	NSLDS Loan (5) End Date	Numeric (CCYYMMDD) N/A Blank	Left
435		2412	2414	3	NSLDS Loan (5) GA Code	Numeric N/A Blank	Left
436		2415	2417	3	NSLDS Loan (5) Contact Type	Alpha N/A Blank	Left
437		2418	2425	8	NSLDS Loan (5) School Code	Numeric N/A Blank	Left
438		2426	2433	8	NSLDS Loan (5) Contact Code	Numeric N/A Blank	Left



<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
439		2434	2436	3	NSLDS Loan (5) Grade Level	Alpha/Numeric N/A Blank	Left
440		2437	2437	1	NSLDS Loan (5) Additional Unsubsidized Loan Flag	P = PLUS denial H = Health Professional B = Both N = Neither	Left
441		2438	2438	1	NSLDS Loan (5) Capitalized Interest Flag	Y = Yes N = No	Left
442		2439	2444	6	NSLDS Loan (5) Amount of Last Disbursement	000000 to 999999 N/A Blank	Right
443		2445	2452	8	NSLDS Loan (5) Date of Last Disbursement	Numeric (CCYYMMDD) N/A Blank	Left
444		2453	2454	2	NSLDS Loan (6) Sequence Number	01 to 06 Blank	Left
445		2455	2455	1	NSLDS Loan (6) Type Code	D = Defaulted R = Recent T = Discharged Blank	Left
446		2456	2456	1	NSLDS Loan (6) Change Flag	# N Blank	Left
447		2457	2458	2	NSLDS Loan (6) Program Code	See NSLDS Loan Program Codes Table	Left
448		2459	2464	6	NSLDS Loan (6) Net Amount	000000 to 999999 Blank	Right
449		2465	2466	2	NSLDS Loan (6) Current Status Code	See NSLDS Loan Current Status Codes Table	Left
450		2467	2474	8	NSLDS Loan (6) Current Status Date	Format is CCYYMMDD Blank	Left
451		2475	2480	6	NSLDS Loan (6) Aggregate Principal Balance	000000 to 999999 N/A Blank	Right

<b>ISIR Record Description/Data Dictionary (Continued)</b>							
<b>Field #</b>	<b>SAR Field</b>	<b>Start</b>	<b>End</b>	<b>Length</b>	<b>Field Name</b>	<b>Valid Content</b>	<b>Justify Signed</b>
452		2481	2488	8	NSLDS Loan (6) Aggregate Principal Balance Date	Numeric (CCYYMMDD) N/A Blank	Left
453		2489	2496	8	NSLDS Loan (6) Begin Date	Numeric (CCYYMMDD) N/A Blank	Left
454		2497	2504	8	NSLDS Loan (6) End Date	Numeric (CCYYMMDD) N/A Blank	Left
455		2505	2507	3	NSLDS Loan (6) GA Code	Numeric N/A Blank	Left
456		2508	2510	3	NSLDS Loan (6) Contact Type	Alpha N/A Blank	Left
457		2511	2518	8	NSLDS Loan (6) School Code	Numeric N/A Blank	Left
458		2519	2526	8	NSLDS Loan (6) Contact Code	Numeric N/A Blank	Left
459		2527	2529	3	NSLDS Loan (6) Grade Level	Alpha/Numeric N/A Blank	Left
460		2530	2530	1	NSLDS Loan (6) Additional Unsubsidized Loan Flag	P = PLUS denial H = Health Professional B = Both N = Neither	Left
461		2531	2531	1	NSLDS Loan (6) Capitalized Interest Flag	Y = Yes N = No	Left
462		2532	2537	6	NSLDS Loan (6) Amount of Last Disbursement	000000 to 999999 N/A Blank	Right
463		2538	2545	8	NSLDS Loan (6) Date of Last Disbursement	Numeric (CCYYMMDD) N/A Blank	Left
464		2546	2560	15	Filler	For ED Use Only	Left
	<b>Total Bytes</b>		<b>2560</b>				

