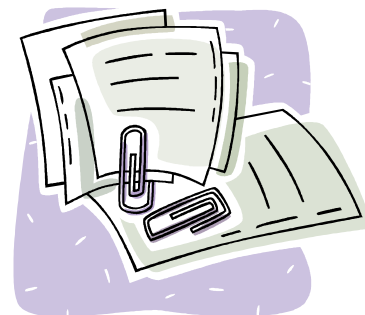


2004-05 Application and Delivery System Update

Jeanne Saunders
Marilyn LeBlanc
Teri Hunt





Today's Topics

- Application Processing Statistics
- The 2004-05 Application Process
 - Getting Ready
 - Applying for Aid
 - Processing Applications at the CPS
 - Receiving and Reviewing Applicant Data
 - Correcting Applicant Data
- Other Noteworthy News
- Important Dates



Other Application Processing-Related Sessions

- Session 4: The ISIR Datamart (hands on)
- Session 5: FAA Access to CPS Online (hands on)
- Session 22: Direct Loan Tools for Direct Loan Schools
- Session 23: EDExpress/COD Pell Processing
- Session 24: EDExpress/COD Direct Loan Processing
- Session 25: FAA Access to CPS Online
- Session 26: 2004-05 ISIR Update
- Session 47: FAFSA IRS Match Discussion



Application Volume

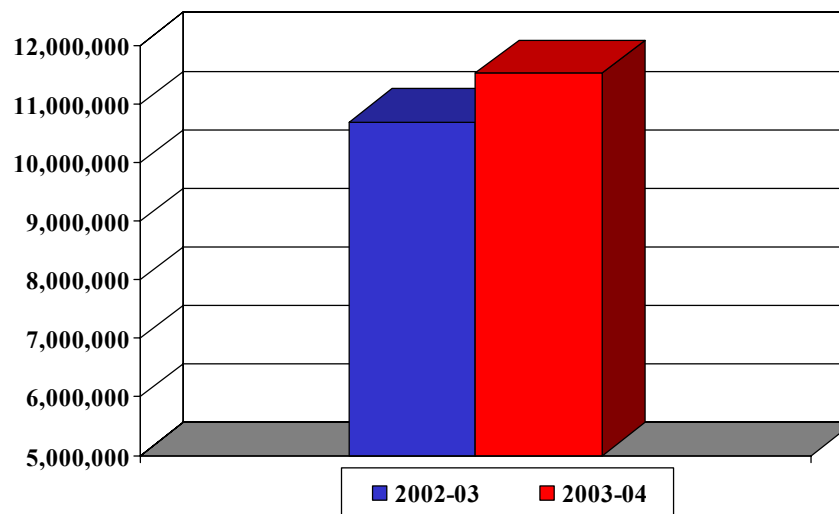
2002-03 and 2003-04

- **10,692,665**

2002-03 FAFSAs
processed as of
November 17, 2002
(week 46)

- **11,533,158**

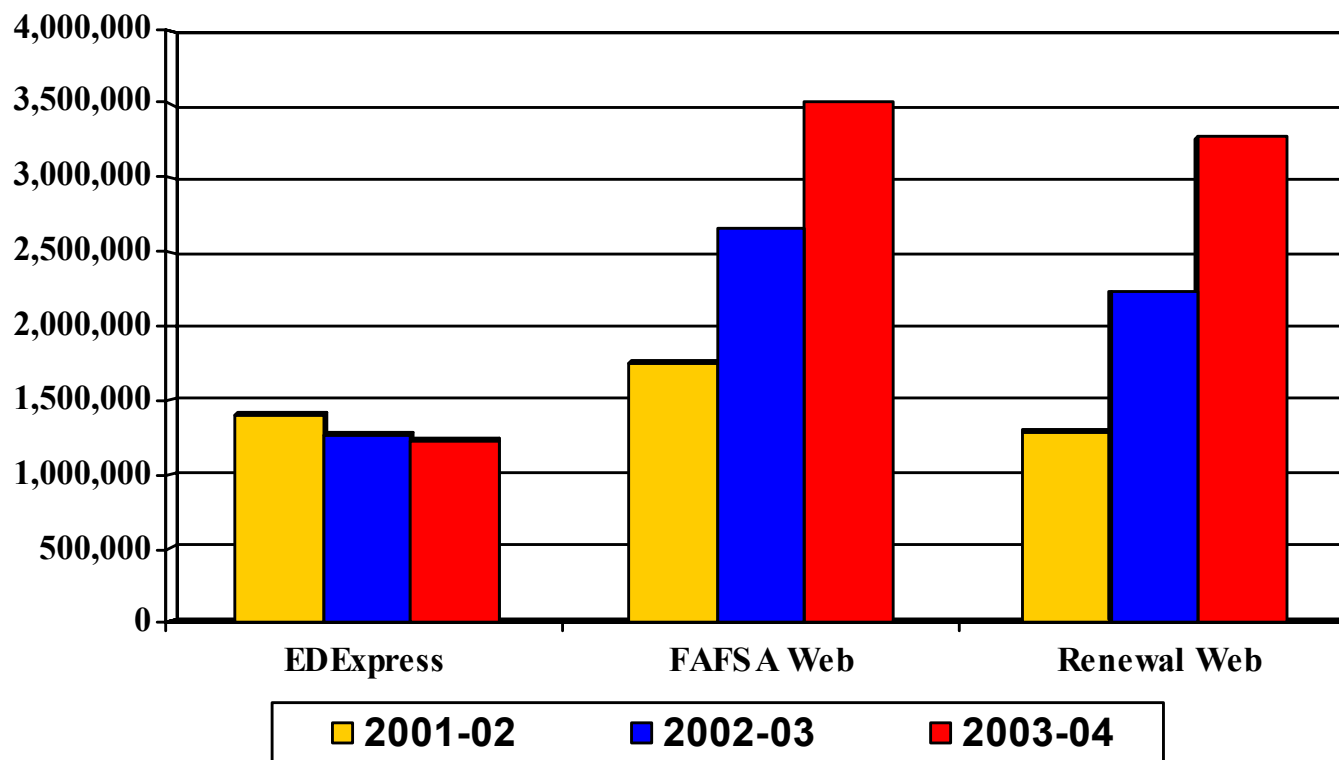
2003-04 FAFSAs
processed as of
November 16, 2003
(week 46)



That's an 7.8% increase!

Electronic Applications

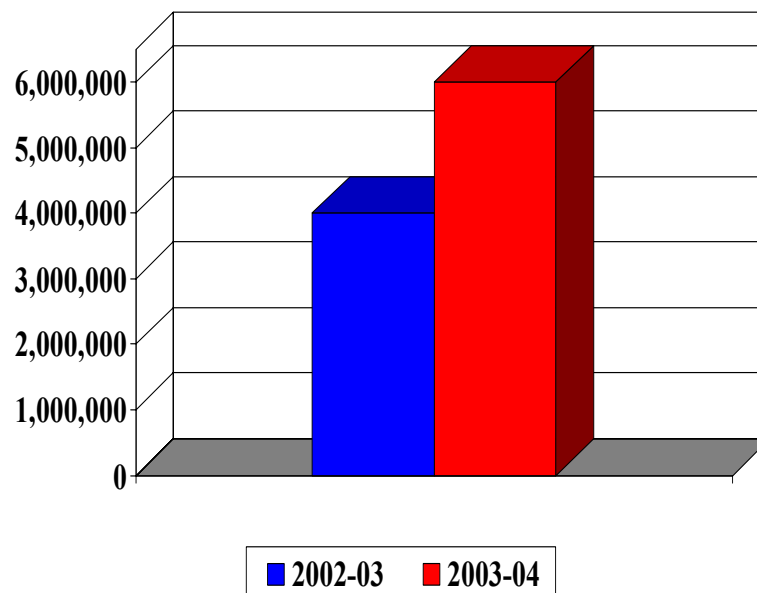
For the first 46 weeks of processing for
2001-02, 2002-03 and 2003-04





Moving to a Paperless Process PINs and Electronic Signatures

- Since Nov. 1998, more than 29 million individuals have received PINs
- In 2002-03, 4.1 million students and parents electronically signed the FAFSA using PIN
- So far in 2003-04, 6 million have signed with PIN





Moving to a Paperless Process

E-mail Messages with Links to PIN and SAR

- In 2003-04, over 7 million students have provided e-mail addresses on their FAFSAs
- Since January 2003
 - Over 7 million PIN e-mails sent
 - Over 10 million SAR e-mails sent



Getting Ready for the 2004-05 Award Year



Order Paper FAFSAs



BPOS

- In October, IFAP announcement posted about placing orders for paper 2004-05 FAFSAs
- Thanks for continuing to reduce those paper FAFSA orders!



FAFSA on the Web

Screen Shots

- In October 2003, a PowerPoint presentation containing FAFSA on the Web screen shots available on IFAP

The screenshot displays the FAFSA on the Web homepage. At the top, there is a navigation bar with icons for Deadlines, Pin Site, Help, Contact Us, FAQs, and Site Map. Below this, the main content area is divided into several sections. On the left, there is a 'Discover Your Opportunities!' section with a link to 'To apply for your PIN online, go to the Department of Education's PIN Site. More >>>'. In the center, there is a 'Welcome to FAFSA' section with a 'FAFSA ALERTS!' box stating 'Submit 2002-2003 FAFSA (Daylight time, June 30, 2003)'. Below this, there is a 'Scheduled Maintenance' notice. On the right, there is a 'Before Beginning a FAFSA' section with a list of steps: Determine my eligibility, Gather documents and information, Check deadlines, Register for a PIN, Find my school codes, Interactive Worksheets, and More Options >>>. Below this, there is a 'Filling Out a FAFSA' section with a list of steps: Fill out a FAFSA, Llamar una FAFSA en Español, Fill out a Renewal FAFSA, Provide Electronic Signature, and More Options >>>. At the bottom, there is a 'Discover Your Opportunities!' section with links to Overview, Pre-Application Worksheet, Fill Out Your FAFSA, Fill Out a Renewal FAFSA, and Fill Out a Spanish FAFSA. On the far right, there is a section titled 'Llene su Solicitud FAFSA en Español' with text in Spanish: 'Usted puede utilizar esta solicitud en línea para llenar y presentar la Solicitud Federal para Estudiantes (FAFSA, por sus siglas en inglés) en la Web. Puede esta solicitud electrónicamente.' and 'Para poder reunir los requisitos para recibir ayuda económica para estudiante necesita llenar una Solicitud Gratuita de Ayuda Federal para Estudiantes cada'.



FAFSA on the Web Toolkits

■ Mailed to --

- Postsecondary schools
- High schools
- State agencies
- Libraries
- PTAs
- TRIO Centers



■ Toolkits include –

- Brochure
- Poster
- Tips Card
- PIN Flyer
- Web-Link Graphics Flyer
- Sticky Notes
- FAA Access Flyer



Demonstration Sites

FAFSA on the Web and FAA Access

- On December 7, 2003, FAFSA on the Web and FAA Access demonstration sites will be available
 - To access sites, go to <http://fafsademotest.ed.gov>
 - Enter:
 - User Name: eddemo
 - Password: fafsatest
- Click on FOTW or FAA Access buttons at bottom of screen to access demo site
- Available until next December





Renewal Application Process

Important Dates

August 2003

Announcement and Guide
posted on IFAP and FSADownload

Network message to schools to
remind students to update
addresses

10/6 - 10/31

Schools could request that
Renewal reminders be sent to
students instead of paper
Renewal FAFSA



Renewal Application Process Reminders

- 11/7 - 12/19** Renewal reminders sent to students if --
- A school requested 'reminder' be sent instead of paper Renewal FAFSA
 - Used Web in 2003-04
 - Indicated on 2003-04 FAFSA that they were graduate or 5th year undergraduate students
 - Provided valid e-mail address on 2003-04 FAFSA
- 11/14 - 12/31** CPS mails Renewal FAFSAs to students



Renewal Application Process Reminders

- If valid e-mail address provided on 2003-04 FAFSA, students receive e-mail reminding them to reapply using their PIN
 - E-mail does not include link to PIN on the Web
 - If valid e-mail address not provided on 2003-04 FAFSA, PIN mailer sent to student's permanent address
 - PIN mailer includes tear-out card



Sample Reminder Notices

PIN Mailer

Here is your U.S. Department of Education PIN. We are sending this to you so you can complete your 2004-2005 Renewal FAFSA. Beginning January 1, 2004, you can apply for student financial aid at www.fafsa.ed.gov.

You will be able to use this PIN to:

- Complete and electronically sign your Free Application for Federal Student Aid (FAFSA) or Renewal FAFSA.
- Check the status and results of your processed FAFSA and make corrections to your FAFSA.
- View a history of the Federal student aid you received.
- Access your Direct Loan account to view Electronic Bills, disbursement information, and payment history, change your repayment plan or payment due date, make address corrections, get interactive counseling on deferment or forbearance for your Direct Loans.
- Complete Direct Loan Entrance Counseling and Exit Counseling over the web and have the results sent to your school of choice electronically.
- Track the processing status of your On-line Consolidation Loan application throughout the entire consolidation process from application receipt to booking with Direct Loan Servicing.
- E-sign your Federal Direct or Federal Family Education Loan (FFEL) Master Promissory Note.

Here is your U.S. Department of Education PIN.



U.S. Department of Education
Federal Student Aid

PIN
121221

You must type your PIN exactly
as it appears on this card.

SEE REVERSE SIDE FOR OPENING INSTRUCTIONS

FEDERAL STUDENT AID PROGRAM
P.O. Box 4223
Iowa City, Iowa 52244

IMPORTANT NOTICE
RETURN SERVICE REQUESTED

CP004300 0000006
ROEJFFFF12 A ROSEMARY
800 2ND STREET #9
CORALVILLE IA 52241

U.S. Department of Education web sites where you can use this PIN:

- FAFSA, Renewal FAFSA, and FAFSA Corrections on the Web www.fafsa.ed.gov
- National Student Loan Data System www.nsls.ed.gov
- Direct Loan Servicing www.dl.ed.gov
- Direct Loan Consolidation www.loanconsolidation.ed.gov

Sample E-mail Reminder

Your U.S. Department of Education PIN Reminder - Message (Plain Text)

File Edit View Insert Format Tools Actions Help Type a question for help

This message has not been sent.

From... cpnnotify@cpsemail.ed.gov

To... student@school.edu

Subject: Your U.S. Department of Education PIN Reminder

Dear John,

Beginning January 1, 2004, you can apply for student financial aid for the 2004-2005 school year using your Renewal FAFSA on the Web at <http://www.fafsa.ed.gov>. To complete your 2004-2005 Renewal FAFSA on the Web you will need your U.S. Department of Education PIN.

If you previously received a PIN and you know your PIN, go to <http://www.fafsa.ed.gov> on or after January 1, 2004 to complete your 2004-2005 Renewal FAFSA on the Web.

If you previously received a PIN and you are not sure what it is, you may request a duplicate copy of your PIN by going to <http://www.pin.ed.gov> and selecting the option "PIN Request and Information", followed by the option "Request a Duplicate PIN". Depending on the delivery method you choose when requesting your PIN, your PIN will be sent by e-mail or postal mail.

Thank You,

U.S. Department of Education
Federal Student Aid

Applying for Aid

Student and School Applications





Student Applications

The Paper FAFSA

FAFSA
Form Application for Federal Student Aid
OMB # 1845-0001

July 1, 2004 - June 30, 2005

Apply free for federal and state student grants, work-study, and loans using this form!

Or apply free over the internet at www.fafsa.ed.gov

Applying by the Deadlines
For federal aid, submit your application as early as possible, but no earlier than January 1, 2004. We must receive your application no later than June 30, 2005. Your college must have your correct, complete information by your last day of enrollment in the 2004-2005 school year.
For state or college aid, the deadline may be as early as January 2004. See the table to the right for state deadlines. You may also need to complete additional forms. Check with your high school guidance counselor or a financial aid administrator at your college about state and college sources of student aid and deadlines.
If you are filing close to one of these deadlines, we recommend you file over the internet at www.fafsa.ed.gov. This is the fastest way to apply for aid.

Using Your Tax Return
If you are filing a 2003 federal income tax return, we recommend that you complete it before filling out this form. If you have not filed your return, you can still submit your FAFSA. Once you file your tax return, you must correct any income or tax data that changed on your FAFSA.

Filling Out the FAFSA
Your answers on this form will be read electronically. Therefore:
• use black ink and fill in ovals completely;
• print clearly in CAPITAL letters and skip a box between words;
• report dollar amounts (such as \$12,366.41) like this:

Correct ☐ Incorrect ☐

1 5 E L M S T
\$ 12 356.41 no cents

Pink is for student information and purple is for parent information.
If you or your family has unusual circumstances not shown on this form (such as loss of employment that might affect your need for student financial aid), submit this form and then consult with the financial aid office at the college you plan to attend.
If you have questions about this application, or for more information on eligibility requirements and the U.S. Department of Education's student aid programs, look on the internet at www.studentaid.ed.gov. You can also call 1-800-4-FED-AID (1-800-433-3243). TTY users may call 1-800-726-8913.

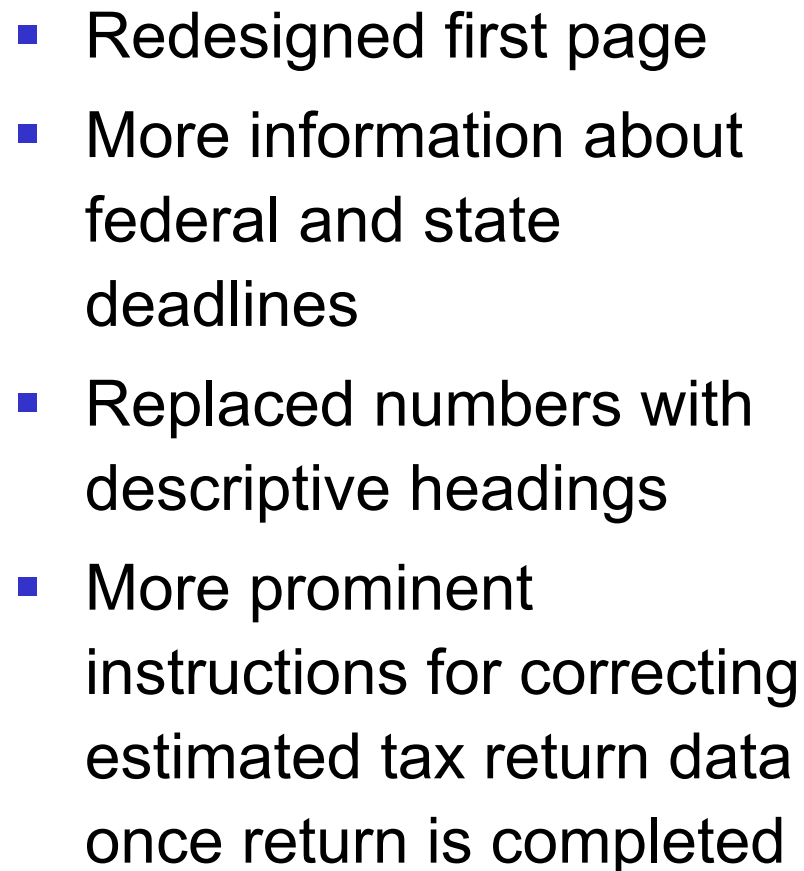
Mailing Your FAFSA
After you complete this application, make a copy of pages 3 through 6 for your records. Then mail the original of only pages 3 through 6 in the attached envelope or send it to: Federal Student Aid Programs, P.O. Box 4091, Mt. Vernon, IL 62864-0091. Be sure to keep the worksheets on page 8.
You should hear from us within four weeks. If you do not, please check online at www.fafsa.ed.gov or call 1-800-433-3243. If you provided your email address in question 13, you will receive information about your application within a few days after we process it.

Let's Get Started!
Now go to page 3, detach the application form, and begin filling it out. Refer to the notes as instructed.

STATE AID DEADLINES
File On-Line and File On-Time
www.fafsa.ed.gov

AR For State Grant - April 1, 2004
For Merit Grant - July 1, 2004
(date received)
AZ Jan 30, 2005 (date received)
CA For merit awards - March 2, 2004
For additional community college awards - September 2, 2004 (date received)
DC Jan 28, 2004 (date received by state)
DE April 15, 2004 (date received)
FL May 15, 2004 (date received)
GA July 1, 2004 (date received)
IL First-time applicants - September 30, 2004
Continuing applicants - August 15, 2004 (date received)
IN March 10, 2004 (date received)
KS April 1, 2004 (date received)
KY March 15, 2004 (date received)
LA May 1, 2004
MA Fresh deadlines - July 1, 2004 (date received)
MD May 1, 2004 (date received)
ME March 1, 2004 (date received)
MI May 1, 2004 (date received)
MN March 1, 2004 (date received)
MO April 1, 2004 (date received)
MT March 1, 2004 (date received)
NC March 15, 2004 (date received)
ND March 15, 2004 (date received)
NE May 1, 2004 (date received)
NH Jan 1, 2004 if you received a Tuition Aid Grant in 2003-2004
All other applicants - October 1, 2004, fall & spring term
March 1, 2005, spring term only (date received)
NY May 1, 2005 (date received)
OH October 1, 2004 (date received)
OK April 30, 2004
First deadline - June 30, 2004
PR All 2003-2004 State Grant recipients & all new 2003-2004 State Grant recipients in degree programs - May 1, 2004
All other applicants - August 1, 2004 (date received)
RI May 2, 2004 (date application signed)
SC March 1, 2004 (date received)
SD Jan 30, 2004 (date received)
TN May 1, 2004 (date received)
TX March 1, 2004 (date received)
Check with your financial aid administrator for these states: AK, AL, AS, CT, CO, FM, GA, GU, HI, IL, IN, IA, KS, KY, LA, ME, MI, MN, MO, NE, NH, NJ, NY, NC, ND, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VA, VT, WA, WI, and WV.
For priority consideration, submit application by date specified.
* Applicants encouraged to submit proof of residency.
Additional directory as required.

- Color of the FAFSA
 - Pink for Students (Pantone 196 CVU)
 - Purple for Parents (Pantone 263 CVU)
- FAFSA includes
 - Return receipt postcard
 - Revised insert
- New, reworded, and reordered questions and instructions





The Paper FAFSA

Page 2

- Added Web site reference for exchange rates

Notes for questions 33 c. and d. (page 4) and 71 c. and d. (page 5)

If you filed or will file a foreign tax return, or a tax return with Puerto Rico, Guam, American Samoa, the U.S. Virgin Islands, the Marshall Islands, the Federated States of Micronesia, or Palau, use the information from that return to fill out this form. If you filed a foreign return, convert all figures to U.S. dollars, using the exchange rate that is in effect today. Go to www.federalreserve.gov/releases/h10/update to view the daily exchange rate.

- Further clarified what is not an investment

Investments do not include the home you live in, the value of life insurance, retirement plans (pension funds, annuities, non-education IRAs, Keogh plans, etc.), and prepaid tuition plans, or cash, savings, and checking accounts already reported in 43 and 81.



The Paper FAFSA

Page 4

- **Step Two**

- **Questions 43 – 45:** Student's asset net worth questions reordered

- **Step Three**

- **Question 49:** Wording for “graduate” dependency question revised to be clearer

49. At the beginning of the 2004-2005 school year, will you be working on a master's or doctorate program (such as an MA, MBA, MD, JD, PhD, EdD, or graduate certificate, etc.)?

Yes ☐ ¹ No ☐ ²

- **Question 53:** Revised to read “Are both of your parents deceased, or are you or were you (until age 18) a ward/dependent of the court?”

The Paper FAFSA

Page 5, Step Four

- Added questions about students' parents
 - Questions 59 and 63: Parent's first initial
 - Questions 60 and 64: Parent's date of birth
- No longer ask "Age of older parent" question





The Paper FAFSA

Page 6

- **Step Six:** Enrollment questions --
 - Moved from Step One
 - One question for all terms
 - Separate response for “Not sure”
- **Certification** includes statement that student cannot receive a Federal Pell Grant from more than one school for the same time period



Paper Renewal FAFSA

- Includes changes made to paper FAFSA
- Rolled forward 2003-04 FAFSA questions --
 - All school codes on transaction used to create the Renewal FAFSA
 - Housing plans for each school code listed
 - Parent's Marital Status Date question
- Enrollment status questions converted
 - If any question = Full time, pre-print as full time
 - Otherwise, leave question blank



Paper Renewal FAFSA

- Did not pre-print --
 - Income fields from previous year's FAFSA for students who qualified for Automatic Zero EFC
 - Parents' SSN and last name information



FAFSA on the Web

www.fafsa.ed.gov

FAFSA
FREE APPLICATION FOR FEDERAL STUDENT AID
We Help Put America Through School

Electronic Access Conference
San Diego, California
New Orleans, Louisiana
2003

Discover Your Opportunities!
FAFSA opens the door to the federal aid process. Every step you can take gets you closer to achieving your education goals. Find out what you can expect from beginning to end. [More>>](#)

Welcome to FAFSA on the Web, U.S. Department of Education

FAFSA ALERTS:
Deadlines:
Submit 2002-2003 FAFSA on the Web Applications by **midnight Central Daylight time, June 30, 2003.** [More>>](#)

Scheduled Maintenance:
FAFSA on the Web will be unavailable on every Sunday from 5 a.m. to 11 a.m. (Eastern Standard Time). We apologize for any inconvenience this may cause. [More>>](#)

Before Beginning a FAFSA
Get organized!
To simplify filling out the application, gather the required documents and other information.

- Determine my eligibility
- Gather documents and information
- Check deadlines
- Register for a PIN
- Find my school codes
- Interactive Worksheets
- More Options >>>

Filling Out a FAFSA
Fill out the application!
FAFSA has seven steps that ask about you, your school plans, financial information and more.

- Fill out a FAFSA
- Llenar una FAFSA en Español
- Fill out a Renewal FAFSA
- Continue working on saved FAFSA
- Provide Electronic Signature
- More Options >>>

FAFSA Follow-up
Find your FAFSA online!
You can go back to your FAFSA to check status, make corrections to a processed FAFSA, and get other information.

- Check status of a submitted FAFSA
- Print Student Aid Report (SAR)
- Make Corrections to a Processed FAFSA
- Student Access
- More Options >>>

FSA ELECTRONIC SERVICES **PRIVACY & SECURITY** **STUDENT GUIDE**

- Apply
- Reapply
- Go to PIN Web site
- Check status of FAFSA
- View SAR information
- Make corrections
- Spanish version



Spanish FAFSA on the Web



- Spanish FAFSA on the Web includes Spanish versions of -
 - Pre-Application Worksheet
 - Student and Parent Worksheets A, B, and C
 - Student and Parent Income Estimator Worksheet
 - Drug Conviction Worksheet



FAFSA on the Web and Renewal FAFSA on the Web

- Includes new and revised paper FAFSA questions
- New parent e-mail address
 - If valid parent e-mail address provided --
 - E-mail sent to parent when FAFSA processed
 - If signature(s) are missing, e-mail will include information about how to sign
 - Correctable on the Web or through FSAIC
 - Will print, but not correctable on paper SAR



FAFSA on the Web and Renewal FAFSA on the Web Enhanced Edits and Skip Logic

- Dependent students required to provide parents' SSN, last name, first name initial, and DOB
- If student's parent is single --
 - Only one parent SSN, last name, first initial, and DOB can be provided
 - Student asked if information is for father or mother
- Housing Plans questions
 - Student required to answer on FOTW
 - Carried forward from previous year on RFOTW



FAFSA on the Web and Renewal FAFSA on the Web Electronic Signatures

- Students and parents can electronically sign within Web applications
- Will validate that SSN used by parent to electronically sign matches SSN reported on the FAFSA
- E-mail with link to rejected SAR information sent to students if not all signatures were provided



School Applications

FAA Access to CPS Online

The screenshot shows the 'FAA Access to CPS Online' web application. At the top, there is a header with the 'FAFSA' logo and the text 'FAA ACCESS TO CPS ONLINE'. Below this, a navigation bar contains links for 'Help' and 'FAQs'. The main content area is titled 'Welcome to FAA Access to CPS Online!' and lists several functions: 'View students' SAR data', 'Check the status of batches', 'Request the signature hold file and set the frequency of receipt', 'Enter a FAFSA or Renewal FAFSA', 'Correct a processed FAFSA', and 'Continue working on a saved FAFSA'. A 'Next' button is visible at the bottom right of the main content area. A footer link says 'Need help with this page?'.

- Implemented in May 2001
- Enhanced each year
- Current version allows FAAs to -
 - View students' SAR information
 - Enter and submit FAFSA and Renewal FAFSA data
 - Correct applicant data



School Applications

EDExpress and FAA Access to CPS Online

FAA Access PIN Authentication and Automation Information

FAFSA
FAA ACCESS TO
CPS ONLINE

We need some personal information and the PIN we mailed to you. You must provide this information to access your U.S. Department of Education information through the Internet. Please answer the following questions and select Submit below.

Since your PIN can be used to retrieve personal information about you and to sign documents, you must not share or disclose the PIN to others. By using your PIN, you agree that it has not been compromised - no one besides you knows it.

PIN Authentication Data

Social Security Number:

Name ID:

Date of Birth:

PIN:

Automation Information

TG Number:

School Code:

Save/Restore Password:

- In 2004-05, EDExpress will interface directly with FAA Access to CPS Online through an embedded browser
 - Clicking on FAFSA Tab in EDExpress will take you to FAA Access Application Entry
 - All application and correction entry will be done in FAA Access



School Applications

EDEExpress and FAA Access to CPS Online

- All other Application Processing functionality still available in EDEExpress
 - ISIR Import/ISIR print
 - ISIR Review tab
 - List-Processed ISIRs
 - NSLDS Print, File Format/External Export



FAA Access to CPS Online

New for 2004-05



- FAA Application Entry
 - Estimated taxes paid calculator added
 - Can skip answering income and asset questions for some students who qualify for Automatic Zero EFC and SNT
 - Printed signature page will include summary of application information entered by FAA



FAA Access to CPS Online

New for 2004-05

- R2T4 to the Web
- ISIR Analysis Tool to the Web
- Use FAA Access to CPS Online to request ISIRs from the ISIR Datamart



ISIR Datamart

- ISIR Datamart will be implemented on Jan. 2, 2004
- Will store 2004-05 ISIR data for retrieval and distribution to authorized users
- New feature in FAA Access to CPS Online allows users to request ISIRs from Datamart
 - For specific students
 - By date



ISIR Datamart

- Options for receiving ISIRs --
 - Daily
 - By request
- Sign up through Participation Management System
 - Default is daily receipt (like current system)
 - May change option at any time
 - Users who select daily receipt can also use Datamart to request ISIRs



ISIR Datamart

Query Options for Retrieving ISIRs

- SSN/Name ID
- Date range for receipt date or processed date
- Transaction number: first, last, all, specific, or greater than X
- Institution code
- Grade level
- Dependency status
- Eligibility status
- State of legal residence or state of college
- EFC range
- Verification status
- Veteran status
- Combination of these fields



ISIR Datamart

Query Requirements

- DPA has authority to run queries
- Queries can be set up to run on demand or for a future date
- Query must be completed before next query can be submitted
- Last query entered is displayed when user returns to FAA Access
- No limit on requesting same ISIR multiple times
- Datamart will be used for FDR, YTD and duplicate requests



ISIR Datamart

Query Results

- As queries run against Datamart, files of requested ISIRs generated
- Files loaded to SAIG under separate message class
- Files of requested ISIRs must be retrieved within 14 calendar days



ISIR Datamart

“Pushed” ISIRs

- Certain ISIRs automatically “pushed” regardless of option selected by institution
 - EFC changes
 - SAR C Code changes
 - System-generated transactions –
 - NSLDS post-screening
 - INS automated secondary confirmation
 - Reprocessing





ISIR Datamart

- “Must See” ISIRs
 - Schools must look at all “pushed” ISIRs
 - School must request ISIRs for all enrolled students
- Types of Message Classes
 - Daily ISIRs
 - ISIRs requested through Datamart
 - ISIRs “pushed” by CPS
 - Errors

Processing Applications at the CPS



2004-05 Changes

CPS Changes

- No more duplicate applications accepted
- Immigration and Naturalization Service match renamed Department of Homeland Security (DHS)





CPS Changes

SSN Database Match with SSA

- SSN match with SSA expanded to include parents of dependent students
- Applicants whose parent has SSA Date of Death (Match Flag = 5) will receive a SAR comment instead of being rejected
- Parents allowed to change SSN, even if SSA gave clean match flag of '4'



CPS Changes

New Rejects



- New rejects for missing/discrepant parent SSN, last name, first name initial, and DOB
 - (Rejects 6, 7, S and T)
- Added rejects for dependent students for excessive Taxes Paid
 - (Rejects 12 and G)



CPS Changes

Multi-Year Applicant Database

- CPS re-engineered to –
 - Perform cross-year edits to detect possible inconsistencies across application years
 - Produce warning comments if edit is hit

Application Results: Receiving and Reviewing Applicant Data



Institutions and Students



The Institutional Student Information Report (ISIR)

- ISIR layout will follow order of paper FAFSA questions
- New Data Source/Data Type codes with alpha-numeric values

1	Electronic	A	Application
2	Student Web	C	Correction
3	FAA Access	E	EZ FAFSA
4	Paper	R	Renewal
5	CPS		
6	FSAIC		



The Institutional Student Information Report (ISIR)

New Flags

- Indicate whether transaction is a result of address or e-mail address change only
- Display parent SSN match flag results





The ISIR

Program Integrity and Verification

- Continue to conduct IRS statistical studies to improve verification selection criteria and process
- Verification Tracking Flag
 - Expanded to 4 characters
 - Higher numbers continue to have higher priority



The ISIR Record Format

- ISIRs in XML format --
 - In 2004-05, ISIRs will not be in XML format
 - In 2005-06, ISIRs will be in XML and current format
 - In 2006-07, all schools will be required to receive ISIRs in XML format
- DCL, GEN-03-09, on IFAP explains reasons for adjustment to implementation schedule



The Student Aid Report

■ The paper SAR

- Printed on pink paper
- Question order follows paper FAFSA
- On first page, under 'You (the Student),' variable text used when student has eligibility issues
- Parent e-mail address printed on SAR, but not correctable
- SAR tells applicants they must call FSAIC to request a copy of their SAR

■ SAR Information on the Web

- Parent e-mail address displayed and can be corrected

Making Corrections to Applicant Data



Students and Institutions



Making Corrections

- Students can correct data on their own using
 - Paper SAR
 - Corrections on the Web
 - Many students eligible for real-time Web corrections
- Students can work with a school to make corrections via FAA Access to CPS Online
 - Many students eligible for real-time Web corrections
- Students can make corrections to certain fields by calling FSAIC at 1-800-4-FED-AID



Student Corrections on the Web

Real-time Corrections

- If student is eligible for real-time corrections on the Web, reprocessed results appear immediately on confirmation page
 - “Official” EFC displayed
 - New link to Student Access on the Web where student can view and print corrected SAR information
 - No separate e-mail sent



FAA Access to CPS Online

New in Student Inquiry

FAFSA
FAA ACCESS TO
CPS ONLINE

Help FAQs

Student Inquiry

SAR Transactions

Below is a list of the 2003-2004 transactions we have processed for 565656565 SM, with the Federal School Code of 001002 at the Central Processing System (CPS) as of 03/19/2003. You can select any of the transaction numbers to view the complete details for that transaction. Select this link if you would like to [view this student's 2002-2003 processed transactions](#).

Note that any applications or corrections that have been submitted recently will not appear here until they have been processed by the CPS.

Note to FAA: This student has transactions which do not contain Federal School Code 001002. You may view these transactions by entering the student's DRN. Select the transaction you wish to view or [enter the student's DRN](#).

Transaction Number	Processed Date	Expected Family Contribution (EFC)	Application Source
04	03/21/2003	DRN Required	Correction on the Web
03	03/14/2003	1200	Correction on the Web
02	03/07/2003	DRN Required	Correction on the Web
01	03/01/2003	2345	FAFSA on the Web

[View a Different Student's Data](#)

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- Will display a list of all transactions for student
 - If institution's school code not listed on transaction no EFC will appear
 - If school code not on transaction, school can access with student's DRN



FAA Access to CPS Online

New in Student Inquiry



Parent Information	ISIR	Tax/Worksheet
Number in Household:	<input type="text" value="2"/>	<input type="text" value="2"/>
Number in College:	<input type="text" value="1"/>	<input type="text" value="1"/>
Tax return filed:	<input type="text" value="Already completed"/>	<input type="text" value="Already completed"/>
Type of Tax Form:	<input type="text" value="IRS 1040A/1040EZ/1040Telefile"/>	<input type="text" value="IRS 1040A"/>
Eligible to file 1040A/1040EZ:	<input type="text" value="Yes"/>	<input type="text" value="Yes"/>
AGI:	<input type="text" value="49999"/>	<input type="text" value="55000"/>
U.S. Income Tax Paid:	<input type="text" value="1000"/>	<input type="text" value="2000"/>
Father's Income from Work:	<input type="text" value="49999"/>	<input type="text" value="65000"/>
Mother's Income from Work:	<input type="text" value="0"/>	<input type="text" value="0"/>
Total from Worksheet A:	<input type="text" value="0"/>	<input type="text" value="0"/>
Total from Worksheet B:	<input type="text" value="0"/>	<input type="text" value="0"/>
Totals:	ISIR	Tax/Worksheet
Verification Total:	<input type="text" value="51233"/>	<input type="text" value="55234"/>
Verification Tolerance:		<input type="text" value="4001"/>
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- Includes new Verification Worksheet
 - Calculates tolerances
 - Displays total “net” error
 - Gives option to create FAA Correction

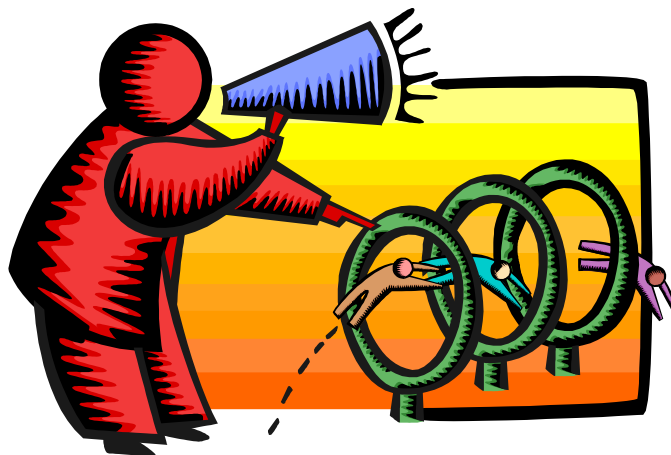


FAA Access to CPS Online

Correction Enhancements

- FAA Corrections
 - Will include estimated taxes paid calculator
 - FAAs can correct student's date of birth
 - FAA can correct student's SSN if SSN match flag not equal to '4'
 - Will determine if correction affects student's eligibility for Auto Zero EFC or SNT
 - Confirmation page will tell FAA if corrected transaction was selected for verification
 - If student provided e-mail address, e-mail will inform students that a school has made corrections on their behalf

Other Noteworthy News and Important Dates





Other Noteworthy News

- Status of the IRS Income Verification Match
- Schools must pay on Primary EFC unless student is ineligible for SNT
- Mainframe Test System available in mid-November
 - Allows testing of application and correction data
 - Participants must have TG number
 - Participants not required to have federal school code



Important Dates

IFAP Announcements and Documents

■ ***October 2003***

- EDExpress and FAA Access to CPS Online Changes on IFAP

■ ***November 2003***

- Student Web Application Product Changes on IFAP
- A Guide to ISIRs on IFAP
- Update to 2004-05 EDE Technical Reference on IFAP
- Federal School Code List mailed

■ ***December 2003***

- Application Processing System Changes on IFAP





Important Dates

Web Products and System Start Up



- ***January 1, 2004***

- FAFSA on the Web, Renewal FAFSA on the Web, Corrections on the Web available for applicants to use
- FAA Access to CPS Online available to FAAs

- ***January 2, 2004***

- Central Processing System starts up!!!