



## ***Session 26***

# ***2004-2005 Institutional Student Information Record (ISIR) Update***

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# Agenda

- CPS Database Match and Edit Changes
- 2004-2005 ISIR Record Changes
- EDE Technical Reference
- CPS Test System Information



# Changes to CPS Database Matches

- INS Match renamed to DHS Match (Department of Homeland Security)
- SSA/SSN Match expanded to include dependent applicant's parents
  - Will not send parent SSN if same as student's
  - Will use same match flag values for results as used for student's match



## Changes to CPS Database Matches cont.

- Parent SSN Match results treated same way as Student SSN Match results with two exceptions:
  - 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'



# Changes to CPS Edits

- Reject Edits
  - Rejects for Parents' SSN Match; require a complete match for at least one parent for dependent applicants
  - **Reject 9** – Modified to require SSN, Last Name and DOB for at least one parent



# Changes to CPS Edits cont.

- Reject Edits cont.
  - Rejects for Parents' SSN Match cont.
    - **Reject 6** - Father's SSN not on SSA database and Mother's SSN/Name/DOB not a complete match (non-verifiable)
    - **Reject 7** - Mother's SSN not on SSA database and Father's SSN/Name/DOB not a complete match (non-verifiable)



# Changes to CPS Edits cont.

- Reject Edits cont.
  - Rejects for Parents' SSN Match cont.
    - **Reject S** - Father's DOB not matched on SSA database and Mother's SSN/Name/DOB not a complete match (verifiable)
    - **Reject T** - Mother's DOB not matched on SSA database and Father's SSN/Name/DOB not a complete match (verifiable)



## Changes to CPS Edits cont.

- Reject Edits cont.
  - Rejects for Taxes Paid
    - **Reject 12** added for dependent students - If taxes paid amount is greater than or equal to AGI (non-verifiable reject)
    - **Reject G** added for dependent students - If taxes paid amount is less than AGI, but greater than 40% of AGI (verifiable reject)





# Changes to CPS Edits cont.

- Warning Edits
  - Current Rejects D and E for Parent's SSN out of issued range changed to warning edits
  - New warning comment code for paper filers who reported parent's marital status as single, but provided two parent SSNs



# Changes to CPS Edits cont.

- Warning Edits cont.
  - Cross-year edits added to detect possible inconsistencies across application years
    - Significant change in:
      - Parents' Number of Family Members or Number in College
      - Independent Student's Number of Family Members or Number in College
      - Parents' Total Income
      - Parents' Taxes Paid



## Changes to CPS Edits cont.

- Warning Edits cont.
  - Edits for exceeding or approaching aggregate loan limits modified to use flags set by NSLDS
- Duplicate paper applications no longer processed; letter sent to applicant



# ISIR Record Changes

- Draft ISIR record layout available on IFAP (<http://ifap.ed.gov>)
- ISIR record layout will follow order of questions on FAFSA
- Several changes to FAFSA and NSLDS data elements



# ISIR Record Changes cont.

- FAFSA Data Element Changes
  - Parents' First Name Initial and DOB added
  - Parent's E-mail Address added
  - Age of Older Parent deleted
  - Enrollment questions consolidated into one question
  - Date fields incremented



# ISIR Record Changes cont.

- FAFSA Data Element Changes cont.
  - Student's E-mail Address moved to question #13
  - Student's/Parents' Asset questions reordered
  - Most of the fields have been renumbered and reordered



# ISIR Record Changes cont.

- NSLDS Data Element Changes
  - Subsidized Loan Limit Flag and Combined Loan Limit Flag added
    - E = Exceeded loan limit
    - C = Close to loan limit
    - N = No problem
  - Value of U (Unavailable) deleted for MPN and PLUS MPN flags



# ISIR Record Changes cont.

- CPS Data Element Changes
  - Added Override for Reject G
  - Added Address Only Change Flag
    - indicates whether transaction is result of address or e-mail address change only
  - Added Match Flags for Parents' SSN Match





# ISIR Record Changes cont.

- CPS Data Element Changes cont.
  - Added fields associated with implementation of ISIR Datamart
    - SAR C Change Flag
    - Pushed ISIR Flag
      - EFC Change, SAR C Change, or System Generated
    - Electronic Transaction Indicator (ETI)



# ISIR Record Changes cont.

- CPS Data Element Changes cont.
  - Deleted fields due to processing changes
    - Early Analysis Flag
    - Subsequent Application Flag
    - Duplicate Request Indicator
    - Electronic Application Entry Source
    - Input Record Type
    - Serial Number



# ISIR Record Changes cont.

- CPS Data Element Changes cont.
  - New Data Source/Data Type codes with alpha-numeric values

## Data Source

- 1 = Electronic
- 2 = Student Web
- 3 = FAA Access
- 4 = Paper
- 5 = CPS
- 6 = FSAIC

## Data Type (e.g.)

- A = Application
- C = Correction
- E = EZ FAFSA
- N = NSLDS Postscreening
- R = Renewal Application
- V = Verification Correction



## ISIR Record Changes cont.

- CPS Data Element Changes cont.
  - Verification Tracking Flag expanded to 4 digits – higher numbers continue to have higher priority for selection
  - New values for Multi School Code Flags
    - Still used to determine which schools get ISIR
    - Will also indicate the type of ISIR for each school



# ISIR Changes

- Changes to Message Classes
  - Current ISIR message classes will be replaced with new message classes to identify types of ISIRs
    - Daily ISIRs
    - Requested ISIRs
    - CPS Pushed ISIRs
    - Errors



# ISIR Changes cont.

## ■ Daily ISIRS

– ISIRs automatically sent to destination points after each day's processing

- IDAP05OP – Application submitted by the school (EAPS)
- IDCO05OP – Correction submitted by the school (CORR)
- IDSA05OP – School listed on record (SARA)
- IDRE05OP – State Agency residents (ESFR)
- IDNR05OP – State Agency non-residents (ESFN)



# ISIR Changes cont.

- Requested ISIRS
  - ISIRs sent to destination points as a result of a request from the ISIR Datamart
    - ISRF05OP



# ISIR Changes cont.

## ■ Pushed ISIRS

- ISIRs automatically “pushed” to destination points after each day’s processing regardless of option selected
  - IGCO05OP – Correction submitted by the school (CORR)
  - IGSA05OP – School listed on record (SARA and SYSG)
  - IGRE05OP – State Agency residents (ESFR)
  - IGNR05OP – State Agency non-residents (ESFN)





# ISIR Changes cont.

## ■ Errors

- Record errors found during processing
  - EAPR05OP – Application data errors
  - CORE05OP – Correction data errors
  - SIGA05OP – Signature record errors



# EDE Technical Reference

- Available at [www.fsadownload.ed.gov](http://www.fsadownload.ed.gov)
- Select References and Documentation
- Select 2004-2005 under Electronic Data Exchange Technical Reference



# EDE Technical Reference cont.

- Section 1 – Overview
  - Provides overview of the EDE process and where to find information about parts of process
  - Sources of Assistance Guide for Schools also available on [fsadownload.ed.gov](http://fsadownload.ed.gov)



# EDE Technical Reference cont.

- Section 2 – EDE Processing
  - Detailed step-by-step instructions for each EDE process
    - Applications and Corrections
    - ISIRs
    - State Agency ISIRs
    - Signatures
  - Table showing signed numeric fields



# EDE Technical Reference cont.

- Section 3 – Record Layouts
  - Electronic App, Correction, Signature, Web Signature Hold, and ISIR
  - Look for “What’s Changed in the Record Layouts Section Since the NASFAA Version”



# EDE Technical Reference cont.

- Section 4 – Processing Codes
  - ISIR Cross-Reference Table
  - Table of Reject Codes
  - Record and Transmission Error Messages
  - Field Name and Position Cross-Reference
    - Added column for Field Verify Flag position
  - Message Classes



# EDE Technical Reference cont.

- Section 5 – Printing
  - Gives general printing guidelines instead of exact print specifications
  - ISIR Fields Not Printed on the ISIR



# 2004-2005 CPS Test System

- System will allow testing with the CPS from late November 2003 through August 2005
- User Guide & Test Data provided
- Comments in flat text file available
- Software Developer Specifications – draft has been issued
- Go to:  
[fsadownload.ed.gov/CPSTestSys0405.htm](http://fsadownload.ed.gov/CPSTestSys0405.htm)





# Technical Assistance

We appreciate your feedback and comments. We can be reached at:

CPS/WAN Technical Support

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Fax: 319-665-7662

Email: [cpswan@ncs.com](mailto:cpswan@ncs.com)