

## ISIR Corrections

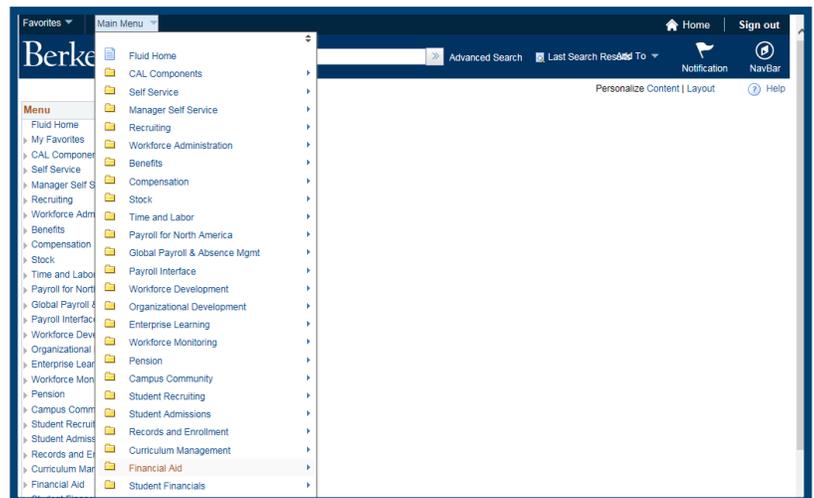
Students apply for financial aid by completing the Free Application for Federal Student Aid (FAFSA). The FAFSA is processed by the Department of Education, which sends electronic records once or twice a day containing data necessary for the determination of financial aid eligibility. These records are called ISIRs and must be matched and loaded to the correct student record in Campus Solutions (CS).

ISIRs are loaded into the ISIR Suspense table. Search/Match rules look for matching student records in CS. Depending on whether a match is found, a combination of ISIR Load Parameters and UCB custom ISIR Load rules determine whether to load an individual ISIR to an existing student record in CS, skip the ISIR, or route it for manual review by setting the status to Suspend.

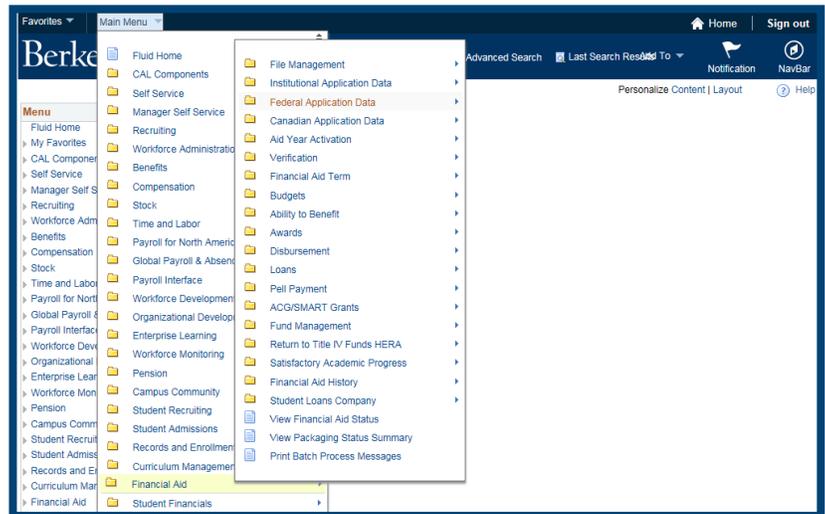
Loading an ISIR to a student record (the Corrections tables) initiates financial aid awarding at the student level. Data in the ISIR Corrections tables is used in downstream financial aid processes such as budgeting and packaging.

Financial Aid office staff may need to review ISIR information, or in rare instances, need to correct the information on an ISIR as part of an Appeals process or any other circumstance that requires review of the data. (Note: This document does not cover corrections that occur as part of QA Verification. Refer to the QA Verification job aid.)

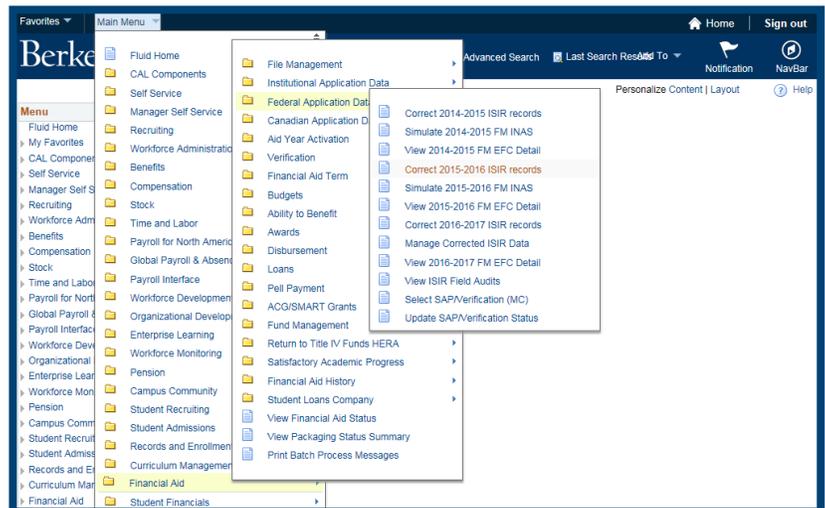
1. From the **Main Menu**, click the **Financial Aid** link.



- Click the **Federal Application Data** menu.

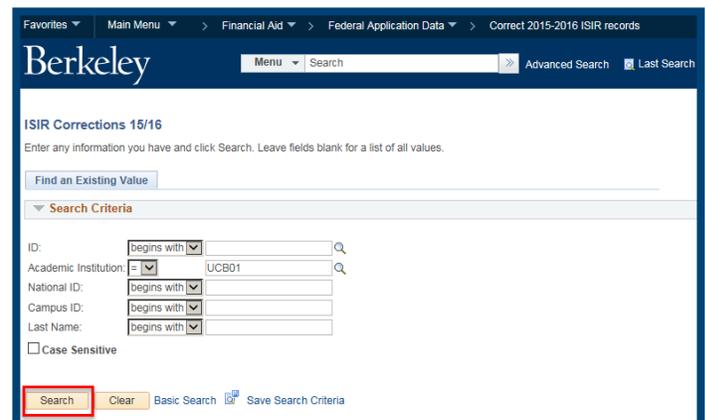


- Click the **Correct 2015-2016 ISIR records** menu



- There are several options to search for a record. Unique identifiers such as Social Security Number or Student ID are the suggested search value. However, you can also search by name.

Enter the Student ID number and then click the **Search** button.



- The search results will only contain ISIRs that have loaded. It will also only display ONE search result per student.

You can click on any column to sort by that value. In this example, we will click the **First Name** column header, to sort the first names alphabetically.

**First Name**

Then, click anywhere on a row for the student ISIR you wish to view.

- The ISIR information for this student displays. The system defaults to the most current loaded ISIR.

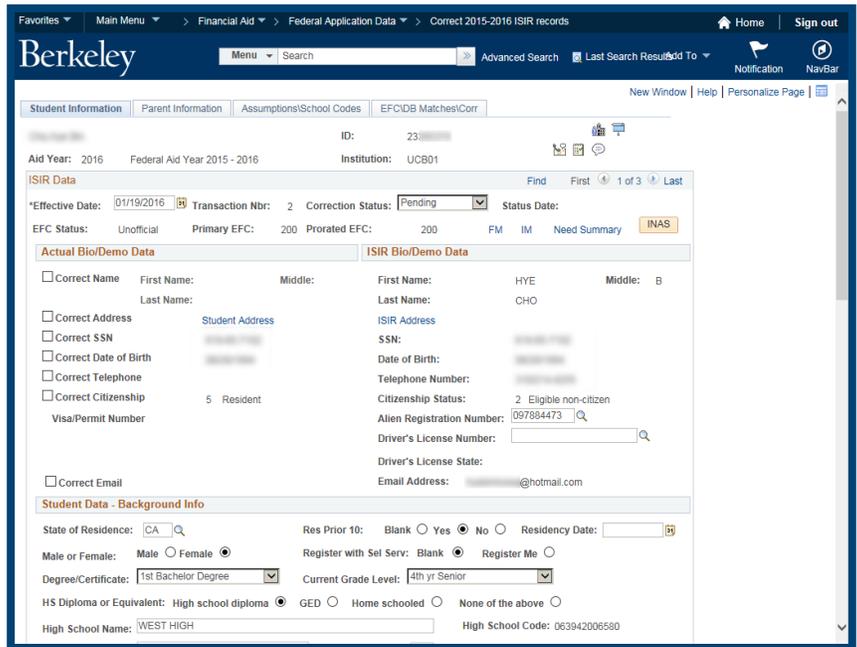
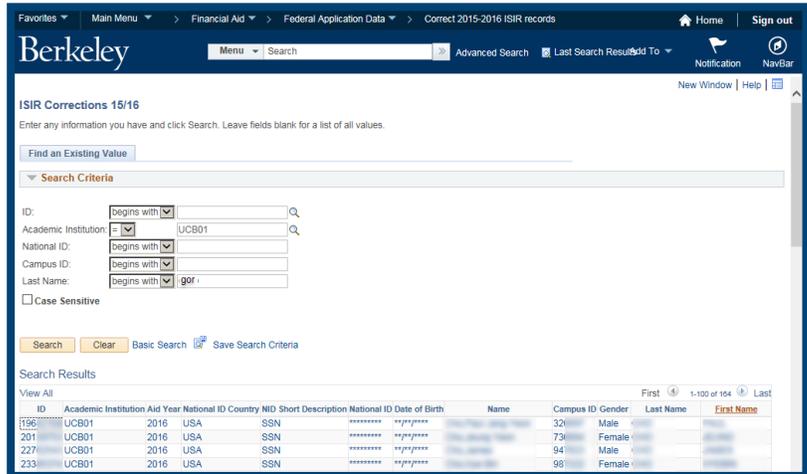
**NOTE:** Using the arrows on the right side of the page allows you to view previous ISIR information.

Review the information on the four tab pages.

**NOTE:** Links to FM, IM, and Need Summary –will appear on all pages.

The **Student Information** page contains information about the student (e.g. Dependency status, SSN, Date of Birth, etc.)

**Actual Bio/Demo Data** (on the left side of the first page) cannot be changed, except for the ISIR Analyst, who can only correct the Social Security Number



- Keep scrolling down to view more information about the student (e.g. Student Income). Notice the **Student Data- Dependency Status Information** section. In this example, the student is coded “D” for Dependent.

The screenshot shows the Berkeley Student Information System interface. The top navigation bar includes 'Favorites', 'Main Menu', 'Financial Aid', 'Federal Application Data', and 'Correct 2015-2016 ISIR records'. The main content area is titled 'Student Data - Dependency Status Information' and contains various fields for student information, including income, marital status, and dependency status. The dependency status is set to 'D DEP'. Below this section is the 'Student Data - Independent Student Information' section.

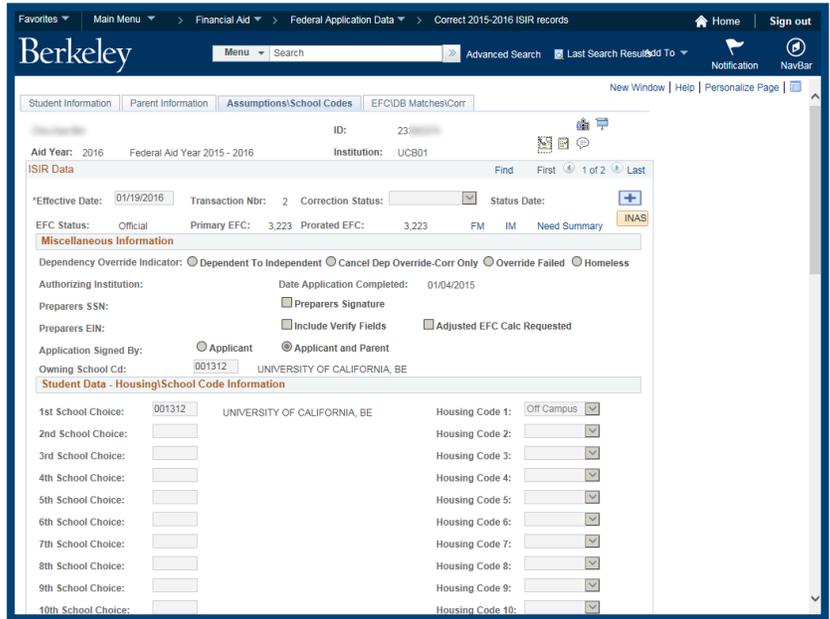
- Scroll back up and click the **Parent Information** tab. Parent Information

Review this page for information about the parents’ background and financial information.

The screenshot shows the Berkeley Student Information System interface with the 'Parent Information' tab selected. The page displays various fields for parent information, including marital status, residence, and financial information. The 'Parent Data - Background Information' section includes fields for marital status, residence, and parent details. The 'Parent Data - Financial Information' section includes fields for federal benefits received, dislocated worker status, tax return filed, and tax form used.

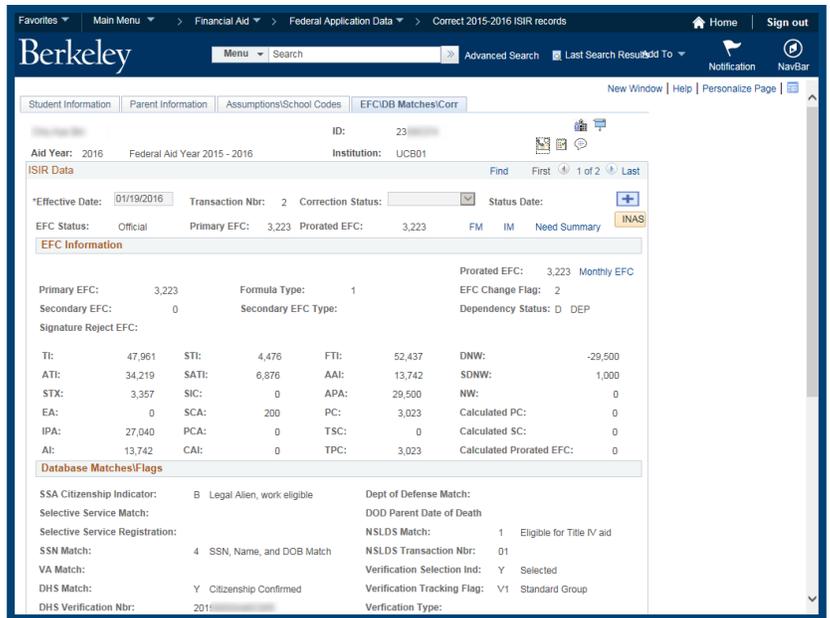
- Click the **Assumptions\School Codes** tab. Assumptions\School Codes

Scroll down to see the school codes and comments.



- Click the **EFC\DB Matches\Corr** tab. EFC\DB Matches\Corr

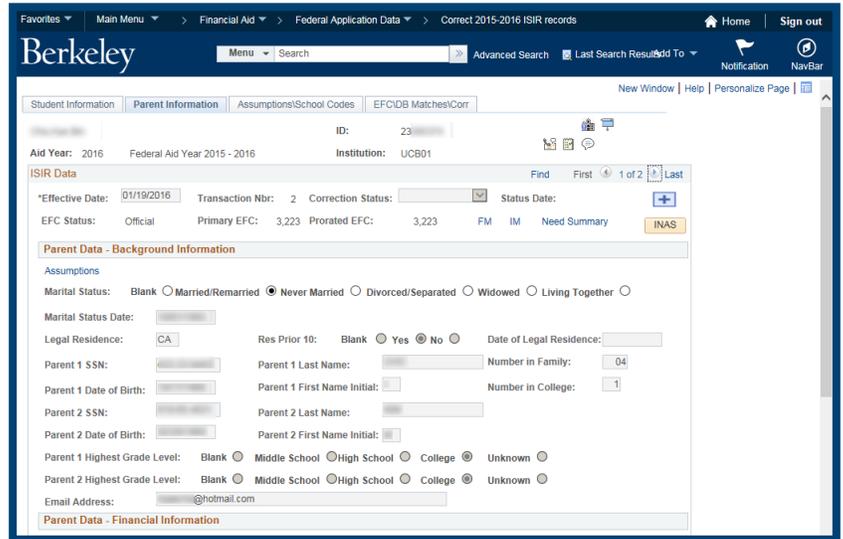
The **EFC** page contains intermediate and calculated values. It will also show corrected fields.



- If all we wanted to do is review the ISIR, we would be done.

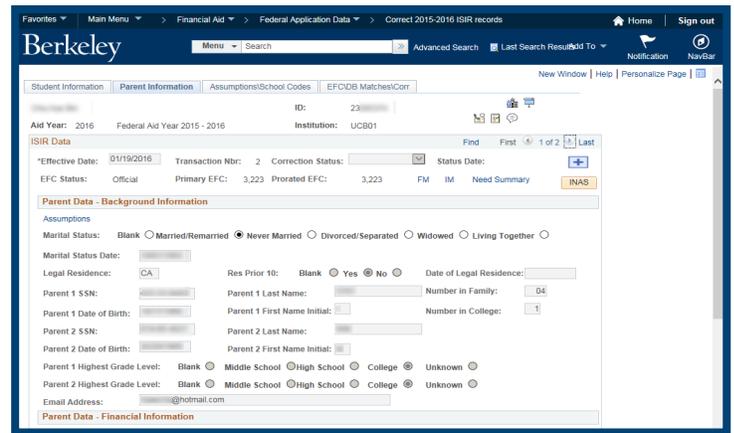
However, in this example, we have documented information that requires an update to the ISIR. We need to correct one of the parent's income and the Adjusted Gross Income (AGI). Therefore we will click the **Parent Information** tab.

**Parent Information**

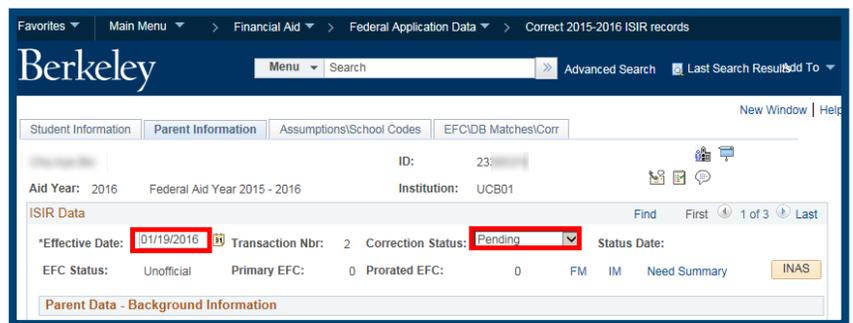


- When you are ready to add a correction, click the plus button. 

If you have been reviewing history, make sure to return the most current row (using the arrow keys or the Last link) before trying to add new data. Data must be added in chronological order.



- The system will add a new Effective Dated row and show a Correction status of **“Pending”**.



14. Scroll down to find the field(s) to update.

In this example we are looking for the **AGI** (Adjusted Gross Income) field, then the second parent's income.

Parent 1 Highest Grade Level:  Blank  Middle School  High School  College  Unknown

Parent 2 Highest Grade Level:  Blank  Middle School  High School  College  Unknown

Email Address:

**Parent Data - Financial Information**

2014 Federal Benefits Received: SSI:  SNAP:  School Lunch:  TANF:  WIC:

Dislocated Worker:  Blank  Yes  No  Don't Know

Tax Return Filed:  Blank  Already Filed/Completed  Will File  Will Not File

Tax Form Used:  Blank  IRS 1040  IRS 1040A/EZ  Foreign Tax Return  U.S. Territory Tax Return

Tax Filing Status:  Blank  Single  Married-Joint  Married-Separate  Head of House  Widow(er)  Don't Know

Eligible For 1040A or 1040EZ:  Blank  Yes  No  Don't Know

Asset Threshold Exceeded:  Blank  Yes  No

Assumptions

AGI: <input type="text" value="49,951"/>	Tax Deferred Pension: <input type="text" value="0"/>	Educational Credits: <input type="text" value="2,000"/>
U.S. Tax Paid: <input type="text" value="0"/>	Self Employment Payment: <input type="text" value="0"/>	Child Support Paid: <input type="text" value="0"/>
Exemptions: <input type="text" value="04"/>	Child Support Received: <input type="text" value="0"/>	Need-Based Employment: <input type="text" value="0"/>
Parent 1 Income: <input type="text" value="0"/>	Interest Income: <input type="text" value="0"/>	Grant/Scholarship Aid: <input type="text" value="0"/>
Parent 2 Income: <input type="text" value="49,958"/>	Untaxed IRA Distributions: <input type="text" value="0"/>	Combat Pay: <input type="text" value="0"/>
Cash Savings: <input type="text" value="0"/>	Untaxed Pensions: <input type="text" value="0"/>	Co-op Earnings: <input type="text" value="0"/>
Investment Net Worth: <input type="text" value="0"/>	Military Allowance: <input type="text" value="0"/>	Add. Financial Total: <input type="text" value="2,000"/>
Bus/Farm Net Worth: <input type="text" value="0"/>	Veterans Non-Ed Benefits: <input type="text" value="0"/>	
	Other Untaxed Income: <input type="text" value="0"/>	
	Untaxed Income: <input type="text" value="0"/>	

Save Return to Search Previous in List Next in List Notify Refresh

Student Information | Parent Information | Assumptions/School Codes | EFC/DB Matches/Corr

15. Enter the appropriate information into the **AGI** (Adjusted Gross Income) field.

In this example, we will enter **20,000**.

Parent 1 Highest Grade Level:  Blank  Middle School  High School  College  Unknown

Parent 2 Highest Grade Level:  Blank  Middle School  High School  College  Unknown

Email Address:

**Parent Data - Financial Information**

2014 Federal Benefits Received: SSI:  SNAP:  School Lunch:  TANF:  WIC:

Dislocated Worker:  Blank  Yes  No  Don't Know

Tax Return Filed:  Blank  Already Filed/Completed  Will File  Will Not File

Tax Form Used:  Blank  IRS 1040  IRS 1040A/EZ  Foreign Tax Return  U.S. Territory Tax Return

Tax Filing Status:  Blank  Single  Married-Joint  Married-Separate  Head of House  Widow(er)  Don't Know

Eligible For 1040A or 1040EZ:  Blank  Yes  No  Don't Know

Asset Threshold Exceeded:  Blank  Yes  No

Assumptions

AGI: <input type="text" value="20,000"/>	Tax Deferred Pension: <input type="text" value="0"/>	Educational Credits: <input type="text" value="2,000"/>
U.S. Tax Paid: <input type="text" value="0"/>	Self Employment Payment: <input type="text" value="0"/>	Child Support Paid: <input type="text" value="0"/>
Exemptions: <input type="text" value="04"/>	Child Support Received: <input type="text" value="0"/>	Need-Based Employment: <input type="text" value="0"/>
Parent 1 Income: <input type="text" value="0"/>	Interest Income: <input type="text" value="0"/>	Grant/Scholarship Aid: <input type="text" value="0"/>
Parent 2 Income: <input type="text" value="49,958"/>	Untaxed IRA Distributions: <input type="text" value="0"/>	Combat Pay: <input type="text" value="0"/>
Cash Savings: <input type="text" value="0"/>	Untaxed Pensions: <input type="text" value="0"/>	Co-op Earnings: <input type="text" value="0"/>
Investment Net Worth: <input type="text" value="0"/>	Military Allowance: <input type="text" value="0"/>	Add. Financial Total: <input type="text" value="2,000"/>
Bus/Farm Net Worth: <input type="text" value="0"/>	Veterans Non-Ed Benefits: <input type="text" value="0"/>	
	Other Untaxed Income: <input type="text" value="0"/>	
	Untaxed Income: <input type="text" value="0"/>	

Save Return to Search Previous in List Next in List Notify Refresh

Student Information | Parent Information | Assumptions/School Codes | EFC/DB Matches/Corr

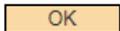
16. Next, we will update the information in the **Parent 2 Income** field.

In this example we will enter **20,000**.

The screenshot shows the 'Parent Data - Financial Information' form in the Berkeley SIS. The 'Parent 2 Income' field is set to 20000. Other fields include 'Parent 1 Highest Grade Level' (Unknown), 'Parent 2 Highest Grade Level' (Unknown), 'Email Address' (@hotmail.com), '2014 Federal Benefits Received' (SSN, SNAP, School Lunch, TANF, WIC), 'Dislocated Worker' (No), 'Tax Return Filed' (Will File), 'Tax Form Used' (IRS 1040), 'Tax Filing Status' (Married-Separate), 'Eligible For 1040A or 1040EZ' (Yes), and 'Asset Threshold Exceeded' (No). Assumptions include AGI (20000), U.S. Tax Paid (0), Exemptions (D4), Parent 1 Income (0), Cash Savings, Investment Net Worth, Bus/Farm Net Worth, Tax Deferred Pension (0), Self Employment Payment (0), Child Support Received (0), Interest Income (0), Untaxed IRA Distributions (0), Untaxed Pensions (0), Military Allowance (0), Veterans Non-Ed Benefits (0), Other Untaxed Income (0), Educational Credits (2,000), Child Support Paid (0), Need-Based Employment (0), Grant/Scholarship Aid (0), Combat Pay (0), Co-op Earnings (0), and Add. Financial Total (2,000). Buttons for Save, Return to Search, Previous in List, Next in List, Notify, and Refresh are visible at the bottom.

17. When all updates are finished, click the **Save** button.

Read the warning message, then click the **OK** button to acknowledge the message and continue to **Save**.



The screenshot shows the 'Parent Data - Background Information' form with a warning message dialog box overlaid. The message reads: 'Warning - No INAS calculation performed. (14400,21) You have made a change that could have an affect on the EFC. Please initiate a call to INAS to recalculate the EFC.' The dialog box has 'OK' and 'Cancel' buttons. The background form shows 'Aid Year: 2016', 'Federal Aid Year: 2015 - 2016', 'Institution: UCB01', 'EFC Status: Unofficial', 'Primary EFC: 0', 'Prorated EFC: 0', 'FM: 0', 'IM: 0', and 'Need Summary' button. The 'INAS' button is also visible in the background.

18. Click the **INAS** (Institutional Needs Analysis System) button.

The screenshot shows the 'Parent Data - Background Information' form with the 'INAS' button highlighted in red. The 'INAS' button is located in the 'Need Summary' area of the form. The background form shows 'Aid Year: 2016', 'Federal Aid Year: 2015 - 2016', 'Institution: UCB01', 'EFC Status: Unofficial', 'Primary EFC: 0', 'Prorated EFC: 0', 'FM: 0', 'IM: 0', and 'Need Summary' button. The 'INAS' button is also visible in the background.

19. Notice the **EFC** (Expected Family Contribution) has been updated.

The screenshot shows the 'EFC:DB Matches/Corr' section for a student with ID 23. The 'Effective Date' is 01/19/2016, and the 'Correction Status' is 'Pending'. The 'Primary EFC' is 200, and the 'Prorated EFC' is also 200. The 'EFC Information' section shows a 'Formula Type' of 1 and an 'EFC Change Flag' of 2. The 'Dependency Status' is 'D DEP'.

20. You can use the arrow keys to go back and look at the historical information.

Click the **Show next row** link to see the previous ISIR. 

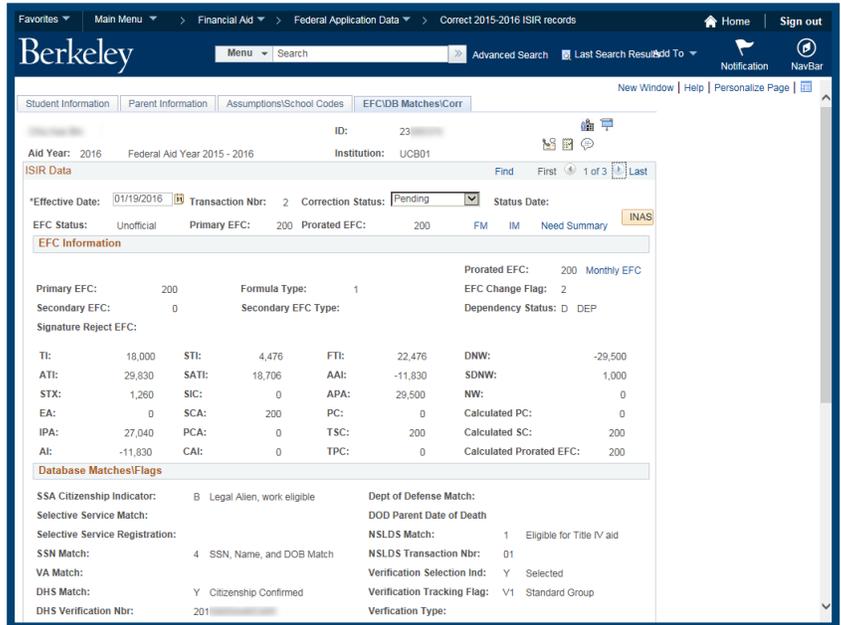
The screenshot shows the 'EFC:DB Matches/Corr' section for a student with ID 23. The 'Effective Date' is 01/19/2016, and the 'Correction Status' is 'Pending'. The 'Primary EFC' is 3,223, and the 'Prorated EFC' is also 3,223. The 'EFC Information' section shows a 'Formula Type' of 1 and an 'EFC Change Flag' of 2. The 'Dependency Status' is 'D DEP'. Below this, there is a table of various financial aid and verification flags.

TI:	47,961	STI:	4,476	FTI:	52,437	DNW:	-29,500
ATI:	34,219	SATI:	6,876	AAI:	13,742	SDNW:	1,000
STX:	3,357	SIC:	0	APA:	29,500	NW:	0
EA:	0	SCA:	200	PC:	3,023	Calculated PC:	0
IPA:	27,040	PCA:	0	TSC:	0	Calculated SC:	0
AI:	13,742	CAI:	0	TPC:	3,023	Calculated Prorated EFC:	0

The 'Database Matches/Flags' section includes:

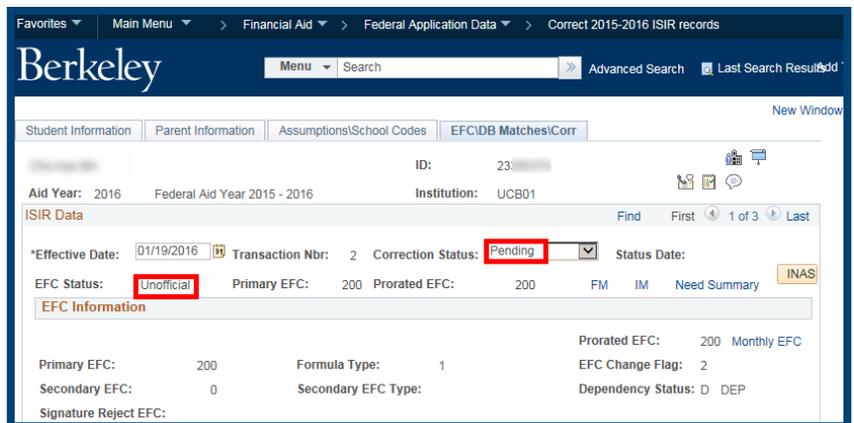
- SSA Citizenship Indicator: B Legal Alien, work eligible
- Selective Service Match: 4 SSN, Name, and DOB Match
- VA Match: Y Citizenship Confirmed
- DHS Match: Y Citizenship Confirmed
- DHS Verification Nbr: 201
- Dept of Defense Match: DDD Parent Date of Death
- NSLDS Match: 1 Eligible for Title IV aid
- NSLDS Transaction Nbr: 01
- Verification Selection Ind: Y Selected
- Verification Tracking Flag: V1 Standard Group
- Verification Type:

21. You can return to the current ISIR by clicking the **Show previous row** arrow. 



22. Notice that the **EFC Status** shows as **Unofficial** and **Correction Status** stays Pending.

This change needs to go to the Department of Education overnight. The status will remain Unofficial until UCB receives a confirmation of the change from CPS.



23. We have finished viewing and correcting an ISIR and can move on to our next task.

If you are finished using Campus Solutions, make sure to sign out and exit your browser as well, at the end of a browser work session. Do not leave your open browser unattended.

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**Support:**

For questions or assistance, please contact Campus Shared Services IT.:

- Call **510-664-9000** (press **option 1**, then **option 2** to reach SIS support)
- Email: **[itcsshelp@berkeley.edu](mailto:itcsshelp@berkeley.edu)**
- Submit a ticket: **[https://shared-services-help.berkeley.edu/new\\_ticket/it](https://shared-services-help.berkeley.edu/new_ticket/it)**