View ISIR Suspense Table

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 a day containing data necessary for the determination of financial aid eligibility to schools. 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 find matching student records in CS while a combination of ISIR Load Parameters and UCB custom ISIR Load rules determine whether to load an individual ISIR to an existing student record, skip the ISIR, or route it for manual review by setting the status to Suspend.

Matched records are moved into the ISIR Corrections tables (but remain viewable in the Suspense table), and the Load Status is set to "Loaded". This process initiates financial aid awarding at the student level. Data from loaded ISIRs (viewable in ISIR Corrections) is used in downstream financial aid processes such as Budgeting and Packaging

If no match is found, the ISIR transaction remains in the Suspense tables with a Load Status of either "Skip" or "Suspend", depending on which criteria is met.
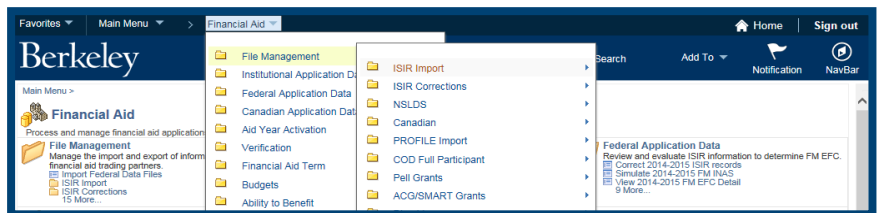
In this exercise we will review 2 students in the ISIR Suspense pages. The first person has multiple Loaded ISIRs. The second person has one ISIR that has Loaded and one that is in Suspense.

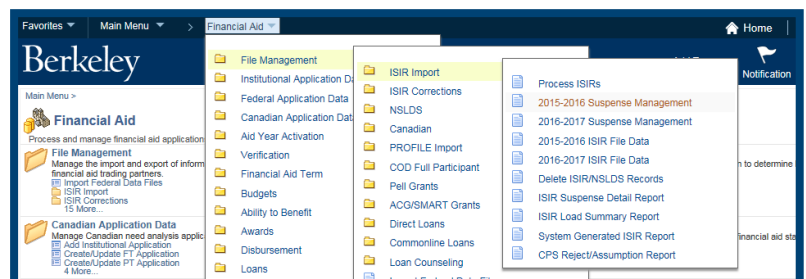1. From the Main Menu, click the **Financial Aid** link.

2. Click the **File Management** menu.
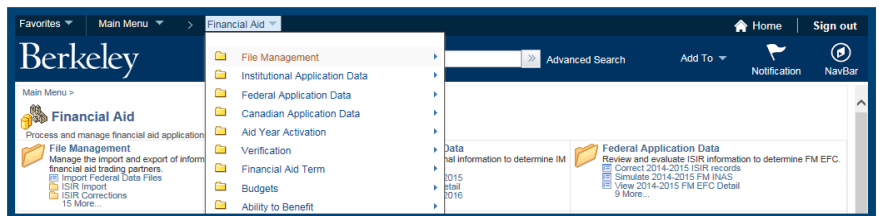
3. Click the **ISIR Import** menu.

4. Click the **2015-2016 Suspense Management** menu

5. There are multiple ways to search, but best practice is to use the Student ID number. Enter the student ID# in the **Empl ID** field.

   Then click the Search button.

6. Four ISIRs show for this person. The `Load Status` for each is "Loaded". The `EC Queue Instance` is the batch that these applications came in. In this case, all 4 ISIRs came in the same batch 515. The Sequence Number is the order in the batch that the ISIRs came in. The higher the number is the most recent.

7. You can view ISIRs in any order, but it may make more sense to view them in order by batch (**EC Queue Instance**). Because all these ISIRs were in the same batch, in this case we may want to sort them in chronological order (**Sequence Number**) within the batch.

   You can sort any column by clicking the title. In this case, we clicked the **Sequence Number** column header to sort by the order they came in during batch 515.

   The lowest sequence number (e.g. 19535) is the earliest ISIR and the highest number (e.g. 19538) is the latest (most recent).

8. We can view the ISIRs in any order, but in this case we will start with the first ISIR (lowest Sequence number). Click anywhere in the row to open up an ISIR.

EC Transaction ID	EC Queue Instance	Sequence Number	Social Security #	Empl ID	Load Status	Name Code	Date of Birth	Last Name	Student's First Name	Load Action
CPS_ISIR_2016	515	19535	*********	261	Loaded	MI	**/**/****	MILLER		Ignor/Skip
CPS_ISIR_2016	515	19536	*********	261	Loaded	MI	**/**/****	MILLER		Ignor/Skip
CPS_ISIR_2016	515	19537	*********	261	Loaded	MI	**/**/****	MILLER		Ignor/Skip
CPS_ISIR_2016	515	19536	*********	261	Loaded	MI	**/**/****	MILLER		Ignor/Skip

Search Results — View All — First 1-4 of 4 Last

9. Review the information about this ISIR. Note the **SAR ID** which will show Social Security Number, first two letters of last name and a transaction number. The first ISIR that loaded in this batch is Transaction 01, the next one will show as Transaction 02 and so on.

ISIR Suspense Management 15/16

EC Queue Instance/Seq. No: 515 19535 Transaction Receipt Date: 01/13/2015 Load Status: Loaded

ISIR Manual Load Parameters

ID: 261___ ID Lock ○ Add ISIR ○ Recycle ● Skip/Done [Process ISIR]
*Institution: UCB01 School Code: 001312
Process Dt (Effdt): 01/14/2015 Alternate Effective Date:

Student Information

Last Name: MILLER First Name: _____ MI:
SAR ID: _____ MI 01 SSN: _____ Date of Birth: _____
Dependency Status: D Dependent w/Primary EFC Primary EFC: 022666
Federal PELL Eligibility: Student's Admit Lvl: 5 - Accepted/Continuing
ED Verification Status: Not Required Verification Select/Tracking: N

ISIR Load Information CPS Generated Data ISIR Reject Reasons Search Match

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

10. Click the **Next in List** button to view the next ISIR.

This has transaction number 02 noted in the SAR ID, noting that it is the 2nd ISIR in this batch.

ISIR Suspense Management 15/16

EC Queue Instance/Seq. No: 515 19536 Transaction Receipt Date: 01/14/2015 Load Status: Loaded

ISIR Manual Load Parameters

ID: 261___ ID Lock ○ Add ISIR ○ Recycle ● Skip/Done [Process ISIR]
*Institution: UCB01 School Code: 001312
Process Dt (Effdt): 01/15/2015 Alternate Effective Date:

Student Information

Last Name: MILLER First Name: _____ MI:
SAR ID: _____ MI 02 SSN: _____ Date of Birth: _____
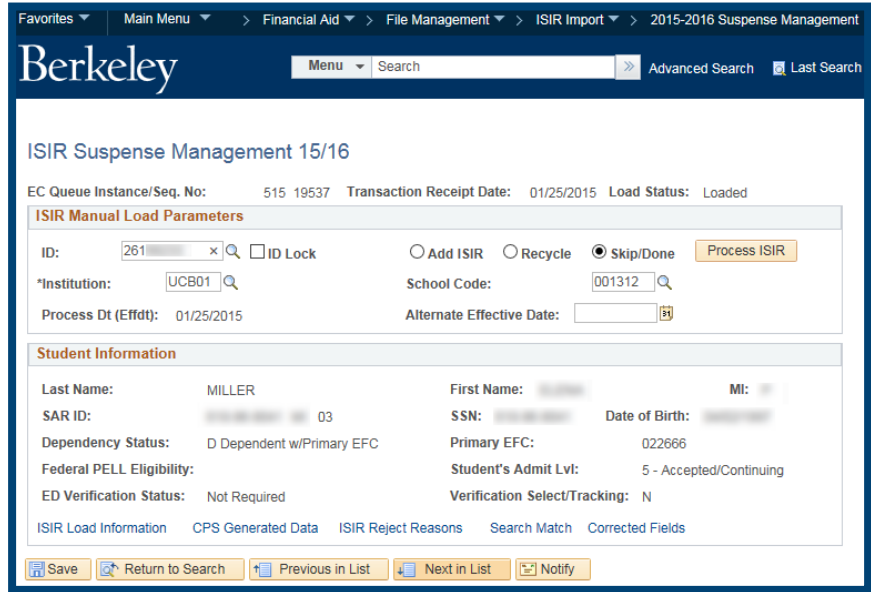Dependency Status: D Dependent w/Primary EFC Primary EFC: 022666
Federal PELL Eligibility: Student's Admit Lvl: 5 - Accepted/Continuing
ED Verification Status: Not Required Verification Select/Tracking: N

ISIR Load Information CPS Generated Data ISIR Reject Reasons Search Match Corrected Fields

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

11. Click the **Next in List** button to see the third ISIR. 📋 Next in List

12. Click the **Next in List** button to view the fourth ISIR. 📋 Next in List

13. Now that we have gone through the summary information for each ISIR, we can click on the blue links at the bottom of each ISIR for more information.

    Click the **ISIR Load Information** link.
    ISIR Load Information

14. The **ISIR Load Information** page will provide information about when the ISIR loaded or if it did not, it would display the reason for the Suspension or the Skip. (Example: Student Not Found)

Click the **Return** link to return to the previous page. Return

View ISIR Load Information

Load Information

Suspend Reason:	1 - Stu Not Found (Max Match)
Skip Reason:	
Error Code:	
Max Match Level:	
Process Instance:	6175
Process Date:	07/06/2015

School Choices/Multiple School Flags

1st Choice:	E00167
2nd Choice:	E00471
3rd Choice:	E00377
4th Choice:	002711
5th Choice:	G21075
6th Choice:	001312
7th Choice:	002707
8th Choice:	002785
9th Choice:	003378
10th Choice:	001739

Return

15. Click the **CPS Generated Data** link.

CPS Generated Data

Favorites ▼ | Main Menu ▼ > Financial Aid ▼ > File Management ▼ > ISIR Import ▼ > 2015-2016 Suspense Management

Berkeley

Menu ▼ Search | Advanced Search | Last Search

ISIR Suspense Management 15/16

EC Queue Instance/Seq. No: 515 19538 Transaction Receipt Date: 01/30/2015 Load Status: Loaded

ISIR Manual Load Parameters

ID: 261_____ ⚲ ☐ ID Lock   ○ Add ISIR ○ Recycle ◉ Skip/Done   Process ISIR

*Institution: UCB01 ⚲   School Code: 001312 ⚲

Process Dt (Effdt): 02/02/2015   Alternate Effective Date: _____ 📅

Student Information

Last Name:	MILLER	First Name:		MI:	
SAR ID:	____ 04	SSN:	Date of Birth:		
Dependency Status:	D Dependent w/Primary EFC	Primary EFC:	022666		
Federal PELL Eligibility:		Student's Admit Lvl:	5 - Accepted/Continuing		
ED Verification Status:	Not Required	Verification Select/Tracking:	N		

ISIR Load Information CPS Generated Data ISIR Reject Reasons Search Match Corrected Fields

💾 Save | 🔄 Return to Search | ⬆ Previous in List | ⬇ Next in List | 📧 Notify

16. This page will display data from CPS. In this instance we can see that this ISIR was generated due to a correction done online by the student.

Click the **Return** link to return to the previous page. Return

CPS Generated Fields

CPS Generated Information

Transaction Data Source/Type:	2C	Web Student Correction
Application Data Source/Type:	2A	Web Student Application
Address Only Change Flag:		
CPS Pushed ISIR Flag:		
NSLDS Post-Screening Code 1:		
NSLDS Post-Screening Code 2:		
NSLDS Post-Screening Code 3:		
Processed Record Type:	H	History/Duplicate
History Correction Applied:	03	
Source of Correction:	A	Applicant
Electronic Institution Ind:		
Reprocess Code:		
EFC Change Flag:		
ISIR SAR C Flag Changed:		
Rejected Status Change Flag:		
Verification Select Chng Flag:		
ISIR Elec Trans Indicator:	1	Non-School Generated, Daily

Return

17. Click the **ISIR Reject Reasons** link. ISIR Reject Reasons

ISIR Suspense Management 15/16

EC Queue Instance/Seq. No: 515 19538   Transaction Receipt Date: 01/30/2015   Load Status: Loaded

ISIR Manual Load Parameters

ID: 261____ x ☐ ID Lock   ○ Add ISIR ○ Recycle ● Skip/Done   Process ISIR
*Institution: UCB01   School Code: 001312
Process Dt (Effdt): 02/02/2015   Alternate Effective Date:

Student Information

Last Name:	MILLER	First Name:		MI:
SAR ID:	____ 04	SSN:	Date of Birth:	
Dependency Status:	D Dependent w/Primary EFC	Primary EFC:	022666	
Federal PELL Eligibility:		Student's Admit Lvl:	5 - Accepted/Continuing	
ED Verification Status:	Not Required	Verification Select/Tracking:	N	

ISIR Load Information   CPS Generated Data   ISIR Reject Reasons   Search Match   Corrected Fields

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

18. If this ISIR had been rejected, this page would show the reason(s).

Click the **Return** link to return to the previous page. Return

Reject Reasons

ISIR Reject Reasons

Reject Reason Codes:	
Reject Reason 1:	
Reject Reason 2:	
Reject Reason 3:	
Reject Reason 4:	
Reject Reason 5:	
Reject Reason 6:	
Reject Reason 7:	
Signature Reject EFC:	

Return

19. Click the **Corrected Fields** link. Corrected Fields .

NOTE: Do not click the **Search Match** link, it will not be used as part of this process. Clicking the link will take you to another browser window and prompt for Search rules and other information most users will not have.

ISIR Suspense Management 15/16

EC Queue Instance/Seq. No: 515 19538 Transaction Receipt Date: 01/30/2015 Load Status: Loaded

ISIR Manual Load Parameters

ID: 261 [ ] ID Lock   ○ Add ISIR ○ Recycle ● Skip/Done   Process ISIR
*Institution: UCB01   School Code: 001312
Process Dt (Effdt): 02/02/2015   Alternate Effective Date: [ ]

Student Information

Last Name:	MILLER	First Name:		MI:
SAR ID:	04	SSN:	Date of Birth:	
Dependency Status:	D Dependent w/Primary EFC	Primary EFC:	022666	
Federal PELL Eligibility:		Student's Admit Lvl:	5 - Accepted/Continuing	
ED Verification Status:	Not Required	Verification Select/Tracking:	N	

ISIR Load Information   CPS Generated Data   ISIR Reject Reasons   Search Match   Corrected Fields

Save   Return to Search   Previous in List   Next in List   Notify

20. The **Corrected Fields** page shows the fields that have been changed since the last ISIR.

NOTE: This will not show the new values, just which fields were updated.

21. Click the **Return** link to return to the previous page. Return

Corrected Fields

Corrected Fields	Personalize	Find			First ◄ 1-7 of 7 ► Last
Fieldname	Correction Status
Parent Exemptions	Field corrected in a previous transaction
School Choice #7	Field corrected in a previous transaction
School Choice #8	Field corrected in this transaction
School Choice #9	Field corrected in this transaction
Housing Code #9	Field corrected in this transaction
School Choice #10	Field corrected in this transaction

Return

We have finished reviewing this person's ISIR information in the suspense table.

We are now ready to look at another person.

22. Click the **Return to Search** button.
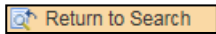
23. Enter the Student ID number in the **Empl ID** field.

24. Then click the **Search** button.

25. The search results display below the search button.

This person has 2 ISIRs. In reviewing the **Load Status**, we can see that one ISIR has Loaded and the other is in Suspense. In looking at the **EC Queue Instance**, we can see that they came in two different batches. The higher the number, the later the load. In this instance, the ISIR that came in batch 512 has loaded, but the later ISIR that came in batch 518 is in Suspense. The Sequence Number is where in the batch the ISIR is, which is helpful if multiple ISIRs come in the same batch.

26. We can review the ISIRs in any order, but in this case we'd like to review the earlier Loaded ISIR.

   Click anywhere on that row to open up the ISIR information.

27. We can now review the information on this page, noting the SAR ID: which will show Social Security Number, first 2 digits of Last Name and a Transaction Number.

28. Click the **ISIR Load Information** link.

   ISIR Load Information

29. This ISIR loaded because it met a Maximum Match level of 10 - the highest match possible. The ISIR information for Name, Social Security Number, Date of Birth, City and State matched, so the system automatically loaded this ISIR. High probability matches (level 10 or 20) will automatically load. Matches with less confidence (level 30 or 40) will flag for manual review.

The process date will also display.

If the record had been **Suspended** or **Skipped**, the reason would show.

Click the **Return** link to go back to the previous page. Return

30. Now we would like to look at the other ISIR, the one that was suspended.

Click the **Previous in List** button.
Previous in List

31. The Suspended ISIR that arrived in Batch number 518 now displays.

Click the **ISIR Load Information**

ISIR Load Information

32. The **Suspend Reason** field will show why this ISIR was suspended. It was suspended for being in 2 – Institutional Review Status. This person was already packaged, therefore, the ISIR didn't automatically load, it went to a skip/add process to be reviewed.

Click the **Return** link to go back to the main page.   Return

33. To see which fields changed on this ISIR since the last one, click the **Corrected Fields** link.

    Corrected Fields

34. Several fields were updated, such as the Student's AGI and income, as well as the parents' AGI and Income.

    NOTE: This page will not show you the actual changes. You would need to log into CPS or load the actual ISIR to see the changed values before it loads.

    When you have finished reviewing this page, click the **Return** link.

    Return

35. In rare cases, if appropriate, to load the ISIR, you would click the ID Lock. Activating the **ID lock** when adding a suspended ISIR causes the record to load if all other ISIR load parameters are met.

36. Click the **ID Lock** option.   ☐ ID Lock

37. Then click the **Add ISIR** radio button.

    ⚪ Add ISIR

38. Click the **Process ISIR** button to load the ISIR.
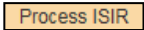
    Process ISIR

    If you don't click the Process ISIR button, the ISIR will be loaded through the nightly batch load process (as long as you have checked the ID LOCK box and the Add ISIR radio button).

We have now manually loaded and processed the Suspended ISIR for this person and it will now show as Loaded in the ISIR Corrections table.

> 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.

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**
- Submit a ticket: **https://shared-services-help.berkeley.edu/new_ticket/it**