



FAFSA Simplification and Campus Connection



ACCESS. INNOVATION. EXCELLENCE.



Agenda

- Basic Timeline
- Oracle Deliveries
 - Demonstration
 - Known Issues
- FAFSA Simplification Project Update
- Open Discussion






Disclaimer

Any screenshots, images, or demonstrations we go through today are from our Test environment. There may be changes in the final version that is deployed when we go-live.

Refer to our Training & Documentation page for all our most current documentation.






Disclaimer – cont.

This presentation is based on information from Oracle and the Department of Education as of 4/5/2024. Content is subject to change.

Refer to our Training & Documentation page for all our most current documentation.



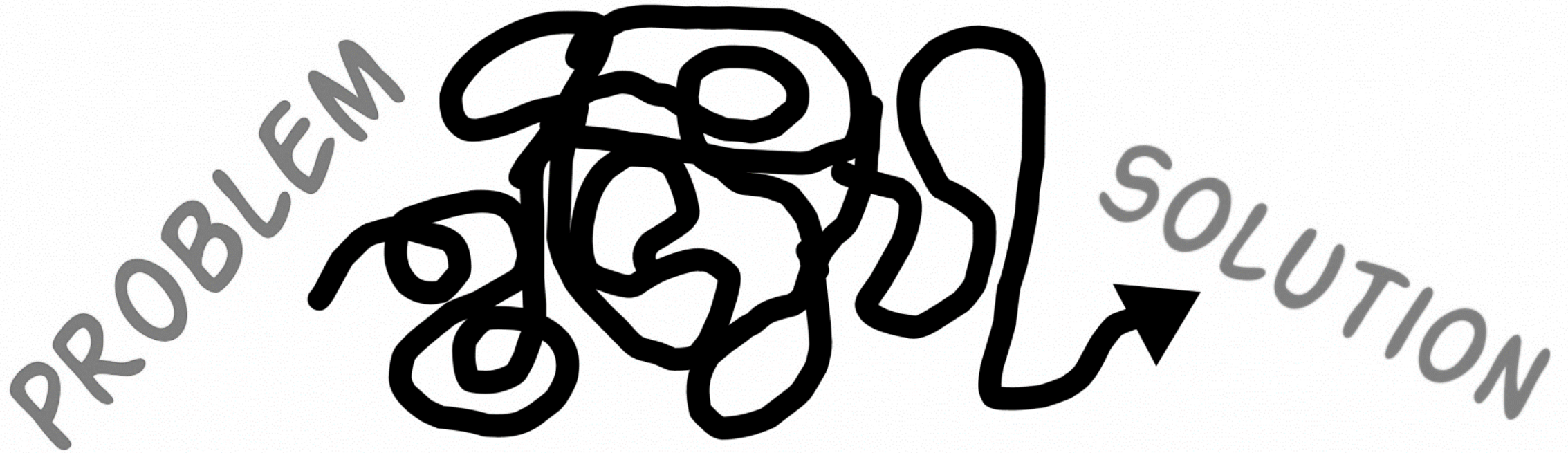


Disclaimer – cont...again

Sherry and Crystal admit that they don't know *everything* and **DO** make mistakes.

Please be kind. ;)

Decorative geometric shapes in the bottom-left corner: a cyan triangle pointing right, a light blue triangle pointing right, and a green parallelogram.



Basic Timeline



Known Timeline

- December 31st – FAFSA Launch
- January/February – 1st and 2nd attempt at ISIR Patching
- Mid-March ISIRs released by ED
 - ~ Campus Solutions begins exporting files from TDClient and providing lists to schools
- Late March – 3rd ISIR Patch released, and schedule requested
- April 9th – Stage patched with all ISIR patches
- April 13th – *Planned* Production patching with all ISIR patches
- April 15th – *Planned* ISIR Load



Functionality Timeline

ISIR Load

Status:
Greenlit

Dependencies:
N/A

Expected:
April 15th

SAI Calc

Status:
Hold

Dependencies:
N/A

Expected:
Mid-May

Corrections

Status:
Hold

Dependencies:
SAI Calc

Expected:
Mid-May

Budgeting

Status:
Hold

Dependencies:
HSNG Equations

Expected:
Late April

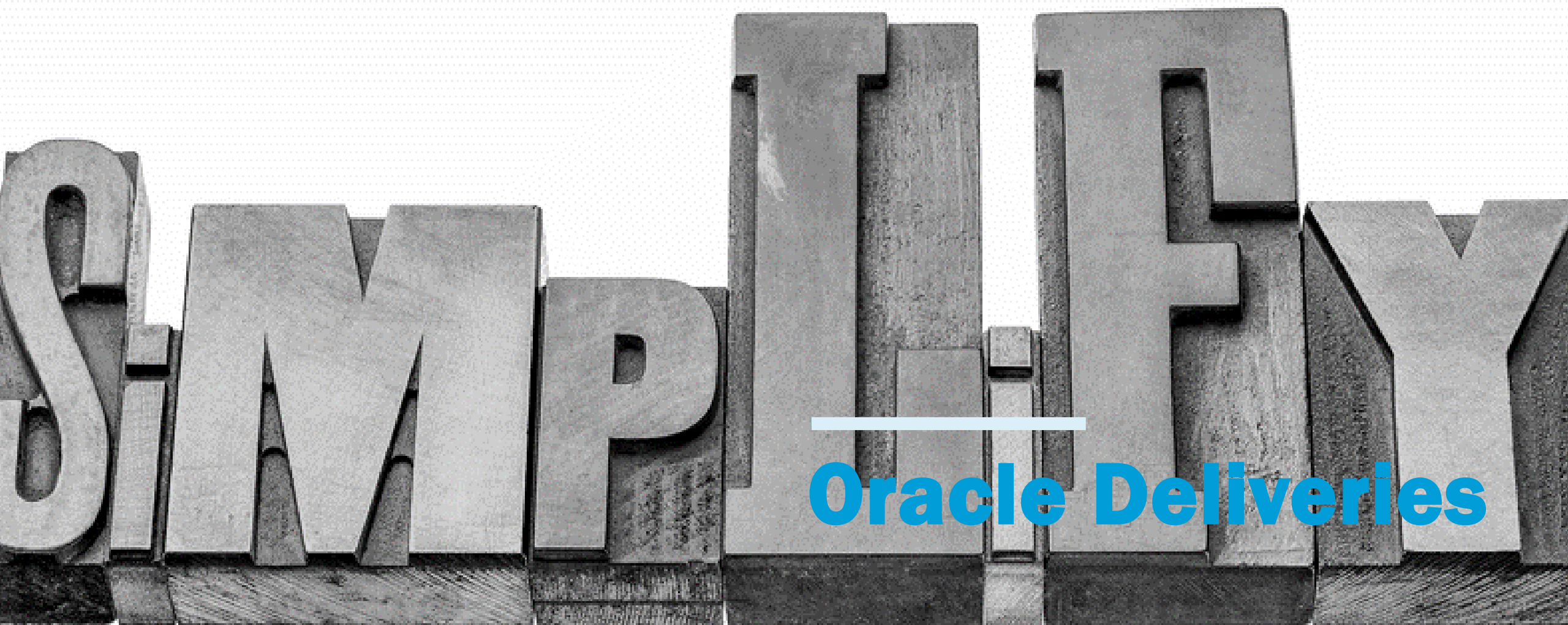
Packaging

Status:
Caution

Dependencies:
ISIR Load

Expected:
Late April

** Expected Timeframes are based on installation of ISIR PRPs



Oracle Deliveries

Suspended ISIRs

Financial Aid > File Management > ISIR Import > 2024-2025 Suspense Management

You are on NDCSTST

NORTH DAKOTA
UNIVERSITY SYSTEM

[< Crystal's Homepage](#)

2024-2025 Suspense Management

ISIR Suspense Management 24/25

EC Queue Instance/Seq Num20446Transaction Receipt Date01/11/2024Load StatusSuspended

ISIR Manual Load Parameters

ID ☐ ID Lock

☐ Add ISIR☒ Recycle☐ Skip/Done

*InstitutionMISU1

School Code002994

Process Dt (Effdt)03/18/2024

Alternate Effective Date

Process ISIR

Student Information

Last NameFirst NameMI

SAR ID01SSNDate of Birth

Dependency StatusX Dependent RejectStudent Aid Index

Federal PELL EligibilityStudent's Admit Lvl5 - Accepted/Continuing

ED Verification StatusVerification Select/TrackingN

ISIR Load InformationFPS Generated InformationISIR Reject Reasons

Search Match

Save

Return to Search

Notify

- Little changed
- Student Aid Index (SAI) labels
- FPS Generated Information label

Bug: Reject Reasons are currently not displaying in the ISIR Reject Reasons link.

Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records

You are on NDCSTST NORTH DAKOTA UNIVERSITY SYSTEM Welcome crystal.tangsrud

< Crystal's Homepage ISIR Corrections Home Search Bell Menu Refresh New Window | Help

Student Information | Spouse Information | Parent Information | Parent Spouse / Partner | Transaction Detail | SAI and Flags

Name Emplid ⊘ ★
Aid Year 2025 Federal Aid Year 2024-2025 Institution MISU1 📞 📅 💬

+

Student Information 🔍 | ⏪ ⏩ 1 of 1

*Effective Date 04/03/2024 Calc SAI

Correction Status ▼

Transaction Num 1

SAI Status Official

SAI 0

Dependency Dependent

Expand All Collapse All IM FM Need Summary

- Page no longer AY specific
- Contributors each have a tab.
- **Calc EFC** is now **Calc SAI**
- Expand or Collapse all content

Bug(s):

- Institution Process Date field missing
- Student Number in College incorrect
- Spacing/overlap of some fields

Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Student Information

Student Information

1 of 1

*Effective Date

04/03/2024

Correction Status

Transaction Num

1

SAI Status

Official

SAI

0

Dependency

Dependent

Calc SAI

Expand All

Collapse All

IM

FM

Need Summary

Student Identifier and Consent

FAFSA UUID

2026[REDACTED]653

Person UUID

31054[REDACTED]afdc

FTI Consent

Granted

Signature Date

02/28/2024

Transaction UUID

b1df1f[REDACTED]b15

Transaction Process Date

03/25/2024

Signature

Yes

▶ Student Identity Information

▶ Student Demographic Info

▶ Student Non-Financial Info

▶ Student Circumstances

▶ Student Fed Benefits Received

▶ Student Tax Form Filed

▶ Student Financial Information



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Student Information

▼ Student Identity Information

CS Bio/Demo Data

First Name

Middle Name

Last Name

Suffix

Date of Birth

SSN

Phone Number

Email Address

Citizenship Status

Student Address

☐ Correct Name

☐ Correct Date of Birth

☐ Correct SSN

☐ Correct Telephone

☐ Correct Email

☐ Correct Citizenship

☐ Correct Address

ISIR Bio/Demo Data

First Name

Middle Name

Last Name

Suffix

Date of Birth

SSN

Phone Number

Email Address

Citizenship Status

ITIN

A-Number

ISIR Address

U.S. citizen

Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Student Information

▼ Student Demographic Info

Legal Residence State

ND

Parent Attend College

One or both completed college

▼

HS Completion Status

High school diploma

▼

HS Diploma Equivalent

Blank

▼

High School City

West Fargo

Legal Residence Date

10/01/2005

Parent Killed in Line of Duty

No

▼

HS Diploma Equivalent State

High School Name

West Fargo High School

High School State

ND

North Dakota

▼ Student Non-Financial Info

Marital Status

Single (Never Married)

▼

Grade Level 2024-2025

First Year

▼

Unsub Only

No

▼

Teacher Certification

Blank

▼

Veteran

Blank

▼

Family Size

Number in College

1st Bachelor's Before 2024-2025

No

▼

On Active Duty

Blank

▼

Child or Other Dependents

Blank

▼



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Student Information

▼ Student Circumstances

Parent Deceased

Foster Care

Legal Guardianship

Unusual Circumstances

Unaccompanied or at Risk

Unaccompanied (FAA)

Unaccompanied (HS)

Ward of Court

Emancipated Minor

Pers Circumstances None Above

Unaccompanied (TRIO)

Unaccompanied (Other)

Unaccompanied (General)

▼ Student Fed Benefits Received

Earned Income Tax Credit

Free/Reduced Lunch

Refund Credit 36B Hlth Plan

SSI

WIC

Federal Housing Assistance

Medicaid

SNAP

TANF

None of the above



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Student Information

▼ **Student Tax Form Filed**

Tax Return Filing Status

Non-US Tax Return

Joint Return with Spouse

1040 or 1040NR

Filed Schedule A,B,D,E,F, or H

EITC Received



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Student Information

▼ Student Financial Information

FTI Amounts

Student FTI Data	FTI Amount	Manually Reported Amount
FTI Start Indicator	CUI//SP-TAX	
IRS response code	Successful Request	
Returned tax year	2022	
Filing status code	Single	
AGI		
Number of exemptions	0	
Number of dependents	0	
Total income earned amount		
Total tax paid amount	0	
Educational credits	0	
Untaxed IRA distributions	0	
IRA deductible and payments	0	





Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Student Information

Tax exempt interest	0	
Untaxed pensions amount	0	
Schedule C net profit/loss	0	
Schedule A indicator	No	
Schedule B indicator	No	
Schedule D indicator	No	
Schedule E indicator	No	
Schedule F indicator	No	
Schedule H indicator	No	
FTI End Indicator	CUI//SP-TAX	





Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Student Information

Non-FTI Amounts		
Student Non-FTI Data	FTI Amount	Manually Reported Amount
Pension Rollover		
IRA Rollover		
Grant/Scholarship Aid		0
Foreign Income Exclusion		0
Child Support Received		
Cash, Savings, and Checking		
Net Worth Busn/Invst Farms		
Net Worth Current Investments		



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Spouse Information

Spouse Information

*Effective Date

04/03/2024

Correction Status

Transaction Num

1

SAI Status

Official

SAI

33,318

Dependency

Independent

Calc SAI

Expand All

Collapse All

IM

FM

Need Summary

Student Spouse Consent

FTI Consent

Granted

Signature

Yes

Signature Date

02/06/2024

▶ Student Spouse Bio/Demo

▶ Student Spouse Tax Form Filed

▶ Std't Sps Financial Information



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Spouse Information

▼ Student Spouse Bio/Demo

First Name

Middle Name

Last Name

Suffix

Birthdate

SSN

ITIN

Phone Number

Email Address

Spouse Address

▼ Student Spouse Tax Form Filed

Tax Return Filing Status

Blank

▼

Non-US Tax Return

Blank

▼

1040 or 1040NR

Yes

▼

Filed Schedule A,B,D,E,F, or H

Blank

▼



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Spouse Information

▼ Std Sps Financial Information

FTI Amounts

Student Spouse FTI Data	FTI Amount	Manually Reported Amount
FTI Start Indicator	CUI//SP-TAX	
IRS response code	Successful Request	
Returned tax year	2022	
Filing status code	Married-Filed Separate Return	
AGI		
Number of exemptions	1	
Number of dependents	0	
Total income earned amount		
Total tax paid amount		
Educational credits	0	
Untaxed IRA distributions	0	
IRA deductible and payments	0	





Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Spouse Information

IRA deductible and payments	0	
Tax exempt interest	0	
Untaxed pensions amount	0	
Schedule C net profit/loss	0	
Schedule A indicator	No	
Schedule B indicator	No	
Schedule D indicator	No	
Schedule E indicator	No	
Schedule F indicator	No	
Schedule H indicator	No	
FTI End Indicator	CUI//SP-TAX	





Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Parent Information

▼ Parent Bio/Demo

First Name

Middle Name

Last Name

Suffix

Birthdate

SSN

ITIN

Phone Number

Email Address

Parent Address

▼ Parent Non-Financial Info

Marital Status

Married (not separated) ▼

Legal Residence Date

08/01/1985

Legal Residence State

ND

North Dakota

Family Size

Number in College

1



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Parent Information

▼ Parent Fed Benefits Received

Earned Income Tax Credit

Free/Reduced Lunch

Refund Credit 36B Hlth Plan

SSI

WIC

Federal Housing Assistance

Medicaid

SNAP

TANF

None of the above

▼ Parent Tax Form Filed

Tax Return Filing Status

Non-US Tax Return

Joint Return with Spouse

1040 or 1040NR

Filed Schedule A,B,D,E,F, or H

EITC Received



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Parent Information

▼ Parent Financial Information

FTI Amounts

Parent FTI Data	FTI Amount	Manually Reported Amount
FTI Start Indicator	CUI//SP-TAX	
IRS response code	Successful Request	
Returned tax year	2022	
Filing status code	Married-Filed Separate Return	
AGI		
Number of exemptions	1	
Number of dependents	0	
Total income earned amount		
Total tax paid amount		
Educational credits	0	
Untaxed IRA distributions	0	
IRA deductible and payments	0	
Tax exempt interest	0	





Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Parent Information

Tax exempt interest	0	
Untaxed pensions amount	0	
Schedule C net profit/loss	0	
Schedule A indicator	No	
Schedule B indicator	No	
Schedule D indicator	No	
Schedule E indicator	No	
Schedule F indicator	No	
Schedule H indicator	No	
FTI End Indicator	CUI//SP-TAX	





Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Parent Information

Non-FTI Amounts		
Parent Non-FTI Data	FTI Amount	Manually Reported Amount
Pension Rollover		
IRA Rollover		
Grant/Scholarship Aid		
Foreign Income Exclusion		0
Child Support Received		
Cash, Savings, and Checking		
Net Worth Busn/Invst Farms		
Net Worth Current Investments		



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Parent Spouse/Partner

Other Parent Information

*Effective Date

04/03/2024

Correction Status

Transaction Num

1

SAI Status

Official

SAI

0

Dependency

Dependent

Calc SAI

Expand All

Collapse All

IM

FM

Need Summary

Parent Spouse/Partner Consent

FTI Consent

Granted

Signature

Yes

Signature Date

02/29/2024

▶ Parent Sps/Ptr Bio/Demo

▶ Parent Sps/Ptr Tax Form Filed

▶ Parent Sps/Ptr Financial Info



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Parent Spouse/Partner

▼ Parent Sps/Ptr Bio/Demo

First Name

Middle Name

Last Name

Suffix

Birthdate

SSN

ITIN

Phone Number

Email Address

Parent Spouse/Partner Address

▼ Parent Sps/Ptr Tax Form Filed

Tax Return Filing Status

Married-Filed Separate Return

▼

Non-US Tax Return

Blank

▼

1040 or 1040NR

Yes

▼

Filed Schedule A,B,D,E,F, or H

No

▼



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Parent Spouse/Partner

▼ **Parent Sps/Ptr Financial Info**

FTI Amounts

Parent Spouse/Partner FTI Data	FTI Amount	Manually Reported Amount
FTI Start Indicator	CUI//SP-TAX	
IRS response code	PII Match Failed	
Returned tax year	2022	
Filing status code		
AGI	0	██████████
Number of exemptions	0	
Number of dependents	0	
Total income earned amount	0	██████████
Total tax paid amount	0	0
Educational credits	0	0
Untaxed IRA distributions	0	0
IRA deductible and payments	0	0





Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Parent Spouse/Partner

IRA deductible and payments	0	0
Tax exempt interest	0	0
Untaxed pensions amount	0	0
Schedule C net profit/loss	0	0
Schedule A indicator		
Schedule B indicator		
Schedule D indicator		
Schedule E indicator		
Schedule F indicator		
Schedule H indicator		
FTI End Indicator	CUI//SP-TAX	





Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Parent Spouse/Partner

Non-FTI Amounts		
Parent Spouse/Partner Non-FTI	FTI Amount	Manually Reported Amount
Pension Rollover		
IRA Rollover		
Foreign Income Exclusion		0

Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Transaction Detail

Transaction Detail

Q

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1 of 1

▶

▶

*Effective Date

04/03/2024

Correction Status

Transaction Num

1

SAI Status

Official

SAI

0

Dependency

Dependent

Calc SAI

Expand All

Collapse All

IM

FM

Need Summary

Transaction Processing Info

Application Source

Online FAFSA

Transaction Source

Online FAFSA

Transaction Receipt Date

02/29/2024

Transaction Status

Processed

FPS Correction Reason

Blank

Owning School Cd

002994 MINOT STATE UNIVERSITY

Date Application Received

02/29/2024

Transaction Type

Application

Transaction Process Date

03/25/2024

Transaction Language

English

Renewal Data Used

Blank

▸ Preparer Information

▸ Affirmation and Consent

▸ Transaction Indicators

▸ School Codes

▸ Reject Reasons

▸ Comment Codes



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Transaction Detail

▼ Preparer Information

First Name	Last Name
Preparers SSN	Preparers EIN
Affiliation	Preparers Signature
Signature Date	Blank

▼ Affirmation and Consent

Student Affirmation Status	Yes	Spouse Affirmation Status	Blank
Parent Affirmation Status	Yes	Parent Spouse Affirmation Stat	Yes
Student Consent Granted	01/19/2024	Stdnt Spouse Consent Granted	
Parent Consent Granted	02/28/2024	Parent Spouse Consent Granted	02/28/2024
Student Transunion Match	Not needed	Stdnt Spouse Transunion Match	Not needed
Parent Transunion Match Status	Not needed	Other Parent Transunion Match	Not needed



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Transaction Detail

▼ Transaction Indicators

Dependency Override Indicator

No FAA Override

▼

CFH Indicator

No Determination

▼

Incarcerated Applicant Flag

▼

FAA Signature

Blank

Student Signed Source

FSA ID

Parent Signed Source

FSA ID

Professional Judgment

No SAI Adjustment Requested

▼

IASG Indicator

No Determination

▼

Corr Applied Against Trans Nbr

Special Handling Indicator

No Special Handling Required

Spouse Signed Source

Not Signed

Parent Spouse Signed Indicator

FSA ID

▼ School Codes

1st School Choice

002994

MINOT STATE UNIVERSITY



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > Transaction Detail

▼ Reject Reasons

Reject Reason Description

	Reject Reason	Edit Nbr	Description
1			

▼ Comment Codes

Comment Code Description

	Comment	Description
1	146	If you need additional help with your FAFSA Submission Summary, contact your college's or career school's financial aid office or select "Visit Help Center" from the FAFSA home page. If your contact information changes, update your information in your Account Settings. Then, select "Make a Correction" to update the information on your FAFSA form.

Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > SAI and Flags

SAI and Flags

1 of 1

*Effective Date

04/03/2024

Correction Status

Transaction Num

1

SAI Status

Official

SAI

1,885

Dependency

Dependent

Calc SAI

Expand All

Collapse All

IM

FM

Need Summary

▶ FPS Information

▶ Match Flags

▶ Corrected/Verified Fields

Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > SAI and Flags

▼ FPS Information

SAI	1,885	SAI Change Flag	
Provisional SAI	0	SAI Formula	Dependent
SAI Computation Type	Blank		
Max Pell Indicator	Blank	Min Pell Indicator	Blank
Student Total FWS Earnings	0	Student Sps Total FWS Earnings	0
Parent Total FWS Earnings	0	Oth Parent Total FWS Earnings	0
Parent Allowances Against Inc	50,205	Parent Payroll Tax Allowance	5,018
Parent Inc Protect Allow (IPA)	34,350	Parent Employ Exp Allow (PEEA)	4,730
Parent Available Income (PAI)	15,387	Parent Avail Adj Income (PAAI)	15,387
Parent Contribution (PC)	3,385	Student Payroll Tax Allowance	0
Stdnt Inc Protect Allow (IPA)	11,130	Stdnt Allow for Negative PAAI	0
Stdnt Employ Exp Allow (SEEA)	0	Student Allowances Against Inc	11,130
Student Available Inc (StAI)	-11,130	Student Contribution Income	-1,500
Student Adj Aval Income (SAAI)	0	Total Student Contrib SAAI	0
Parent Discretionary Net Worth	0	Parent Net Worth	0
Parent Asset Protection Allow	0	Parent Contribution from Asset	0
Student Net Worth	0	Student Asset Protection Allow	0
Student Contrib Assets (SCA)	0	Assumed Student Family Size	
Assumed Parent Family Size		Students Total Income	0
Parent Total Income	65,592	FISAP Total Income	65,592



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > SAI and Flags

▼ Match Flags

FPS Pushed ISIR Flag	Trans not sent to school	Reject Status Change Flag	No Change to Reject Status
Verification Tracking Flag	Blank	Student Selected for Verif	N
Verification Select Chng Flag		NSLDS Transaction Nbr	01
High School Flag	Blank	High School Code	271108500189
DHS Primary Match Status	Blank	DHS Secondary Match Status	
DHS Case Number		NSLDS Match Status	Eligible for Title IV Aid
Student SSA Citizenship Flag	U.S. Citizen	Student SSA Match Flag	Full match
Student Spouse SSA Match Flag	Blank	Parent SSA Match Flag	Full match
Par Sps SSA Match Flag Results	Not sent	VA Match Flag Results	Match not Performed
Drug Abuse Hold Indicator	Not On Hold	Pell Grant Eligibility	Yes
Reprocessed Reason Code		Stdnt Last Name/SSN Chg Flag	No Change
FPS C Flag	No Flag Set	FPS C Change Flag	No Change to FPS C flag
Use User Provided Data Only			



Correct ISIR Records

Financial Aid > Federal Application Data > Correct ISIR Records > SAI and Flags

▼ Corrected/Verified Fields

Corrected Fields

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1-1 of 1 ▼

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View All

ISIR Field Num

Code

Verified Fields

Q

|

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◀

1-1 of 1 ▼

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▶▶

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View All

ISIR Field Num

Code

Simulate FM

Financial Aid > Federal Application Data > Simulate FM

You are on NDCSTST

NORTH DAKOTA
UNIVERSITY SYSTEM

< FA Financial Aid

Simulate FM

Student Information

Spouse Information

Parent Information

Parent Spouse / Partner

Transaction Detail

SAI and Flags

Name

Emplid

Aid Year 2025

Federal Aid Year 2024-2025

Institution MISU1

Student Information

Correction Status Correction(s) Pending

SAI Status Unofficial

SAI 0

Dependency Status

Get Federal Data

Calc SAI

Use Simulated Data

Expand All

Collapse All

FM

Need Summary

Student Identifier and Consent

FTI Consent

Signature

Signature Date

Student Identity Information

Student Demographic Info

Student Non-Financial Info

Student Circumstances

Student Fed Benefits Received

Student Tax Form Filed

Student Financial Information

- Completely revised to match the **Correct ISIR Records** page.

As of 4/13/24 this is not functioning, pending future patches.

Manage 2024-2025 Verification

Financial Aid > Verification > Manage 2024-2025 Verification

Consolidated Tax Data-Federal

Student's Tax Data

Non-Financial Info

Updated Family Size Number In College

Marital Status-Student

Federal Benefits Received

Received EITC	<input type="text" value="Blank"/>	Received Federal Housing	<input type="text" value="Blank"/>
Received Free Lunch	<input type="text" value="Blank"/>	Received Medicaid	<input type="text" value="Blank"/>
Received Refund Credit 36B	<input type="text" value="Blank"/>	Received SNAP	<input type="text" value="Blank"/>
Received SSI	<input type="text" value="Blank"/>	Received TANF	<input type="text" value="Blank"/>
Received WIC	<input type="text" value="Blank"/>	Fed Benefits:None of the Above	<input type="text" value="Yes"/>

Tax Form Filed

Filed 1040 or 1040NR	<input type="text" value="Blank"/>	Filed Non-U.S. Tax Return	<input type="text" value="Blank"/>
Filed Joint Return with Current Spouse	<input type="text" value="Blank"/>	Tax Return Filing Status	<input type="text" value="Blank"/>

Manually Entered Financial

Income Earned From Work	<input type="text" value="0"/>	Tax Exempt Interest Income	<input type="text" value="0"/>
Untaxed Portions of IRA Distb	<input type="text" value="0"/>	Untaxed Pension	<input type="text" value="0"/>
AGI	<input type="text" value="0"/>	Taxes Paid by the Student	<input type="text" value="0"/>
Deductible Payments IRA/KEOGH	<input type="text" value="0"/>	Education Credit	<input type="text" value="0"/>
Foreign Earned Income Exclusion	<input type="text" value="0"/>	College Grant and Scholarship	<input type="text" value="0"/>

Student Spouse Tax Data

Tax Form Filed

Filed 1040 or 1040NR	<input type="text" value="Blank"/>	Filed Non-U.S. Tax Return	<input type="text" value="Blank"/>
Tax Return Filing Status	<input type="text" value="Blank"/>		

- Consolidated Tax Data has been updated to reflect current fields on the FAFSA.
- Broken down by contributor.
- Corresponds to the manually entered tax data.

As of 4/13/24 this is not functioning, pending future patches.

Financial Aid Term

Financial Aid > Financial Aid Term > Maintain Student FA Term > Acad Level

FA Term

Acad Level

Statistics

Financial Aid

Records/Term Info

Withdrawal Info

Dot ID:

Term Information

Find | View All

First

1 of 2

Last

Institution

Minot State University

Term

2530

2025 Sprng

Semester

Student Data

Find | View All

First

1 of 1

Last

Effective Date

04/05/2024

Sequence

1

Effective Status

Active

Academic Career

Undergraduate

Primary Program

Accounting

Academic Plan

BS-Accounting

Academic Sub-Plan

Form of Study

☐

Class Enrollment

Approved Academic Load

☐

Full-Time

Academic Load

☐

F

Enrolled Full-Time

Financial Aid Load

☐

F

Enrolled Full-Time

Academic Level

☐

40

Senior

Projected

☐

40

Senior

Start

☐

40

Senior

End

☐

40

Senior

Course Load Percent

☐

0.00

Enrollment Intensity Percent

☐

100

100%

Calculated Values

Full-Time

Full-Time

Full-Time

Senior

Senior

Senior

View HERA Academic Level

- Enrollment Intensity to be used with calculating Pell for packaging/repackaging
- Will adjust automatically with enrollment changes.
- For FA Term overrides will need to be calculated and updated manually (i.e. Collaborative)

NDU Collaborative FA Term will be updated to calculate/override before Fall 2024.



The background of the slide features two overlapping road signs. The top sign is white with a black border and the word 'COMPLEX' in large, bold, black capital letters. To the left of the word is a black arrow pointing left. The bottom sign is also white with a black border and the word 'SIMPLE' in large, bold, black capital letters. To the right of the word is a black arrow pointing right. The signs are mounted on a metal pole. The text 'FAFSA Simplification Project' is overlaid in the center in a bold, blue font.

FAFSA Simplification Project



FAFSA Simplification Project Overview

- Documentation
 - Training & Documentation Page
 - Project Tracking Document
- Updates
- Time on Project to Date



Securing FTI

Status: In Progress

Change #s: 4

Expected Completion: Ongoing

- Identified all areas where FTI exists.
- Reviewed security/access and modified.
- Created new query security structure so data cannot be accessed without Financial Aid role.
- Awaiting additional guidance from ED.
- Drafting new Securing FTI document.

Securing FTI

Securing Federal Tax Information

Contents

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Federal Tax Information

Federal Tax Information (FTI) is data received from the IRS which is protected by IRS Code section 6103. The FUTURE Act permits FAFSA contributors to consent to disclose and use of their FTI for the "purposes of determining an applicant's eligibility for federal student aid" ([GENERAL-23-24](#)). FTI is categorized as Controlled Unclassified Information (CUI/SP-TAX).

FTI for each FAFSA contributor includes the following:

- Tax year (e.g., 2022 tax year information for the 2024-25 FAFSA);
- Tax filing status;
- Adjust Gross Income (AGI);
- Number of dependents;
- Income earned from work;
- Taxes paid;
- Educational tax credits;
- Untaxed individual retirement arrangement/account (IRA) distributions;
- IRA deductions and payments;
- Untaxed pension amounts
- Tax-exempt interest;
- Schedule C net profit/loss;
- Indicators for Schedules A, B, D, E, F, and H; and
- IRS response code.
- Tax filer and FTI provided to [ETIM](#)
- Not found at the IRS
- Found and a non-filer
- Found but IRS not able to provide [information](#)

In addition to specific use/access restrictions, FTI also requires specific labeling and Student Aid Internet Gateway (SAIG) mailboxes for receipt of this data. Individuals who wish to access or utilize FTI data; should familiarize themselves with these restrictions, requirements, and penalties which are detailed in [GENERAL-23-24](#).

Campus Connection and FTI

Campus Connection is the system of record for all NDUS data received from the FAFSA via the ISIR. Access to FTI is limited to higher level Financial Aid and CTS Administrator roles. Access is granted to these roles by the [Campus Access and Control Officers \(CACO\)](#).

Roles

- **NDUS FA DIRECTOR WITH SETUP** - This role will be given to Directors and those people identified by the directors. This role will give the access needed to perform all Financial Aid functions within the office.
- **NDUS FA DIRECTOR W/O SETUP** - This role is intended for all employees in the Financial Aid Office that will be processing financial aid. This role gives display only access to setup screens. This role has all the same access as the Director with setup role, EXCEPT the setup.
- **NDUS CTS HELP DESK (CTS Role)** – NDUS – CTS Service Desk Role
 - *FTI is removed from pages that this role has access to using the Page and Configurator tool within Campus Connection.*
- **CS – Administrator (CTS Role)** – Administrative roles for CTS employees
- **CS - SM Security Test (CTS Role)** – Administrative roles for CTS employees
- **SA Administrator (CTS Role)** – Administrative roles for CTS employees
- **NDU UPG FUNCTIONAL (CTS Role)** – Administrative roles for CTS employees
- **NDU UPG TECHNICAL (CTS Role)** – Administrative roles for CTS employees

Pages with FTI Data

Below is a list of pages which contain FTI data and the roles which have access to those pages.

**** Indicates FTI is removed from pages this role has access to by using the Page and Configurator tool within Campus Connection.**

- 20xx-20xx ISIR File Data
 - **Roles:**
 - NDUS FA DIRECTOR W/O SETUP
 - NDUS FA DIRECTOR WITH SETUP
 - CS – Administrator
 - CS – SM Security Test
 - SA Administrator
 - NDU UPG FUNCTIONAL
 - NDU UPG TECHNICAL
- CPS Rejects/Assumptions Report (in PDF)
 - **Roles:**
 - NDUS FA DIRECTOR W/O SETUP
 - NDUS FA DIRECTOR WITH SETUP
 - CS – Administrator
 - CS – SM Security Test
 - SA Administrator
 - NDU UPG FUNCTIONAL
 - NDU UPG TECHNICAL
- ISIR Outbound Data 2x/2x – Correction Data
 - **Roles:**
 - NDUS FA DIRECTOR W/O SETUP
 - NDUS FA DIRECTOR WITH SETUP



Housing Data Collection

Status: **In Progress**

Change #s: 8

Expected Completion: Late April

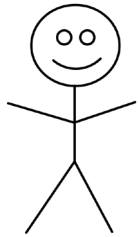
- Use of Budget Equations and Assumptions to assume a student's housing choice at the time of budgeting.
- Override ability on the **NDU FA Housing** page.
 - Manually or in batch
- Still working on budget equations and testing.
- See documentation on **Training & Documentation** page.

So, what does this look like?

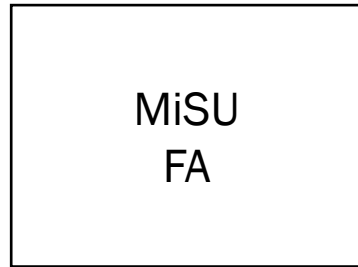


Description	Assumption Logic
MiSU On Campus	<ul style="list-style-type: none">• 23-24 FAFSA = On Campus• Dependent FYR not in select zip codes
MiSU With Parent	<ul style="list-style-type: none">• 23-24 FAFSA = With Parent• Dependent FYR in select zip codes
MiSU Off Campus	<ul style="list-style-type: none">• All other students

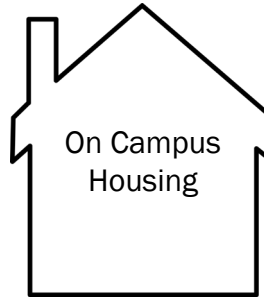
So, what does this look like? - **Dakota**



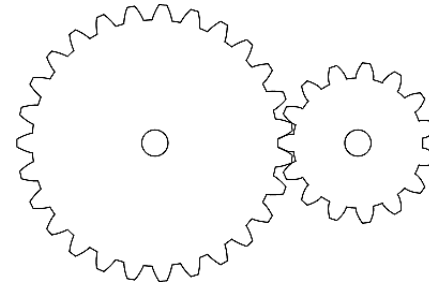
Dakota is a FYR student living outside of a defined radius at MiSU does their FAFSA



MiSU FA receives the FAFSA and builds a budget



MiSU FA **Assumes** Dakota is living on campus based on specified criteria.

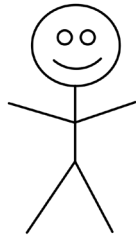


Budgeting gives Dakota an on campus budget.

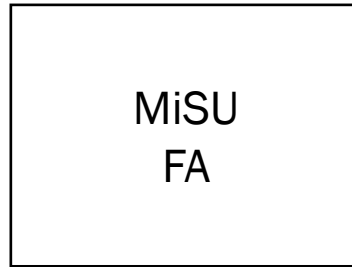


MiSU FA sends Dakota an Offer Letter that indicates her housing is assumed.

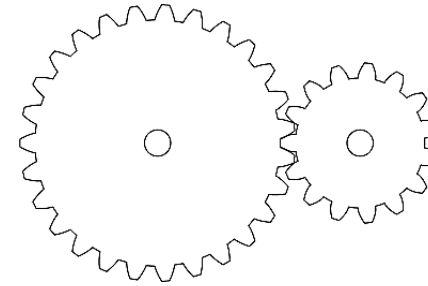
So, what does this look like? - **Dakota**



Dakota reviews the offer letter and notifies MiSU FA that they are living off campus

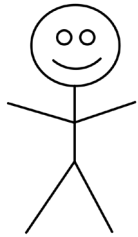


MiSU FA updates the **NDU FA Housing** page to indicate Dakota is "off campus"



Manual budgeting and Rebudgeting give Dakota an off campus budget

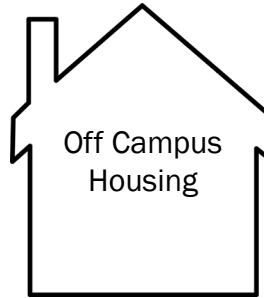
So, what does this look like? - North



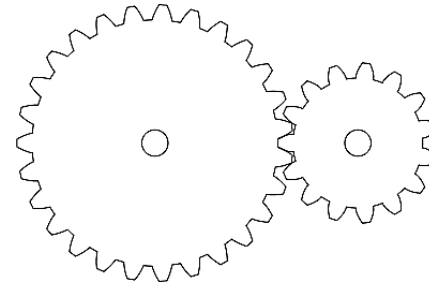
North is not a FYR
and does their
FAFSA.



MiSU FA receives the
FAFSA and builds a
budget



MiSU FA **Assumes**
North is living off
campus based on
specified criteria.

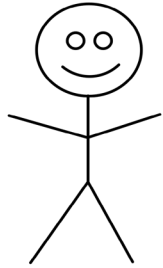


Budgeting gives
North an off campus
budget.

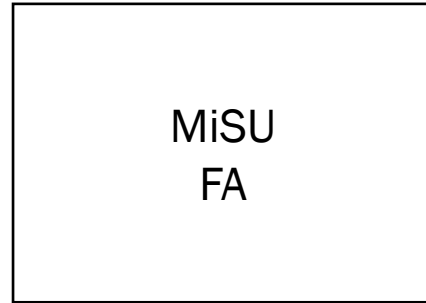


MiSU FA sends North
an Offer Letter that
indicates her housing
is assumed.

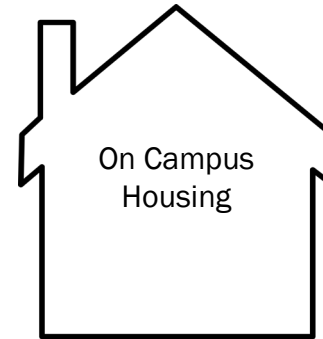
So, what does this look like? - North



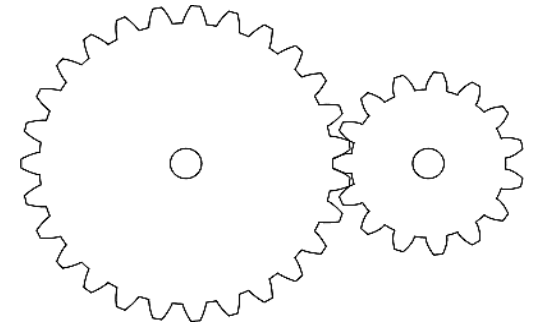
North decides to live on campus but doesn't tell MiSU FA.



MiSU FA gets a list of students living on campus before fall start. North is on the list.



MiSU FA updates the **NDU FA Housing** page with their "on campus" status.



Manual budgeting and Rebudgeting give North an on campus budget



Verification

Status: **In Progress**

Change #s: 10, 13, 14, and 15

Expected Completion: Mid-May

- Significantly reducing the number of checklists assigned.
- Also significant reduction in selected students.
 - NDUS = .003% selection rate currently (less than 60 students)
- Verification will take into account if data is manually entered or FADDX is used.
- Inclusion of Parent Killed in Line of Duty Verification (V0)
- Verification working group to begin prep-steps at testing in early May.
- Foreign Income Exclusion for those selected for verification.



Foreign Income Exclusion

Status: **In Progress**

Change #s: 10

Expected Completion: Late April

- Foreign Income is not considered when student is eligible for Maximum Pell.
- Institutions are required to “determine if adding the exempted foreign income to the adjusted [AGI] would make the student ineligible for the maximum Pell Grant award.”
<https://www2.ed.gov/policy/highered/reg/hearulemaking/2009/fafsa-q-and-a.html>
- For those not selected for verification the NDU ISIR Comment Codes report should be run for comment codes 040, 076, 096, and 127. Use the **Simulate FM** page to determine if eligibility would change.
- Documentation forthcoming.

Comment Codes

Status: Complete

Change #s: 7

- No change in set-up process
- New checklist items were created and moved to Production
 - Begin with FAS instead of FAC or FAI (120+)
- Campuses can edit odd year set-up at anytime in Production
- Campuses can remove the odd year process from bypass when ready once ISIR load begins for 24-25

C-codes setup

ISIR C-Code Processing

*Dept [2160] *EMail [E-MAIL] ☐ Bypass

Category/Year Division (even/odd) bypass Find | View All First 1 of 4 Last

Category: C-Code Even/Odd Year: Even ☐ Bypass Screening

Checklists Find | View All First 1 of 4 Last

*Category: C-Code *Even/Odd Year: Even *Checklist Code: FACCDE FA C-Code - Even Year

☒ Comm Link ☐ Complete on Communication Completion

C-code Correlation Find | View 100 First 1 of 161 Last

*Category: C-Code *C-code: 003 *Checklist Item Code: FAS003 ACTION REQ 003: Unusual Circ Even/Odd Year: Odd

☐ Bypass Screening (for item code) ☐ Checklist item is one-time only ☐ Checklist item expires on due date

Communications Find | View All First 1 of 6 Last

*Category: C-Code *Even/Odd Year: Even *Notice Type: Initial *Precedence: Primary *Method: Email *Letter Code: FAFDocEmI

Additional Follow-ups: 2 Begin: 7 Days After Overdue Days Between Follow-ups: 7

Save Return to Search Notify Add Update/Display

Provisionally Independent

Status: Complete

Change #s: 6

- Set-up is defaulted to the correct settings
- ISIR will load but will have an Unofficial SAI
- Students with an unofficial SAI will not be picked up by packaging
- Provisionally independent students will need to be verified by an aid administrator

The screenshot shows a web interface for managing ISIR reject reasons and comments. At the top, there are tabs for 'ISIR Reject Reasons' and 'ISIR Comments'. Below these, there are filters for 'Aid Year 2025', 'Federal Aid Year 2024-2025', and 'Institution'. The main section is titled 'ISIR Comment Codes' and includes a search bar, 'Find | View 5', and pagination 'First 1-100 of 327 Last'. The table below lists four comment codes with their descriptions, severity levels, and DB match use options.

*Code	Description	Severity Level	DB Match Use
001	What To Do Next	<input type="checkbox"/>	<input type="checkbox"/>
002	This FAFSA Submission Summary reflects your college's or career school's decision to consider you an independent student.	0 Ignore	<input type="checkbox"/>
003	You didn't report information about your parents because you indicated that you have an unusual circumstance. You need to follow up with your college's or career school's financial aid office before your	1 Action Required	<input type="checkbox"/>
004	You indicated that you're an independent student. For this reason, all parent information has been removed from your FAFSA form.	0 Ignore	<input type="checkbox"/>



Rejected ISIRs

Status: In Progress

Change #s: 17 & 18

Expected Completion: Late April

- Set-Up Page
 - NDU Applications > NDU Financial Aid > Setup > NDU ISIR Reject Code Setup
- Will select students who have an ISIR that is rejected and send a communication letting them know why, using checklist item text
 - New FAS and FAR checklist items were created (60+)
- Process run daily by Production Control



New Pell Eligibility Report

Status: Pending

Change #s: 11

Expected Completion: Late May

- Update the NDU Pell Eligibility Report to handle updated Pell awarding criteria:
 - Minimum Pell
 - Maximum Pell
 - “Standard” Pell
- Current report is used to determine who isn’t awarded Pell and may be eligible.



Other Changes

- Impacts to the ND State Grant Program – **In Progress**
- WS Reporting to COD – **Complete**
- FAFSA Completion Project – **In Progress**
- FA History Tables – **In Progress**
- Enrollment Intensity/Collab FA Term Update - **Pending**
- Other Reports, Queries, and Processes - **Ongoing**



Open Discussion



Things we have found with ISIRs...

- Tax filers being treated as non-tax filers and getting Max Pell when they shouldn't.
- Both FTI and manual tax data entered for a contributor.