FAFSA Simplification and Campus Connection

NORTH DAKOTA
UNIVERSITY SYSTEM

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.
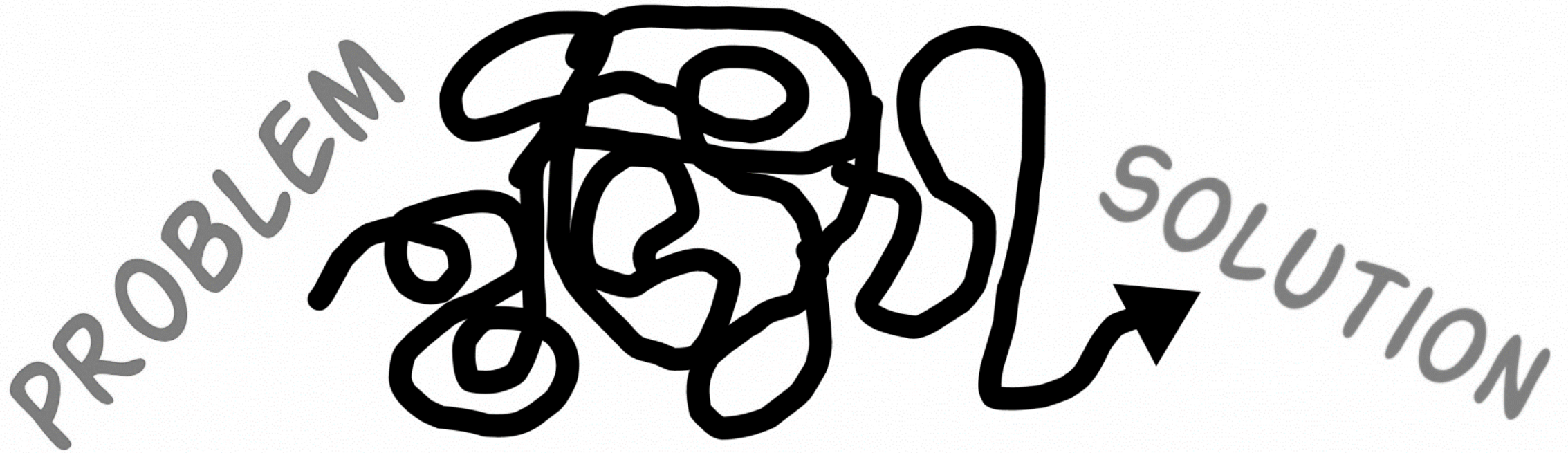
Disclaimer – cont...again

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

Please be kind. ;)

PROBLEM

SOLUTION

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 <u>all</u> ISIR patches
- April 13th – *Planned* Production patching with <u>all</u> ISIR patches
- April 15th – *Planned* ISIR Load

Functionality Timeline

ISIR Load	SAI Calc	Corrections	Budgeting	Packaging
Status: Greenlit	**Status:** Hold	**Status:** Hold	**Status:** Hold	**Status:** Caution
Dependencies: N/A	**Dependencies:** N/A	**Dependencies:** SAI Calc	**Dependencies:** HSNG Equations	**Dependencies:** ISIR Load
Expected: April 15th	**Expected:** Mid-May	**Expected:** Mid-May	**Expected:** Late April	**Expected:** Late April

** Expected Timeframes are based on installation of ISIR PRPs
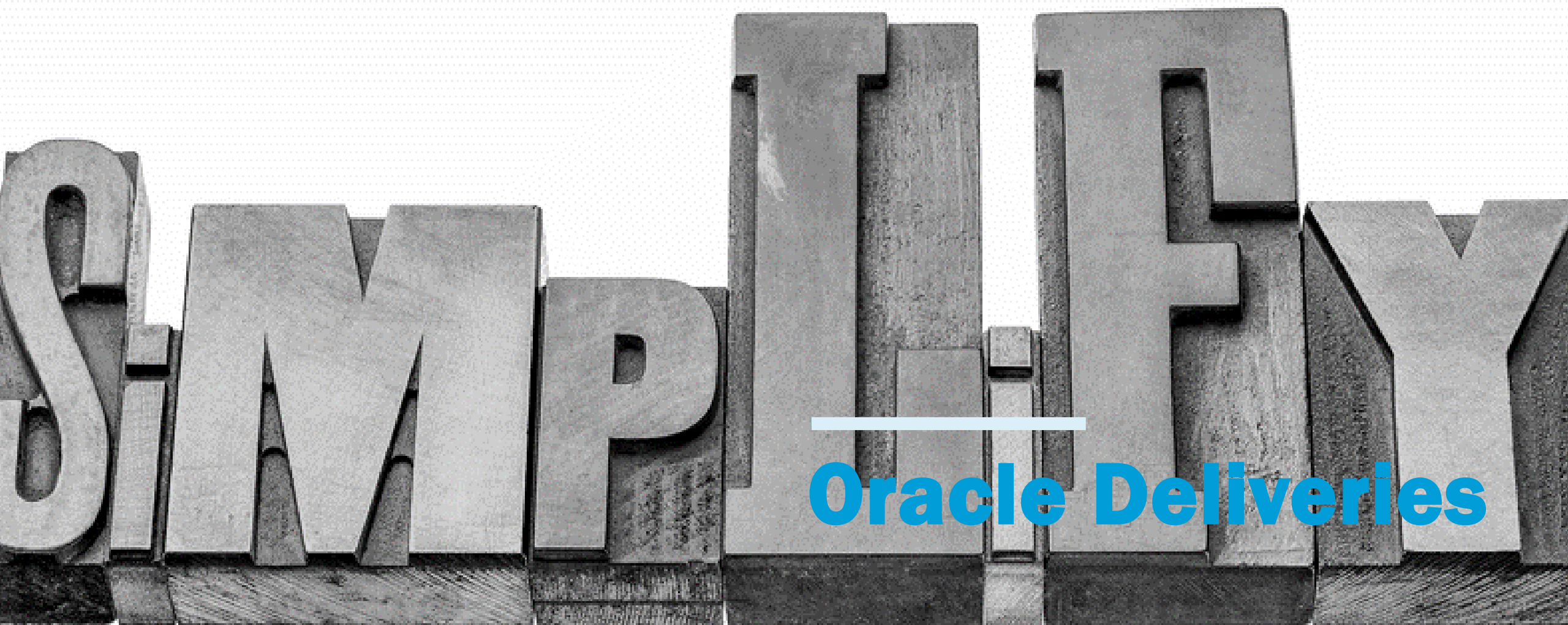
Oracle Deliveries

Suspended ISIRs

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

- 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

- 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

Correct ISIR Records

Correct ISIR Records

▼ **Student Demographic Info**

Legal Residence State	ND	Legal Residence Date	10/01/2005
Parent Attend College	One or both completed college	Parent Killed in Line of Duty	No
HS Completion Status	High school diploma	HS Diploma Equivalent State	
HS Diploma Equivalent	Blank	High School Name	West Fargo High School
High School City	West Fargo	High School State	ND North Dakota

▼ **Student Non-Financial Info**

Marital Status	Single (Never Married)	Family Size	
Grade Level 2024-2025	First Year	Number in College	
Unsub Only	No	1st Bachelor's Before 2024-2025	No
Teacher Certification	Blank	On Active Duty	Blank
Veteran	Blank	Child or Other Dependents	Blank

Correct ISIR Records

▼ Student Circumstances

Parent Deceased	Blank		Ward of Court	Blank
Foster Care	Blank		Emancipated Minor	Blank
Legal Guardianship	Blank		Pers Circumstances None Above	Yes
Unusual Circumstances	No		Unaccompanied (TRIO)	Blank
Unaccompanied or at Risk	No		Unaccompanied (Other)	Blank
Unaccompanied (FAA)	Blank		Unaccompanied (General)	Blank
Unaccompanied (HS)	Blank			

▼ Student Fed Benefits Received

Earned Income Tax Credit	Blank		Federal Housing Assistance	Blank
Free/Reduced Lunch	Blank		Medicaid	Blank
Refund Credit 36B Hlth Plan	Blank		SNAP	Blank
SSI	Blank		TANF	Blank
WIC	Blank		None of the above	Blank

Correct ISIR Records

▼ Student Tax Form Filed

Tax Return Filing Status	Blank		1040 or 1040NR	Blank
Non-US Tax Return	Blank		Filed Schedule A,B,D,E,F, or H	Blank
Joint Return with Spouse	Blank		EITC Received	Blank

Correct ISIR Records

▼ 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

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

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

Spouse Information

Search | |◄ ◄ | 1 of 1 ▾ | ► ►|

Calc SAI

*Effective Date 04/03/2024

Correction Status

Transaction Num 1

SAI Status Official

SAI 33,318

Dependency Independent

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**
▶ **Stdt Sps Financial Information**

Correct ISIR Records

Correct ISIR Records

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

▼ **Stdt 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

Parent Information

🔍 | |◄ ◄ | 1 of 1 ▼ | ► ►|

Calc SAI

*Effective Date 04/03/2024

Correction Status [_____ ▼]

Transaction Num 1

SAI Status Official

SAI 0

Dependency Dependent

Expand All	Collapse All		IM	FM	Need Summary

Parent Consent

FTI Consent Granted

Signature [Yes ▼]

Signature Date 02/28/2024

▶ **Parent Bio/Demo**
▶ **Parent Non-Financial Info**
▶ **Parent Fed Benefits Received**
▶ **Parent Tax Form Filed**
▶ **Parent Financial Information**

Correct ISIR Records

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

Correct ISIR Records

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

▼ **Parent Fed Benefits Received**

Earned Income Tax Credit	Yes	Federal Housing Assistance	Blank
Free/Reduced Lunch	Yes	Medicaid	Yes
Refund Credit 36B Hlth Plan	Blank	SNAP	Blank
SSI	Yes	TANF	Blank
WIC	Blank	None of the above	Blank

▼ **Parent Tax Form Filed**

Tax Return Filing Status	Blank	1040 or 1040NR	Blank
Non-US Tax Return	Blank	Filed Schedule A,B,D,E,F, or H	Blank
Joint Return with Spouse	Blank	EITC Received	Blank

Correct ISIR Records

▼ 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

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	🔍 I ◁ ◀ 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

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

▼ **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	1040 or 1040NR	Yes
Non-US Tax Return	Blank	Filed Schedule A,B,D,E,F, or H	No

Correct ISIR Records

▼ **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

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

Correct ISIR Records

▼ **Preparer Information**

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

▼ **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

▼ Transaction Indicators

Dependency Override Indicator	No FAA Override	Professional Judgment	No SAI Adjustment Requested
CFH Indicator	No Determination	IASG Indicator	No Determination
Incarcerated Applicant Flag		Corr Applied Against Trans Nbr	
FAA Signature	Blank	Special Handling Indicator	No Special Handling Required
Student Signed Source	FSA ID	Spouse Signed Source	Not Signed
Parent Signed Source	FSA ID	Parent Spouse Signed Indicator	FSA ID

▼ School Codes

1st School Choice   002994   MINOT STATE UNIVERSITY

Correct ISIR Records

▼ 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

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
Stndt 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

▼ **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 Indicatior	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

Simulate FM

Financial Aid > Federal Application Data > Simulate FM

- 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** 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

- 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.

FAFSA Simplification Project

FAFSA Simplification Project Overview

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

Securing FTI

- 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

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 FTIM
- 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.
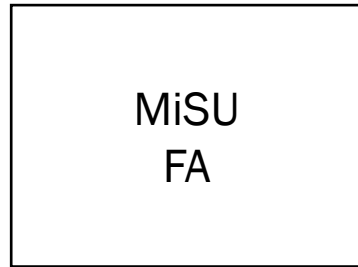
So, what does this look like?

Description	Assumption Logic
MiSU On Campus	• 23-24 FAFSA = On Campus • Dependent FYR not in select zip codes
MiSU With Parent	• 23-24 FAFSA = With Parent • Dependent FYR in select zip codes
MiSU Off Campus	• All other students

So, what does this look like? - Dakota
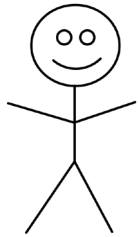
Dakota is a FYR student living outside of a defined radius at MiSU does their FAFSA

MiSU FA receives the FAFSA and builds a budget
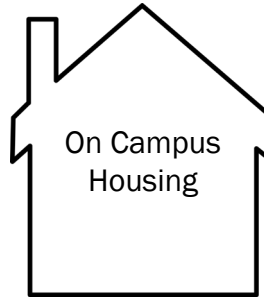
MiSU FA **Assumes** Dakota is living on campus based on specified criteria.
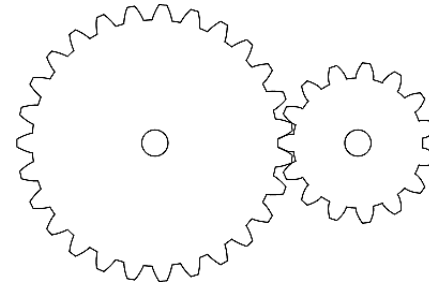
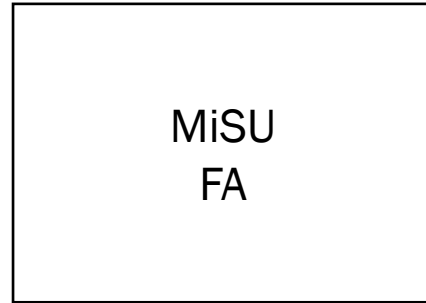Budgeting gives Dakota an on campus budget.

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

So, what does this look like? - Dakota
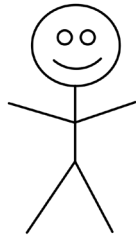
Dakota reviews the offer letter and notifies MiSU FA that they are living off campus
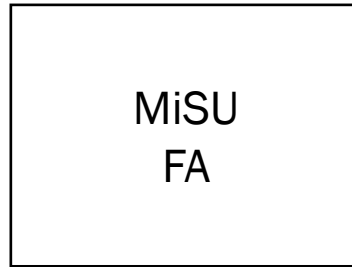
MiSU
FA

MiSU FA updates the **NDU FA Housing** page to indicate Dakota is "off campus"
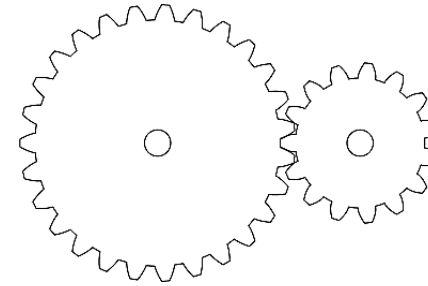
Manual budgeting and Rebudgeting give Dakota an off campus budget

So, what does this look like? - North
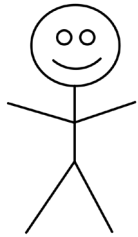
North is not a FYR and does their FAFSA.

MiSU FA

MiSU FA receives the FAFSA and builds a budget

Off Campus Housing

MiSU FA **Assumes** North is living off campus based on specified criteria.
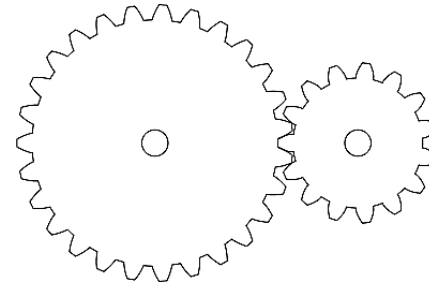
Budgeting gives North an off campus budget.

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

So, what does this look like? - North
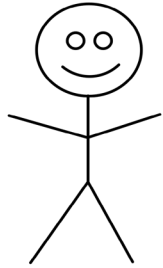
North decides to live on campus but doesn't tell MiSU FA.

MiSU
FA

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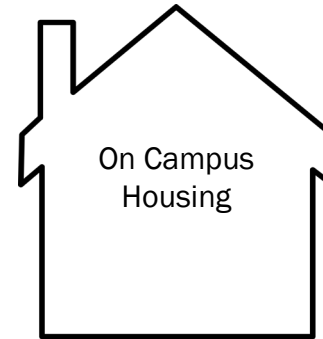
On Campus
Housing

MiSU FA updates the **NDU FA Housing** page with their "on campus" status.
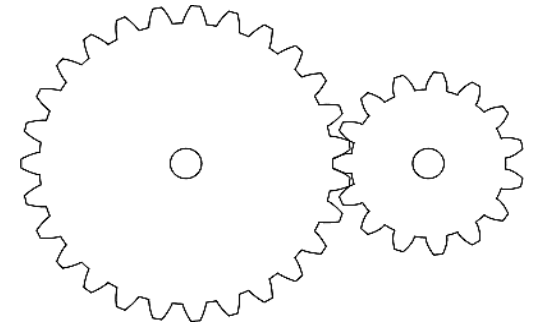
Manual budgeting and Rebudgeting give North an on campus budget

Verification

- 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

- 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

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

Rejected ISIRs

- 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

SIMPLE COMPLEX

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.