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.

**Sequence Number**

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.

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.

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

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

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.
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.

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

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

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.

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**
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.
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**

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

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.

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

38. Click the **Process ISIR** button to load the 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](https://shared-services-help.berkeley.edu/new_ticket/it)