
The ISIR Guide

2021-2022

U.S. Department of Education



Change History Table

The Change History table is updated each time *The ISIR Guide* is modified, providing a cumulative list of revisions made to the document.

When *The ISIR Guide* is modified, the footer is updated to include the revision date. For example, if a change is made to page 67 in December 2020, the footer on that page will show “Rev. 12/20.”

Date	Page	Changes/Notes
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Introduction

Overview

The ISIR Guide is designed to assist financial aid administrators (FAAs) with interpreting student information on the Institutional Student Information Record (ISIR) and making corrections. The ISIR contains all information reported on the Free Application for Federal Student Aid (FAFSA®) form, key processing results, and National Student Loan Data System (NSLDS) financial aid history. The term *ISIR* refers to all processed student information records that are sent electronically to institutions by the Central Processing System (CPS).

ISIRs are sent to schools through the Electronic Data Exchange (EDE), which is the U.S. Department of Education's (ED's) electronic service that enables schools to send data to and receive resulting processed data from the CPS and other Federal Student Aid systems. *The ISIR Guide* explains codes and flags that appear as FAA information on the ISIR.

Student Aid Reports (SARs) are the paper or electronic (eSAR) output documents that are sent to students or printed from the FAFSA on the Web and FAA Access to CPS Online Web sites. SARs and ISIRs contain the same processed student information in different formats. The SAR is explained in detail in Appendix C of this guide.

The 2021-2022 ISIR follows the question order of the FAFSA, and the remaining data elements are grouped with similar elements in a logical order that we refer to as "data blocks." After these data blocks—such as student demographic information, financial information, dependency determination questions, and parental information—filler spaces are included. When mid-cycle changes are needed for particular data elements, we use the filler spaces to add, remove, or revise those elements. As a result, the change affects only the existing filler blocks and not the entire record layout.

A complete version of the *EDE Technical Reference* is posted to ED's Information for Financial Aid Professionals (IFAP) Web site, located at ifap.ed.gov. It can be downloaded in portable document format (PDF).

You can use the table below to find more information about the 2021-2022 Federal Student Aid system changes and enhancements. The following guides are posted on the IFAP Web site:

Document	Type of Changes
<u>Summary of Changes for the Application Processing System Guide</u>	<p>This guide provides an overview of major application processing system updates, such as:</p> <ul style="list-style-type: none"> • Need Analysis Income Threshold Increase • Schedule 1 Question Changes <p>This guide also covers changes to the FAFSA.</p> <p>It covers changes to Federal Student Aid’s Web sites for students, such as:</p> <ul style="list-style-type: none"> • FAFSA on the Web • myStudentAid mobile app <p>It covers changes to Federal Student Aid’s Web sites for FAAs, such as:</p> <ul style="list-style-type: none"> • FAA Access to CPS Online (FAA Access) • CPS Web Applications Demo System <p>This guide also includes an application processing system schedule and a summary of changes to components of the CPS, such as:</p> <ul style="list-style-type: none"> • Database matches • CPS edits • Need analysis changes • Comment code changes • Changes to application output sent to students, such as the SAR and SAR Acknowledgement
<u>Electronic Data Exchange (EDE) Technical Reference</u>	<p>This technical reference includes general information about the EDE process, a summary of changes to the technical reference, descriptions of the electronic FAFSA and corrections process, information on sending and receiving electronic data, record layouts and processing codes used to send and receive electronic data, and information on printing an ISIR.</p>
<u>SAR Comment Codes and Text</u>	<p>This document includes the comment code numbers and text along with reject code SAR C code information, data match information, and resolution descriptions.</p>
<u>Software Cover Letters</u>	<p>The software cover letters describe changes and enhancements to specific releases of Federal Student Aid PC products, such as EDEExpress and Direct Loan (DL) Tools for Windows.</p>

Note: Throughout this guide, when we reference the FAFSA on the Web site, we are describing both the English and Spanish versions of the site unless otherwise noted. The functionality of the English and Spanish versions of FAFSA on the Web are the same; the only difference is the language used. Also throughout this guide, references to FAFSA on the Web pertain to the myStudentAid mobile application unless otherwise noted.

Processing Flow

The applicant data processing flow for generating ISIRs is the same in 2021-2022 as it was in 2020-2021.

The student starts by submitting a FAFSA. The information is processed through the CPS, and the results are returned to the student and institution. See the bullet point labeled “The Financial Aid Application” on the next page for filing options.

The charts on pages 7 through 9 show how information from a financial aid applicant flows through the system for the various types of applications and corrections and describe when an ISIR is generated. The major participants, documents, and records in the application process are listed below:

- **The U.S. Department of Education.**
- **The Student.** The student can apply for federal student aid under the following Title IV programs: Federal Pell Grant, Teacher Education Assistance for College and Higher Education (TEACH) Grant, Federal Supplemental Educational Opportunity Grant (FSEOG), Federal Work-Study, and William D. Ford Federal Direct Loan (Direct Loan) programs.
- **The FSA ID for Students and Parents.** The FSA ID is a username and password combination that is used to confirm a person’s identity and serves as a student’s or parent’s identifier to allow access to personal information in various ED systems. It also acts as a legally binding digital signature on some online forms. Because the FSA ID serves as an electronic signature and provides access to personal information, the FSA ID should not be created by anyone other than the owner of the ID. The FSA ID should not be shared with anyone, including FAAs. The FSA ID simplifies and expedites processing for an applicant and his or her parent.

Students and parents must create their own FSA IDs. The FSA ID is issued in real time so that the student or parent can use it immediately to authenticate with and retrieve data from the IRS and sign the FAFSA electronically, but the FSA ID cannot be used for anything else until the identifying information is sent to the Social Security Administration (SSA) and matched with that agency’s database. The Social Security Number (SSN), name, and date of birth submitted by the applicant or parent are transmitted for a match with the SSA. If the SSN, name, and date of birth are successfully matched (SSN Match Flag value of **4**), the applicant or parent can use the FSA ID to access a renewal FAFSA, view or print a SAR, make corrections, and access NSLDS data.

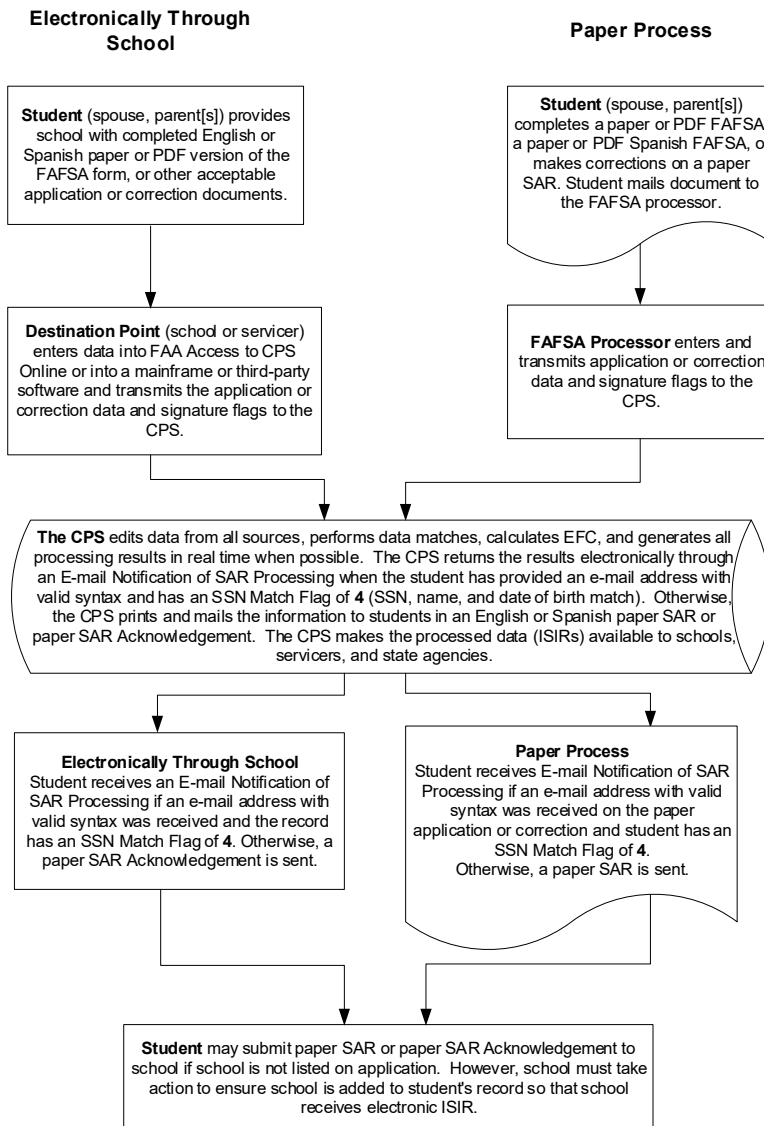
In the limited cases where the SSA match is unsuccessful, the FSA ID is disabled and, if the applicant provided an e-mail address, an e-mail is sent to notify the applicant that an FSA ID will not be issued. If the applicant used the temporary FSA ID to sign his or her FAFSA, the applicant is also sent a paper SAR requesting all required signatures. A SAR comment (comments 275 to 280) appears on the student’s SAR (and ISIR), indicating the specific results of the SSA match. Until a positive match (SSN Match Flag value of **4**) is received from the SSA, the FSA ID cannot be used to sign any documents or access Web sites that require the FSA ID.

- **The Financial Aid Application.** Different forms of the application are available for the student to apply for federal student aid. These include English and Spanish versions of the following:
 - FAFSA on the Web
 - myStudentAid mobile app (English only)
 - FAFSA PDF
 - Paper FAFSA
 - FAFSA on the Phone

The school can also submit an application for the student by completing an online FAFSA through FAA Access to CPS Online or by submitting an ASCII flat file through the Student Aid Internet Gateway (SAIG) in message class EAPS20IN.

- **The FAFSA Processor.** One organization serves as the data-entry processor for the 2021-2022 processing year under a contract with ED. The FAFSA processor receives paper applications, paper SAR corrections, and paper signature pages in the mail; performs document analysis to ensure that the data is acceptable; and handles missing or unacceptable responses. The processor images the application, enters the information from the application, and transmits the data and image electronically to the CPS.
- **The Central Processing System (CPS).** The CPS operates under a contract with ED to receive and process application and correction information. The CPS matches student records with other federal databases, such as the SSA and Department of Homeland Security, to confirm eligibility. The CPS also applies a series of compute edits to the application information to check for inconsistencies, contradictions, and missing data. During the compute process, the CPS uses the need analysis formula specified by law to calculate each applicant's Expected Family Contribution (EFC).
- **The Institutional Student Information Record (ISIR).** ISIRs are electronic records produced by the CPS that provide institutions with processed application and correction information. ISIRs can be sent to destination points (schools, servicers, and state agencies) daily or by request using FAA Access to CPS Online.
- **The Student Aid Report (SAR).** This document provides the student with processed application information. A student who provides an e-mail address on the FAFSA and has an SSN Match Flag value of 4 (SSN, name, and date of birth match) receives an e-mail notification that his or her SAR can be accessed electronically. For students who do not meet these criteria, the CPS prints the SAR and mails it directly to the address the student provided. The SAR is in English or Spanish, depending on the language used on the application or correction that generates the SAR.
- **The School.** "The school" refers to each postsecondary educational institution that the student listed on the financial aid application. The FAA at the school uses the processed information from the ISIR or SAR to determine the types and amount of federal student aid the applicant is eligible to receive. Schools and states can also use information from the ISIR or SAR to award their own financial aid.

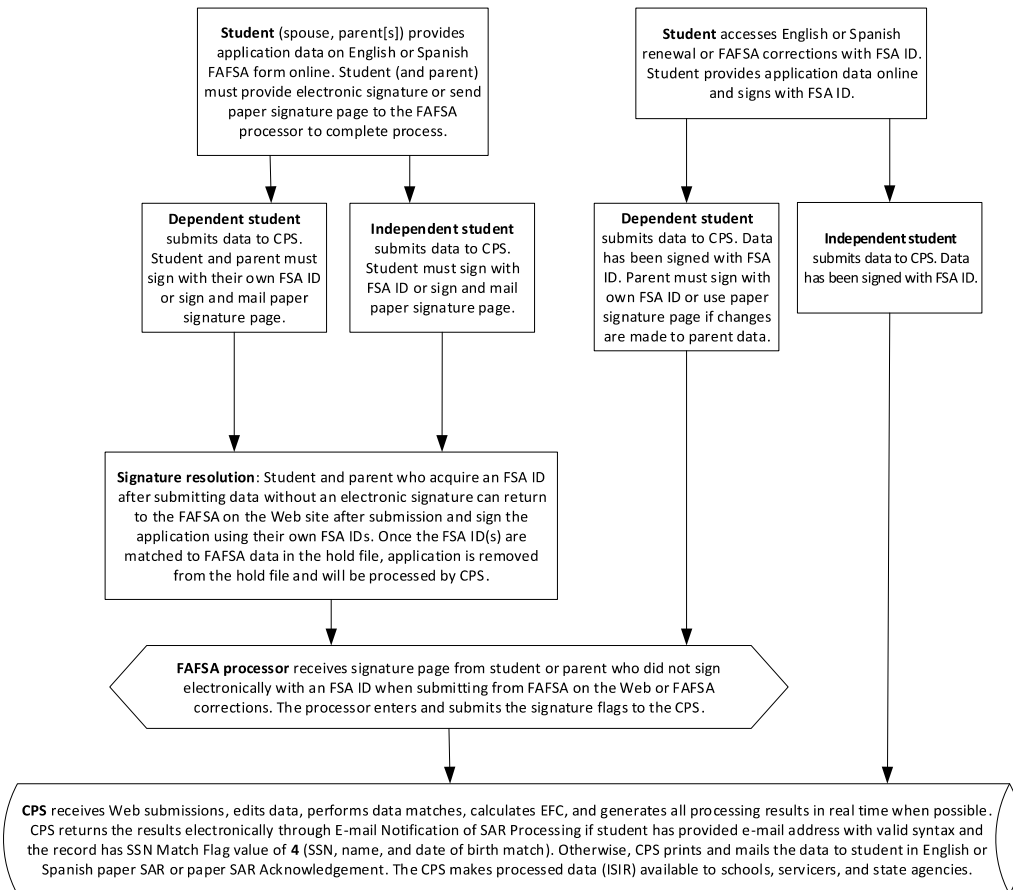
Federal Application Processing for Generating ISIR: Electronic and Paper



Federal Application Process to Generate an ISIR: Web

FAFSA on the Web Process (FSA ID optional*)

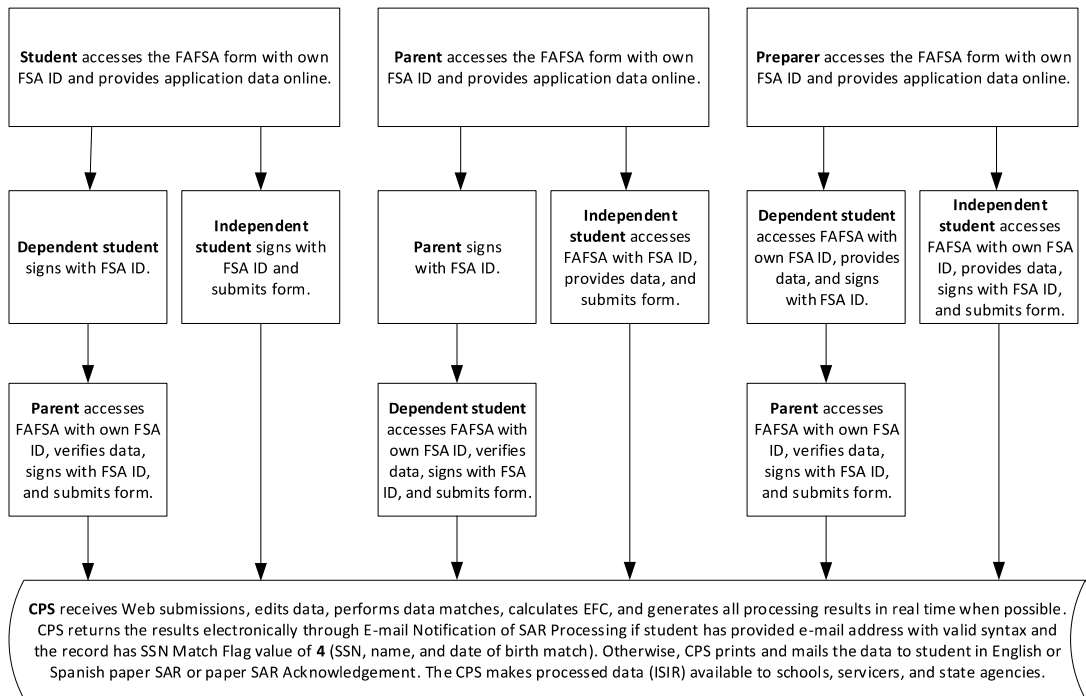
Renewal FAFSA and FAFSA Corrections Process (FSA ID required*)



* The FSA ID is an electronic signature. See "The Federal Student Aid FSA ID for Students and Parents" in the "Processing Flow" section earlier in this guide for more information on FSA IDs.

Federal Application Processing for Generating ISIR: Mobile Application

myStudentAid Mobile App Process (FSA ID required*)



* The FSA ID is an electronic signature. See "The Federal Student Aid FSA ID for Students and Parents" in the "Processing Flow" section earlier in this guide for more information on FSA IDs.

Transactions

A transaction is an interaction between the CPS and a financial aid applicant or a school that changes any of the data on a student's record. Each transaction results in a new ISIR and SAR and is identified by a two-digit transaction number (for example, 01, 02, or 03). A transaction may also be system-generated. For example, when a student's eligibility for federal student aid changes on NSLDS, the CPS automatically processes the application information and generates a new ISIR transaction without additional input from the student or from a school. These system-generated transactions are automatically sent (or "pushed") to the destination point in unique electronic message classes.

When application data for an award year first arrives at the CPS and is processed, the resulting report is called the "01" transaction. The student receives an E-mail Notification of SAR Processing or a paper SAR or SAR Acknowledgement, and the listed schools can receive ISIRs. State agencies can also receive the ISIR data.

If corrections are necessary, the student can make the corrections electronically through FAFSA on the Web. Alternatively, students who receive a paper SAR can make changes on the SAR and return it to the FAFSA processor to have the information processed. A school can submit corrections electronically through the SAIG or enter the corrections using the FAA Access to CPS Online Web site, even if the school did not submit the original application electronically. The corrections generate a new ISIR record that is identified as the "02" transaction.

To create a correction transaction, a change must be made to at least one data element. Examples of common corrections include an address correction or the addition or change of a school. The first correction transaction is labeled "02," and subsequent correction transactions are labeled "03," "04," and so forth. Identifying the correct transaction is important when communicating with the Common Origination and Disbursement (COD) System and when requesting duplicate SARs or making ISIR requests. If the number of transactions exceeds 30, subsequent transactions are rejected by the CPS for "too many transactions."

Highlights and Assumptions

Paper System Highlights and Assumptions

Students are instructed to review information on the SAR carefully for accuracy. SAR items requiring special attention are highlighted in **bold** type. The student and the FAA should pay careful attention to questions and responses that are highlighted.

During the edit process, the CPS applies logic that compares two or more pieces of information provided by the student. On the SAR, the CPS highlights information that is conflicting or missing and items that are questioned.

In certain instances, the application is rejected if the student's data is in conflict. For example, an independent student answers that he or she is not married but provides financial information for a spouse. The CPS rejects this application (Reject 11) and prints the questioned items in bold type on the SAR. In this situation, the student receives a SAR with arrows printed next to the questionable line items. The student is then required to correct them. The CPS does not calculate an EFC, because key financial information is conflicting.

In other situations, the CPS makes assumptions and does not reject the student's record. For example, a student reports that he or she is married and provides a spouse's income, but reports only one person in the household. In this case, the CPS assumes two people are in the household, highlights both questions and responses on the SAR, and calculates an EFC, as long as the record is not rejected for other reasons. Both the reported and the assumed values are printed; "ASSUMED" appears in parentheses next to the assumed response that was used in the EFC calculation.

The CPS most often makes assumptions when questions are left blank. After an answer is assumed, the assumed information is used throughout the subsequent edits and in the EFC calculation.

On the ISIR, EDEExpress prints the letter **h** to the left of the field title that was highlighted. EDEExpress prints an asterisk (*) to the left of the field title to indicate that the CPS made an assumption, and the assumed value is printed in place of the reported value.

Electronic System Highlights and Assumptions

All Federal Student Aid application systems used to submit application data contain certain edits that prompt users to resolve inconsistencies before sending the information to the CPS. These edits are contained in:

- FAA Access (application and corrections modules),
- FAFSA on the Web, and
- myStudentAid mobile app.

When inconsistencies or missing data would cause the record to be rejected at the CPS, the Web sites and mobile app do not allow the record to be submitted until information is changed or added. However, when these inconsistencies would cause an assumption to be made, the user is prompted to review and change the data, and the application can be submitted even if a change is not made. The ISIR data file that a school receives includes a flag for each highlighted field in positions 2314 to 2508, and the printed ISIR displays an **h** (for highlight) next to the items on which assumptions were made.

An FAA can override certain CPS rejects using FAA Access. If a record contains inconsistent or missing data that would result in the CPS rejecting the record, the FAA receives a message to correct or re-enter the information. If the data originally provided is correct, the FAA must re-enter the data. FAA Access sets and transmits a reject override code in the student's record, suppressing the edit, and the actual data is used instead of assumed values. For example, a student may have an unusually large number of family members. When the FAA re-enters the number of family members, FAA Access sets a reject override code in the student's record, which excludes the reject for an unusually large number of family members.

Similarly, an FAA can override certain CPS assumptions using FAA Access. If values were assumed when CPS processed the application, both the reported values and the assumed values display in FAA Access. Assumed values are marked with an asterisk (*) on the left side of the entry box. For example, if three people are in an independent student's household and three are in college, the CPS assumes one in college and displays a message. When the FAA re-enters the number in household and the number in college, an assumption override code is submitted with the data that suppresses the assumption.

Students who are using FAFSA on the Web or the myStudentAid mobile app can confirm in the same way the data they have entered. In response to the student's confirmation, the Web application sets the assumption override codes and most reject override codes.

ISIR Data

Overview

A school can automatically receive ISIRs for students who listed its Federal School Code on their applications or corrections. Institutions can send application and correction data from the school or through a servicer (both are called destination points) and receive processed student records (ISIRs) at the destination point.

A school can also access 2020-2021 and 2021-2022 ISIRs from the ISIR Datamart, the centralized location for all ISIR data generated by the CPS. Schools, state agencies, and other authorized users receive ISIRs from the datamart through the SAIG. For more information on the ISIR Datamart, see the *2021-2022 Electronic Data Exchange (EDE) Technical Reference*, available on the IFAP Web site.

Schools do not need to print paper ISIRs. However, so that you can refer to the codes that appear on the ISIR as we discuss them in this guide, Appendix D contains an example of the ISIR as it appears when printed using the EDEExpress for Windows software. The student's processed FAFSA information appears on the printout along with one or two pages for "NSLDS Financial Aid History," depending on the student's number of loans.

Cover Page

The first page of the ISIR contains the student's identifying information, including his or her name and mailing address, along with the transaction processing date, EFC, and, if applicable, C flag.

The remainder of the page contains the comments identified on the ISIR in the Comment Codes field for which float-in text is provided.

The bottom of the page includes the applicant's transaction ID or "trans ID," which consists of the applicant's original SSN, first two letters of the last name, and transaction number. For example:

XXX-XX-XXXX JO 01

XXX-XX-XXXX is the SSN; **JO** is the first two letters of the last name; and **01** is the transaction number.

FAFSA® Questions

The FAFSA questions are printed on pages 2 and 3 of the ISIR.

The student's processed application information appears on the printout in a two-column, two-page format with an abbreviated version of each FAFSA question on the left and the student's response on the right. Information is divided into sections like the FAFSA sections (for example, Step One, Step Two, and Step Three). Questions are not numbered individually, but each section heading identifies the range of FAFSA questions included.

New for 2021-2022: The layout of the ISIR printed from EDEExpress has changed. The data in each step is still grouped in two columns; however, all the data for Step One is in a linear layout at the top of page one, followed by Step Two below that, and so forth.

For information on changes to the 2021-2022 FAFSA, see the *Summary of Changes for the Application Processing System* guide, available in the fall. For information on changes to the ISIR printed from EDEExpress, see the *EDE Technical Reference*. Both documents are posted to the IFAP Web site.

Notes about Federal School Codes

- **SAR** – The SAR lists all the Federal School Codes included on a student's application or correction for a specific transaction.
- **FAA Access** – Only school information (Federal School Code, name, and housing plans) associated with your school code is displayed in FAA Correction Entry, Student Inquiry, ISIR Compare, and the eSAR (PDF and HTML). In addition, the Electronic Federal School Code Indicator and FAA Federal School Codes fields are *always* blank, and the Electronic Transaction Indicator (ETI) Flag field is set to the ETI flag of the school receiving the ISIR.

If the student has not included your school on a transaction, you can access the transaction in FAA Correction Entry by entering the student's Data Release Number (DRN), adding your school's Federal School Code, and selecting a corresponding housing plan. However, if the student has already selected ten schools on that transaction, FAA Access displays a message alerting you that you cannot add another school because the student already listed ten schools. If the student wants to add your school, he or she can replace one of the ten schools with your Federal School Code by submitting a FAFSA correction.

- **School ISIRs** – Schools receive one ISIR for each student who lists their Federal School Code on his or her application. Schools with main and branch campuses that are serviced by one TG number receive multiple ISIRs for one student if the applicant listed more than one Federal School Code associated with the TG number.

- **Servicer ISIRs** – Servicers for more than one Federal School Code selected by the student on a given transaction receive multiple ISIRs, and each ISIR has only one Federal School Code. The only difference between the ISIRs the servicer receives for that transaction is the Federal School Code. The ISIR is transmitted to the Destination Point (TG Number/Mailbox) of the main campus for the selected Federal School Code. In addition, the Electronic Federal School Code Indicator and FAA Federal School Codes fields are *always* blank, and the ETI Flag field is set to the ETI flag of the school receiving the ISIR.
- **State Agency ISIRs** – ISIRs sent to state agencies include all school and housing codes that the student listed on the FAFSA.

Asset Threshold Exceeded

The Student Asset Threshold Exceeded and Parent Asset Threshold Exceeded fields are printed among the answers to the FAFSA fields and follow the respective asset questions. These fields inform you if the applicant's or parents' assets exceeded the threshold, therefore requiring the applicant or parents to provide additional asset information by answering questions 40 to 42 (for independent applicants) or questions 88 to 90 (for parents of dependent applicants).

ISIR Value	Value Printed on ISIR	Description
Blank	Blank	Asset threshold filtering question was not presented or the applicant filed using a paper FAFSA. Alternatively, the FAA used EDE or FAA Access.
1	Yes	Asset threshold was exceeded; must provide additional asset information
2	No	Asset threshold was not exceeded; no additional asset information is needed

Dependency Status Results

On the top right column of the second page of the ISIR, the applicant's dependency status is displayed. The following dependency status codes are used:

ISIR Value and Value Printed on ISIR	Description
D	Dependent
I	Independent
X	Rejected Dependent
Y	Rejected Independent

Office Information

The “Office Information” section is located on the third page, beginning about mid-page, following the FAFSA questions. This section includes the following fields:

- Primary EFC Type
- Secondary EFC Type
- Transaction Processed Date
- Transaction Data Source/Type
- Reject Override Codes
- Assumption Override Codes
- Source of Correction
- Federal School Code Indicator

Primary and Secondary EFC Types

These codes tell an FAA which formula was used to calculate the EFC.

ISIR Value and Value Printed on ISIR	Description
1	Full Needs Test: dependent
2	Full Needs Test: independent without dependents
3	Full Needs Test: independent with dependents
4	Simplified Needs Test: dependent
5	Simplified Needs Test: independent without dependents
6	Simplified Needs Test: independent with dependents

Transaction Processed Date

The Transaction Processed Date field shows the date this transaction was processed at the CPS.

Transaction Data Source/Type Code

The Transaction Data Source/Type code identifies a FAFSA processor or other source of the transaction.

ISIR Value	Value Printed on ISIR
1A	Electronic Application
1C	Electronic – Correction Full SAR
2A	Web Student – Application
2B	Web Student – Application Spanish
2C	Web Student – Correction
2E	Web Student – EZ FAFSA
2F	Web Student – EZ FAFSA Spanish
2G	Web Student – EZ FAFSA Renewal Application
2H	Web Student – EZ FAFSA Renewal Spanish
2Q	Web Student – Spanish Correction
2R	Web Student – Renewal Application
2T	Web Student – Spanish Renewal Application
3A	Web FAA – Application
3C	Web FAA – Correction
3E	Web FAA – EZ FAFSA
3G	Web FAA – EZ FAFSA Renewal Application
3R	Web FAA – Renewal Application
4A	Paper – Application
4B	Paper – Application Spanish
4C	Paper – Correction
4J	Paper – Correction Application
4K	Paper – Correction Application Spanish
4Q	Paper – Spanish Correction
4U	PDF – Application
4V	PDF – Spanish Application
5D	CPS – Drug Abuse Hold Release
5L	CPS – Identity Hold Release
5M	CPS – DHS secondary confirmation
5N	CPS – NSLDS Postscreening
5P	CPS – Reprocessed Record
5S	CPS – CPS System-generated Signature
5W	CPS – SSA Death File Match
5X	DOD File Match

ISIR Value	Value Printed on ISIR
5Y	CPS – CPS Identity Verification
6A	FAFSA on the Phone
6B	Spanish FAFSA on the Phone
6C	FSAIC – Correction
6E	EZ FAFSA on the Phone
6F	Spanish EZ FAFSA on the Phone
7G	FAFSA4caster EZ FAFSA Renewal
7H	FAFSA4caster EZ FAFSA Spanish Renewal
7R	Web Student – FAFSA4caster Renewal App
7T	Web Student – FAFSA4caster Spanish Ren App
8A	mySA mobile app Application
8C	mySA mobile app Correction
8E	mySA mobile app EZ FAFSA
8G	mySA mobile app EZ FAFSA Renewal
8R	mySA mobile app Renewal App

Reject and Assumption Override Codes

The ISIR shows which Reject Override Codes and which Assumption Override Codes were set on the transaction. These override codes enable a student or an FAA to override certain rejects. FAAs can also override certain assumptions the CPS has made about a student’s data when the information appears to be inconsistent. If an override is set, “1” is printed on the ISIR. If no override is set, the field is blank.

ISIR Value and Value Printed on ISIR	Description
Blank	No override code set
1	Override code set

The FAFSA is intended to be a snapshot of the student and parent’s situation “as of the date” the application was completed. Students and parents should not change their answers to these questions unless the data originally submitted was incorrect as of the date the application was submitted.

Some exceptions to this rule exist. For example, FAAs have the discretion to ask a student to update marital status information for changes that occur after the initial application was submitted. If the FAA determines the update is necessary to address an inequity or to reflect more accurately the applicant’s ability to pay, the FAA can override the resulting marital status reject edit (Reject 21). Additional guidance for the appropriate use of the reject override is found in the *Federal Student Aid Handbook*.

Source of Correction

The Source of Correction Flag is a field that is set on each correction transaction and indicates the source of the correction.

ISIR Value	Value Printed on ISIR
A	Applicant
D	CPS
S	School

Federal School Code Indicator

The Federal School Code Indicator is always blank on ISIRs sent to schools and servicers.

On ISIRs sent to state agencies, the Federal School Code Indicator verifies the identity of the originating institution. The ISIR prints the school code associated with the Electronic Federal School Code Indicator field in ISIR position 2941.

FAA Information

The “FAA Information” section displays all relevant information about a student’s eligibility in one place. This section is printed on the third page of the ISIR, following the “Office Information” section. Descriptive labels are intended to help the FAA identify reject codes, match flags, intermediate values, and so forth.

The fields, codes, and flags found in the “FAA Information” section of the printed ISIR are identified below.

Date ISIR Received

The Date ISIR Received field indicates the date the ISIR was imported into the school’s EDExpress software.

Verification Flag

The Verification Flag indicates if a student has been selected for verification on any transaction. After the student is selected, he or she will remain selected for the current processing year. This data comes from the Student Is Selected for Verification field on the ISIR record layout.

ISIR Value and Value Printed on ISIR	Description
Y	Selected for verification
N	Not selected for verification
*	Selected for verification on a subsequent transaction

Professional Judgment Flag

This flag indicates the status of an EFC adjustment resulting from a professional judgment decision by an FAA.

ISIR Value	Value Printed on ISIR	Description
Blank	Blank	No EFC adjustment processed
1	Yes	EFC adjustment processed
2	Failed	EFC adjustment attempted but failed

When an FAA uses professional judgment to change a data item on the ISIR, only the school that made the change remains listed on the new ISIR transaction.

Transaction Receipt Date

This field shows the date the FAFSA processor or the CPS received the information that generated the transaction. The Application Receipt Date field for the first application has a fixed date. However, the Transaction Receipt Date field changes each time a new ISIR transaction is generated.

For example, a student mails a FAFSA that is received by the FAFSA processor on March 16, 2021. This first transaction SAR and ISIR have an Application Receipt Date and a Transaction Receipt Date of March 16, 2021. If the student then mails in a SAR with corrections, and it is received on April 20, the 02 transaction shows an Application Receipt Date of March 16, 2021, and a Transaction Receipt Date of April 20, 2021.

Reprocessed Reason Code

This code provides information about records that are reprocessed by the CPS for any reason. When the Transaction Data Source/Type code is set to **5P** (reprocessed record), this position will contain a two-digit number, beginning with **01** and incrementing each time a group of records is reprocessed. Check the IFAP Web site for announcements that define the reason associated with a particular two-digit number.

Processed Record Type

This code indicates the type of processed record.

ISIR Value and Value Printed on ISIR	Description
Blank	Original or Renewal Application (from any source)
C	Correction Application
H	Correction (from any source)

CPS Pushed ISIR

This field identifies transactions that are automatically sent (pushed) to schools. The information for this field comes from the CPS Pushed ISIR Flag field in the ISIR record layout. If the ISIR is pushed, the ISIR record layout contains **Y**, and the ISIR prints **Yes** for transactions meeting the pushed ISIR criteria. If the ISIR does not meet the criteria for a pushed ISIR, this field is blank, and nothing is printed next to the CPS Pushed ISIR label. The following are examples of transactions automatically pushed to the school:

- EFC Change Flag is set
- SAR C Flag changes between transactions
- Transaction is system-generated
- Reject Status Change Flag is set
- Verification Selection Change Flag is set

Rejects Met

Up to seven reject reason codes can be printed in this space. See Appendix A for the reject reason codes and the comment numbers associated with certain types of rejects.

Verification Tracking Flag

This field identifies the verification group with which the record is associated. You use this information to determine which fields require verification. Federal Student Aid provided revised verification guidance in [Dear Colleague Letter GEN-19-02](#), posted on the IFAP Web site. See the *Dear Colleague Letter* for FAFSA information that may require verification. The *Dear Colleague Letter* will also include acceptable documentation for verifying information ED selected for verification.

ISIR Value and Value Printed on ISIR	Description
V1	Standard verification
V2	For Federal Student Aid use only
V3	For Federal Student Aid use only
V4	Custom verification
V5	Aggregate verification
V6	Household resources verification
Blank	Not selected for verification

Dependency Override Indicator

This flag identifies a record that resulted from an application or correction on which an FAA made a dependency override request. On initial applications, overrides can be made in one direction only, from dependent to independent. Also, FAA Access enables an FAA to cancel a previous override.

ISIR Value	Value Printed on ISIR	Description
Blank	Blank	No FAA override requested
1	Yes	FAA changed dependency status from dependent to independent
2	Canceled	FAA canceled override
3	Failed	FAA override request failed
4	Homeless Youth Det	FAA determined applicant is a homeless youth

When an FAA performs a dependency override, only the school that submitted the override receives the new ISIR transaction.

ETI

The Electronic Transaction Indicator (ETI) Flag indicates whether the school receiving the ISIR submitted input to generate the transaction or did not generate the transaction but was listed on the record. It also indicates whether the type of ISIR is a daily, requested, or pushed ISIR. One character is printed on the ISIR.

The ETI is set to the ETI flag of the school receiving the ISIR.

ISIR Value and Value Printed on ISIR	Description
0	School generated the transaction and is an ISIR Daily school (applications) (IDAP)
1	School did not generate the transaction and is an ISIR Daily school (automatic) (IDSA)
2	School generated the transaction and is an ISIR Request school (ISRF)
3	School did not generate the transaction and is an ISIR Request school (applications) (ISRF)
4	School generated the transaction and is an ISIR Daily school; ISIR is CPS Pushed ISIR (corrections) (IGCO)
5	School did not generate the transaction and is an ISIR Daily school; ISIR is CPS Pushed ISIR (automatic) (IGSA)
6	School generated the transaction and is an ISIR Request school; ISIR is CPS Pushed ISIR (corrections) (IGCO)
7	School did not generate the transaction and is an ISIR Request school; ISIR is CPS Pushed ISIR (automatic) (IGSA)
8	School did not generate the transaction and is an ISIR Daily school; ISIR is CPS Pushed System-Generated ISIR (IGSG)
9	School did not generate the transaction and is an ISIR Request school; ISIR is CPS Pushed System-Generated ISIR (IGSG)
Blank	No destination code associated or school not participating

Correction # Applied To

This field only applies to transactions greater than 01 and indicates the prior transaction against which the correction was made. For example, if you are looking at a 03 transaction and the Correction # Applied To field is 02, it means that corrections were made against the 02 transaction to create the 03 transaction.

Application Receipt Date

This field shows the date the paper application was received by the FAFSA processor or the date an electronic FAFSA transmission was received by the CPS.

Pell Eligible Flag

The Pell Grant Eligibility Flag field in the ISIR record layout, alerts schools to an applicant's Pell Grant eligibility status. This data is found in the Pell Elig Flag field on the ISIR. The value **Y** confirms that a student's EFC and undergraduate or qualifying graduate status make him or her eligible for a Pell Grant and that the record has been included in the payment system database.

ISIR Value and Value Printed on ISIR	Description
Blank	Not eligible for a Pell Grant
Y	Eligible for a Pell Grant

If an undergraduate student incorrectly reported on the FAFSA that he or she will be a graduate student or has a bachelor's degree, this information **must** be corrected. Otherwise, he or she is not considered eligible for a Pell Grant, and the school is unable to receive Pell funds for that student.

Primary and Secondary EFCs/Alternate EFCs

The ISIR "FAA Information" section contains the Primary EFC and Secondary EFC. If a primary and a secondary EFC appear, the student qualified for the Simplified Needs Test (SNT) but also provided information about assets. Two calculations were performed, producing the primary EFC (asset information was not included in the calculation) and the secondary EFC (asset information was included in a full-data calculation). If only a Primary EFC appears, the student

- did not meet the SNT criteria (and only the full-data calculation was done) or
- met the SNT criteria and provided no asset information or incomplete or inconsistent asset information (and only one calculation could be performed).

The figures printed for each of the 12 months represent alternate EFCs that an FAA must use to award aid—other than a Federal Pell Grant—for an academic year that is less than or greater than nine months. For dependent students, the alternate EFCs are calculated by the CPS according to a formula prescribed by Congress. For independent students in an enrollment period of less than nine months, the EFC is prorated.

Intermediate Values

These abbreviations represent the intermediate steps used in calculating the EFC. They show the components of the need analysis formula, such as the employment allowance or parents' contribution from assets. These components are defined by Congress. The values can be useful to FAAs in performing recalculations or in making professional judgment adjustments to data items. The intermediate values are identified as follows:

ISIR Field Label	Description
TI	Total Income
ATI	Allowances against Total Income
STX	State and Other Tax Allowance
EA	Employment Allowance
IPA	Income Protection Allowance
AI	Available Income
CAI	Contribution from Available Income (Independent Student)
DNW	Discretionary Net Worth
NW	Net Worth
APA	Education Savings and Asset Protection Allowance
PCA	Parents' Contribution from Assets
AAI	Adjusted Available Income
TSC	Total Student's Contribution
TPC	Total Parents' Contribution
PC	Parents' Contribution
STI	Student's Total Income
SATI	Student's Allowance against Total Income
SIC	Dependent Student's Income Contribution
SDNW	Student's Discretionary Net Worth
SCA	Dependent Student's Contribution from Assets
FTI	Fiscal Operations Report and Application to Participate (FISAP) Total Income

More information on the need analysis formula and methodology for calculating the EFC is available in the *Federal Student Aid Handbook, Volume 1: Student Eligibility* and *2021-2022 EFC Formula Guide* located on the IFAP Web site.

IRS Data Flags

IRS Request Flags

The student and parent IRS request flags on the ISIR help you determine if an applicant was eligible for the IRS data retrieval process, if data was retrieved from the IRS, and if the data from the IRS was modified. The IRS request flag is different from the IRS display flag (described later in the guide), which informs the school if the student or parent was presented with the IRS Data Retrieval Tool (DRT), and, if not, the reason it was not displayed.

ISIR Value and Value Printed on ISIR	Description
Blank	IRS DRT not available in the application method used by the student (for example, paper FAFSA, EDE, or FAA Access)
00	Not eligible to use the IRS DRT and was therefore not presented with the option to use it in FAFSA on the Web
01	Presented with the option to use the IRS DRT in FAFSA on the Web and elected to use it, but did not transfer IRS data into the FAFSA
02	IRS data was transferred from the IRS and was not changed by the user prior to submission of an application or correction
03	IRS data was transferred from the IRS and changed by the user prior to submission of an application or correction
04	IRS data was transferred from the IRS and then changed by the user on a subsequent transaction
05	Presented with the option to use the IRS DRT in FAFSA on the Web, but did not elect to use it
06	IRS data was transferred from the IRS, but a subsequent change made the student or parent ineligible to use the IRS DRT
07	IRS data was transferred from IRS, but the IRS indicated that an amended tax return was filed

IRS Display Flags

This flag informs the school whether the student or parent was presented with the IRS Data Retrieval Tool, and, if not, the reason it was not displayed. The IRS display flag is different from the IRS request flag, which describes what happens after the student or parent is presented with the IRS DRT.

New for 2021-2022: We updated the year reference in **D** for both the student and parent IRS Display Flag fields.

Values for the Student IRS Display Flag are as follows:

ISIR Value and Value Printed on ISIR	Description
A	Skipped the income and asset questions – IRS DRT was not displayed
B	IRS DRT was displayed to student
C	Tax return filing status not equal to “Already completed” – IRS DRT was not displayed
D	Marital status date greater than or equal to January 2020 – IRS DRT was not displayed
E	First three digits of SSN are 666 – IRS DRT was not displayed
J	Filed a Puerto Rican or foreign tax return – IRS DRT was not displayed
K	Married and tax return filing status is “Married–Filed Separate Return” – IRS DRT was not displayed
L	Married and tax return filing status is “Head of Household” – IRS DRT was not displayed
M	Conflict between the marital status and tax return filing status – IRS DRT was not displayed
Blank	IRS DRT not available (for example, paper, EDE, or FAA Access)

Values for the Parent IRS Display Flag are as follows:

ISIR Value and Value Printed on ISIR	Description
A	Dependent student has special circumstances, or independent student skipped the parent questions – IRS DRT was not displayed
B	IRS DRT was displayed to parent
C	Tax return filing status not equal to “Already completed” – IRS DRT was not displayed
D	Marital status date greater than or equal to January 2020 – IRS DRT was not displayed
E	First three digits of SSN are 666 – IRS DRT was not displayed
F	Non-married parent or both married parents entered all zeroes in SSN – IRS DRT was not displayed
G	Neither married parent entered a valid SSN – IRS DRT was not displayed
J	Parent filed a Puerto Rican or foreign tax return – IRS DRT was not displayed
K	Parents are married, and tax return filing status is “Married–Filed Separate Return” – IRS DRT was not displayed
L	Parents are married, and tax return filing status is “Head of Household” – IRS DRT was not displayed
M	Conflict between the parents’ marital status and tax return filing status – IRS DRT was not displayed
N	Parents’ marital status is “Unmarried and both parents living together” – IRS DRT was not displayed
Blank	IRS DRT not available (for example, paper, EDE, or FAA Access)

IRS Data Field Flags

The IRS data field flags indicate if the IRS DRT was used, if the data in the field was retrieved from the IRS Web site, and whether it was later changed. Fields for both the student and parent questions are printed on the ISIR.

New For 2021-2022: The new Filed Schedule 1 data field flags for the student and parent are printed in this section.

ISIR Label	ISIR Record Layout Field Name
IRA Deductions	IRS IRA Payments Data Field Flag
Tax Exempt Int. Income	IRS Interest Income Data Field Flag
Untaxed IRA Dist. & Pension Portions	IRS Untaxed Portions of IRA Distributions and Pensions Data Field Flag
Filed Schedule 1?	IRS Filed Schedule 1 Data Field Flag
AGI	IRS Adjusted Gross Income (AGI) Data Field Flag
Taxes Paid	IRS Federal Income Tax (FIT) Data Field Flag
Tax Return Type	IRS Type of Tax Return Data Field Flag
Return Filing Status	IRS Tax Return Filing Status Data Field Flag
Education Credits	IRS Education Credits Data Field Flag

The valid content for all the student and parent IRS Data Field Flags listed above follows.

ISIR Value and Value Printed on ISIR	Description
0	IRS data not transferred (default value)
1	IRS data was transferred and not changed by user
2	IRS data was transferred and changed by user to a different value
3	IRS Request flag is equal to 02, 03, 04, or 07, and field has been corrected on this transaction
4	IRS Request flag is equal to 02, 03, 04, or 07, and field has been corrected on a previous transaction
Blank	IRS Data Retrieval Tool was not used

CFH Indicator

The Children of Fallen Heroes (CFH) indicator identifies an applicant who meets the criteria for the Children of Fallen Heroes Scholarship Act. This scholarship requires Pell eligibility for children of public safety officers who die in the line of duty. Once the applicant is identified as eligible, this flag will always be set to **Y** (Yes) and will carry forward on subsequent transactions and subsequent years. The data for this field comes from the Children of Fallen Heroes Indicator field in the ISIR record layout.

ISIR Value and Value Printed on ISIR	Description
Blank	No determination made for Children of Fallen Heroes Scholarship
1	Yes, eligible for Children of Fallen Heroes Scholarship
2	No, ineligible for Children of Fallen Heroes Scholarship

Duplicate SSN Flag

This flag is set to **Yes** if another record was found in the CPS database with the same SSN but a different last name. The data for this field comes from the Duplicate SSN Indicator field in the ISIR record layout.

ISIR Value	Value Printed on ISIR	Description
Blank	Blank	No other records with the same SSN and different last name
Y	Yes	Another record is found on the CPS database with the same SSN but a different last name

Address Only Correction

If a mailing or e-mail address modification is the only change to a record, this field contains data.

Note: Corrections to the Signed By and Special Handle fields can be included with an Address Only change. The Address Only Change Flag field on the ISIR contains one of the following values.

ISIR Value and Value Printed on ISIR	Description
Blank	No change
1	Student's mailing address corrected
2	Student's e-mail address corrected
3	Parent's e-mail address corrected
4	More than one of the above corrected

SAR C Change Flag

If the SAR C Flag is set or removed from the transaction being corrected, this change flag field contains the value Y.

ISIR Value and Value Printed on ISIR	Description
Blank	SAR C Flag has not changed
Y	SAR C Flag has changed

High School Flag

This flag is set to **Y** if the high school information reported on the application is not found on the high school file.

ISIR Value and Value Printed on ISIR	Description
Blank	Reported High School was found on valid high school file
Y	Reported High School was not found on valid high school file

Rejected Status Change Flag

If the reject status on a transaction changes as a result of that status being corrected, this field is set to **Y**.

ISIR Value and Value Printed on ISIR	Description
Blank	No change to reject status
Y	Reject status has changed

Verification Selection Flag

The Verification Selection Flag identifies a correction transaction that is selected for verification for the first time, if any non-rejected prior transaction was not selected for verification.

This field is always blank on an initial transaction that is not rejected. This flag is set to **Y** only on the transaction that is initially selected for verification. This flag is set to **C** only on the transaction that causes an applicant to move from one verification tracking group to another. If the Verification Selection Flag field is set from the previous transaction, this field is blank. The data for this field comes from the Verification Selection Change Flag field in the ISIR record layout.

ISIR Value and Value Printed on ISIR	Description
Blank	Verification selection status has not changed from transaction being corrected
Y	Transaction is now selected for verification when the transaction being corrected was not selected
C	Change in verification tracking group

EFC Change Flag

This flag indicates whether the EFC has increased or decreased between a correction transaction and the transaction against which the correction was made.

ISIR Value	Value Printed on ISIR	Description
Blank	No change	No change in EFC value
1	Increase	EFC increased
2	Decrease	EFC decreased

Special Circumstance Flag

The Special Circumstances Flag identifies a transaction that was filed on the Web by a dependent applicant who believes he or she has a special circumstance that prevents him or her from providing parental information.

ISIR Value and Value Printed on ISIR	Description
Blank	Flag is not set
1	Dependent record submitted without parental data
2	Correction made to parental data
3	Unaccompanied homeless individual Dependent student answered “No” to all three homelessness dependency status questions and indicated he or she is unaccompanied and homeless or at risk of homelessness
4	Dependent student who only wants to be considered for unsubsidized loans

A value of **1**, **3**, or **4** in this field identifies an applicant who did not provide parental information. The ISIR is rejected, and no EFC is calculated for the transaction.

A student who answers “Yes” to any of the homelessness dependency status questions is automatically determined to be independent.

- If the student’s application has the Special Circumstances Flag field set to **1**, collect appropriate documentation and, if the applicant qualifies, set the Dependency Override Indicator to “1.” If not, the applicant needs to provide parental information.
- If the student’s application has the Special Circumstances Flag field set to **3**, collect appropriate documentation and, if the applicant qualifies, set the Dependency Override Indicator to “4” for homeless youth determination. If not, the applicant needs to provide parental information.
- If the student’s application has the Special Circumstances Flag field set to **4**, collect appropriate documentation if warranted so you can award unsubsidized loans.
In these situations, do **not** set and submit a dependency override, because doing so would trigger the CPS to treat the dependent student as independent and could lead to misawarding of aid.
- When an applicant provides parental information on a subsequent transaction, the Special Circumstances Flag field contains a value of **2**.

Auto Zero EFC Flag

An applicant who meets certain federal benefits, dislocated worker, tax filing, and income criteria qualifies automatically for an EFC amount of **0**. When these criteria are met, the CPS assigns a **0** EFC and does not perform a full calculation except for Total Income (TI), Student's Total Income (STI), and FISAP Total Income (FTI). (Only these three intermediate values will appear in the "FAA Information" section.) This information is found in the Automatic Zero EFC Indicator field on the ISIR.

ISIR Value	Value Printed on ISIR	Description
Blank	Blank	Does not meet criteria
Y	Yes	Student meets automatic zero EFC criteria

SNT Flag

This flag provides information about the Simplified Needs Test (SNT), which excludes asset information from the EFC calculation. The SNT is performed if an applicant meets certain federal benefits, dislocated worker, tax filing status, and income criteria.

ISIR Value	Value Printed on ISIR	Description
Y	Yes	SNT was met
N	No	SNT was not met or could not be determined

Match Flags

The "Match Flags" section of the ISIR shows alphabetic or numeric codes that are the result of matching the applicant record with databases containing information that can affect eligibility. The match flags appear in the "FAA Information" section and are described on the following pages.

The *2021-2022 SAR Comment Codes and Text* guide, which will be posted on the IFAP Web site in the summer of 2020, contains a detailed discussion about the flags and codes.

SSN Match Flag

The SSN Match Flag is the result of the student's SSN match with the Social Security Administration (SSA).

ISIR Value and Value Printed on ISIR	Description
Blank	Record not sent to match or match not performed
1	No match on SSN
2	SSN and name match, but no match on date of birth
3	SSN match, no match on name
4	SSN, name, and date of birth match
5	SSN, name, and date of birth match but includes a date of death
6	SSN was not verified
8	Record was not sent to the SSA

SSA Match Flag

The SSA match flag is the result of the U.S. citizenship match with the Social Security Administration. The data for this field comes from the SSA Citizenship Flag field in the ISIR record layout.

ISIR Value and Value Printed on ISIR	Description
Blank	Domestic born (U.S. citizen) if SSN Match Flag equals 4 (SSN, name, and date of birth match), or No match conducted if SSN Match Flag equals 8 (Record not sent to the SSA) or Blank (Match not performed)
A	U.S. citizen
B	Legal alien, eligible to work
C	Legal alien, not eligible to work
D	Other
E	Alien, student restricted, work authorized
F	Conditionally legalized alien
N	Unable to confirm citizenship due to no match on SSN, name, or date of birth
*	Foreign

DHS Match Flag

The DHS Match Flag is the result of the Department of Homeland Security (DHS) match. An applicant record must meet specific criteria and contain an Alien Registration Number (ARN) for the DHS match. The student's immigration status is returned to the CPS, where eligible noncitizenship status is then determined.

ISIR Value and Value Printed on ISIR	Description
Blank	Record not sent to DHS or match not performed
Y	Citizenship confirmed
N	Citizenship not confirmed

SS Match Flag

The SS match flag is the result of the Selective Service (SS) System match. An applicant record that meets specific criteria is sent to Selective Service to confirm the applicant's registration. An applicant's gender must be male in order to be sent for this match. The data for this field comes from the Selective Service Match Flag field in the ISIR record layout.

ISIR Value and Value Printed on ISIR	Description
Blank	Record not sent to the Selective Service or match not performed
N	Registration status not confirmed
T	Temporarily exempt
Y	Registration status confirmed

NSLDS Match Flag

The NSLDS match flag is the result of the match with NSLDS to identify potential default or overpayment issues in the applicant's financial aid history.

ISIR Value and Value Printed on ISIR	Description
Blank	Match not performed
1	Student not in default or overpayment
2	Default
3	Overpayment
4	Default and overpayment
7	Match, but no data provided
8	Record not sent to NSLDS

VA Match Flag

The VA match flag is the result of the match with Veterans Affairs (VA) to confirm the applicant is a veteran. An applicant record that meets specific criteria, including a self-reported yes to the “Are you a Veteran” question, is sent to VA.

ISIR Value and Value Printed on ISIR	Description
Blank	Match not performed
1	Veteran status confirmed
2	Record found on VA database but not a qualifying veteran
3	Record not found on VA database
4	Record found on VA database but applicant on active duty
8	Record not sent to VA

DHS Sec. Conf. Match Flag

The Secondary DHS Confirmation Match Flag is the result of DHS’s confirmation that an applicant failed primary confirmation of eligible noncitizen immigration status.

ISIR Value and Value Printed on ISIR	Description
Blank	N/A
C	DHS has not yet confirmed eligible noncitizen status
N	DHS did not confirm eligible noncitizen status
P	Pending results of secondary confirmation
X	DHS did not have enough information to confirm eligible noncitizen status
Y	Citizenship status confirmed by DHS

Parent 1 SSN and Parent 2 SSN Match Flags

The SSN match flag is the result of Parent 1's or Parent 2's SSN match with the SSA.

ISIR Value and Value Printed on ISIR	Description
Blank	Match not performed
1	No match on SSN
2	SSN and name match, no match on date of birth
3	SSN match, no match on name
4	SSN, name, and date of birth match
5	SSN, name, date of birth match with date of death
6	SSN not verified
8	Record not sent to SSA

DOD Match Flag

The DOD Match Flag is the result of the match with the Department of Defense (DoD) to identify an applicant whose parent was a member of the U.S. Armed Forces who died as a result of service in Iraq or Afghanistan after September 11, 2001.

ISIR Value and Value Printed on ISIR	Description
Blank	No match
Y	Applicant's SSN included in the DoD Match file

Notes about the DOD Match Flag and Parent's Date of Death: The DOD match flag results and parent's date of death are included in the ISIR file. For sensitivity reasons, we limit the way this information is printed:

- The DOD Match Flag is printed with the other match flag information in the "FAA Information" section of the ISIR.
- The parent's date of death is not printed on the EDEXpress ISIR report.
- The DOD Match Flag results and the parent's date of death are never printed on the SAR.
- The DOD Match Flag and parent's date of death are printed on the FAA version of the eSAR.

In addition, each time the DoD updates its database, the CPS compares the most recent transaction for all non-matched student records with the DoD database. If a student's record was recently added to the DoD file, the CPS sends the following:

- System-generated ISIR transaction to the school that includes comment code 298, a DOD Match Flag value of **Y**, date of parent's death, and the Transaction Data Source/Type field code of **5X**.
- System-generated SAR to the student that includes comment code 298 stating, "This SAR has been produced due to a possible change in your eligibility for federal student aid. Please contact your financial aid office for more information."
- Personalized letter to the student explaining a possible increase in eligibility for Title IV aid.

FAAs need the Parent's Date of Death to confirm that applicants who were over age 23 on the date of their parent's or guardian's death were enrolled in college on that date. The FAA can view this data in:

- the ISIR file,
- FAA Access to CPS Online, and
- the FAA Information View dialog box in the EDEExpress 2021-2022 software.

Students with a positive DoD match may be eligible for additional Title IV aid for the award year, including a maximum Pell Grant award or an Iraq and Afghanistan Service Grant. As stated earlier, FAAs must assess each student with a positive DoD match and adjust the student's aid package as necessary.

Note: When submitting award requests to the Common Origination and Disbursement (COD) System, you must pay on an ISIR transaction with the DOD Match Flag set to **Y** in order for the award to be accepted.

A [November 6, 2009 Electronic Announcement](#) provided detailed information on the steps you need to take for students with a positive DoD match and aid eligibility. A [May 13, 2010 Electronic Announcement](#) and [June 5, 2018 Electronic Announcement](#) provide additional guidance.

DHS Verification #

The data for this field comes from the DHS Verification Number field in the ISIR record layout. The U.S. Department of Homeland Security (DHS) populates this field and returns it to CPS during the matching process. It is used to identify students requiring third-step verification in the Systematic Alien Verification for Entitlements (SAVE) system. As described in the [February 26, 2018 Electronic Announcement](#), ED has given Title IV schools access to the DHS SAVE system. This access replaced the paper and mail-in form G-845 process on May 1, 2018. It allows schools to submit third-step verification requests and receive immigration document status confirmation electronically to determine eligible noncitizenship status. For more information on how to access and navigate the SAVE system, see “SAVE Instructions for U.S. Department of Education (School) Users” at: ifap.ed.gov/dhs-save-eligible-noncitizen-dhs-save-electronic-third-step-verification.

SS Registration Flag

The SS Registration Flag field displays the result of the applicant’s request to be registered with the Selective Service System. If an applicant meets specific criteria (including male gender and between the age of 17 ½ and 26), certain data from his record is sent to Selective Service so he can be registered. The data for this field comes from the Selective Service Registration Flag field in the ISIR record layout.

ISIR Value and Value Printed on ISIR	Description
Blank	Record not sent to Selective Service or match not performed
N	Registration not completed
T	Temporarily exempt
Y	Registration completed

NSLDS Transaction Number

The NSLDS Transaction Number field indicates the number of the last transaction on which the student’s NSLDS data changed. It tells the FAA to review the NSLDS information on a particular transaction.

NSLDS Database Results Flag

The NSLDS Database Results Flag field shows the result of the match with NSLDS and informs the FAA whether the applicant was found in the NSLDS database.

ISIR Value and Value Printed on ISIR	Description
Blank	Record not sent to NSLDS, and all NSLDS fields will be blank
1	Match was found, and NSLDS data sent to CPS
2	SSN match but name or DOB did not match, and no data sent
3	SSN not found in NSLDS, no match
4	Match was found but no relevant NSLDS data to send to the CPS
5	Real-time transaction not sent to NSLDS

Comments

The last line in the “FAA Information” section shows all the codes for comments generated on the record. FAAs can review the comment codes without reading every SAR comment to find those that may require action. Up to 20 comment codes can be printed.

The EDEExpress software prints comment text if the option is selected. Certain comment codes (047, 050, 112, 149, 158, 159, 170, and 171) are included in the ISIR file, but the corresponding text is not included on the ISIR printed from EDEExpress. The space available for these comments is used to print the variable text on the SAR. All comment codes and text used in 2021-2022 are provided in the *2021-2022 SAR Comment Codes and Text* guide, to be posted in the summer of 2020 on the IFAP Web site.

NSLDS Financial Aid History

FAAs can view limited NSLDS information on the ISIR or by accessing the FAA Access to CPS Online Web site. Complete student financial aid history information is available at the NSLDS Professional Access Web site, located at nslsfp.ed.gov.

The “NSLDS Financial Aid History” section displays the NSLDS information included in the ISIR file. Descriptive labels are intended to help the FAA identify the data. Below are descriptions of the data appearing in the “NSLDS Financial Aid History” section of the printed ISIR format.

New for 2021-2022: The NSLDS pages have been reformatted to print landscape. Fields have been moved on the pages to give the layout a cleaner look.

Flags (Upper Section)

At the top of the “NSLDS Financial Aid History” section, the loan status change flags appear next to the corresponding labels. If the number sign (#) appears to the right of the label, under the “Changed” column, the status has changed.

Discharged Loan Flag

The Discharged Loan Flag field reflects the status of any loan discharged due to disability or death. If this flag contains a value other than N, the C Flag is set on the SAR/ISIR, and a comment is given.

ISIR Value and Value Printed on ISIR	Description
C	Conditional discharge
D	Death
M	Multiple codes
N	None
P	Permanent discharge
R	Reaffirmed

Fraud Loans Flag

The Fraud Loans flag field indicates whether any loans or overpayments are flagged for potential fraud status. Appendix B includes a chart for 2021-2022 loan status codes and eligibility.

Defaulted Loans Flag

The Defaulted Loans flag field indicates whether any loans are in a defaulted status. Appendix B includes a chart for 2021-2022 loan status codes and eligibility.

Loan Sat. Repayment Flag

The Loan Satisfactory Repayment flag field at the top of the “Financial Aid History” section indicates whether the student has made satisfactory repayment arrangements with the loan servicer. The field displays the value **Y** for “Yes” or **N** for “No.”

Active Bankruptcy Flag

The Active Bankruptcy flag field at the top of the “Financial Aid History” section shows whether the student has an active bankruptcy case pending resolution. The field displays the value **Y** for “Yes” or **N** for “No.”

TEACH Grant Loan Conversion Flag

The TEACH Loan field flag at the top of the “Financial Aid History” section indicates whether a TEACH Grant has been converted into a loan. The field displays the value **Y** for “Yes” or **N** for “No.” The data for this field comes from the NSLDS TEACH Grant Loan Conversion Flag field in the ISIR record layout.

Note: The status changes reported on a 2021-2022 ISIR may affect a student’s eligibility for payments during the 2020-2021 award year.

If the school has disbursed funds to a student who is found ineligible, it must contact the student to arrange for repayment. If the student has received a Federal Direct Loan, the school must notify the appropriate Federal Loan Servicer.

Unusual Enrollment History Flag

This field reports the result of edits performed by NSLDS to identify records with unusual enrollment history. The following values may appear in the Unusual Enrollment History Flag field:

ISIR Value and Value Printed on ISIR	Description
1	For Federal Student Aid use only
2	Possible enrollment pattern problem, school may need to resolve
3	Questionable enrollment pattern, school must resolve
N	Enrollment pattern not unusual, no school action required
Blank	Record not sent for match

Postscreening Reason Codes

Up to three Postscreening Reason Codes can be sent on the same ISIR. The codes listed in the NSLDS Post Screening Reason field help schools identify students whose eligibility for federal student aid may have changed since the last SAR/ISIR transaction. To find cases where a student's eligibility status has changed, NSLDS scans its database weekly.

ISIR Value and Printed on ISIR	Description
Blank	Not an NSLDS postscreening transaction
01	The student entered default on a Title IV loan that was previously not in default
02	Became obligated for a new overpayment of a Title IV grant or loan
03	Cleared a previously reported default of a Title IV loan
04	Cleared an overpayment obligation on a previously reported Title IV grant or loan
05	Direct Loan Master Promissory Note (MPN) status change (Stafford)
06	A loan was discharged due to disability
07	A loan went out of disability discharged status
08	Student has a loan for a closed school
09	Student has exceeded subsidized aggregate loan limit
10	Student has exceeded combined aggregate loan limit
11	Exceeding subsidized loan limit resolved
12	Exceeding combined loan limit resolved
13	For Federal Student Aid use only
14	Loan entered active bankruptcy
15	Direct Loan PLUS MPN status change
16	Graduate Direct Loan PLUS MPN status change
17	A fraud conviction was added to the student's record
18	A fraud conviction on the student's record was cleared
19	TEACH Grant was converted to a loan
20	Pell eligible and met or exceeded Pell lifetime limit
21	No longer meeting or exceeding Pell lifetime limit
22	Pell eligible and close to Pell lifetime limit
23	No longer close to Pell lifetime limit

ISIR Value and Printed on ISIR	Description
24	Unusual enrollment history status change
25	Subsidized Usage Limit Applies Flag field status change
26	Confirmed loan subsidy status change
27	Decrease in subsidized usage period
99	The “Other” category includes NSLDS requests for individual reprocessing, NSLDS error reprocessing, etc.

In most postscreening situations, the CPS generates a new SAR/ISIR transaction that includes the changed information as part of the “NSLDS Financial Aid History” section. Students with an SSN Match Flag value of **4** (SSN, name, and date of birth match) and a valid e-mail address receive an E-mail Notification of SAR Processing instead of a paper SAR for system-generated transactions. The processed ISIRs are returned to the school in the IGSG20OP message class, and FAAs can identify these transactions when both of the following are true:

- CPS Pushed ISIR Flag equals **Y**
- Transaction Data Source/Type Code equals **5N** (NSLDS Postscreening)

A comment is printed on the output document (SAR/ISIR) informing the student and the school that the record needs to be reviewed because a change was made to the record that could affect the student’s eligibility for Title IV aid.

Postscreened ISIR transactions meet the criteria of a pushed ISIR and are automatically returned to the school, even if the school did not request the ISIR. Postscreening Reason Codes are included in the top area of the “Financial Aid History” section. If the transaction is system-generated because of postscreening, a numeric value appears in this field. Values **01** through **27** correspond to the situations described previously, and a code of **99** is used for any other data changes that generate the transaction. Schools must act on the updated information they receive regarding a change in a student’s eligibility for Title IV aid and must ensure that a student remains eligible for payment; otherwise, the school is liable for improperly disbursed funds.

Aid Type Summary

The “Aid Type Summary” section includes information for the Pell Grant, TEACH Grant, Iraq and Afghanistan Service Grant, FSEOG, and Perkins Loan that appear on the ISIR. The following fields display in this section:

Overpayment Flags

The following values appear in the Overpayment Flag fields for Pell Grant, TEACH Grant, Iraq and Afghanistan Service Grant, FSEOG, and Perkins Loan that appear on the ISIR:

ISIR Value and Value Printed on ISIR	Description
D	Deferred
N	N/A
S	Satisfactory payment arrangements
F	Fraud
W	Waived
Y	Overpayment exists

Contact

The Contact field for each Overpayment Flag displays a school code (OPE-ID) or ED Debt Collection Service Region code. “N/A” is displayed when no overpayment exists, and “Access NSLDS” is displayed when the ISIR Contact Value equals Y, because more than one overpayment exists for a specific aid type.

LEU %

The NSLDS Pell Lifetime Eligibility Used (LEU) field provides the percentage of the total Pell Grant lifetime eligibility used by the applicant. This percentage is printed on the ISIR in the format 9999.999%.

Lifetime Limit Flag

The NSLDS Pell Lifetime Limit Flag identifies whether an applicant is close to or exceeding his or her total Pell Grant eligibility limit. Valid values are:

ISIR Value and Value Printed on ISIR	Description
C	Close to Pell limit
E	Met or exceeded Pell limit
H	High Pell percent
N	No problem
Blank	Record not sent for match

For additional discussion of Pell Lifetime Limits, see the [June 29, 2012 Electronic Announcement](#).

Subsidized Usage Limit Applies Flag

The Subsidized Usage Limit Applies Flag field indicates whether an applicant's record is being tracked based on regulations limiting the time (measured in academic years) that a student can receive Direct Subsidized Loans. (The time is limited to 150% of the published length of the program in which the applicant is currently enrolled.) This flag displays the value **Y** for "Yes" or **N** for "No." When this flag is set to **Y**, comment code 267 is printed on the ISIR.

Subsidized Usage Period

This field provides the total time during which the student has received Direct Subsidized Loans as of the date of the ISIR. The total does not include the time during which the student received Direct Subsidized Loans while enrolled in a non-credential teacher certification program. In general, applicants cannot receive Direct Subsidized Loans for more than 150% of the published length of the program in which they are currently enrolled. This field contains numeric six-digit values.

FFEL/Direct Loans Changed Flag and Perkins Loan Changed Flag

If the number sign (#) appears below the "Changed" column, the loan status has changed.

Aggregate Amounts for FFEL/Direct Loans, TEACH Loans, and Perkins Loans

This section includes information on subsidized loans, unsubsidized loans, TEACH Loans (TEACH Grant converted to a loan), and unallocated portions of consolidated loans. The combined amount reflects the total amount the student has borrowed in subsidized and unsubsidized loans. The combined amount does not include any unallocated amounts, as that portion cannot be attributed to either loan type. Schools are not required to research unallocated dollars to determine their effect on a student's aggregate loan eligibility. NSLDS continues to calculate and send the CPS the outstanding principal balance and total amounts of the unallocated portion of a Consolidation Loan. Separately, NSLDS calculates and reports the TEACH Loan (Direct Unsubsidized) outstanding principal balance and total amounts.

NSLDS does not maintain the Consolidation Loan's outstanding principal balance or total amounts. Instead, NSLDS has developed an algorithm to determine the breakdown of a Consolidation Loan (FFEL and Direct Loan) and then allocates it appropriately in the subsidized, unsubsidized, combined, and unallocated aggregate amounts. For purposes of calculating aggregates for prescreening and postscreening, NSLDS assumes that the total outstanding balance of a Consolidation Loan consists of the same ratio of subsidized and unsubsidized loans as the sum of the disbursed amounts on the original underlying loans. The remaining portion that cannot be attributed to either the subsidized or the unsubsidized loans is applied to the unallocated amounts. If NSLDS cannot identify the underlying loans for a Consolidation Loan, NSLDS counts the entire Consolidation Loan in the subsidized aggregate balance.

The outstanding principal balance and current year loan amount for Perkins Loans are included in this section. For all FFELs and Direct Loans in an out-of-school status or cases where the loan period end date plus 90 days has passed, the aggregate outstanding principal balance amount is determined by comparing the net loan amount, disbursed amount, and outstanding principal balance after subtracting capitalized interest. If all three of these are greater than zero, the one with the lowest value is used. Zero is not used if any one of these fields is equal to zero; instead, the lesser of the other two values is used. The net loan amount is the amount of the loan less cancellations and refunds.

For FFELs and Direct Loans in an in-school or in-grace status when the corresponding loan status date is within 90 days after the loan end period date, the aggregate outstanding principal balance amount is determined as follows:

- If either outstanding principal balance or disbursed amount is greater than zero, use the one with greater value, but do not exceed the net loan amount.
- If both are equal to zero, use zero. These are usually loans guaranteed or approved but not disbursed.

For non-consolidated Direct Loans in an in-school status when the corresponding loan status date is within 90 days after the loan end period date, pending disbursements are calculated by subtracting the total disbursed amount from the net loan amount. For non-consolidated FFELs in an in-school status when the corresponding loan status date is within 90 days after the loan end period date, pending disbursements are calculated by subtracting the aggregate outstanding principal balance from the net loan amount. Pending disbursements are not calculated for any Direct Loan or FFEL in an out-of-school status or after the loan period end date plus 90 days has passed.

The ISIR provides cumulative undergraduate and graduate FFEL/Direct Loans aggregate loan totals; however, this information is separated into corresponding undergraduate and graduate portions and dynamically displayed on the “Loan History” section of the NSLDS Professional Access Web site, located at nsldsfa.ed.gov. This makes it easy for an FAA to determine aggregate loan amounts and limits grouped by graduate and undergraduate academic levels.

Pell Payment Data

Pell Grant data shows current award year (2021-2022) school payment information as reported to NSLDS by the COD System. Information for up to three Pell Grants is printed on the ISIR. This information includes the following:

- (Attending) School Code
- Transaction Number
- Scheduled Award Amount
- Award Amount
- Disbursed Amount (Amount Paid to Date)
- Additional Eligibility Indicator
- Percent Scheduled Award Used by Award Year
- Date as Of (Last Update Date)
- Pell Verification Flag
- EFC
- Pell Payment Change Flag

A message instructing the school to “Access NSLDS for additional Pell Data” appears when the student has more than three Pell records for the award year.

Teacher Education Assistance for College and Higher Education (TEACH Grant) Data

TEACH Grant data shows school payment information as reported by schools to the COD System and transmitted to NSLDS by a Federal Loan Servicer. This section provides aggregate disbursement amounts for undergraduate/post baccalaureate TEACH Grants and graduate TEACH Grants. Information for up to three TEACH Grant awards from the current and prior award years is printed on the ISIR. NSLDS determines the three most relevant TEACH Grants to include based on

- Grants with the highest year in school and
- Most recent reported grant data from the COD System.

This information includes the following:

- (Attending) School Code
- Transaction Number
- Scheduled Award Amount
- Award Amount
- Disbursed Amount (Amount Paid to Date)
- Award Year
- Date as of (Last Update Date)
- Academic Year Level
- Loan Conversion Flag
- TEACH Grant Sequence Code
- TEACH Grant Change Flag

A message instructing the school to “Access NSLDS for additional TEACH Grant Data” appears when the student has more than three TEACH Grant records.

Loan Detail

Title IV loans are reported to NSLDS by guaranty agencies (GAs) and Federal Loan Servicers. Information for up to six loans is printed on the ISIR from the current and prior award years. NSLDS determines the six most relevant loans to include. The information appearing for each loan in the “Loan Detail” section is as follows:

- Description of Loan Program Type – The NSLDS Loan Program Code ISIR field identifies the loan program type.
- Net Loan Amount
- Capitalized Interest (appears as **YES** or **NO**)
- Amount of Last Disbursement
- Outstanding Principal Balance

- Loan Begin Date
- Loan End Date
- Grade Level
- Loan Type (Recent, Discharged, Defaulted, or Fraud)
- Additional Unsubsidized Loans Flag
- School Code
- Loan Change Flag
- GA Code
- Contact Code
- Contact Type
- Date of Last Disbursement
- As of Current Loan Status Date
- Subsidy Status Date
- As of Outstanding Principal Balance Date

If there is no information to report, N/A is displayed.

Note: For a Direct Loan, when an additional unsubsidized loan has been awarded, one of the following reason codes appears:

ISIR Value	Value Printed on ISIR	Description
P	PLUS	PLUS Loan denial
H	Health Prof	Health Profession Loan
B	Both	Both
N	Neither	Neither

When an additional unsubsidized loan has been awarded due to a PLUS Loan denial for an FFEL unsubsidized loan, the reason displayed is “PLUS.” NSLDS derives this value when the PLUS denial conditions are met. Direct Loan Servicing provides NSLDS with these PLUS denial and health profession codes after origination.

When students have both undergraduate and graduate loans, NSLDS monitors the respective aggregate loan levels and flags them according to the appropriate loan limits. To calculate the aggregate amounts, NSLDS uses the grade levels reported by the data providers rather than the applicant’s self-reported grade level from the FAFSA.

When consolidation loans are reported to NSLDS, lenders often need some time to report underlying loans as paid in full through consolidation. NSLDS considers the age of the consolidation loans when calculating aggregate outstanding principal balances.

NSLDS does not calculate an aggregate outstanding principal balance if

- The consolidation loan (FFEL and Direct Loan) date is within 60 days of the current date *and*

- All the underlying loans have an open loan status code and are not one of the following Loan Status Codes: **PC**, **PN**, **DN**, **PF**, or **DP**. See Appendix B of this guide for code values.

This procedure should decrease the occurrences of double counting and inflated aggregate amounts that may have contributed to students' exceeding the aggregate loan limits. An underlying loan is a loan associated with a consolidated loan with loan status code **PC**, **PN**, **DN**, **PF**, or **DP**, and the loan status date of the underlying loan is within 210 days (before or after) of the consolidated loan date. See Appendix B of this guide for code values.

Additionally, FFEL Consolidation Loans and Direct Consolidation Loans factor out any underlying Perkins or PLUS loans from the unallocated amount.

The "Loan Detail" section continues to display up to six loans (including Perkins Loans). The sort and display order of the loans is determined by current loan status and categorized into different groups:

- Group 1 includes loans in a deceased status, making the student ineligible for aid.
- Group 2 includes loans in a defaulted or fraud status, making the student ineligible for aid.
- Group 3 includes loans where a school may have to take action; this includes loans in an abandoned, disability, active bankruptcy, or temporary uninsured status.
- Group 4 are loans in an open status not included in groups 2 and 3.
- Group 5 includes closed loans (those not included in groups 1, 2, 3, and 4).

Group 1 consists of loan statuses for deceased borrowers, **DD** (defaulted, then loan holder died) and **DE** (loan holder died). This category ensures that FAAs are notified of these loan statuses, because SARs for applicants with one or more loan status codes of **DD** or **DE** are not distributed.

Within each group, the sort order is determined by descending loan begin date with the highest outstanding principal balance sorted first for loans with the same loan begin date. Loans selected are from group 1 first, group 2 second, and followed by those in groups 3 and 4. Loan status codes and their groupings are identified in Appendix B. If more than six loans are in the NSLDS database, a message to **Access NSLDS** for additional information is printed on the output. The NSLDS Professional Access Web site, located at nsldsfa.ed.gov, displays this loan information.

A contact type is included for each loan. The contents of the Contact Type field are listed below:

ISIR Value and Value Printed on ISIR	Description
SCH	School
LEN	Lender
EDR	ED region
GA	Guaranty agency/federal loan servicer
LNS	Lender servicer
DDP	Disability data provider
RDS	U.S. Department of Education
N/A	Not applicable

MPN Information

Master Promissory Note (MPN) information for three loan types is located at the end of the “Loan Detail” section.

- The Direct Loan Subsidized/Unsubsidized MPN field identifies whether a student has an MPN for Subsidized and Unsubsidized Direct Loans on file at the COD System.
- The Direct Loan PLUS MPN identifies if an MPN for a PLUS loan is on file at the COD System.
- The Direct Loan Graduate/Professional PLUS Loan’s MPN information is provided by the Direct Loan Servicer if an MPN is on file at the COD System.

Each MPN indicator identifies the MPN status as listed in the table on the next page.

ISIR Value	Value Printed on the ISIR
Blank	No data from NSLDS
A	Active MPN
C	All MPNs closed
E	Inactive due to the linking of a PLUS Loan with an endorser
I	All MPNs inactive
N	No MPN on file

Loan Limit Information

Four loan limit flags are printed next to the “MPN Information” section and indicate the condition of the borrower’s loan limits:

- Undergraduate Subsidized Loan Limit Flag
- Undergraduate Combined Loan Limit Flag
- Graduate Subsidized Loan Limit Flag
- Graduate Combined Loan Limit Flag

Comment codes are generated based on the value of these four flags. Because the NSLDS Professional Access Web site displays the undergraduate and graduate portions separately, FAAs can use it to aid in researching the loan limit flags received on the ISIR.

The valid flag values for loan limit flags are as follows:

ISIR Value	Value Printed on the ISIR
Blank	Blank
C	Close to or equal to limit
E	Exceeded limit
N	Not near limit
R	Exceeded loan limit and reaffirmed debt

Additional NSLDS Resources

For additional discussion of NSLDS information and applicable school requirements, see the following documents:

- *Federal Student Aid Handbook*, Volume 1–FSA Handbook: Student Eligibility, Chapter 3–NSLDS Financial Aid History, located at: ifap.ed.gov.
- *Dear Colleague Letter* GEN-96-13, announcing the use of NSLDS for the Financial Aid Transcript (FAT), located at: ifap.ed.gov/dear-colleague-letters/01-04-1999-gen-96-13-letter-announces-availability-national-student-loan
- *Dear Colleague Letter* GEN-98-6, announcing the implementation of NSLDS/CPS post screening, located at: ifap.ed.gov/dear-colleague-letters/09-10-1998-gen-98-06-implementation-nsldscps-post-screening-process-during
- *Dear Colleague Letter* GEN-03-12, describing NSLDS procedures to calculate aggregate loan limits for consolidated loans, located at: ifap.ed.gov/dpeletters/GEN0312.html
- Current and Archived NSLDS Information, including newsletters, located at: ifap.ed.gov/ilibrary/document-types/nslds-reference-materials

Additional ISIR Data

In addition to the information described above that is included on the printed EDEXpress ISIR, we explain several important fields that may be included in the ISIR file but are not printed on the EDEXpress ISIR.

DRN

The student's Data Release Number (DRN) is not printed on the ISIR and is not part of the ISIR file. The DRN is printed only on the student's SAR and the Web confirmation pages for FAFSAs, pre-filled FAFSAs, corrections, and electronic signatures. The DRN appears immediately after the confirmation number. See Appendix C for more information about the DRN.

Signature Reject EFC

The Signature Reject EFC is an EFC value calculated for records that have only signature rejects and no other reject reasons. One or more of the following rejects can be displayed on the student's record:

- **14** (missing student signature on paper FAFSA or SAR)
- **15** (missing parent signature on FAFSA or SAR)
- **16** (missing student signature on Web application)

The EFC is not printed on the ISIR from EDEXpress, the SAR, or the eSAR and does not appear in FAA Access. Appropriate signatures must be processed, as usual, before award disbursements can be made. This information benefits students who are trying to meet state deadlines that require the EFC to be calculated by a certain date. This value is found on the ISIR in positions 1594 to 1599.

Field Correction Flags

The ISIR contains a Correction Flag for each field on the FAFSA/SAR. These flags are found in positions 2104 through 2298 on the ISIR and may contain the following values:

Value	Meaning	Symbol Printed on ISIR
0	Field was not previously corrected	
1	Field was corrected on the current transaction (i.e., changed to another value; correction from blank to zero is not considered a correction)	#
2	Field was corrected on a previous transaction (i.e., changed to another value; correction from blank to zero is not considered a correction)	@

EDEExpress does not actually print the data in this field. EDEExpress uses the values in this field to print the character # (number sign) on the ISIR to the right of the field variable that was corrected on the most current transaction and to print the character @ (at symbol) to the right of the field variable that was corrected on a previous transaction.

Correction flags are cumulative (i.e., the flag is included on all subsequent transactions).

FAFSA® Data Verify Flags

FAFSA Data Verify Flags are found on the ISIR (positions 2524 through 2718). Each FAFSA Data Verify Flag byte corresponds to a specific SAR field and indicates fields corrected to the same value on the transaction being corrected.

Value	Meaning
0	Field was not corrected to the same value
1	Field was verified as containing the same data as the transaction being corrected
2	CPS has asked that the field be verified

EDEExpress does not print these flags on the ISIR. These flags can be found on the ISIR record layout. They were added at the request of third-party servicers to assist them in performing correction edits.

Corrections and Updates

Overview

The initial steps in the application process are sending a student's application information to the CPS and receiving that student's processed application data back from the system. One of three types of output document is received by the applicant as a result of a processed application:

- E-mail Notification of SAR Processing
- SAR
- SAR Acknowledgement

For more information on the types of documents sent to a student and the situations in which they are sent, see Appendix C of this guide.

When data must be updated (under the limited circumstances allowed by regulation) or corrected, additional steps are required in the application process. FAAs and students can change some application data. Different processes are used for correcting records depending on who is changing the record and the type of document used to make the change.

FAAs Making Corrections

FAAs can make corrections to students' records using FAA Access, third-party software, or their own mainframe systems.

FAA Access to CPS Online

In FAA Access, changes (corrections or updates) can be made to any student's record by an FAA, regardless of whether the application originally entered the system in paper or electronic format. Both updates and corrections are referred to as correction transactions. If the school corrects or updates a record electronically, it must maintain signed correction documentation.

Documentation can consist of a paper SAR or other documents, such as tax returns, a verification worksheet, or a change-of-address form. The FAA enters the changes on the FAA Access correction entry screen, submits the changes to the CPS, and receives an ISIR containing the new processed data. In this electronic input situation, the student receives an E-mail Notification of SAR Processing if he or she provided an e-mail address with valid syntax and has an SSN Match Flag value of 4 (SSN, name, and date of birth match). Otherwise, a SAR Acknowledgement is sent. The school receives an electronic ISIR.

Mainframe System

FAAs can use their own systems to make changes or updates to any student's record, regardless of whether it originally entered the system as a paper or an electronic application. Using a mainframe system or third-party software, FAAs can submit electronic corrections to the CPS using the SAIG. As with FAA Access, the school must maintain signed correction documentation.

In this electronic input situation, the student receives an E-mail Notification of SAR Processing if he or she provided an e-mail address with valid syntax and has an SSN Match Flag value of 4. Otherwise, a SAR Acknowledgement is sent. The school receives an electronic ISIR.

For more information on supporting a mainframe system, see the *2021-2022 Electronic Data Exchange (EDE) Technical Reference*, which provides sufficient programmer specifications and information to design or build your own system or software, or the *Application Processing System Specifications for Software Developers*. Both documents are posted on the IFAP Web site.

Students Making Corrections

A student can make corrections to his or her application data using paper output documents or using FAFSA on the Web. The options for a student to make a correction depend on the document the student received after the application or subsequent transaction was processed. In most cases, a student receives one of the output documents described below. The exception is for a student who submits corrections that are processed in real time through FAFSA on the Web; this student will have the option to view and print the eSAR after he or she clicks the Exit button on the confirmation page to return to the My FAFSA page.

E-mail Notification of SAR Processing

The E-mail Notification of SAR Processing is designed to notify the student of application and eligibility status more quickly than either the paper SAR or the SAR Acknowledgement. The e-mail includes a link to the student's processed SAR information online and enables the student to print the online SAR document as often as needed. In addition, the student can correct or confirm the applicant data, as needed. To complete corrections to the application data, the student must sign with his or her FSA ID. Students with undeliverable e-mail addresses and those whose E-mail Notifications of SAR Processing have been returned to ED are sent paper SARs or SAR Acknowledgements.

SAR Acknowledgement

The SAR Acknowledgement is designed to notify the student of application and eligibility status and is mailed when an applicant has completed an electronic application or correction and has an SSN Match Flag value of 4 (SSN, name, and date of birth match) and no missing signatures (Reject Reasons are not 15 or 16), but a valid e-mail address was not provided. If corrections are needed, the student uses FAFSA on the Web, contacts the school to submit the corrections through FAA Access or a mainframe system, or calls the Federal Student Aid Information Center (FSAIC) to request a duplicate SAR and use it to mail corrections or updates to the FAFSA processor.

SAR

The SAR is designed to serve two basic purposes: to notify the student of application and eligibility status and to provide a means for correcting or confirming applicant data.

The SAR is a correction vehicle for students who filed on paper and do not have a valid e-mail address. Additionally, a paper SAR is mailed when an applicant does not have an SSN Match Flag value of 4 (SSN, name, and date of birth match), or when an application is missing signatures and a valid e-mail address was not provided. A student can correct or update his or her application information on the SAR and mail it to the FAFSA processor for data entry.

After the FAA or student makes corrections and the changes are processed, the student receives a new E-mail Notification of SAR Processing, SAR Acknowledgement, or SAR. In all cases, an ISIR is generated for the school.

SAR Corrections

As described in the previous section, for each non-real-time transaction processed at the CPS, an output document is sent to the applicant: a paper SAR, a SAR Acknowledgement, or an E-mail Notification of SAR Processing with information for accessing SAR data on the Web. (If corrections are submitted on FAFSA on the Web and processed in real time, the applicant is instead presented with a link to his or her eSAR after clicking the Exit button on the confirmation page.) This section describes the paper SAR. Additional information on the paper SAR, including changes for 2021-2022, can be found in Appendix C.

The SAR contains boxes with corresponding FAFSA question numbers and shortened question descriptions. These question boxes include the student's response to the question. Next to or below the question box are boxes or ovals that resemble the answer fields on the FAFSA and that the student can use to indicate or write in a corrected answer, if necessary.

Items that are highlighted (printed in bold type) require special attention. Highlighting indicates the CPS identified the responses as questionable or inconsistent with other answers. The CPS may assume answers to certain questions by comparing them with other information on the application. Answers might be assumed when the question was left blank, or a positive number might be assumed when the answer to an income question was given as a negative number.

When the CPS assumes an answer, both the value reported by the applicant and the assumed values are printed on the SAR. The word "ASSUMED" appears in parentheses with the assumed value. Assumed values are used by the CPS in performing the EFC calculation and should be reviewed carefully. If the assumed values are correct, the student does not need to change them on the SAR.

The student can correct other items if necessary, whether or not they are highlighted.

If the record has been rejected, an arrow points to the response field for the questioned item. This indicates that the student must provide a new answer because the original response was blank or illegible, and the item is necessary to perform an EFC calculation. The student can also correct other items if necessary, even if they are not highlighted.

Instructions to the student at the top of the SAR explain the meaning of the arrows and the proper way to fill in an oval or to correct, confirm, or delete an answer. To confirm a previously reported answer, the student must rewrite the same value in the answer fields and return the SAR.

Parent Information for Independent Students

The SARs for dependent and independent students contain the same sections and numbered items as the FAFSA. Parent information is printed in the parent section for an independent student if the student provided it on the FAFSA, although the EFC calculation does not include parental data. Students in certain health profession programs are advised that they may have to provide parental data because the data is required by many health profession schools to award Title VII aid. Parental data provided by independent students is not subject to any edits, but the data appears on the SAR and ISIR and is carried forward on all transactions.

Parental data is required for dependent students and is edited and used in the EFC calculation.

Signatures

SAR Corrections

A message in the lower portion of the last page of the SAR shows the address where corrections should be mailed.

In the lower left corner of the same page, the student is asked to certify that any corrections made on the SAR are accurate and complete. The student must sign this statement if he or she chooses to submit the corrections on paper. If the student is dependent and is changing parental data, one parent must also sign.

The student can also make corrections using FAFSA on the Web, located at fafsa.gov. An FSA ID (described below) is needed to access the application data to be corrected. When corrections are made using the Web, a parent needs to supply his or her FSA ID only if the parental data is changed. The student must supply his or her FSA ID.

FSA IDs

The FSA ID is a username and password combination that serves as a student's or parent's identifier to allow access to personal information in various ED systems and acts as a digital signature on some online forms. The FSA ID simplifies and expedites processing for an applicant and his or her parent. The FSA ID is issued in real time so that the student or parent can use it immediately to electronically sign the application, but the FSA ID cannot be used for anything else until the identifying information is confirmed with the Social Security Administration. For more information, see "The FSA ID for Students and Parents" in the "Processing Flow" section earlier in this guide.

Signature Rejects

The Signature Reject EFC field is calculated for records that have only one or more of the three signature rejects described on the following pages.

Note: The Signature Reject EFC is included in the ISIR file but is not printed on the ISIR from EDExpress, the SAR, or the eSAR and does not appear in FAA Access or Student Inquiry. Appropriate signatures must be processed as usual before award disbursements can be made. This information benefits students who are trying to meet state deadlines that require the EFC to be calculated by a certain date.

Reject 16 — Missing Student Signature from an Electronic Application

Reject 16 is generated and sent in an E-mail Notification of SAR Processing or on a paper SAR to a student who submitted an application by calling FSAIC (FAFSA on the Phone) or through FAFSA on the Web, but did *not* provide an FSA ID or follow up with a signed Signature/Certification page. Reject 16 is also generated if the Signature/Certification page sent by the applicant was incomplete and could not be processed.

If the application record indicates that a Signature/Certification page was printed, the CPS holds the transmission for up to 14 calendar days pending receipt of the page. If the Signature/Certification page is not received in 14 calendar days, the CPS processes the record and mails a SAR with a Reject 16 code.

If the application record indicates that a Signature/Certification page was *not* printed, the CPS immediately processes the record and mails a SAR with a Reject 16 code.

Note: Reject 16 may appear with other rejects or highlighted data requiring correction or verification. A Reject 16 SAR does not have a calculated EFC and contains the full certification statement that appears on the FAFSA.

Reject 15 — Missing Parent Signature on FAFSA or SAR

Reject 15 is generated and sent in an E-mail Notification of SAR Processing or on a paper SAR to a dependent student who submitted a paper FAFSA or SAR without a parent signature. Reject 15 is also generated if a dependent student files a FAFSA or renewal application on FAFSA on the Web or the myStudentAid mobile app and signs with an FSA ID but does not provide a parent signature or FSA ID.

To resolve a Reject 15 code, the CPS requires at least one parental signature for dependent students. The parent can use his or her FSA ID to sign electronically using FAFSA on the Web or the myStudentAid mobile app; sign and mail the Signature/Certification statement on the paper SAR; or contact the school's FAA, who can submit the signature data electronically through the FAA Access to CPS Online Web site.

When a parent signs his or her dependent child's application or correction record with an FSA ID, other corrections can be made simultaneously; however, both the dependent student and one of the student's parents must use their FSA IDs to sign an application or correction, or the transaction will result in a Reject 15.

A dependent student can also print the Signature/Certification page, obtain a parent's signature, and mail it to the processor. The transmitted application is held up to 14 calendar days, pending receipt of the page. If the Signature/Certification page is not received in 14 calendar days, the CPS processes the record and sends an E-mail Notification of SAR Processing or a paper SAR with a Reject 15 code.

If the application record indicates that a Signature/Certification page was *not* printed, the CPS processes the record and mails a SAR with a Reject 15 code or sends the E-mail Notification of SAR Processing.

If neither parent of a dependent student has an FSA ID and does not have a printer to print the Signature/ Certification page, the student's school can obtain the necessary documentation and submit the parent signature using FAA Access.

Note: Reject 15 may appear with other rejects or highlighted data requiring correction or verification. A Reject 15 SAR does not have a calculated EFC and contains the full certification statement that appears on the FAFSA.

Reject 14 — Missing Student Signature on Paper FAFSA or SAR

Reject 14 is generated when a student submits a paper FAFSA or SAR without a student signature or if the FAFSA or correction was signed before October 1, 2020, and sent to the FAFSA processor after that date.

To correct a SAR with Reject 14, the student must sign and return the paper SAR to the FAFSA processor address indicated on the form. The student can also make other corrections to the Reject 14 SAR simultaneously, if necessary. By signing and returning the certification statement along with the application data, the student completes the application process.

A student who has an active FSA ID can also sign his or her record electronically and make other corrections using FAFSA on the Web. Alternatively, schools can obtain the necessary documentation from the student and submit his or her signature using the FAA Access to CPS Online Web site.

Note: Reject 14 may appear with other rejects or highlighted data requiring correction or verification. A Reject 14 SAR does not have a calculated EFC and contains the full certification statement that appears on the FAFSA.

School Code Corrections

A student can correct the school codes listed on his or her record in several ways. A school code can be added, removed, or replaced using FAFSA on the Web, FAFSA on the Phone, or the SAR.

Note: The FAFSA contains space for up to four school codes and housing plans, while FAFSA on the Web applications and corrections can contain up to ten school codes.

On the SAR, the student can correct any of the four school code fields, and the new code is added in the position in which it was entered on the SAR. If the student chooses a position that has a school code in it, the previous code is replaced by the new school code. The school with the code that was removed does not receive ISIRs for the student.

The same results occur if the student makes the school code correction using FAFSA on the Web or makes the request over the telephone through FSAIC.

The ISIRs sent to schools only include the school code of the school receiving the ISIR. Servicers receive a separate ISIR for each school they serve, if the school is selected by the student on the transaction.

If the student submitted fewer than ten schools on a transaction, an FAA can add his or her own school code by using the student's DRN to access the transaction in FAA Correction Entry. On the resulting SAR, the school code is added to the student's first blank college choice.

If the student has already submitted ten schools on the transaction, the FAA cannot add his or her school code and receives an alert in FAA Correction Entry. Only the student can add another school code, by replacing one of the ten schools already listed.

To prevent schools from viewing or receiving transactions that contain a professional judgment by another school, students and FAAs are not permitted to add a new school code to a transaction that contains a professional judgment flag. To make the correction, the student or FAA must choose a transaction on which a professional judgment has not been performed. This requirement does not apply to transactions that result from dependency overrides.

Getting Help

Customer Service

FSATECH Listserv

FSATECH is an e-mail listserv for technical questions about Federal Student Aid systems, software, and mainframe products.

For more information on subscribing to FSATECH, go to ed.gov/offices/OSFAP/services/fsatechsubscribe.html.

CPS/SAIG Technical Help Desk

Federal Student Aid maintains this call center to address questions about CPS processing, EDEExpress and EDconnect software, SAIG enrollment, and data transmissions and to collect system enhancement suggestions.

800/330-5947

Representatives are available Monday through Friday, 8 a.m. to 8 p.m. Eastern Time (ET).

E-mail: CPSSAIG@ed.gov

Federal Student Aid Information Center (FSAIC)

The FSAIC serves the public with information, in both English and Spanish, about federal student financial aid programs. It provides students, parents, FAAs, and others general information about federal grant, work-study, and loan programs; assistance with completing the paper and electronic versions of the FAFSA; orientation regarding the FSA ID; and information about student aid processing timeframes.

FSAIC customer service representatives can assist with: FAFSA status checks, completion of FAFSA application and corrections, requests to change addresses and Federal School Codes on the FAFSA, duplicate SAR requests, identification of loan holders (including contact information), Federal Student Aid publication requests, and NSLDS loan and TEACH Grant exit counseling.

800/4-FED-AID (800/433-3243); 334/523-2691; or TDD/TTY 800/730-8913

Representatives are available Monday through Friday from 8 a.m. to 11 p.m. ET and Saturday and Sunday 11 a.m. to 5 p.m. ET.

FSAIC is closed on federal holidays with a few exceptions: New Year's Day, Martin Luther King Jr.'s Birthday, and Washington's Birthday, when it is open from 11 a.m. to 5 p.m. ET. FSAIC is also closed the day after Thanksgiving and on December 24. For specific hours of operation, visit the StudentAid.gov Web site at studentaid.gov/help-center/contact#all-aid-fsaic.

APPENDIX A – 2021-2022 REJECT CODES AND REJECT REASONS

Reject Reason Codes

Reject reason codes can be either alphabetic or numeric. Some reject reasons are verifiable—that is, the student can confirm the questionable data by re-entering the same value or correcting it to a different value. Other reject reasons are not verifiable; the questioned data must be changed or provided. In all reject situations, the questioned information is highlighted on the SAR, and an EFC is not calculated.

A confirmation overrides a CPS edit. For example, if a student reports an exceptionally large number of family members (such as 20), the student’s application receives a Reject W. The student can confirm the information by correcting the item to the same value, and Reject W is not triggered again.

However, if instead of confirming that 20 family members is correct, the student changes “20” to “21,” the corrected data is subject to the same edits and will receive Reject W again.

In FAA Access, an FAA can override some verifiable rejects before transmitting the student’s data to the CPS if the FAA knows that the reported information is correct. When filing an application or making corrections using FAFSA on the Web, the student can also override the reject by confirming the information he or she has entered.

As part of the annual changes, we incremented the year references in our edits that cause rejects A and B to be set on a record.

Reject Codes and How to Respond to Each

Reject codes, reasons, and their associated SAR comment codes are listed in the following table. If a student’s record is rejected for more than one reason, the reject codes appear in the “FAA Information” section in priority order. The resolution for a rejected SAR is the responsibility of the student, not the institution, and the SAR comment generated by the reject explains what action the student must take.

Table of Reject Codes and How to Respond to Each

Reject Code	Reject Reason	Action	Comment Code
*A	Date of birth year equals 1900 through 1946	Confirm (re-enter the same value) or correct the date of birth.	069
*B	Independent student and date of birth equals 09/01/2005 or greater, and date of birth is not equal to or greater than current year	Confirm (re-enter the same value) or correct the date of birth.	072
*C	Taxes paid is greater than zero and greater than or equal to a fixed percentage of the AGI, but not equal to or greater than AGI. (Parent or Independent Student)	Confirm (re-enter the same value) or correct taxes paid and adjusted gross income.	154, 155
D	Student's SSN match, but no name match	Confirm (re-enter the same value) for student's first and last name.	061
E	Parent 1 SSN match, but no name match	Confirm (re-enter the same value) for parent 1 last name and first initial.	040, 377
F	Parent 2 SSN match, but no name match	Confirm (re-enter the same value) for parent 2 last name and first initial.	051, 379
*G	Taxes Paid is greater than zero, and greater than or equal to a fixed percentage of the AGI, but not equal to or greater than AGI (Dependent Student)	Confirm (re-enter the same value) or correct taxes paid and adjusted gross income.	153
*J	Parent 1 SSN contains all zeroes and reported as a tax filer	Confirm (re-enter the same value) for parent 1 SSN.	**083, 388
*K	Parent 2 SSN contains all zeroes and reported as a tax filer	Confirm (re-enter the same value) for parent 2 SSN.	**084, 389
*N	Missing first or last name	Correct the student's last name or first name or confirm (re-enter the same value) a blank first or last name field if the student actually has only one name.	080

*These reject codes are the same as the Reject Override Codes.

**If both rejects J and K are on the ISIR, comment codes 083 and 084 are suppressed and replaced with comment code 164, and comment codes 388 and 389 are suppressed and replaced with comment 391.

Table of Reject Codes and How to Respond to Each (continued)

Reject Code	Reject Reason	Action	Comment Code
R	Student's SSN match, but no date of birth match	Confirm (re-enter the same value) or correct the student's date of birth.	060
S	Parent 1 SSN match, but no date of birth match	Confirm (re-enter the same value) or correct parent 1 date of birth.	016, 373
T	Parent 2 SSN match, but no date of birth match	Confirm (re-enter the same value) or correct parent 2 date of birth.	017, 375
*W	Unusually high number of family members	If the student is dependent, confirm (re-enter the same value) or correct Parents' Number of Family Members. If the student is independent, confirm (re-enter the same value) or correct Student's Number of Family Members.	178, 179
1	The simplified needs test is not met, automatic zero EFC flag is not set, asset threshold exceeded is "Yes" or blank on current transaction, and any asset data is blank	For a dependent student, if the Student's Asset Threshold Exceed field equals Yes or blank on the current transaction, provide the following: Student's Cash, Savings and Checking, Student's Real Estate/ Investment Net Worth, and Student's Business/ Investment Farm Net Worth. Also, if the Parents' Asset Threshold Exceed field equals Yes or blank on current transaction, provide the following: Parents' Cash, Savings, and Checking, Parents' Real Estate/ Investment Net Worth, and Parents' Business/Investment Farm Net Worth. For an independent student, if the Student's Asset Threshold Exceed field equals Yes or blank on current transaction, provide the following: Student's Cash, Savings and Checking, Student's Real Estate/ Investment Net Worth, and Student's Business/Investment Farm Net Worth.	150, 151

*These reject codes are the same as the Reject Override Codes.

Table of Reject Codes and How to Respond to Each (continued)

Reject Code	Reject Reason	Action	Comment Code
2	Incomplete FAFSA	If the student is dependent, provide parents' taxed and untaxed income. If the student is independent, provide student and spouse (if married) taxed and untaxed income.	129, 130
*3	Student's taxes paid is greater than zero and equal to or greater than AGI	Correct student's taxes paid or AGI.	114, 152
4	Student's marital status date on the initial application is greater than the date the application was signed Or Student's marital status date on a correction transaction is greater than transaction receipt date	If the student's marital status date is after the date the application was originally signed, correct the marital status to single.	062
5	Missing or invalid date of birth	Correct the student's date of birth.	018
6	Parent 1 Social Security Number was not matched with the Social Security Administration	Correct the SSN for the parent 1. Also review and correct the name and/or date of birth for parent 2 and/or parent 1 to achieve a full match for at least one parent.	011, 369
7	Parent 2 Social Security Number was not matched with the Social Security Administration	Correct the SSN for the parent 2. Also review and correct the name and/or date of birth for parent 2 and/or parent 1 to achieve a full match for at least one parent.	012, 370
8	SSN match with Date of Death	Contact the Social Security Administration to fix the error at SSA. Then re-enter name or date of birth and submit as a correction for an updated SSA Match.	076, 140, 145
9	Dependent student and one of SSN, last name, or date of birth is missing for both parents	Correct the SSN, name, and/or date of birth for parent 2 and/or parent 1 to achieve a full match for at least one parent.	049, 387

*These reject codes are the same as the Reject Override Codes.

**Table of Reject Codes and How to Respond to Each
(continued)**

Reject Code	Reject Reason	Action	Comment Code
10	Missing marital status and number of family members	If the student is dependent, review and correct Parents' Marital Status and Parents' Number of Family Members. If the student is independent, review and correct Student's Marital Status and Student's Number of Family Members.	168, 169
11	Marital status inconsistent with reported incomes	If the student is dependent, review and correct at least one of the following: either Parents' Marital Status, or parent 1 Income From Work and parent 2 Income From Work. If the student is independent, review and correct at least one of the following: either Student's Marital Status or Student's Income Earned From Work and Spouse's Income Earned From Work.	089, 099
*12	Parents' taxes paid is greater than zero and equal to or greater than AGI	Correct parents' taxes paid or AGI.	111
13	Missing name	Provide the following: Student's last name and/or student's first name, or confirm a blank first or last name field if the student actually has only one name.	082
14	Missing student signature on paper FAFSA or SAR	Signature correction must be made on a printed Student Aid Report certification page and resubmitted to the FAFSA Processor or can be corrected electronically.	160
15	Missing parent signature on FAFSA or SAR	Signature correction must be made on a printed Student Aid Report certification page and resubmitted to the FAFSA Processor or can be corrected electronically.	108

*These reject codes are the same as the Reject Override Codes.

Table of Reject Codes and How to Respond to Each (continued)

Reject Code	Reject Reason	Action	Comment Code
16	Missing student signature on Web application	Signature correction must be made on a printed Student Aid Report certification page and resubmitted to the FAFSA Processor or can be corrected electronically.	110, 285
17	Citizenship status left blank and SSA did not confirm U.S. citizenship status or applicant reported not a U.S. citizen or eligible noncitizen	Provide the citizenship status with the alien registration number if appropriate.	068
18	SSN not verified on Social Security Administration's database	Correct the Social Security Number. If the SSN is already correct, contact the Social Security Administration to fix the error in their records. Then re-enter SSN and submit as a correction for an updated SSA Match.	024
19	An EFC cannot be calculated because the Department of Justice has placed a "hold" on the student	Student needs to call 202-377-3889 to resolve comment 009.	009
*20	A non-tax filer is reporting an income that is above the IRS filing requirement	If the student is dependent, review and correct the appropriate set of data from the following: Student's tax return completed status or student's income or Parents' tax return completed status or income for the parent 1 and parent 2. If the student is independent, review and correct at least one of the following: student's tax return completed status or income for the student and spouse.	126, 131
*21	Student's corrected marital status date is greater than or equal to the application receipt date and less than or equal to the transaction receipt date	If the student's marital status date is after the date the application was received, correct the marital status date and/or marital status.	119

*These reject codes are the same as the Reject Override Codes.

Table of Reject Codes and How to Respond to Each (continued)

Reject Code	Reject Reason	Action	Comment Code
23	An EFC cannot be calculated because the Department of Education has placed an eligibility “hold” on the student	Student needs to call 202-377-4074 to resolve comment 281.	281
24	NSLDS Fraud Loan Flag is set indicating loan was obtained fraudulently	Student needs to contact the lender and resolve issue to have the Fraud Loan Flag reset in NSLDS.	272

APPENDIX B - LOAN STATUS CODES AND ELIGIBILITY CHARTS

Overview

Appendix B describes the loan status codes, federal loan servicer loan servicing codes, federal loan servicers, FFEL-only servicer codes, guaranty agency codes, FFEL lenders, and contact information and fields associated with loan status.

The Loan Status Codes table on the following pages contains a column titled “Group (ISIR sort order).” This column describes the order by which these loans are sorted and displayed on the ISIR with regard to their current loan status. The loans are categorized into the following groups:

- Group 1 includes loans in deceased status, making the student ineligible for aid.
- Group 2 includes loans in a defaulted or fraud status, making the student ineligible for aid.
- Group 3 includes loans where a school may have to take action; this includes loans in an abandoned, disability, active bankruptcy, or temporary uninsured status.
- Group 4 are loans in an open status not included in groups 2 and 3.
- Group 5 includes closed loans (those not included in groups 1, 2, 3, and 4).

Loan Status Codes

Code	Status	Eligibility for Title IV	Group (ISIR sort order)
AL	Abandoned Loan	Yes	3
BC	No Prior Default, Bankruptcy Claim, Discharged	Yes, because loan was not in default and was discharged	5
BK	No Prior Default, Bankruptcy Claim, Active	Yes, because loan was not in default	3
CA	Canceled (Perkins = Loan Reversal)	Yes	5
CS	Closed School Discharge	Yes	5
DA	Deferred	Yes	4
DB	Defaulted, then Bankrupt, Active. (Perkins: all bankruptcies. Federal Family Education Loan (FFEL) and Direct Loans: Chapter 13)	No, unless debtor can show that loan is dischargeable. See Dear Colleague Letter GEN-95-40 , dated September 1995	2
DC	Defaulted, Compromise	Yes, because compromise is recognized as payment in full	5
DD	Defaulted, then Died	No, because if borrower is reapplying, then loan status is in error	1
DE	Death	No, because if borrower is reapplying, then loan status is in error	1
DF	Defaulted, Unresolved	No	2
DI	Disability	Yes	3
DK	Defaulted, then Bankrupt, Discharged. (Perkins: all bankruptcies. FFEL and Direct Loans: Chapter 13)	Yes, because defaulted loan has been totally discharged	5

Loan Status Codes (continued)

Code	Status	Eligibility for Title IV	Group (ISIR sort order)
DL	Defaulted, in Litigation	No	2
DN	Defaulted, then Paid in Full through Consolidation Loan	Yes	5
DO	Defaulted, then Bankrupt, Active, other. For FFEL and Direct Loans in Chapters 7, 11, and 12	No, unless debtor can show that loan is dischargeable. See Dear Colleague Letter GEN-95-40 , dated September 1995	2
DP	Defaulted, then Paid in Full	Yes, because loan was paid in full	5
DR	Defaulted Loan Included in Roll-up Loan	Yes, because the loan was combined with other loans and subrogated to the Department of Education, which reported the same information to NSLDS in one loan. The status of that record will determine eligibility	5
DS	Defaulted, then Disabled	Yes, because loan debt is canceled	3
DT	Defaulted, Collection Terminated	No	2
DU	Defaulted, Unresolved	No	2
DW	Defaulted, Write-Off	No	2
DX	Defaulted, Satisfactory Arrangements, and Six Consecutive Payments	Yes, assuming student continues to comply with repayment plan on defaulted loan or is granted forbearance by the GA	4
DZ	Defaulted, Six Consecutive Payments, then Missed Payment	No, loan is back in active default status	2
FB	Forbearance	Yes	4
FC	False Certification Discharge	Yes	5
FR	Fraud	No	2
FX	Fraud, Resolved	Yes	5

Loan Status Codes (continued)

Code	Status	Eligibility for Title IV	Group (ISIR sort order)
IA	Loan Originated	Yes	4
ID	In School or Grace Period	Yes	4
IG	In Grace Period	Yes	4
IM	In Military Grace	Yes	4
IP	In Post-Deferment Grace (Perkins only)	Yes	4
OD	Defaulted, then Bankrupt, Discharged, other. For FFEL and Direct Loans in Chapters 7, 11, and 12	Yes, because defaulted loan has been totally discharged	5
PC	Paid in Full through Consolidation Loan	Yes. Does not matter whether consolidation loan was through FFEL or Direct Loan or whether underlying loans were in default	5
PD	Permanently Disabled	Yes	3
PF	Paid in Full	Yes	5
PM	Presumed Paid in Full	Yes	5
PN	Non-defaulted, Paid in Full through Consolidation Loan	Yes	5
PX	Identity Theft – Loan Discharged	Yes	2
PZ	PLUS Loan, Student has since died	No, the deceased student is not eligible because if borrower is reapplying, then loan status is in error Yes, the living parent of a parent PLUS Loan is eligible to receive Title IV aid	5
RF	Refinanced	Yes, because defaulted loans cannot be refinanced	5

Loan Status Codes (continued)

Code	Status	Eligibility for Title IV	Group (ISIR sort order)
RP	In Repayment	Yes	4
UA	Temporarily Uninsured – No Default Claim Requested	Yes	3
UB	Temporarily Uninsured – Default Claim Denied	Yes, because the loan is not a federal loan while temporarily uninsured	3
UC	FFEL: Permanently Uninsured/ Unreinsured – Non-Defaulted Loan Perkins: Non-Defaulted Loan Purchased by School	Yes	5
UD	FFEL: Permanently Uninsured/ Unreinsured – Defaulted Loan Perkins: Defaulted Loan Purchased by School	Yes, because the loan is no longer a federal loan	5
UI	Uninsured/Unreinsured	Yes, does not matter if loan was in default	3
VA	Disability, determined by Veteran’s Administration	Yes, disabled veteran discharged	3
XD	Defaulted, Satisfactory Arrangements, and Six Consecutive Payments	Yes, assuming student continues to comply with repayment plan on defaulted loan or is granted forbearance by the GA	4

Federal Loan Servicer Loan Servicing Codes

Borrower and school contact information for all federal loan servicers is available on the IFAP Web site's [Loan Servicing Centers for Students page](#) and [Loan Servicing Centers for Schools page](#), respectively.

Code	Name
700500	Department of Education Missouri Higher Education Loan Authority (MOHELA), Chesterfield, MO
700501	Department of Education Education Services of America, Inc. (HESC-EDFINANCIAL), Knoxville, TN
700502	Department of Education Utah Higher Education Assistance Authority (UHEAA-Cornerstone), Salt Lake City, UT
700503	Department of Education Aspire Resources Inc. – ISL, West Des Moines, IA
700504	Department of Education Granite State, Concord, NH
700505	Department of Education EDMANAGE, Columbia, SC
700506	Department of Education OSLA Servicing, Oklahoma City OK
700508	Department of Education KSA Servicing, Louisville, KY
700509	Department of Education EDGEducation Loans, Raleigh, NC
700510	Department of Education COSTEP Servicing, McAllen, TX
700511	Department of Education Vermont Student Assistance Corporation (VSAC) Federal Loans, Winooski, VT
700529	Department of Education ECSI Federal Perkins Loan Servicer, Coraopolis, PA
700556	Department of Education Debt Management and Collections System, Greenville, TX

Federal Loan Servicer Loan Servicing Codes (continued)

Code	Name
700577	Department of Education Xerox, Utica, NY
700578	Department of Education SALLIE MAE, Reston, VA
700579	Department of Education FEDLOAN SERVICING (PHEAA), Harrisburg, PA
700580	Department of Education NELNET, Lincoln, NE
700581	Department of Education GREAT LAKES, Madison, WI
700582	Department of Education NELNET (TPD), Denver, CO
700583	Department of Education Direct Loan Servicing Center (ACS/Conduent), Greenville, TX

Federal Loan Servicers

Code	Short Name	Name
500	ED/MOHELA	Department of Education/Missouri Higher Education Loan Authority
501	ED/HESC-EDFINANCIAL	Department of Education/Education Services of America, Inc.
502	ED/UHEAA-Cornerstone	Department of Education/Utah Higher Education Assistance Authority
503	ED/Aspire	Department of Education/Aspire Resources Inc.
504	ED/Granite State	Department of Education/GSMR-NH
506	ED/OSLA	Department of Education/OSLA Servicing
511	ED/VSAC	Department of Education/VSAC Servicing
529	ED/ECSI	Department of Education/ECSI Federal Perkins Loan Servicer
577	ED/ACS	Department of Education/ACS
578	ED/NAVIENT	Department of Education/Navient
579	ED/PHEAA	Department of Education/FEDLOAN Servicing (PHEAA)
580	ED/NELNET	Department of Education/NELNET
581	ED/Great Lakes	Department of Education/Great Lakes
583	ED/DLSC	Direct Loan Servicing Center (ACS)

FFEL-only Servicers

Code	Name	City	State
700001	ALABAMA COMMISSION ON HIGHER EDUCATION	MONTGOMERY	AL
700002	CONN. ASSISTANCE FOR LOAN SERVICING (CAL)	ROCKY HILL	CT
700003	NYSHESC NEW YORK STATE HIGHER EDU	ALBANY	NY
700004	STUDENT LOAN MARKETING ASSOCIATION	KILLEEN	TX
700005	OHIO PAYMENT SERVICES	COLUMBUS	OH
700006	ACS	LONG BEACH	CA
700007	ADP NOT IN SERVICE	CHERRY HILL	NJ
700008	SOUTHWEST STUDENT SERVICES CORP	GILBERT	AZ
700009	BANK OF NORTH DAKOTA	BISMARCK	ND
700010	BANK ONE	COLUMBUS	OH
700011	BANKS OF IOWA COMPUTER SERVICES	CEDAR RAPIDS	IA
700012	BOONE COUNTY NATIONAL BANK	COLUMBIA	MO
700013	BORTHWICK ASS NOT IN SERVICE	DOVER	NH
700014	BRAZOS HIGHER ED AUTHORITY	AUSTIN	TX
700015	C.S.X. COMM NOT IN SERVICE	JACKSONVILLE	FL
700016	STUDENT LOAN MARKETING ASSOCIATION	LYNN HAVEN	FL
700017	CITIBANK (NYS) STUDENT LOAN	PITTSFORD	NY
700018	THE STUDENT LOAN CORPORATION	ROCHESTER	NY
700019	CITICORP INFO RES NOT IN SERVICE	TROY	MI
700020	CITICORP INFO RES – NOT IN SERVICE	WOBURN	MA
700021	CITIZENS FIDELITY BANK & TRUST CO	LEXINGTON	KY
700022	COLLEGE FINANCE ASSISTANCE CORP	DEERFIELD	IL
700023	COLLEGE ACCESS NETWORK	DENVER	CO
700024	COMAC FINANCIAL SERV NOT IN SERVICE	OKLAHOMA CITY	OK
700025	COMERICA BANK – DETROIT	DETROIT	MI
700026	COMPUTER SERVICES, INC	ELIZABETHTOWN	KY
700027	COSTEP	EDINBURG	TX
700028	CROSS ISLAND COMPUTERS	WILLINSTON PARK	NY
700029	CSOBA	DENVER	CO
700030	NELNET LOAN SERVICES (JAX)	LINCOLN	NE
700031	CTHEA/COSTEP (CENTRAL TEXAS HIGH)	SAN MARCOS	TX

FFELP-only Servicers (continued)

Code	Name	City	State
700032	CUSTOMER THRIFT SERVICES, INC.	FLORHAM PARK	NJ
700033	DATA CENTER, INC.	HUTCHINSON	KS
700034	UNIPAC SERVICE CORPORATION	DENVER	CO
700035	DUNFAM, INC.	LONGWOOD	FL
700036	E.L.M.I. (NOEL BAILEY)	WAKEFIELD	MA
700037	EDUCATION LOAN SERVICES INC	BRAINTREE	MA
700038	GREAT LAKES ED LOAN SVCS, INC. (EASCI)	ABERDEEN	SD
700039	EASTERN OPERATIONS CENTER	MECHANICSVILLE	VA
700040	EDS – NO LONGER IN BUSINESS	RICHARDSON	TX
700041	NELNET (EFS)	INDIANAPOLIS	IN
700042	STUDENT LOAN CO-OPERATIVE, INC.	WAKEFIELD	MA
700043	USA GROUP LOAN SERVICES INC	INDIANAPOLIS	IN
700044	EFS – PROFESSIONAL LOAN SERVICES	INDIANAPOLIS	IN
700045	EFS OF MICHIGAN - NO LONGER BUSINESS	EAST LANSING	MI
700046	ELECTRONIC DATA SYSTEMS	LOMBARD	IL
700047	ELECTRONIC DATA SYSTEMS	WOBURN	MA
700048	FINANCIAL SERVICE, INC.	GLEN ROCK	NJ
700049	FIRST AMERICA SAVINGS BANK	LONGMONT	CO
700050	FIRST FINANCIAL MANAGEMENT CORP.	ATLANTA	GA
700051	FIRST INTERSTATE BANK OF DES MOINES	DES MOINES	IA
700052	FIRST NATIONAL BANK IN BOULDER	BOULDER	CO
700053	EDUSERV TECHNOLOGIES, INC	WINSTON-SALEM	NC
700054	FISC	LEWISTON	ME
700055	FISERV	CLEVELAND	OH
700057	GREAT LAKES HIGHER ED CORP	MADISON	WI
700058	OFFICE OF EDUCATION SERVICES	BATON ROUGE	LA
700059	GEORGIA STUDENT FINANCE AUTHORITY	TUCKER	GA
700060	GUARANTEED STUDENT LOAN	CANYON	TX
700061	EDUSERV TECHNOLOGIES INC	ST PAUL	MN
700062	HARPER, SMITH AND ASSOCIATE	JACKSONVILLE	FL
700063	HAWAII IMPULSE SYSTEMS	HONOLULU	HI
700064	HIGHER EDUCATION SERVICING CORP	ARLINGTON	TX
700065	IOWA HIGHER ED LOAN PGM	DES MOINES	IA
700066	ILLINOIS DESIGNATED ACCT PURCHASE PROG	DEERFIELD	IL
700067	ILLINOIS STATE SCHOLARSHIP COMM	DEERFIELD	IL
700068	IOWA COLLEGE AND COMMISSION	DES MOINES	IA

FFELP-only Servicers (continued)

Code	Name	City	State
700070	IOWA HIGHER EDUCATION LOAN PROGRAM	DES MOINES	IA
700071	KEARNEY STATE BANK	KEARNEY	NE
700072	KENTUCKY HIGHER ED STUDENT LOAN CORP	LOUISVILLE	KY
700073	LEBER SERVICES	ROCKFORD	IL
700074	LIBERTY NATIONAL BANK AND TRUST CO	LOUISVILLE	KY
700075	EDUSERV TECHNOLOGIES, INC	SALT LAKE CITY	UT
700076	STUDENT LOAN MARKETING ASSOCIATION	RESTON	VA
700077	SALLIE MAE	RESTON	VA
700078	STUDENT LOAN MARKETING ASSOC. VA	HERNDON	VA
700079	STUDENT LOAN MARKETING ASSOCI/TEXAS	KILLEEN	TX
700080	M.F.G. INFORMATION SYSTEMS	DECATUR	IL
700081	MISSOURI HIGHER ED LOAN AUTHORITY	ST. LOUIS	MO
700082	MAINE ED SERVICE	AUGUSTA	ME
700083	MFG INFORMATION SYSTEMS, INC.	BARTONVILLE	IL
700084	MISSISSIPPI GUARANTEE STUDENT LOAN	JACKSON	MS
700085	MASSACHUSETTS HIGHER ED ASSOC	BOSTON	MA
700086	MITCHELL SWEET AND ASSOCIATES	TEMPE	AZ
700087	MONTANA BANK OF SO MSCA	MISSOULA	MT
700088	MONTANA GUARANTEED STUDENT LOAN PGM	HELENA	MT
700089	N.C.R.	VIRGINIA BEACH	VA
700090	NATIONAL BANK OF AMERICA	SALINA	KS
700091	NCR CORPORATION	FRAMINGHAM	MA
700092	NCR DATA CORPORATION	GLASTONBURY	CT
700093	NCR DATA SERVICES	CRANBURY	NJ
700094	NCR-MID-ATLANTIC DATA SERV CENTER	COLUMBIA	MD
700095	NHELP SERVICING CENTER	LINCOLN	NE
700096	NELLIE MAE	BRAINTREE	MA
700097	NEW JERSEY DEPT OF HIGHER ED	TRENTON	NJ
700098	NEW MEXICO ED ASSISTANCE FOUNDATION	ALBUQUERQUE	NM
700099	NATIONAL EDUCATION SERVICING	CHICAGO	IL
700100	AMERICAN EDUCATION SERVICES	HARRISBURG	PA
700101	PANHANDLE PLAINS STUDENT LOAN CENTER	CANYON	TX
700102	PNC EDUCATION LOAN CENTER	PITTSBURGH	PA
700103	STUDENT ASSISTANCE SUPPORT SERVICE	AUSTIN	TX
700104	SANDUSKY COMPUTER CENTER, INC.	SANDUSKY	OH
700105	SAVINGS BANKS TRUST CO.	WOODBURY	NY

FFELP-only Servicers (continued)

Code	Name	City	State
700106	SOUTH CAROLINA STUDENT LOAN CORP	COLUMBIA	SC
700107	SOUTHERN EDUCATORS LIFE INSURANCE	NORCROSS	GA
700108	SOUTHRUST BANK/LSC/VA	MERRIFIELD	VA
700109	TGSLC LOAN SERVICING	AUSTIN	TX
700110	STUDENT FINANCE SERVICE CORP	SEATTLE	WA
700111	STUDENT LOAN FINANCE ASSISTANCE	LOS ANGELES	CA
700112	STUDENT LOAN FUND OF IDAHO MARKET	FRUITLAND	ID
700113	STUDENT LOAN FUNDING CORP	CINCINNATI	OH
700114	SUBURBAN BANK OF AURORA	AURORA	IL
700115	SUSIE MAE	HARTFORD	CT
700116	T.E. LOTT & CO	COLUMBUS	MS
700117	THE CHASE MANHATTAN BANK N.A.	TAMPA	FL
700118	STUDENT LOAN SERVICE CENTER	HARTFORD	CT
700119	TRANS WORLD INSURANCE CO	SACRAMENTO	CA
700120	USA FUNDS	INDIANAPOLIS	IN
700121	NELNET LOAN SERVICES INC. (DEN)	LINCOLN	NE
700122	UNIPAC	ST. PAUL	MN
700123	UNIVERSITY ACCOUNTING SERVICE	BROOKFIELD	WI
700124	STUDENT LOAN MARKETING ASSOCIATION	WALTHAM	MA
700125	USERS, INC	HONOLULU	HI
700126	UTAH STATE BOARD OF REGENTS LSC	SALT LAKE CITY	UT
700127	VERMONT STUDENT ASST. CORP.	WINOOSKI	VT
700128	VIRGINIA EDUCATION LOAN AUTHORITY	RICHMOND	VA
700129	EDFINANCIAL SERVICES	KNOXVILLE	TN
700130	WESCO	HELENA	MT
700131	WESCO	GRAND RAPIDS	MI
700132	WEST TEXAS EDUCATION SERVICE	EL PASO	TX
700133	WYOMING STUDENT LOAN CORP	CHEYENNE	WY
700134	1ST INTERSTATE DALLAS	DALLAS	TX
700135	5/3 BANK	CINCINNATI	OH
700136	HIGHER EDUCATION ASSISTANCE FOUN	ST. PAUL	MN
700138	STUDENT INFORMATION SERVICE CENTER	ALBANY	NY
700139	STUDENT INITIATED LOAN SERVICING	MONTGOMERY	AL
700140	STUDENT LOAN SERVICES	JACKSONVILLE	FL
700141	AMERICAN EDUCATION SERVICES	HARRISBURG	PA
700142	STUDENT LOAN SERVICING CENTER	ST. PAUL	MN

FFELP-only Servicers (continued)

Code	Name	City	State
700143	INDIANA SECONDARY MARKET	INDIANAPOLIS	IN
700144	NELNET LOAN SERVICES INC. (LOANSTAR)	BRYAN	TX
700145	IOWA CREDIT UNION LEAGUE	DES MOINES	IA
700146	ISM LOAN SERVICING CENTER	INDIANAPOLIS	IN
700147	LENDER SERVICE PGM	MADISON	WI
700148	NORTHEASTERN COMPUTER SERVICES INC.	SYRACUSE	NY
700149	OHIO STUDENT LOAN COMMISSION	COLUMBUS	OH
700150	PROMAX	WO. WEYMOUTH	MA
700151	MEMBER DATA PROCESSOR, INC.	CARMEL	IN
700152	RHODE ISLAND STUDENT LOAN AUTHORITY	WARWICK	RI
700153	RONALD FRAME, EDS	BINGHAMTON	NY
700154	TEXAS GUARANTEED STUDENT LOAN CORP.	AUSTIN	TX
700155	OSLA STUDENT LOAN SERVICING	OKLAHOMA CITY	OK
700156	WISCONSIN HIGHER EDUCATION CORP.	MADISON	WI
700157	CHELA	SAN FRANCISCO	CA
700158	EFG TECHNOLOGIES	WINSTON-SALEM	NC
700160	AMSOUTH BANK N.A.	BIRMINGHAM	AL
700161	EDUCATION SERVICES FOUNDATION	JACKSON	MS
700162	CHEMICAL BANK - EDUCATIONAL	JERICO	NY
700163	COMMERCE BANK OF ST. LOUIS	ST. LOUIS	MO
700164	COSTA MESA SERVICE CENTER	LOS ANGELES	CA
700165	CREDIT UNION PROCESSING	BATTLECREEK	MI
700166	CUPS	SOUTHFIELD	MI
700167	DAVENPORT BANK AND TRUST CO	DAVENPORT	IA
700168	FIRST BANK OPERATIONS CENTER	DULUTH	MN
700170	ICUL DATA SERVICES	DES MOINES	IA
700172	STUDENT ASSISTANCE FOUNDATION OF MT	HELENA	MT
700173	MISSOURI HIGHER EDUCATION LOAN AUTH	CHESTERFIELD	MO
700174	NELS	PROVIDENCE	RI
700178	NSLP	LINCOLN	NE
700180	STUDENT LOAN SERVICE CORP	SALT LAKE CITY	UT
700181	STUDENT LOAN SERVICING CENTER	MINNEAPOLIS	MN
700183	TOWN NORTH NATIONAL BANK	KILLEEN	TEX
700185	ACADEMIC LOAN RESOURCE	SEATTLE	WA
700189	STUDENT ASSISTANCE SUPPORT SERVICE	AUSTIN	TX
700190	STUDENT LOAN SVCING CTR/SLMA WA	SPOKANE	WA

FFELP-only Servicers (continued)

Code	Name	City	State
700191	SALLIE MAE, INC.	WILKES-BARRE	PA
700192	MONTANA HIGHER EDUCATION STUDENT AS	HELENA	MT
700193	FIRST SECURITY STUDENT LOAN	BOISE	ID
700194	CHASE STUDENT LOAN SERVCING, LLC	MADISON	MS
700195	ACADEMIC LOAN RESOURCE	FRUITLAND	ID
700196	IOWA STUDENT LOAN LIQUIDITY CORP	DES MOINES	IA
700197	LSI FINANCIAL GROUP	LITTLE ROCK	AR
700198	AFSA DATA CORP	UTICA	NY
700199	STUDENT LOAN SERVICING CENTER/SLMA	PANAMA CITY	FL
700200	GREATER EAST TEXAS SERVICING CORP	BRYAN	TX
700201	ACS EDUCATION SERVICES, INC.	LONG BEACH	CA
700202	WELLS FARGO BANK NA	SIOUX FALLS	SD
700203	WACHOVIA EDUCATION FINANCE, INC	SACRAMENTO	CA
700204	GRANITE STATE MANAGEMENT & RESOURCE	CONCORD	NH
700205	KNIGHT COLLEGE RESOURCE GROUP	BOSTON	MA
700206	STUDENT LOAN FINANCE CORPORATION	ABERDEEN	SD
700207	GREAT LAKES EDUCATIONAL LOANS SERV	MADISON	WI
700208	BRAZOS HESC	WACO	TX
700209	STUDENT ASSISTANCE FOUNDATION OF MT	HELENA	MT
700210	GEORGIA HIGHER EDUCATION ASST. CORP	TUCKER	GA
700211	ELM RESOURCES (PEPS)	OAKLAND	CA
700212	ACCESS GROUP, INC.	WILMINGTON	DE
700213	WESTERN STATES LEARNING CORP	CHEYENNE	WY
700215	XPRESS LOAN SERVICING	CLEVELAND	OH
700216	CLC SERVICING CORP.	WOODBURY	MN
700217	STUDENT LOAN FUND OF IDAHO (IMA)	FRUITLAND	ID
700218	GCO SERVICING CORPORATION	FRUITLAND	ID
700219	BRAZOS LOAN SERVICING	COLLEGE STATION	TX
700220	ALL STUDENT LOAN SERVICING CORP	VANCOUVER	WA
700788	STUDENT LOAN MARKETING ASSOCIATION	HERNDON	VA
700789	STUDENT LOAN MARKETING ASSOCIATION	WILKES-BARRE	PA
700790	UNIPAC SERVICE CORP	LINCOLN	NE
700791	FOUNTAINHEAD GROUP, LLC, STE 1910	ST. PAUL	MN

Guaranty Agencies

New for 2021-2022 – Deleted guaranty agency codes 723, 744, 753, and 800 because they closed.

Number	Short Name	Name
577	ED/ACS	Department of Education/ACS
706	California	Educational Credit Management Corporation – California
708	Colorado	College Assist
712	Florida	Florida Department of Education OSFA
713	Georgia	Georgia Student Finance Commission
717	Illinois	Illinois Student Assistance Commission
721	Kentucky	Kentucky Higher Education Assistance Authority
722	Louisiana	Louisiana Office of Student Financial Assistance
725	Massachusetts	American Student Assistance
726	Michigan	Michigan Higher Education Assistance Authority
729	Missouri	Missouri Department of Higher Education
730	Montana	Montana Guaranteed Student Loan Program
731	Nebraska	National Student Loan Program, Inc.
733	New Hampshire	New Hampshire Higher Education Assistance Foundation
734	New Jersey	New Jersey Higher Education Assistance Authority
735	New Mexico	New Mexico Student Loan Guarantee Corporation
736	New York	New York State Higher Education Services Corporation
737	North Carolina	North Carolina State Education Assistance Authority
738	North Dakota	North Dakota Post Claims Collection
740	Oklahoma	Oklahoma College Assistance Program
742	PHEAA	Pennsylvania Higher Education Assistance Agency
745	South Carolina	South Carolina State Education Assistance Authority
747	Tennessee	Tennessee Student Assistance Corporation
748	Texas	Texas Guaranteed Student Loan Corporation
749	Utah	Utah Higher Education Assistance Authority
750	Vermont	Vermont Student Assistance Corporation
755	Great Lakes	Great Lakes Higher Education Corporation
927	ECMC	Education Credit Management Corporation
951	ECMC	Education Credit Management Corporation

FFEL Lenders

To find the lender's code, name, city, and state, use the NSLDS Professional Access Web site at nsldsfa.ed.gov. Users can filter by type "Lender," then select "Retrieve" to display a list of all lenders in the database in alphabetical order. Users can also narrow down the list by entering the organization code or name before selecting "Retrieve."

Contact Information & Fields Associated with Loan Status

Loan	Contact	GA Code	School Code	Current Holder	Region Code
FFEL	Primary: Servicer or Lender (as applicable) Secondary: GA	Yes	OPE-ID	Servicer or Lender Code (as applicable)	Blank
FFEL, defaulted	GA	Yes	OPE-ID	000### (### is the GA Code)	Blank
FFEL, assigned*	ED (See Region)	555 or 556 (ED)	OPE-ID	Servicer Code: 700556 (ED)	Yes
FFEL, TPD	ED	575 and 582 (ED)	OPE-ID	Servicer Code: 700582 (ED)	Blank
FFEL, U.S. Dept. of ED Servicer	ED/SALLIE MAE Primary: Servicer Code Secondary: GA Code	578 (ED)	OPE-ID	Servicer Code: 700578 (ED)	Blank
FFEL, U.S. Dept. of ED Servicer	ED/PHEAA Primary: Servicer Code Secondary: GA Code	579 (ED)	OPE-ID	Servicer Code: 700579 (ED)	Blank
FFEL, U.S. Dept. of ED Servicer	ED/NELNET Primary: Servicer Code Secondary: GA Code	580 (ED)	OPE-ID	Servicer Code: 700580 (ED)	Blank
FFEL, U.S. Dept. of ED Servicer	ED/Great Lakes Primary: Servicer Code Secondary: GA Code	581 (ED)	OPE-ID	Servicer Code: 700581 (ED)	Blank
FDLP, Held by Debt Collection Service (DCS)	ED (See Region)	555 or 556 (ED)	OPE-ID	Servicer Code: 700556 (ED)	Yes

Contact Information & Fields Associated with Loan Status (Continued)

Loan	Contact	GA Code	School Code	Current Holder	Region Code
FISL	Primary: Servicer (if applicable) Secondary: School (is primary contact if no servicer used)	Blank	OPE-ID	Servicer Code (if applicable), or blank	Blank
FISL, Held by DCS	ED (See Region)	555 or 556 (ED)	OPE-ID	Servicer Code: 700556 (ED)	Yes
Perkins	Primary: Servicer (if applicable) Secondary: School (is primary contact if no servicer used)	Blank	OPE-ID	Servicer Code (if applicable), or blank	Blank
Perkins, Held by DCS	ED (See Region)				
Perkins, U.S. Dept. of ED/ECSI	ED	529 and 577 (ED)	OPE-ID	Servicer Code: 700529 (ED)	Blank

* Assigned = Held by Debt Collection Service (DCS).

Note: The School Code field always shows the OPE-ID of the school the student attended when the loan was received.

APPENDIX C – SAR AND SAR ACKNOWLEDGEMENT

Overview

For each non-real-time transaction processed at the CPS, an output document is sent to the applicant: a paper SAR, SAR Acknowledgement, or an E-mail Notification of SAR Processing with information to access SAR data on the Web. (If corrections are submitted on FAFSA on the Web and processed in real time, the applicant is instead presented with a link to his or her eSAR after clicking the Exit button on the confirmation page.) The type of document sent is determined by the type of record that was submitted by the applicant and his or her results of the Social Security Administration (SSA) Social Security Number (SSN) Match as follows:

Record Submitted	Output
Any record type and applicant did not have a match with the SSA (SSN Match Flag not equal to 4 [SSN, name, and date of birth match])	English or Spanish SAR
Paper FAFSA® or SAR (SSN Match Flag equal to 4)	English or Spanish SAR or E-mail Notification of SAR Processing
FAFSA on the Web and the myStudentAid mobile app, application and corrections (non-real-time) with signatures (SSN Match Flag equal to 4)	English or Spanish SAR Acknowledgement or E-mail Notification of SAR Processing
FAFSA on the Web and the myStudentAid mobile app, application and corrections (non-real-time) without signatures (SSN Match Flag equal to 4)	English or Spanish SAR or E-mail Notification of SAR Processing

Record Submitted	Output
FAFSA on the Web and the myStudentAid mobile app, corrections (real-time) (SSN Match Flag equal to 4)	No output; student receives link to eSAR after clicking Exit on the confirmation page
FAA Access to CPS Online Application or Correction (SSN Match Flag equal to 4)	English SAR Acknowledgement or E-mail Notification of SAR Processing

Students who meet the following criteria receive an e-mail containing a link to access the eSAR instead of the paper SAR or paper SAR Acknowledgement:

- SSA match equals 4 and
- E-mail address exists and has valid syntax.

We print and mail a paper SAR to students

- Who did not have an have an SSN Match Flag value of 4, or
- Who were missing signatures and did not have an e-mail address, or
- Whose e-mail addresses have invalid syntax, or
- Whose E-mail Notifications of SAR Processing were returned to us.

The SAR serves two basic purposes:

- Notifies the student of application and eligibility status
- Provides a means for correcting or confirming applicant data

The SAR Acknowledgement is designed to notify the student of application and eligibility status. If corrections are needed, the student uses FAFSA on the Web or contacts the school to submit them through FAA Access or a mainframe system.

The E-mail Notification of SAR Processing is designed to notify the student of application and eligibility status more quickly than the paper SAR or the SAR Acknowledgement. It enables the student to view the SAR online and to print the online SAR document as often as needed. The SAR links the student to FAFSA on the Web for correcting or confirming the applicant data. To complete corrections to the application data, the student must sign with an FSA ID and, if dependent and changing parental data, a parent must also sign.

Masked Values

We mask student and parent tax values with “Xs” on the SAR and SAR Acknowledgement if the information was transferred into the FAFSA using the IRS Data Retrieval Tool (DRT).

New for 2021-2022: The Student or Parent Filed a Schedule 1 field will be masked if the data was transferred from the IRS.

The fields that may be masked are as follows:

- Type of Tax form Used (Student question 33 and Parent question 80)
- Tax Filing Status (Student question 34 and Parent question 81)
- Filed a Schedule 1 (Student question 35 and Parent question 82)
- Adjusted Gross Income (AGI) (Student question 36 and Parent question 84)
- U.S. Income Taxes Paid (Student question 37 and Parent question 85)
- Income Earned from Work (Student question 38, Spouse question 39, Parent 1 question 86, and Parent 2 question 87)
- Education Credits (Student question 43a and Parent question 91a)
- IRA Deductions and Payments (Student question 44b and Parent question 92b)
- Tax exempt Interest Income (Student question 44d and Parent question 92d)
- Untaxed Portions of IRA Distributions and Pensions (Student question 44e and Parent question 92e)

Paper SAR

The paper SAR follows the order of the questions as they are presented on the paper FAFSA.

English SARs are 10-page documents, and Spanish SARs are 11-page documents. The first four pages are in a letter format and include the comment text, NSLDS information, and FAFSA information. The last six pages (seven pages for Spanish) display the question responses reported by the student and provide space for making corrections. Each page of the SAR is described in detail below.

To match the color scheme of the paper FAFSA, the 2021-2022 SAR is printed on orange paper.

The SAR was also revised to increment years and update IRS tax form references.

We mask student and parent tax values with “Xs” on the SAR if the information was transferred into the FAFSA using the IRS DRT. See the “Masked Values” section on page C-2 for affected fields.

A draft copy of the 2021-2022 SAR will be available later this year on the IFAP Web site at ifap.ed.gov/application-processing-information/fafsa-and-sar-materials.

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The date below the “https://fafsa.gov” Web site address in the upper left corner is the date the record was processed at the CPS. Below the processing date is a tracking number for the FAFSA processor and the CPS that is not used for any institutional purpose. The student’s name and mailing address is printed below the tracking number.

The student’s four-digit Data Release Number (DRN) is located to the right of the processed date in the upper right corner below the Office of Management and Budget (OMB) number. The DRN can be used by schools to access the student’s electronic application record if they were not originally listed on the student’s application or SAR. In addition, the student can use the DRN to request a correction by telephone through the FSAIC at 800/4FED AID (800/433-3243) or TDD/TTY 800/730-8913. The following types of changes can be made:

- Correct data-entry errors made by the FAFSA processor
- Update the response to FAFSA question 23 (drug question)
- Request a change of address, e-mail address, telephone number, or institution
- Update the assumption overrides

Below the DRN is the student’s EFC. The EFC printed on the front page of the SAR is the primary EFC, calculated for a nine-month academic year. An asterisk printed next to the EFC indicates that the student was selected for verification by the CPS. A “C” printed next to the EFC indicates the student has an eligibility problem that must be resolved before Title IV aid can be disbursed.

Below this information, we print information specific to the applicant based on his or her application information, processing results, and database match results.

In the lower part of the SAR, two series of numbers appear on every page. The numbers on the left are processing codes used by the FAFSA processor and the CPS for tracking and quality-control purposes. The numbers on the right are a cross-cycle student identifier, providing the CPS an alternate way to identify a student without printing his or her SSN on the form.

SAR–Page 2

The upper half of page 2 contains required information from the OMB regarding the

- Paperwork Reduction Act,
- the release of information to schools, and
- drug convictions affecting aid eligibility.

The “Only For Use by Financial Aid Office” section on the SAR appears on the lower half of page 2. Descriptive labels are intended to help the FAA identify reject codes, match flags, intermediate values, and so forth. This data is similar to the FAA information provided on the ISIR, which is described in detail earlier in this guide; however, the presentation of the information is different.

Note: The DOD Match Flag information is not printed on the SAR; it is printed only on the ISIR.

Important Note: The comment codes listed on this part of the SAR are only a subset of all the comments generated for this student. Included here are only those comment codes that do not have a corresponding flag or other indicator already provided in the “FAA Information” section of the ISIR.

SAR–Page 3

The third page uses checkboxes in front of each comment that is printed on the SAR.

The first section, “Comments About Your Information,” includes comments that have been set during the processing of the record at the CPS. The first section is for general notes.

The second section, “What You Must Do Now,” is a checklist to help students resolve any issues on the SAR—such as missing information or eligibility problems—and to give them detailed information and directions for getting additional help.

SAR–Page 4

This page displays information about the student’s financial aid history. This is a subset of the information received from NSLDS, which is included on the ISIR and described earlier in this guide. The information printed on the SAR includes the aggregate loan information for FFEL, Direct, Perkins, and TEACH loans.

SAR–Pages 5-10 (Spanish Pages 5-11)

The remaining six pages of the English SAR (seven pages of the Spanish SAR) display the applicant's answers to each question on the FAFSA and so allow the SAR to be a vehicle for corrections in the paper system.

Each numbered item in the SAR corresponds to a question on the FAFSA and contains a shortened version of the question text. Printed beneath the numbered item is the student's response to that question. Below or to the right of each question response are boxes or ovals that resemble the answer fields on the FAFSA, which the student can use to indicate or write in a corrected answer, if necessary.

Items that are highlighted (printed in bold type) require special attention. Highlighting indicates the student must provide a new answer because the CPS identified the responses as blank, illegible, questionable, or inconsistent with other answers. The CPS may assume answers to certain questions by comparing them with other information on the application. Answers might be assumed when the question is left blank, or a positive number might be assumed when the answer to an income question is given as a negative number.

When the CPS assumes an answer, both the value reported by the applicant and the assumed value are printed on the SAR. The word "ASSUMED" appears in parentheses with the assumed value. Assumed values are used by the CPS in performing the EFC calculation and should be reviewed carefully. If the assumed values are correct, the student does not need to change them on the SAR.

The student can correct other items, if necessary, whether or not they are highlighted.

When an application is rejected, the resulting SAR does not have a calculated EFC. The SAR requires the student to correct information and return pages 5 through 10 of the English SAR (pages 5 through 11 of the Spanish SAR) to the FAFSA processor for reprocessing.

Instructions to the student at the top of page 5 explain the meaning of the arrows and the proper way to fill in an oval or to correct, confirm, or delete an answer. To confirm a previously reported answer, the student must rewrite the same value in the answer field and return the SAR.

Sometimes students are caught in a reject "loop" because they do not respond to all highlighted and arrowed items to turn off the reject or because they provide new information that the edit check still considers inconsistent or questionable.

Up to four school codes and housing plans are printed on pages 9 and 10 (Spanish page 10) of the SAR; however, the student can list up to ten school codes on his or her Web application or correction. The following English statement is printed under question 101g if the fifth through tenth college codes are non-blank on the applicant's record:

"Your FAFSA information was sent to all the colleges you listed although they are not all shown here. To see all of the colleges you listed, go to <https://fafsa.gov> and select 'View or Print your Student Aid Report (SAR)' after logging in."

Printed immediately below is a statement about graduation, retention, and transfer rates:

“For the graduation, retention, and transfer rates of the colleges listed on your FAFSA, view your Student Aid Report online at <https://fafsa.gov>. You can find these rates and other important consumer information about the colleges you're interested in attending at collegescorecard.ed.gov/.”

See the “Corrections and Updates” section of this guide for more information on using the SAR to make corrections.

SAR Acknowledgement

The SAR Acknowledgement is a three-page paper document (four pages in Spanish) that summarizes the processing results of a FAFSA that was submitted electronically by the school or the student and in which no e-mail address was provided. It is issued for information purposes only and so cannot be used to make corrections.

To match the color scheme of the paper FAFSA, the 2021-2022 SAR Acknowledgement is printed on orange paper. It was also revised to increment years and update IRS tax form references.

We mask student and parent tax values with “Xs” on the SAR Acknowledgement if the information was transferred into the FAFSA using the IRS DRT. See the “Masked Values” section on page C-2 for affected fields.

SAR Acknowledgement–Page 1

Page 1 of the SAR Acknowledgement is in a letter format addressed to the applicant, similar to the SAR. The U.S. Department of Education letterhead is used and includes the FAFSA on the Web Internet address. The Office of Management and Budget (OMB) form-clearance number is printed on the right side.

The date below “<https://fafsa.gov>” in the upper left corner is the date the record was processed at the CPS. Below the processing date is a tracking number for the FAFSA processor and the CPS that is not used for any institutional purpose. The student’s name and mailing address is printed below the tracking number.

To the right of the processed date (below the OMB number) is the student’s four-digit Data Release Number (DRN).

Below the DRN is the student’s EFC. The EFC printed on the front page of the SAR Acknowledgement is the primary EFC, calculated for a nine-month academic year. An asterisk printed next to the EFC indicates that the student was selected for verification by the CPS. A “C” printed next to the EFC indicates the student has an eligibility problem that must be resolved before Title IV aid can be disbursed.

The front page of the SAR Acknowledgement contains two sections: “Application Status (review the checked boxes)” and “Federal Student Aid Eligibility (review the checked boxes).” Both sections display checkboxes next to statements regarding eligibility status and processing results.

SAR Acknowledgement–Pages 2-3 (Spanish Pages 2-4)

Page 2 and page 3 display, in condensed form, every numbered question from the FAFSA and include the student’s answer or the value the CPS assumed.

Only the first four school codes and housing plans are printed on the SAR Acknowledgement. However, because students can enter up to ten college choices on the Web, the following English statement is printed before the “For Financial Aid Office Use Only” section if the fifth through tenth college codes are non-blank on the applicant’s record:

“Your FAFSA information was sent to all the colleges you listed although they are not all shown here. To see all of the colleges you listed, go to <https://fafsa.gov> and select ‘View or Print your Student Aid Report (SAR)’ after logging in.”

In the lower part of the page, the “For Financial Aid Office Use Only” section includes information and codes for FAAs. Included here are important flags showing results of data matches, as well as other information needed by FAAs to determine aid eligibility.

Note: Up to 20 comment codes generated for the student’s ISIR are printed here, regardless of whether an associated match flag or other indicator is also provided.

APPENDIX D – Sample 2021-2022 ISIR

Overview

The remaining pages in this document contain a sample of the 2021-2022 ISIR that is printed using the EDEExpress software. You are not required to print your ISIR output documents in this or any other format. If you do choose to print ISIRs, you can also choose to print additional information on the ISIR. See the “Printing” section in the *2021-2022 Electronic Data Exchange (EDE) Technical Reference*, posted on the IFAP Web site.

New for 2021-2022: The following changes were made to the ISIR printed from EDEExpress:

- Two new flag fields are printed on the ISIR under the “IRS Data Field Flags.” The flags are for the student and parent “Filed Schedule 1.”
- On pages 2 and 3, the two-column formatting is now applied to each ISIR section individually rather than to the entire page. As a result, the placement of fields has been slightly adjusted.
- The NSLDS pages were redesigned to print in landscape layout.

Note: Changes to the EDEExpress 2021-2022 ISIR report may occur following the publication of this guide. If this occurs, we will update the sample and repost *The 2021-2022 ISIR Guide*, which can be found on the IFAP Web site.

Sample ISIR

20YY - 20YY Institutional Student Information Record

IMPORTANT: Read ALL information to find out what to do with this report.

XXXXXXXXXXXX X. XXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXX XX 99999

OMB Number: 9999-9999
MMMMMMMM DD, 20YY
EFC 999999 X

999

999
XX
XX
XXXXXXXXXXXXXXXXXXXX

999
XX
XX

999
XX
XX
XX
XX
XX
XX
XXXX

20YY-20YY Institutional Student Information Record

Student ID	999-99-9999 XX 99	EFC	999999 X
		Dependency Status	X

STEP ONE (The Student) (Q9 - Q99)

Name	XXXXXXXXXXXXX X. XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Selective Service Registration?	X
Address	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Drug Conv Affecting Elig?	XXX
City State Zip	XXXXXXXXXXXXXXXXXX XX 99999	Parent 1 Educational Level	XXXXXXXXXXXXXXXXXX
Social Security Number	999-99-9999	Parent 2 Educational Level	XXXXXXXXXXXXXXXXXX
Student's Date of Birth	MM/DD/20YY	E-mail Address	XXXXXXXXXXXXXXXXXXXX@XXXXXXXXXXXXXXXXXXXX.XXX
E-mail Address	XXXXXXXXXXXXXXXXXXXX@XXXXXXXXXXXXXXXXXXXX.XXX	Permanent Home Phone #	(999)999-9999
Permanent Home Phone #	(999)999-9999	High School or Equivalent?	XXXXXXXXXXXXXX
Driver's License #	XXXXXXXXXXXXXXXXXXXX	High School Name	XXXXXXXXXXXXXXXXXXXX
Student's Citizenship Status	XXXXXXXXXXXXXXXXXX		XXXXXXXXXXXXXXXXXXXX
Student's Alien Registration Number	XXXXXXX	HS City State	XXXXXXXXXXXXXXXXXXXX, XX
Marital Status	XXXXXXXXXX	High School Code	99999999999999
Marital Status Date	MM/CCYY	First Bachelor's Degree by July 1, 20YY?	XXX
State of Legal Residence	XX	Grade Level in College	XXXXXXXXXXXXXXXXXX
Legal Resident Before 01/01/20YY?	XXX	Degree/Certificate	XXXXXXXXXXXXXXXXXX
Student's Legal Residence Date	MM/CCYY	Interested in Work-Study?	XXXXXXXXXXXXXX
Male or Female?	XXXXXX		

STEP TWO (Student & Spouse) (Q99 - Q99)

Tax Return Filed?	XXXXXXXXXXXX	Taxable Earnings Need-Based Empl	9999999
Type of 20YY Tax Return Used	XXXXXXXXXXXX	Grant & Scholarship Aid Reported	9999999
Student Filed Schedule 1?	XXXXXXXXXXXX	Special Combat Pay/Combat Pay	9999999
Tax Return Filing Status	XXXXXXXXXXXX	Co-op Earnings	9999999
Adjusted Gross Income	-9999999	Student and Spouse Untaxed Income	99999999
U.S. Income Tax Paid	-9999999	Tax-Deferred Pension/Savings	9999999
Student's Income Earned From Work	-9999999	IRA Deductions and Payments	9999999
Spouse's Income Earned From Work	-9999999	Child Support Received	9999999
Cash, Savings, and Checking	9999999	Tax Exempt Interest Income	9999999
Net Worth of Investments	9999999	Untaxed IRA Distrib. & Pensions	9999999
Net Worth of Business/Farm	9999999	Military or Clergy Allowances	9999999
Asset Threshold Exceeded	XXX	Veterans Noneducation Benefits	9999999
Student's Addl Financial Info	99999999	Other Untaxed Income	9999999
Education Credits	9999999	Money Rec'd/Paid on Your Behalf	9999999
Child Support Paid	9999999		

STEP THREE (Student & Status) (Q99 - Q99)

Born Before January 1, 20YY?	XXX	Orphan or Ward of the Court?	XXX
Is Student Married?	XXX	Are/Were you an Emancipated Minor?	XXX
Working on Master's/Doctorate Program?	XXX	Are/Were you in Legal Guardianship?	XXX
On Active Duty in U.S. Armed Forces?	XXX	Homeless Child or Youth?	XXX
Veteran of U.S. Armed Forces?	XXX	Determined by HUD Homeless?	XXX
Have Children You Support?	XXX	Is Student at Risk for Homelessness?	XXX
Dependents Other Than Children/Spouse?	XXX		

STEP FOUR (Parents) (Q99 - Q99)

Marital Status	XXXXXXXXXX	WIC Benefits	XXX
Marital Status Date	MM/CCYY	Tax Return Filed?	XXXXXXXXXXXX
Parent 1 SSN	999-99-9999	Type of 20YY Tax Return Used	XXXXXXXXXXXX
Parent 1 Last Name	XXXXXXXXXXXX	Parents Filed Schedule 1?	XXXXXXXXXXXX
Parent 1 First Initial	X	Tax Return Filing Status	XXXXXXXXXXXX
Parent 1 Date of Birth	MM/DD/CCYY	Is Parent a Dislocated Worker?	XXXXXXXXXXXX
Parent 2 SSN	999-99-9999	Adjusted Gross Income	-9999999
Parent 2 Last Name	XXXXXXXXXXXX	U.S. Income Tax Paid	9999999
Parent 2 First Initial	X	Parent 1 Income Earned From Work	-9999999
Parent 2 Date of Birth	MM/DD/CCYY	Parent 2 Income Earned From Work	-9999999
E-mail Address	XXXXXXXXXXXXXXXXXXXX@XXXXXXXXXXXXXXXXXXXX.XXX		
State of Legal Residence	XX	Cash, Savings, and Checking	9999999
Legal Residents Before 01/01/20YY?	XXX	Net Worth of Investments	9999999
Parents' Legal Residence Date	MM/CCYY	Net Worth of Business/Farm	9999999
Number of Family Members	99	Asset Threshold Exceeded	XXX
Number in College	99	Parents' Addl Financial Info	99999999
Medicaid or SSI	XXX	Education Credits	9999999
SNAP Benefits	XXX	Child Support Paid	9999999
Free/Reduced Price Lunch Benefits	XXX	Taxable Earnings Need-Based Empl	9999999
TANF Benefits	XXX	Grant & Scholarship Aid Reported	9999999

*=assumption h=highlight flag #=corrected this trans @=corrected previous trans
Page X of Y

20YY-20YY Institutional Student Information Record

Student ID	999-99-9999 XX 99	EFC	999999 X
Student's Last Name	XXXXXXXXXXXXXXXXXX	Dependency Status	X
STEP FOUR (Parents) Continued			
Special Combat Pay/Combat Pay	9999999	Tax Exempt Interest Income	9999999
Co-op Earnings	9999999	Untaxed IRA Distrib. & Pensions	9999999
Parents' Untaxed Income	99999999	Military or Clergy Allowances	9999999
Tax-Deferred Pension/Savings	9999999	Veterans Noneducation Benefits	9999999
IRA Deductions and Payments	9999999	Other Untaxed Income	9999999
Child Support Received	9999999		
STEP FIVE (Student House Hold) (Q99 - Q99)			
Number Family Members	99	Free/Reduced Price Lunch Benefits	XXX
Number in College	99	TANF Benefits	XXX
Medicaid or SSI	XXX	WIC Benefits	XXX
SNAP Benefits	XXX	Student/Spouse a Dislocated Worker?	XXX
STEP SIX (Q999)			
School #1	999999 Housing #1 XXXXXXXXXXXX	Date Completed	MM/DD/20YY
School #2	Housing #2	Signed By	XXXXXXXXXXXXXXXXXXXX
School #3	Housing #3	Preparer's Social Security Number	999-99-9999
School #4	Housing #4	Employer Identification Number (EIN)	XXXXXXXXXX
School #5	Housing #5	Preparer's Signature	XXXXXX
School #6	Housing #6		
OFFICE INFORMATION			
Primary EFC Type	9	Source of Correction	XXXXXXXXXX
Secondary EFC Type	9	Federal School Code Indicator	999999
Transaction Processed Date	MM/DD/20YY		
Transaction Data Source/Type XX			
Reject Override Codes			
A: X	B: X	C: X	G: X J: X K: X N: X W: X 3: X 12: X 20: X 21: X
Assumption Override Codes			
1: X	2: X	3: X	4: X 5: X 6: X
FAA Information			
Date ISIR Received	MM/DD/20YY	CPS Pushed ISIR	XXX
Verification Flag	X	Rejects Met	99,99,99,99,99,99,99
Professional Judgment Flag	XXXXXX	Verification Tracking Flag	XXXX
Transaction Receipt Date	MM/DD/20YY	Dependency Override Indicator	XXXXXXXXXX
Reprocessed Reason Code	XX	ETI	9
Processed Record Type	X	Correction # Applied To	99
		Application Receipt Date	MM/DD/20YY
Pell Eligibility Flag: X			
Primary EFC	999999	Secondary EFC	999999
Mon 1 999999	Mon 7 999999	Mon 1 999999	Mon 7 999999
Mon 2 999999	Mon 8 999999	Mon 2 999999	Mon 8 999999
Mon 3 999999	Mon 10 999999	Mon 3 999999	Mon 10 999999
Mon 4 999999	Mon 11 999999	Mon 4 999999	Mon 11 999999
Mon 5 999999	Mon 12 999999	Mon 5 999999	Mon 12 999999
Mon 6 999999		Mon 6 999999	
IRS Data Flags			
Flag	Student	Parent	Flag
Req	X	X	AGI
Display	X	X	Taxes Paid
IRA Deductions	X	X	Tax Return Type
Tax-Exempt Int. Income	X	X	Return Filing Status
Untaxed IRA Dist. & Pension Portions	X	X	Education Credits
Filed Schedule 1?	X	X	
CFH Indicator	X		
Duplicate SSN Flag	XXX		Verification Selection Flag
Address Only Correction	X		EFC Change Flag
SAR C Change Flag	X		Special Circumstance Flag
High School Flag	X		Auto Zero EFC Flag
Rejected Status Change Flag	X		SNT Flag
Match Flags			
SSN 9 SSA 9 DHS 9	SSN 9 NSLDS 9 VA 9	DHS Sec. Conf. X	Parent 1 SSN 9 Parent 2 SSN 9 DOD X
DHS Verification	#9999999999999999		SS Registration Flag
NSLDS Transaction Number	9		NSLDS Database Results Flag
Comments:	999,999,999,999,999,999		

*=assumption h=highlight flag #=corrected this trans @=corrected previous trans
Page X of Y

20YY-20YY Institutional Student Information Record

Student ID 999-99-9999 XX 99 EFC 999999 X
 Student's Last Name XXXXXXXXXXXXXXXX

READ, SIGN, AND DATE

If you are the student, by signing this application you certify that you (1) will use federal and/or state student financial aid only to pay the cost of attending an institution of higher education, (2) are not in default on a federal student loan or have made satisfactory arrangements to repay it, (3) do not owe money back on a federal student grant or have made satisfactory arrangements to repay it, (4) will notify your college if you default on a federal student loan, and (5) will not receive a Federal Pell Grant from more than one college for the same period of time.

If you are the parent or the student, by signing this application you certify that all of the information you provided is true and complete to the best of your knowledge and you agree, if asked, to provide information that will verify the accuracy of your completed form. This information may include U.S. or state income tax forms that you filed or are required to file. Also, you certify that you understand that the Secretary of Education has the authority to verify information reported on this application with the Internal Revenue Service and other federal agencies. If you electronically sign any document related to the federal student aid programs using an FSA ID (username and password) and/or any other credential, you certify that you are the person identified by that username and password, and/or other credential, and have not disclosed that username and password, and/or other credential to anyone else. If you purposely give false or misleading information, you may be fined up to \$20,000, sent to prison, or both.

Everyone whose information is given on this form should sign below. The student (and at least one parent, if parent information is given) MUST sign below.

Student _____ Date: _____

Parent _____ Date: _____

XXXXXXXXXXXXX X. XXXXXXXXXXXXXXXX

999-99-9999

20YY - 20YY NSLDS Financial Aid History Processed: MM/DD/20YY

This page contains your previous financial aid information, which is contained in the National Student Loan Data System (NSLDS).
Your Financial Aid Administrator will use it to determine your eligibility.

Flags

Discharged Loan	Fraud Loans	Defaulted	Loan Sat.	Repayment	Active Bankruptcy	TEACH Loan	Overpayment	Unusual Enroll
Value	Changed	Value	Changed	Value	Changed	Value	Changed	History
X	X	X	X	X	X	X	X	9

Aid Type Summary

Aid Type	Overpayment	Contact	LEU %	Lifetime Limit Flag
Pell	X	XXXXXXXXXXXXX	9999.999%	X
TEACH	X	XXXXXXXXXXXXX		
Iraq and Afghanistan Service Grant	X	XXXXXXXXXXXXX		
FSEOG	X	XXXXXXXXXXXXX		
Perkins	X	XXXXXXXXXXXXX		

Subsidized Usage Limit Applies Flag	Subsidized Usage Period	FFEL/Direct Loans Changed	Perkins Loans Changed
X	999.999	X	X

FFEL/Direct Loans Aggregate Amounts

Loan Type	Outstanding Principal Balance	Pending Disbursement(s)	Total
Subsidized Loans	\$999,999	\$999,999	\$999,999
Unsubsidized Loans	\$999,999	\$999,999	\$999,999
TEACH Loans	\$999,999		\$999,999
Combined Loans	\$999,999	\$999,999	\$999,999
Unallocated Consolidation Loans	\$999,999		\$999,999

Perkins Loans Aggregate Amounts

Outstanding Principal Balance	Current Year Loan Amount
\$999,999	\$999,999

TEACH Grants Aggregate Amounts

Undergrad/Post Bacc Disb Amount	Current Year Loan Amount
\$999,999	\$999,999

School Code	Trans #	Scheduled Amount	Award Amount	Disbursement Amount	Additional Indicator	% Scheduled Award Used by Award Year	Date as of	Pell Verification Flag	EFC	Changed?
999999	99	\$9999	\$9999	\$9999	X	99.9999	MM/DD/CCYY	X	99999	X

XXXXXXXXXXXXX X. XXXXXXXXXXXXXXXX

999-99-9999

20YY - 20YY NSLDS Financial Aid History Processed: MM/DD/20YY

This page contains your previous financial aid information, which is contained in the National Student Loan Data System (NSLDS).
Your Financial Aid Administrator will use it to determine your eligibility.

TEACH Payment Data (Access NSLDS for additional TEACH data.)

School Code	Trans #	Scheduled Amount	Award Amount	Disbursement Amount	Award Year	Data as of	Grade Level	Loan Conversion Flag	Sequence	Changed?
999999	99	\$9999	\$9999	\$9999	9999	MM/DD/CCYY	9	X	999	X

FFEL Stafford Subsidized Detail

Net Loan Amount	Capitalized Interest	Amount of Last Disbursement	Outstanding Balance	Begin Date	End Date	Grade Level	Loan Type	Additional Unsubsidized	School Code
\$999,999	XXX	\$9999	\$999,999	MM/DD/CCYY	MM/DD/CCYY	9	XXXXXXXXXX	XXXXXXXXXXXX	99999999

FFEL Stafford Subsidized Detail (continued)

Changed?	GA Code	Contact Code	Contact Type	Status Code	Confirmed Subsidy Status	Date of Last Disbursement	Loan Status Date	Subsidy Status Date	Outstanding Balance Date
X	999	XXXXXXXXXX	999	XX	X	MM/DD/CCYY	MM/DD/CCYY	MM/DD/CCYY	MM/DD/CCYY

FFEL Stafford Subsidized Detail

Net Loan Amount	Capitalized Interest	Amount of Last Disbursement	Outstanding Balance	Begin Date	End Date	Grade Level	Loan Type	Additional Unsubsidized	School Code
\$999,999	XXX	\$9999	\$999,999	MM/DD/CCYY	MM/DD/CCYY	9	XXXXXXXXXX	XXXXXXXXXXXX	99999999

FFEL Stafford Subsidized Detail (continued)

Changed?	GA Code	Contact Code	Contact Type	Status Code	Confirmed Subsidy Status	Date of Last Disbursement	Loan Status Date	Subsidy Status Date	Outstanding Balance Date
X	999	XXXXXXXXXX	999	XX	X	MM/DD/CCYY	MM/DD/CCYY	MM/DD/CCYY	MM/DD/CCYY

FFEL Stafford Subsidized Detail

Net Loan Amount	Capitalized Interest	Amount of Last Disbursement	Outstanding Balance	Begin Date	End Date	Grade Level	Loan Type	Additional Unsubsidized	School Code
\$999,999	XXX	\$9999	\$999,999	MM/DD/CCYY	MM/DD/CCYY	9	XXXXXXXXXX	XXXXXXXXXXXX	99999999

FFEL Stafford Subsidized Detail (continued)

Changed?	GA Code	Contact Code	Contact Type	Status Code	Confirmed Subsidy Status	Date of Last Disbursement	Loan Status Date	Subsidy Status Date	Outstanding Balance Date
X	999	XXXXXXXXXX	999	XX	X	MM/DD/CCYY	MM/DD/CCYY	MM/DD/CCYY	MM/DD/CCYY

Page X of Y

XXXXXXXXXXXXX X. XXXXXXXXXXXXXXXX

999-99-9999 XX 99

XXXXXXXXXXXXX X. XXXXXXXXXXXXXXXX
999-99-9999
20YY - 20YY NSLDS Financial Aid History Processed: MM/DD/20YY
This page contains your previous financial aid information, which is contained in the National Student Loan Data System (NSLDS).
Your Financial Aid Administrator will use it to determine your eligibility.

FFEL Stafford Subsidized Detail

Net Loan Amount	Capitalized Interest	Amount of Last Disbursement	Outstanding Balance	Begin Date	End Date	Grade Level	Loan Type	Additional Unsubsidized	School Code
\$999,999	XXX	\$9999	\$999,999	MM/DD/CCYY	MM/DD/CCYY	9	XXXXXXXXXX	XXXXXXXXXXXX	99999999

FFEL Stafford Subsidized Detail (continued)

Changed?	GA Code	Contact Code	Contact Type	Status Code	Confirmed Subsidy Status	Date of Last Disbursement	Loan Status Date	Subsidy Status Date	Outstanding Balance Date
X	999	XXXXXXXX	999	XX	X	MM/DD/CCYY	MM/DD/CCYY	MM/DD/CCYY	MM/DD/CCYY

Direct Sub (SULA Eligible)

Net Loan Amount	Capitalized Interest	Amount of Last Disbursement	Outstanding Balance	Begin Date	End Date	Grade Level	Loan Type	Additional Unsubsidized	School Code
\$999,999	XXX	\$9999	\$999,999	MM/DD/CCYY	MM/DD/CCYY	9	XXXXXXXXXX	XXXXXXXXXXXX	99999999

Direct Sub [SULA Eligible] (continued)

Changed?	GA Code	Contact Code	Contact Type	Status Code	Confirmed Subsidy Status	Date of Last Disbursement	Loan Status Date	Subsidy Status Date	Outstanding Balance Date
X	999	XXXXXXXX	999	XX	X	MM/DD/CCYY	MM/DD/CCYY	MM/DD/CCYY	MM/DD/CCYY

MPN Information

Loan Type	MPN
Direct Loan Subsidized/Unsubsidized	XXXXXXXXXXXXXXXX
Direct Loan PLUS	XXXXXXXXXXXXXXXX
Direct Loan Grad PLUS	XXXXXXXXXXXXXXXX

Loan Limit Information

Loan Type	Loan Limit Flag
Undergraduate Subsidized	XXXXXXXXXXXXXXXX
Undergraduate Combined	XXXXXXXXXXXXXXXX
Graduate Subsidized	XXXXXXXXXXXXXXXX
Graduate Combined	XXXXXXXXXXXXXXXX