Processing and Using Institutional Financial Aid Applications

Maintaining Institutional Financial Aid Applications

Your institution can gather additional resource information about students and their families by using the College Board PROFILE application which is electronically supported by the System or by entering your institutional application on the pages in this component.

Note: The College Board PROFILE and institutional application data share the same pages. You might unintentionally create multiple institutional aid records for a student from these three sources, which could cause unintended INAS calculation results.

Note: Question marks or blanks on College Board PROFILE data files are converted or appear as zeros in currency based numeric fields.

For further information about the fields in this component, please refer to The College Board's *PROFILE User's Guide*, available to College Board PROFILE subscribers.

This section lists common elements and discusses how to:

- Review student information.
- Review parent information.
- Review currency information family information, and institutional questions.
- Review all computed data for student and parents.

Related Links

Loading and Managing PROFILE Records
Using INAS Batch Calculations

Common Elements Used in This Section

Need Summary	Click to access the Need Summary page, where you can review the student's federal and institutional need calculations.
FM (federal methodology)	Click to access the INAS Fed Extension page, where you can override INAS Local Policy Options for federal data.

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IM (institutional methodology) Click to access the Institutional Need Calculation Extension 1 page, where you can override INAS Local Policy Options for institutional data.

INAS (institutional need analysis system) Click to calculate an unofficial federal and institutional Expected Family Contribution (EFC) by using the College Board's Institutional Need Analysis System (INAS). A COBOL program is used to perform the INAS calculation.

Related Links

Defining Federal and Institutional Methodologies

Overriding Expected Family Contribution (EFC)

Pages Used for Institutional Applications

Note: The navigation paths for the pages listed in the following page introduction table are for aid year 20nn-20nn. Oracle supports access for three active aid years with valid INAS calculations. Earlier aid year institutional application data is available for display only at Financial Aid, Financial Aid History, View Archived Application Data, Institutional Application.

Page Name	*Definition Name*	*Navigation*	*Usage*
Student Data	INST_STUDENT_nn	Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Student Data	View or enter all the information about the student.
Parent Data	INST_PARENT_nn	Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Parent Data	View or enter all the parent information.
Miscellaneous Data	INST_MISC_nn	Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Miscellaneous Data	View or enter signature, family member, school selection, and institutional question (the College Board PROFILE Section Q) information. You can also view FNAR messages on this page.
Computation Data	INST_COMP_SUMM_nn	Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Computation Data	View or enter computed parent and student income, allowance, and asset information using your institutional and federal methodology. The computed values appear here.

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Reviewing Student Information

Access the Student Data page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Student Data).

Image: Maintain Institutional Application, Student Data tab (page 1 of 3)

This example illustrates the fields and controls on the Maintain Institutional Application, Student Data tab (page 1 of 3). You can find definitions for the fields and controls later on this page.

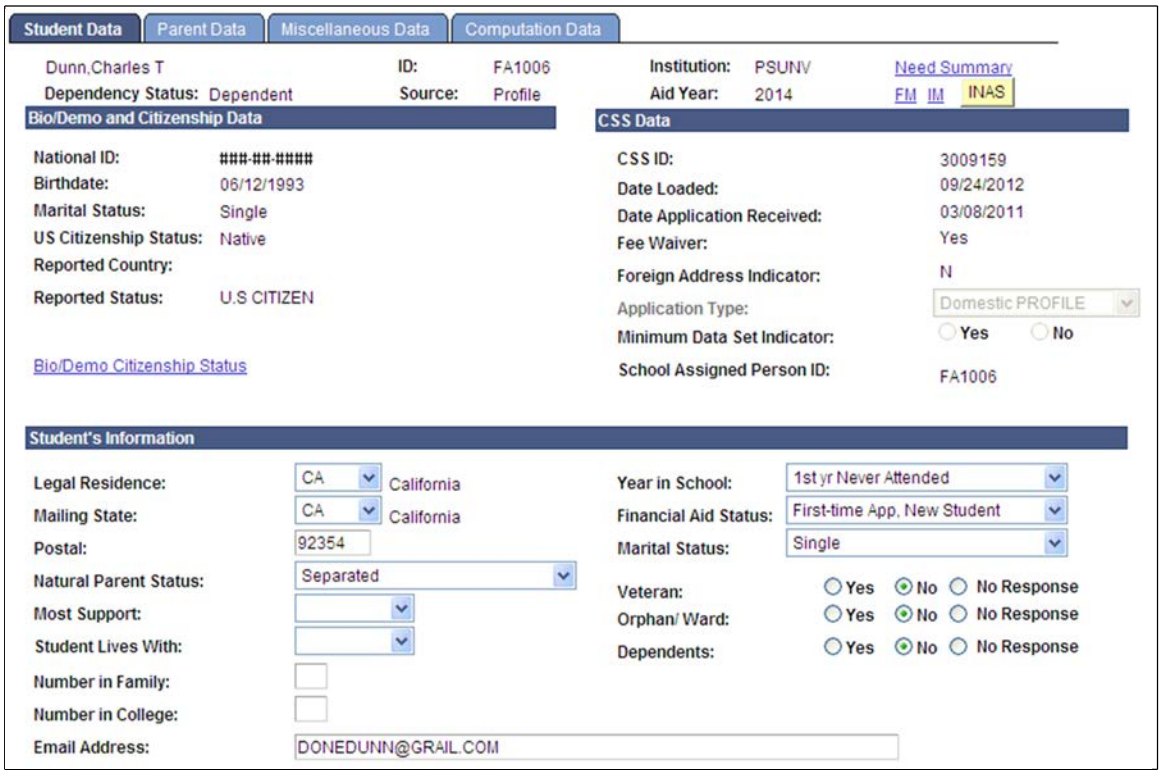

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Image: Maintain Institutional Application, Student Data tab (page 2 of 3)

This example illustrates the fields and controls on the Maintain Institutional Application, Student Data tab (page 2 of 3). You can find definitions for the fields and controls later on this page.

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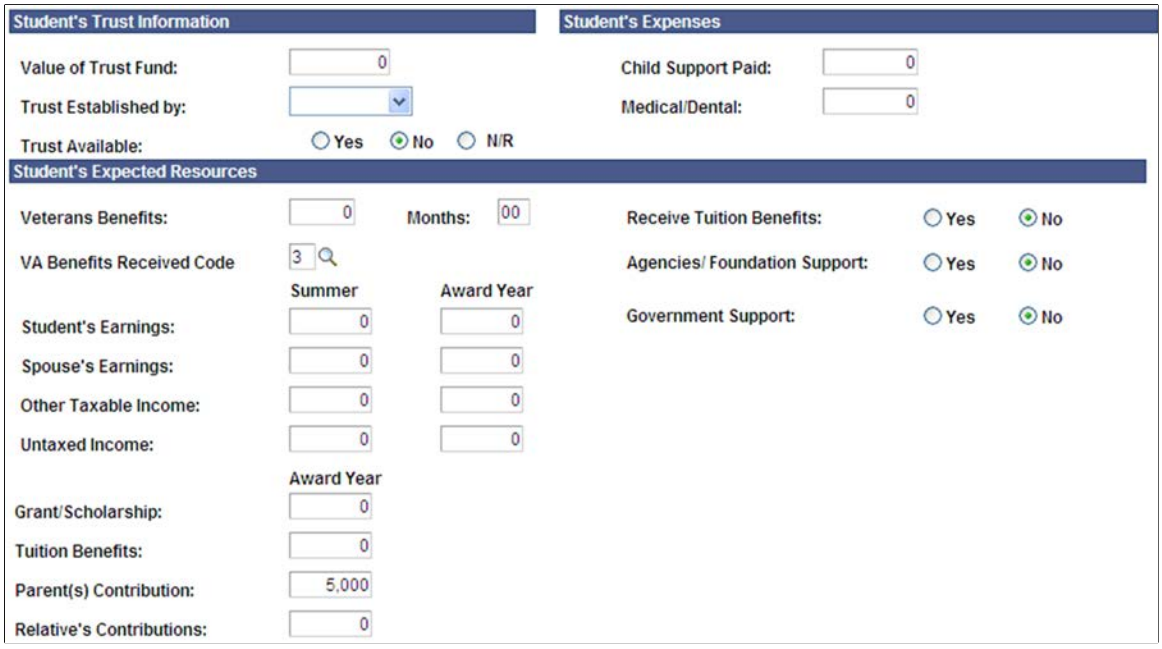
Image: Maintain Institutional Application, Student Data tab (page 3 of 3)

This example illustrates the fields and controls on the Maintain Institutional Application, Student Data tab (page 3 of 3). You can find definitions for the fields and controls later on this page.



The system displays the student's name, ID, institution, dependency status, application source, and aid year.

Bio/Demo and Citizenship Data

The data for the fields in this group box are populated from Campus Community Bio/Demo data.

National ID

Displays the student's National ID.

Note: PROFILE supports the loading of an International PROFILE Application Type, and PROFILE-related tables may reflect the National ID (NID) of a foreign student. During the PROFILE Data Load, the system tests if the student's NID meets the format rules defined for the specified country. If the NID meets the test, then a row is inserted into Person Data with the NID and NID Country. If the NID does not meet the test, then a row is inserted into Person Data with the NID Country and that country's default NID.

Reported Country

Displays the student's *reported* country if not United States of America.

Reported Status

Displays the *reported* United States citizenship status: *U.S CITIZEN*, *ELIG NON-CITIZEN*, or blank

Bio/Demo Citizenship Status

Click this link to access the Campus Community Citizenship/ Passport page to confirm the citizenship status of the student's Biographic/ Demographic data against the values in the Reported Country and Reported Status fields.

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CSS Data

CSS ID

Displays the student's unique identifying number assigned by College Board to ensure both privacy and quick retrieval of records. When you call the College Board inquiry number with questions about specific records, it is helpful to know the student's College Board ID number.

Date Loaded

Displays the date the College Board application was loaded into the system.

Date Application Received

Displays the date the PROFILE application was received by College Board.

Fee Waiver

Displays *Yes* or *No*.

AP Flag

Note: This field is not supported after aid year 2010–2011.

Displays a *Y* value from PROFILE only if student passed two or more AP classes with a test grade of 3 or higher. This field is blank if no information is available, the student does not give permission for information to be passed, or the student does not qualify for a *Y* value.

Foreign Address Indicator

Displays *Y* if the student has a foreign address. Displays *N* if the student does not have foreign address.

Application Type

Displays *1* if the application is a Domestic PROFILE and *4* of the application is an International PROFILE.

Note: The following Application Types are not loaded into the system: 2 (Noncustodial PROFILE) and 3 (Registration only record).

Minimum Data Set Indicator

Displays status identifying lowest income filers.

School Assigned Person ID

The student's reported ID assigned to the student by the student's school.

Student's Information

Legal Residence

Select the student's state of legal residence. Values include US states, Canada (CN), or Mexico (MX).

Mailing State

Select the US state in which the student is a resident.

Postal

Enter the postal code or zip code for the student's state of residence.

Natural Parents Marital Status

Select from *Divorced, Married, Never Married Living Separate, Never Married Living Together, Separated, Single Parent Donor Conceived, Single adoptive parent*, or *Widowed*.

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Most Support	Select from: *Father* or *Mother.*
Student Lives With	Select from: *Blank, Father, Mother,* or *Neither.*
Number in Family	Enter the total number of people in the student's household. The system displays *01* through *99* and blank for dependent students.
Number in College	Enter the total number of people in college from the student's household. The system displays *1* through *9* and blank for dependent students.
Email Address	Enter the student's email address.
Year in School	Enter the academic year for which the student is seeking financial aid.
Financial Aid Status	Enter the student's status as it relates to receiving financial aid.
Marital Status Code	Select the marital status to be used for financial aid purposes. This marital status can differ from the Bio/Demo Data page marital status.
Veteran	Select *Yes, No* or *No Response* to indicate whether the student is a veteran.
Orphan/Ward	Select *Yes, No,* or *No Response* to indicate whether the student is an orphan or ward of the state.
Dependents	Select *Yes, No,* or *No Response* to indicate whether the student has dependents.

Student's Income and Benefits

Tax Filed Status	Select from blank, *Completed, Non Filer,* or *Will File.*
Tax Form Type	Optional. Select from *1040, 1040A, 1040EZ, Canadian, Puerto Rican, Other US,* or *Other Non—US.*
Number of Exemptions	Select the number of exemptions the student claimed on their tax U.S. Federal tax form.
Combat Pay	Displays an amount or is blank.
Dislocated Worker	Select *Yes, No,* or *N/R* (not reported).
Orphan/Foster/Ward after 13	Select *Yes, No,* or *N/R* (not reported).
Homeless	Select *Yes, No,* or *N/R* (not reported).

The remaining fields refer directly to items on the U.S. federal tax form or data collected from applicable sources, such as an institutional application or other third-party sources. Enter the values from the student's tax form in the appropriate fields.

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Student's Assets

Cash, Savings, and Checking	Enter a value.
IRA/ Keogh	Enter a value.
Self Employed	Select *Yes* or *No*.
Student Lives on Farm	Select *Yes, No,* or *N/R* (no response).
Large Business Indicator	Select *Yes, No,* or *N/R* (Not Reported).
Investment	Enter the value and debt amounts.
Home	Enter the value and debt amounts.
Home Purchase Year	Enter year home was purchased.
Price	Enter the price of the home indicated in the Home Purchase Year field.
Other Real Estate	Enter the value and debt amounts.
Business/Farm	Enter the value and debt amounts.

Student's Trust Information

Value of Trust Fund	Enter the value of the trust in USD.
Trust Established by	Select *Other* or *Parents.*
Trust Available	Select *Yes, No,* or *N/R* (no response) to indicate the availability of the trust.

Student's Expenses

Enter values from the student's tax form.

Student's Expected Resources

Veterans Benefits	Enter the amount of veterans benefits received. The system displays *00* through *12* or blank.
Months	Enter the number of months the veterans benefits were received in the year.
VA Benefits Received Code	Enter the VA Benefits received by the student. Valid values are: • *1* = GI Bill - Active Duty (Ch 30) • *2* = Post-9/11 GI Bill (Ch 33) • *3* = GI Bill - Selective reserve (Ch 30) • *4* = REAP (Ch 1607)

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- *5* = Voc Rehab and Employment (Ch 31)
- *6* = DEAP (Ch 35)
- *7* = Any other type of VA educational benefits

Student's Earnings	Enter for both summer and school year.
Spouse's Earnings	Enter for both summer and school year.
Other Taxable Income	Enter for both summer and school year.
Untaxed Income	Enter for both summer and school year.
Grant/Scholarship	Enter a value.
Tuition Benefits	Enter a value.
Parent(s) Contribution	Enter a value.
Relative's Contributions	Enter a value.
Receive Tuition Benefits	Indicate whether or not the student receives tuition benefits from the parents' employers.
Agencies/Foundation Support	Indicate whether the student expects to receive from agencies or foundations to pay for educational expenses during any year of attendance.
Government Support	Indicate whether the student expects to receive from her government to pay for educational expenses during any year of attendance.

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Reviewing Parent Information

Access the Parent Data page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Parent Data).

Image: Maintain Institutional Application, Parent Data tab (page 1 of 4)

This example illustrates the fields and controls on the Maintain Institutional Application, Parent Data tab (page 1 of 4). You can find definitions for the fields and controls later on this page.

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Image: Maintain Institutional Application, Parent Data tab (page 2 of 4)

This example illustrates the fields and controls on the Maintain Institutional Application, Parent Data tab (page 2 of 4). You can find definitions for the fields and controls later on this page.

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Image: Maintain Institutional Application, Parent Data tab (page 3 of 4)

This example illustrates the fields and controls on the Maintain Institutional Application, Parent Data tab (page 3 of 4). You can find definitions for the fields and controls later on this page.

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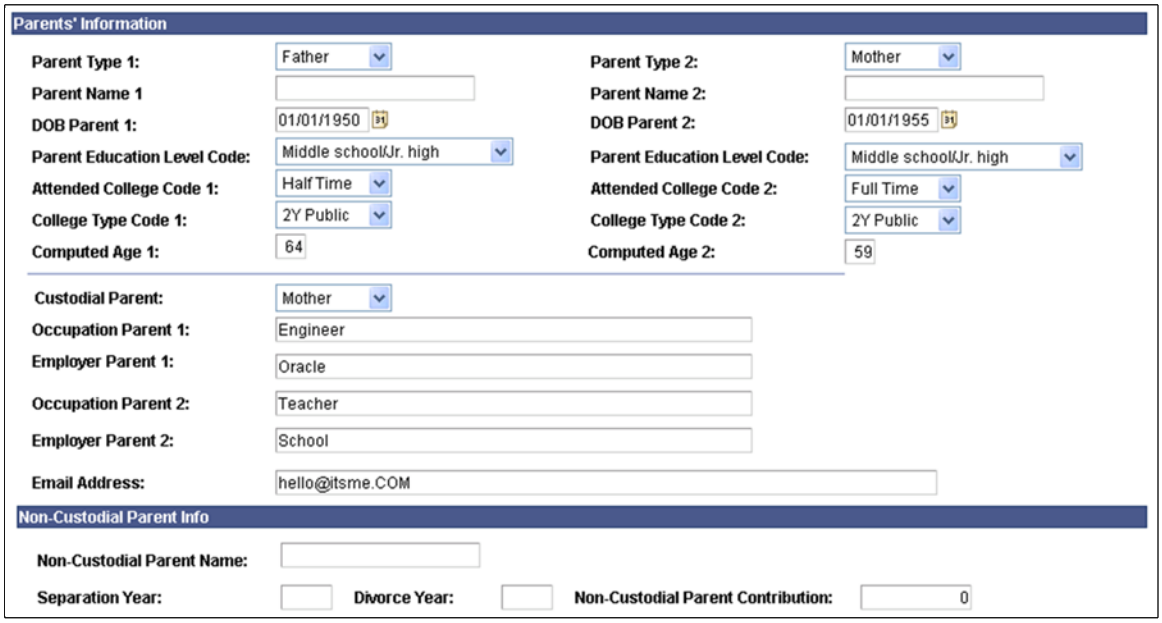
Image: Maintain Institutional Application, Parent Data tab (page 4 of 4)

This example illustrates the fields and controls on the Maintain Institutional Application, Parent Data tab (page 4 of 4). You can find definitions for the fields and controls later on this page.



The system displays the student's name, ID, institution, dependency status, application source, and aid year.

Parent's Household

Legal Residence Select the legal residence of the parent. Values include US states, Canada (CN), or Mexico (MX).

Country of Residence Enter the code for the parents' country of residence

Number Family Members Number of family members in the parent's household. The system displays *01* through *99* and blank for dependent students.

Number in College Number of dependents in college that are part of the parent's household. This number does not include parents who may be in college. The system displays *1* through *9* and blank for dependent students.

Housing Status Select *Living with Others*, *Own Home*, *Provided by Employer,* or *Rent.*

Marital Status Code Select: *Divorced/No Domestic Ptship*, *Married/Domestic Partnership*, *Never Married*, *Remarried*, *Separated*, *Widowed* or *blank.*

Date of Remarriage Displays the date for which the parent remarried.

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Parents' Expenses

Enter both the Current and Expected parents' expenses for these fields.

Parent's Expected Expenses

Utilities Expenses	Enter the amount the parents report as the annual utility expenses of the family.
Food Expenses	Enter the amount the parents report as the annual food expenses of the family.
Clothing Expenses	Enter the amount the parents report as the annual clothing expenses of the family.
Household Expenses	Enter the amount the parents report as the annual household expenses of the family.
Amount Owed to Others	Enter the amount the parents report as owed to others.
Annual Debt Payment	Enter the amount the parents report as their annual payments against their total debt.
Automobile Maintenance	Enter the amount the parents report as their annual automobile expenses.
Property Insurance	Enter the amount the parents report as the cost of their property insurance.
Vacation Cost	Enter the amount the parents report as spending on vacation costs.
Entertainment Cost	Enter the amount the parents report as spending on entertainment costs.
Number Employed in Home	Enter number of people the parents report as employed in the home.
Amount Paid to Home Employee	Enter the amount the parents report is paid to the employees who work in the home.
Other Expenses	Enter the cost of any parental expenses not reported anywhere else on the PROFILE.
Monthly Mortgage/Rent Payment	Enter the parents' monthly mortgage or rent payment.
Travel Payment Plan	Select the parents' Travel Payment Plan.

Parent's Assets

Cash, Savings, and Checking	Enter a value.
Assets Held by Siblings	Enter a value.
Owed to Parent by Others	Enter the amount owed to parents by others

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Value of Other Assets	Enter the value of any assets not already reported.
Father Retirement Assets	Can be blank or a number from 0000000 to 9999999.
Mother Retirement Assets	Can be blank or a number from 0000000 to 9999999.
Annual Debt Income	The annual income realized by the parents from debts owed to them.
Investment	Enter both the Value and Debt for this item and all the following items.
Home	Enter a value.
Home Purchase Year	Purchase year of the parent's home.
Price	Purchase price of the parents' home.
Self Employed	Select *Yes*, *No*, or *N/R* (no response).
Family Lives on Farm	Select *Yes*, *No*, or *N/R* (no response).
Number of Employees Indicator	Select *Yes*, *No*, or *N/R* (no response).
Business	Enter value and debt amounts for the business.
Farm	Enter value and debt amounts for the farm.
Other Real Estate	Enter value and debt amounts for other real estate.
Real Estate Purchase Year	Enter purchase year of any other real estate.
Price	Enter purchase price of any other real estate.
Number of Businesses	Enter a number 0 to 9 or leave blank.
Number of Farms	Enter a number 0 to 9 or leave blank.
Business Return Filed Fields 1 through 9	Enter the type of Business Tax return filed.

Prior Year Income

AGI	Adjusted gross income from the prior year's tax form.
Taxes Paid	Enter a value.
Itemized Deductions	Total of the prior year's itemized deductions.
Other Untaxed Income	Enter a value.

Parent's Income and Benefits

Many fields in this group box refer to items on the U.S. federal tax form or data collected from applicable sources, such as your institution's financial aid application or other third-party sources.

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Tax Filed Status	Select from blank, *Completed, Non Filer,* or *Will File.*
Tax Form Type	Optional. Select from *1040, 1040A, 1040EZ, Canadian, Puerto Rican, Other US,* or *Other Non—US.*
Number of Exemptions	Select the number of exemptions the parents claimed on their tax U.S. federal tax form.
Combat Pay	Displays an amount or is blank.
Social Security Benefit Family	Enter untaxed social security benefits.
Other Untaxed Income	Enter other untaxed income.
Receive TANF	Select *Yes, No,* or *N/R* (no response).
Receive SSI	Select *Yes, No,* or *N/R* (no response).

The remaining fields refer directly to items on the U.S. federal tax form or data collected from applicable sources, such as an institutional application or other third-party sources. Enter the values from the Parent's tax form in the appropriate fields.

Parents' Expected Income

Enter values from the parents' tax form.

Parents' Information

Parent Type 1 and **Parent Type 2**

Select the type of parent providing information on the PROFILE and assigned to the traditional father (1) or mother (2) position.

- *1* = Father
- *2* = Mother
- *3* = Stepfather
- *4* = Stepmother
- *5* = Legal guardian
- *8* = Other

DOB Parent 1 and **DOB Parent 2**

Indicates the reported parents' dates of birth. The information is reported as MM/DD/YYYY or the field may be blank.

Attended College Code 1 and **Attended College Code 2**

Indicates if the parent attended college and if on a full-time or part-time basis.

College Type Code 1 and **College Type Code 2**

Indicates the type of college the parent attended.

Computed Age 1 and **Computed Age 2**

Indicates the calculated age for the parent.

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Occupation Parent 1 and **Occupation Parent 2**	Indicates the occupation and can be blank.
Employer Parent 1 and **Employer Parent 2**	Indicates the employer and can be blank.
Custodial Parent	Identifies a dependent student's custodial parent when the biological/adoptive parents are separated, divorced, or were never married. Values include: *Father* and *Mother.*
Email Address	Displays the parents' preferred email address. This field can be blank or contain up to 35 characters.

Non-Custodial Parent Info

Separation Year	Enter the year of the separation.
Divorce Year	Enter the year of the divorce.
Non-Custodial Parent Contribution	Enter the financial contribution to the student by the non-custodial parent.

Related Links

Using Equation Engine in Packaging

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Reviewing Currency Information, Family Information, and Institutional Questions

Access the Miscellaneous Data page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Miscellaneous Data).

Image: Maintain Institutional Application, Miscellaneous Data tab (1 of 3)

This example illustrates the fields and controls on the Maintain Institutional Application, Miscellaneous Data tab (1 of 3). You can find definitions for the fields and controls later on this page.

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Image: Maintain Institutional Application, Miscellaneous Data tab (2 of 3)

This example illustrates the fields and controls on the Maintain Institutional Application, Miscellaneous Data tab (2 of 3). You can find definitions for the fields and controls later on this page.

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Image: Maintain Institutional Application, Miscellaneous Data tab (3 of 3)

This example illustrates the fields and controls on the Maintain Institutional Application, Miscellaneous Data tab (3 of 3). You can find definitions for the fields and controls later on this page.

The system displays the student's name, ID, institution, dependency status, application source, and aid year.

Currency Information

Currency Code	Enter the currency in which the original data was reported by the student.
Currency Rate	Enter the currency conversion rate used to process the student's data.
Country Coefficient	Enter the country coefficient used to process the student's data.
Converted Currency Code	Enter the original currency converted into US dollars reported by citizens living abroad and Canadians.

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Converted Currency Rate Enter the rate the student used in converting their currency into US dollars. Reported by citizens living abroad and Canadians.

Explanation / Certification

Special Circumstances Select this check box to indicate that the student/family has notified the institution of Special Circumstances that may affect the calculation of financial need. The College Board PROFILE also uses the information listed in Section Q to set this indicator flag to inform the institution that modified institutional questions exist for the student.

Explanations Text Displays the actual explanations and special circumstances text provided by the filer.

Family Members

Relationship Select the relationship to the student.

Age Enter the family member's age.

Attend College Select *blank, Yes, Full-Time,Yes, Half-Time,* or *No, Will Not Attend.*

College Type Select a college type.

School Selection

CSS Code This is the institution's code number as reported by the student on the PROFILE application. Each school the student selected to receive their application is listed.

Housing Code This is the type of housing the student expects to have.

FNAR Messages

The system displays the Financial Need Analysis Report message number, message text, and message Values 1 through 5, if any. These College Board PROFILE messages inform you about processing exceptions to data received and assumptions that should be taken into consideration when reviewing the institutional application.

Assumption Messages

The system displays the CSS INAS IM Assumptions alphanumeric code, message text, and value, if any. These are the INAS Assumptions triggered during the need analysis methodology and include the full text of the e-FNAR assumption generated by the PROFILE system and any corresponding values.

Institutional Questions

Number Number of an application question that the student/family believes warrants further explanation. This number may also

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	refer to a series of additional questions that have been modified for the institution by College Board PROFILE.
Answer	Answer to the question shown in the Number field.

Reviewing All Computed Data for Student and Parents

Access the Computation Data page (Financial Aid, Institutional Application Data, Maintain Application 20nn-20nn, Computation Data).

Image: Maintain Institutional Application, Computation Data tab (page 1 of 3)

This example illustrates the fields and controls on the Maintain Institutional Application, Computation Data tab (page 1 of 3). You can find definitions for the fields and controls later on this page.

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Image: Maintain Institutional Application, Computation Data tab (page 2 of 3)

This example illustrates the fields and controls on the Maintain Institutional Application, Computation Data tab (page 2 of 3). You can find definitions for the fields and controls later on this page.

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Image: Maintain Institutional Application, Computation Data tab (page 3 of 3)

This example illustrates the fields and controls on the Maintain Institutional Application, Computation Data tab (page 3 of 3). You can find definitions for the fields and controls later on this page.

Note: Beginning with the 2011-2012 Aid Year, the PROFILE XML file contains only the IM with Options calculations except for Custodial Parent, which contains only the IM Base calculation. However, INAS always generates both the IM Base and IM with Options calculations. This means that the Computation Data page displays data differently depending upon whether or not INAS has been invoked.

Note: Computation tables display no intermediate values until the INAS calculation is called using batch or online calculation.

The system displays the student's name, ID, institution, dependency status, application source, and aid year.

This page is designed to display computed need analysis results based on both the parent's and student's information. Therefore, the page displays a Parent Contribution Section and a Student Contribution Section. The following sections describe what each column represents.

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Note: To more closely align interim calculation results with the Estimated Federal Methodology (EFM) computation worksheets from the College Board, the Computation Data page displays an *N/A* value for several fields. For parents of dependent students and independent students with dependents, EFM calculations display *N/A* for From Income, From Assets, Total Contribution - Income and Total Contribution - Assets fields.

Contribution Summary

The PARENT CONTRIBUTION section displays three columns: IM Base, IM w/Options, and EFM.

- The IM Base column displays standard base INAS calculations. Although the IM Base calculation is not delivered as part of the PROFILE record, Oracle supports calculating the College Board's IM Base calculation if INAS is invoked after the initial load of the PROFILE record.
- The IM w/Options column is the result of using the institutional options that you set up when you defined your institutional methodology. IM w/Options is delivered as part of the PROFILE record.
- The EFM column displays the estimated federal methodology amount. Financial aid administrators are reminded that the EFM is always estimated and never official.

The STUDENT CONTRIBUTION section displays three columns: IM Base, IM w/ Options, and EFM.

- The IM Base column displays standard base INAS calculations. Although the IM Base calculation is not delivered as part of the PROFILE record, Oracle supports calculating the College Board's IM Base calculation if INAS is invoked after the initial load of the PROFILE record.
- The IM w/Options column is the result of using the institutional options that you set up when you defined your institutional methodology. IM w/Options is delivered as part of the PROFILE record.
- The EFM column displays the estimated federal methodology amount. Financial aid administrators are reminded that the EFM is always estimated and never official.

Total Income	Indicates the custodial parent's total contribution for the student from the base IM computation.

Custodial Parent Information

The system displays the calculations for Total Income, Total Contribution, Number in College Adjustment, Contribution for Student, contribution From Income, and contribution From Assets for Parent's Contribution and Student's Contribution.

For the PARENT CONTRIBUTION IM Base:

Percent Income	Indicates the custodial parent's percentage of total parents income from the base IM computation.
Contribution From Income	Indicates the custodial parent's contribution from income for the student from the base IM computation.
Contribution From Assets	Indicates the custodial parent's contribution from assets for the student from the base IM computation.

For the PARENT CONTRIBUTION IM w/Options

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Percent Income	Indicates the custodial parent's percentage of total parental income from the option IM computation.
Contribution From Income	Indicates the custodial parent's contribution from income for the student from the option IM computation.
Contribution From Assets	Indicates the custodial parent's contribution from assets for the student from the options IM computation.

Education Savings Calculations

The system displays the Parent's and the Student's Annual Education Savings Allowance (AESA) and Cumulative Education Savings Allowance (CESA) calculations. These are PROFILE specific calculated values used in INAS calculations for Institutional Methodology.

Income

The system displays the calculations for Taxable Income, Untaxed Income, Adjustments to Income, and Total Income for Parent's Contribution and Student's Contribution.

Allowances

The system displays the calculations for U.S. Income Tax, FICA Taxes, Medical/Dental, Elementary/Secondary Tuition, Employment Allowance, Annual Education Savings, Income Protection Allowance/MMA, Total Allowances, Calculated Available Income, and Available Income for Parent's Contribution and Student's Contribution. The Total Contribution - Income amount is the sum of all the fields in the Allowances section.

Assets

The system displays the calculations for Cash Savings, IRA Value, Home Equity, Real Estate/Investment Equity, Adjusted Business/Farm Value, Sibling's Assets/Prepaid Tuition, Value of Trusts, and Net Worth for Parent's Contribution and Student's Contribution.

The system displays the calculations for Emergency Reserve Allowance, Cumulative Education Savings, Low Income Asset Allowance, Discretionary Net Worth, Asset Protection Allowance, Conversion Percentage, and Income Supplement for Parent's Contribution and Student's Contribution. The Total Contribution - Assets amount is the sum of all the fields in the Assets section.

Loading and Managing PROFILE Records

Before you begin loading applications, define all PROFILE data load parameters and set up your run control options using the Financial Aid Run Controls page. This section discusses how to:

- Load PROFILE records.
- View PROFILE load summaries.
- Manage suspended PROFILE records.
- Delete PROFILE records.

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Note: Oracle supports the CSS / Financial Aid PROFILE File Layout (with corresponding school year) for PROFILE data received from the College Board.

Pages Used to Load and Manage PROFILE Records

Note: Oracle supports two academic years of PROFILE data loads.

Page Name	*Definition Name*	*Navigation*	*Usage*
Load Records	SFA_PF_RUNCNTL	Financial Aid, File Management, PROFILE Import, Load Records, Load Records	Import PROFILE records into the database.
Load Summary	SFA_PF_IN_LOAD	Financial Aid, File Management, PROFILE Import, Load Summary, Load Summary	From the PROFILE Staging Table, view the load status and other details of each record of a PROFILE load instance.
Suspense Management	SFA_PF_SUSP_CNTRL	Financial Aid, File Management, PROFILE Import, Suspense Management, Suspense Management	Process suspended or skipped PROFILE records.

Loading PROFILE Applications

Every time the PROFILE Load process is run, all records are inserted into the PROFILE Staging tables. Depending on your Search/Match, Add Level, and Suspense Level Rules, the student's record is inserted into either the Institutional Application (IM) tables or managed through the PROFILE Suspense Management component. As an example, your school may only admit 60 percent of those students who actually list your School Code on the PROFILE application. Instead of loading every student who has listed your school code on the PROFILE application, you can load only those students officially admitted.

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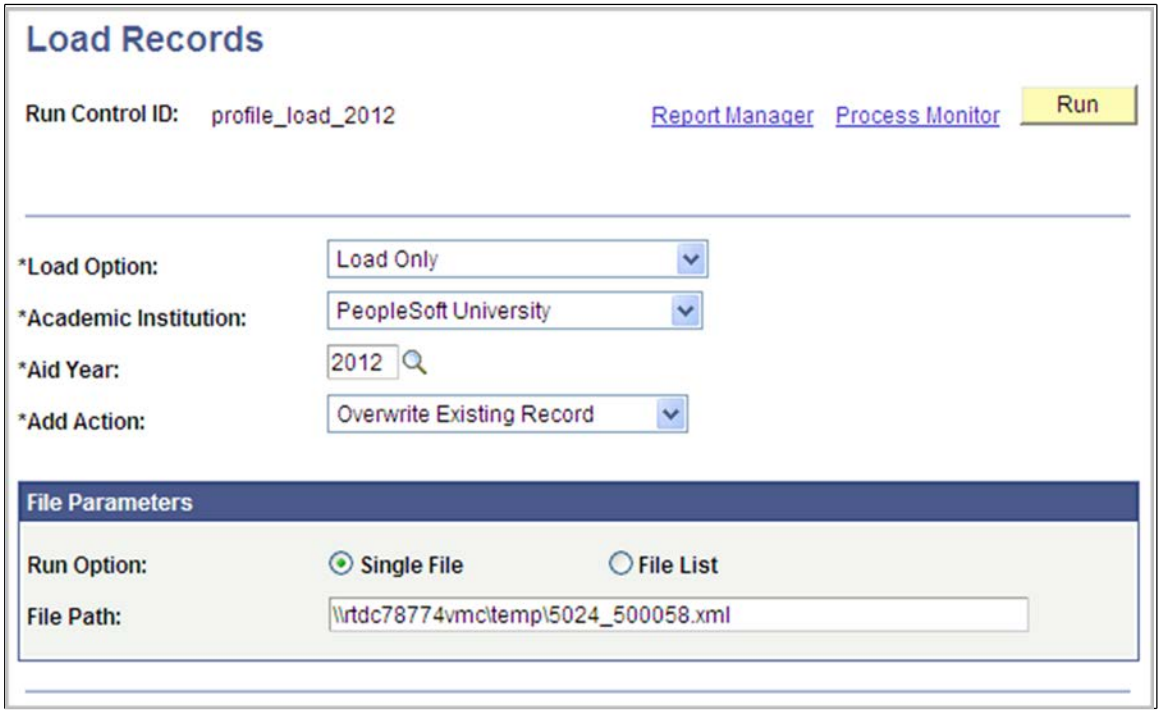
Access the Profile Load page (Financial Aid, File Management, PROFILE Import, Load Records, Load Records).

Image: PROFILE Load Records

This example illustrates the fields and controls on the PROFILE Load Records. You can find definitions for the fields and controls later on this page.



Load Option

Select the Load Option.

- Load Only — Select this option to only load the specified PROFILE files. No suspended or skipped records are reevaluated for loading.
- Recycle Only — Select this option to only reevaluate suspended PROFILE records for loading.
- Load and Recycle — Select this option to both load the specified PROFILE files and reevaluate suspended PROFILE records.
- Load Unprocessed — Select this option to load all Unprocessed PROFILE records in the PROFILE Staging table. This skips records with a status of "Error Encountered. "

Add Action

Select the action to be taken for rows that can be loaded.

- Add New Record Only — Add ONLY new PROFILE records into the system; do not overwrite existing PROFILE records.

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- Overwrite Existing Record — Add new PROFILE records into the system AND update existing PROFILE records.

Run Option

Select one of the following:

- *Single:* Load only a single XML file
- *File List:* If you have multiple XML files to load, you can combine them into a single load instance by using File List.

  Create a .TXT file that includes a list of the multiple XML files you want to load and their corresponding source path. The PROFILE Import process reads the .TXT file and searches for the listed XML files using the path defined in the file list. If an error is found for a file in the list file, the PROFILE Import process loads the previous files into the database and then stops processing. The files after the file in error are not processed. Use the message log to view the files that the system loaded successfully or unsuccessfully as well as any corresponding error messages.

  Note: The Process Monitor can display the run status as *Success* even when a problem occurs with the load process. To determine whether all files in a file list were successfully processed, open the date-stamped list file and verify that its content does not reflect an error in processing.

Note: Each PROFILE XML file must have a unique file name. If you attempt to load a record with a duplicate file name, the PROFILE load process fails.

Related Links

Page Used to Set Up PROFILE Data Load Parameters
Setting Up PROFILE Data Load Parameters
Overriding Expected Family Contribution (EFC)

Viewing PROFILE Load Summaries

The PROFILE Load Summary component displays the load status and other details of each record of the file selected to review from the PROFILE Staging Table.

Access the PROFILE Load Summary (Financial Aid, File Management, PROFILE Import, Load Summary , Load Summary).

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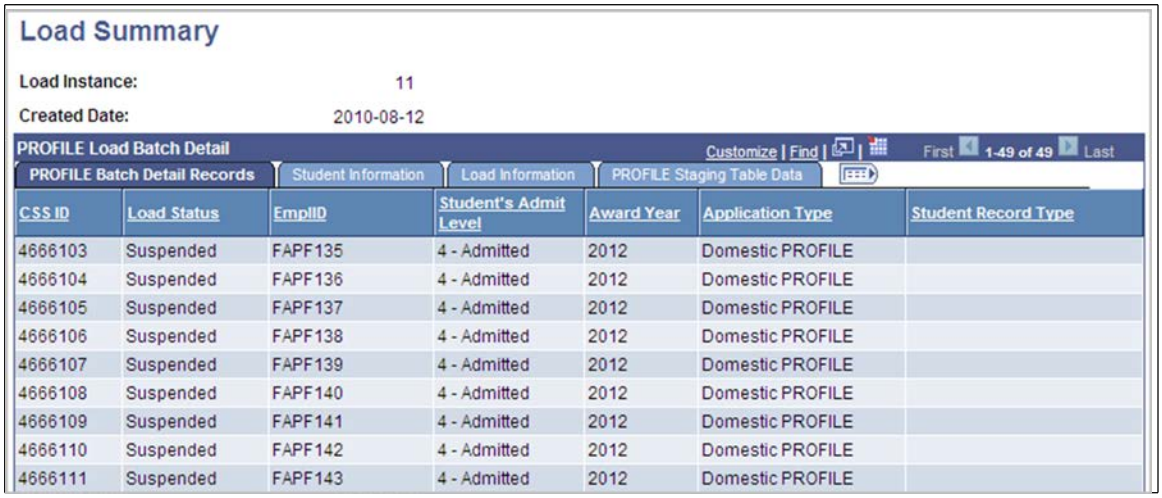
PROFILE Batch Detail Records tab

Image: PROFILE Load Summary page, Batch Detail Records tab

This example illustrates the fields and controls on the PROFILE Load Summary page, Batch Detail Records tab. You can find definitions for the fields and controls later on this page.



Load Summary

Load Instance: 11

Created Date: 2010-08-12

PROFILE Load Batch Detail — Customize | Find | First 1-49 of 49 Last

PROFILE Batch Detail Records | Student Information | Load Information | PROFILE Staging Table Data

CSS ID	Load Status	EmplID	Student's Admit Level	Award Year	Application Type	Student Record Type
4666103	Suspended	FAPF135	4 - Admitted	2012	Domestic PROFILE	
4666104	Suspended	FAPF136	4 - Admitted	2012	Domestic PROFILE	
4666105	Suspended	FAPF137	4 - Admitted	2012	Domestic PROFILE	
4666106	Suspended	FAPF138	4 - Admitted	2012	Domestic PROFILE	
4666107	Suspended	FAPF139	4 - Admitted	2012	Domestic PROFILE	
4666108	Suspended	FAPF140	4 - Admitted	2012	Domestic PROFILE	
4666109	Suspended	FAPF141	4 - Admitted	2012	Domestic PROFILE	
4666110	Suspended	FAPF142	4 - Admitted	2012	Domestic PROFILE	
4666111	Suspended	FAPF143	4 - Admitted	2012	Domestic PROFILE	

CSS ID

Displays the unique identifier assigned to student by the PROFILE system.

Load Status

Displays the Load Status of the record.

- *Unprocessed* — Record is loaded to PROFILE Staging table but is not loaded to Inst App tables.
- *Suspended* — Record failed Search/Match or PROFILE Add Level load rules.
- *Processed* — Record is loaded to application table.
- *User Delete* — PROFILE Application Record has been deleted by the user.
- *Discarded* — Record is not loaded because it is a Noncustodial PROFILE or Registration Only record.
- *Skipped* — Record meets Search/Match and PROFILE Add Level load rules, but there is an existing record and the load parameter is "Add New Record Only" or the Review Status is Complete on the Packaging Status Summary.
- *Error Encountered* — Scenarios in which status is set include: Data Load Parameters not set, missing or mismatched Aid Year, SSN invalid, SQL Error, and invalid data in Search/Match fields. Status can be set by user manually when an errant record is identified on the PROFILE XML file.

Student's Admit Level

Displays the student's admit level as associated with Academic Program Statuses in the Defining Application Processing

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Options, Working with Applications, Reviewing Admit Level Associations page.

The values are:

- *5 - Accepted/Continuing*
- *4 - Admitted*
- *3 - Applied/Pending*
- *2 - Inactive*
- *1 - Has Not Applied*

Application Type

Displays the PROFILE Application Type

- *Domestic PROFILE*
- *Noncustodial PROFILE*
- *Registration Only record*
- *International PROFILE*

Student Record Type

Displays the CSS Student Record Type

- *Original Data*
- *ACR* (Additional College Request)
- *Duplicate Record*

Update Status to Error

Click this button to set the Load Status from *Unprocessed* to *Error Encountered.* Records with a Load Status of *Error Encountered* can be skipped during subsequent PROFILE Load attempts.

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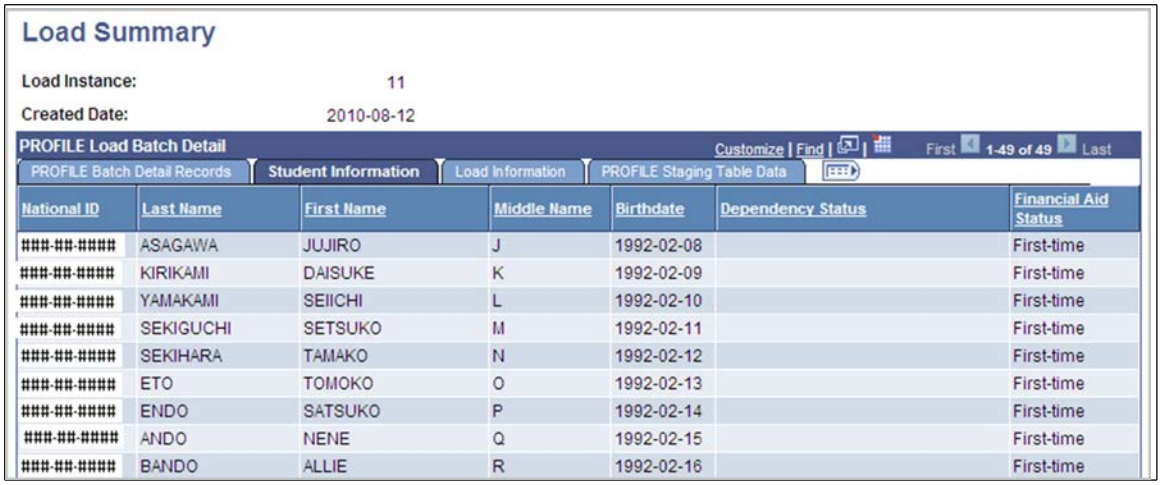
Student Information tab

Image: PROFILE Load Summary page, Student Information tab

This example illustrates the fields and controls on the PROFILE Load Summary page, Student Information tab. You can find definitions for the fields and controls later on this page.



Load Summary

Load Instance: 11

Created Date: 2010-08-12

PROFILE Load Batch Detail — Customize | Find | First 1-49 of 49 Last

PROFILE Batch Detail Records | Student Information | Load Information | PROFILE Staging Table Data

National ID	Last Name	First Name	Middle Name	Birthdate	Dependency Status	Financial Aid Status
###-##-####	ASAGAWA	JUJIRO	J	1992-02-08		First-time
###-##-####	KIRIKAMI	DAISUKE	K	1992-02-09		First-time
###-##-####	YAMAKAMI	SEIICHI	L	1992-02-10		First-time
###-##-####	SEKIGUCHI	SETSUKO	M	1992-02-11		First-time
###-##-####	SEKIHARA	TAMAKO	N	1992-02-12		First-time
###-##-####	ETO	TOMOKO	O	1992-02-13		First-time
###-##-####	ENDO	SATSUKO	P	1992-02-14		First-time
###-##-####	ANDO	NENE	Q	1992-02-15		First-time
###-##-####	BANDO	ALLIE	R	1992-02-16		First-time

National ID — For United States students, displays the Social Security Number. For non-United States students, displays the student's country and National Identifier or default National Identifier.

Dependency Status — Displays *Dependent* or *Independent*

Financial Aid Status

- *First-time* – Either a first-time applicant entering student or a first-time applicant, continuing student
- *Renewal Applicant* — Continuing student

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Load Information tab

Image: PROFILE Load Summary page, Load Information tab

This example illustrates the fields and controls on the PROFILE Load Summary page, Load Information tab. You can find definitions for the fields and controls later on this page.

Suspend Reason	• *Student ID not Found*– No student met the specified Search/ Match Rules criteria • *Student not at Load Level* – Student ID found, but student is not at the designated Admit Level. • *Non-Unique Student ID Found* – More than one student meets the Search/Match criteria. • *Manual*– Load Status set to *Suspended* manually by the user • *FA Term Not Built*– At least one FA Term record for the corresponding Year does not exist. • *Packaging Completed*– Student's Aid Processing Status is *Packaging Completed*
Skip Reason	• *Final Review Flag Set* — Review Status is Complete

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- *Student Already Exists* — PROFILE Load encountered a matching ID despite the Add Action = Add New Record Only; therefore, the student is suspended.
- *Student Not at Suspend Level* — Student fails Suspend Level rule.
- *Manual*—- Load Status set to Skipped manually by the user

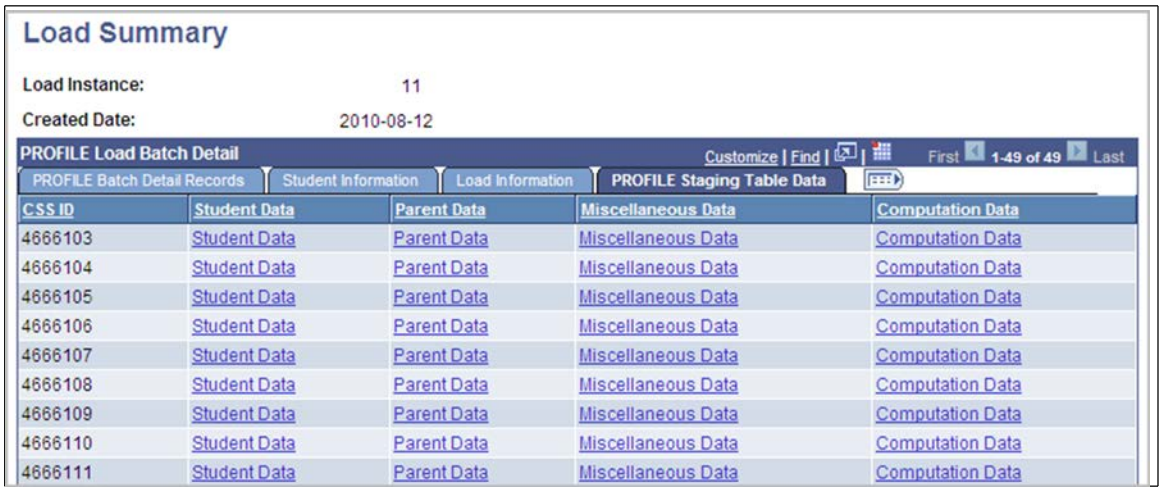
Alternate Institution Displays the Alternate Institution for PROFILE records that were deleted by the user (status of *User Delete*) and reloaded (status of *Processed*) to a different Institution than was originally loaded.

PROFILE Staging Table Data tab

This tab displays links to view PROFILE data as it is received from the College Board.

Image: PROFILE Load Summary page, PROFILE Staging Table Data

This example illustrates the fields and controls on the PROFILE Load Summary page.



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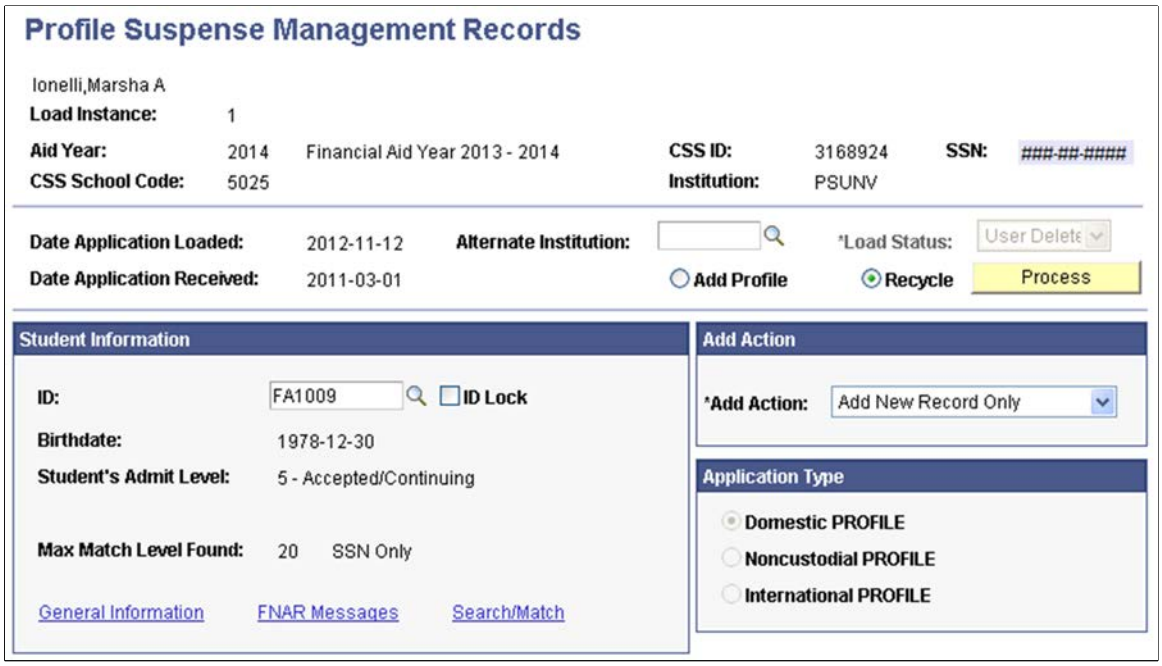
Managing Suspended PROFILE Records

Access the Profile Suspense Management Records page (Financial Aid, File Management, PROFILE Import, Suspense Management, Profile Suspense Management).

Image: PROFILE Suspense Management Records page

This example illustrates the fields and controls on the PROFILE Suspense Management Records page. You can find definitions for the fields and controls later on this page.



Use the PROFILE Suspense Management Records page to review and manage unmatched, unprocessed, and deleted PROFILE records.

Alternate Institution

Enter an Alternate Institution code to reload a user-deleted PROFILE record (Load Status is *User Delete*) into the Institutional (IM) Application tables with a new Institution value.

See Deleting PROFILE Records.

Load Status

Displays the current status of the record. If the Load Status is *Skipped* or *Suspended*, the field can be updated. If the status is *Discarded* or *User Delete*, the field is view only.

Note: If you update the Load Status to *Discarded*, the Load Status cannot be updated again.

Add Profile

Select this radio button and click the Process button to load a suspended PROFILE record into the application table.

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Note: Selecting Add Profile supersedes *any* Profile Routing Control setup. Add Profile always adds the student into the Institutional Application tables. Even if the student fails Search/Match, because the Add Profile option is selected, the student is added into the Institutional Application tables with a new system-generated ID.

Note: Please refer to the decision matrix after the attribute descriptions for this page to see how the ID, ID Lock, Add Profile, and Recycle attributes work together.

Recycle

Select this radio button and click the Process button to have the PROFILE records reconsidered by the PROFILE load process using the Profile Routing Control setup.

Note: Selecting Recycle always calls Search/Match. If Search/Match fails, then the "Search/Match No Match Action" defined in the Profile Routing Control is interrogated to determine the next step:
If "Allow Add if Eligible", a new ID is created if the student meets the criteria for adding a new record.
If "Suspend", the student's record remains in the Suspense Management table.

Note: Please refer to the decision matrix after the attribute descriptions for this page to see how the ID, ID Lock, Add Profile, and Recycle attributes work together.

Process button

After selecting the Add PROFILE or Recycle radio button, click this button to invoke a real-time action to load the PROFILE record into the Institutional Application (IM) tables.

Add Action

Select the action to be taken for rows that can be loaded.

- Add New Record Only — Add ONLY new PROFILE records into the system; do not overwrite existing PROFILE records.
- Overwrite Existing Record — Add new PROFILE records into the system AND update existing PROFILE records.

ID

Select the ID to use to load the PROFILE record into the application tables.

Note: Please refer to the decision matrix after the attribute descriptions for this page to see how the ID, ID Lock, Add Profile, and Recycle attributes work together.

ID Lock

Select this check box after the selecting the ID to force the PROFILE load process to use the ID as the matching person.

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Note: Please refer to the decision matrix after the attribute descriptions for this page to see how the ID, ID Lock, Add Profile, and Recycle attributes work together.

Max Match Level Found Displays the highest Search Match Level rule that was met for this PROFILE record.

General Information Click this link to display general information about the student.

FNAR Messages Click this link to display FNAR messages.

Search/Match Click this link to access the Person Search Match page and search for a student ID to match to the PROFILE record.

The following table is a decision matrix explaining the results of different combinations of the ID, ID Lock, Add, and Recycle attributes on this page.

ID	*ID Lock*	*Add*	*Recycle*	*Treatment*
blank	unchecked	selected	not selected	Call Search/Match. Assign record new ID if no match found. Record added.
blank	unchecked	not selected	selected	Call Search/Match. Based on PROFILE Routing Control parameters, record added or suspended. If added, assign new ID if no match found.
blank	checked	selected	not selected	Search/Match not called. Assign record new ID, warning given. Record added.
blank	checked	not selected	selected	Search/Match not called. Based on PROFILE Routing Control parameters, record added or suspended. If added, assign new ID, warning given.
not blank	unchecked	selected	not selected	Warning given before calling Search/Match. Record assigned new ID if no match found. Record added.

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ID	ID Lock	Add	Recycle	Treatment
not blank	unchecked	not selected	selected	Warning given before calling Search/Match. Based on PROFILE Routing Control parameters, record added or suspended. If added, record assigned new ID if no match found.
not blank	checked	selected	not selected	Search/Match not called. Record added with specified ID.
not blank	checked	not selected	selected	Search/Match not called. Based on PROFILE Routing Control parameters, record added or suspended. If added, record assigned with specified ID.

Reviewing Institutional Correction Audits

This section discusses how to view institutional correction audits.

Page Used to Review Institutional Correction Audits

Page Name	Definition Name	Navigation	Usage
Institutional Application Correction Audits	INST_CORR_AUDITS	Financial Aid, Institutional Application Data, View Correction Audits, Institutional Application Correction Audits	Review corrections made to a student's institutional application using the Maintain Institutional Application component. This page enables you to track certain limited changes that you make to a student's institutional application data.

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Viewing Institutional Correction Audits

Access the Institutional Application Correction Audits page (Financial Aid, Institutional Application Data, View Correction Audits, Institutional Application Correction Audits).

Image: Institutional Application Correction Audits page

This example illustrates the fields and controls on the Institutional Application Correction Audits page. You can find definitions for the fields and controls later on this page.

The system displays the student's name, ID, Aid Year, and Institution.

The system displays the following information relating to a change made to a student's institutional application (PROFILE, Institutional, or Canadian): User ID of the person who made the change, the Date/Time of the change, the application Source for the Old Value, the record and field name of what changed, the original data—Old, and the changed data—New.

Changes are listed in reverse chronological order, by Record Name, then Field Name.

Deleting PROFILE Records

Bundle 39
Added the ability to delete manually created PROFILE records.
Added "Add Type" field to the PROFILE Application Delete page.

There are rare cases when a PROFILE record is accidentally loaded either to another student or to the wrong Institution. There can be also cases where you specified the wrong EmplID (or similar severe error) while manually adding a PROFILE application to the Institutional Application tables. You can use the PROFILE Application Delete process to delete these erroneously loaded/added records. Running this process deletes all corresponding Institutional application tables for the selected student for the specified Aid Year and Institution.

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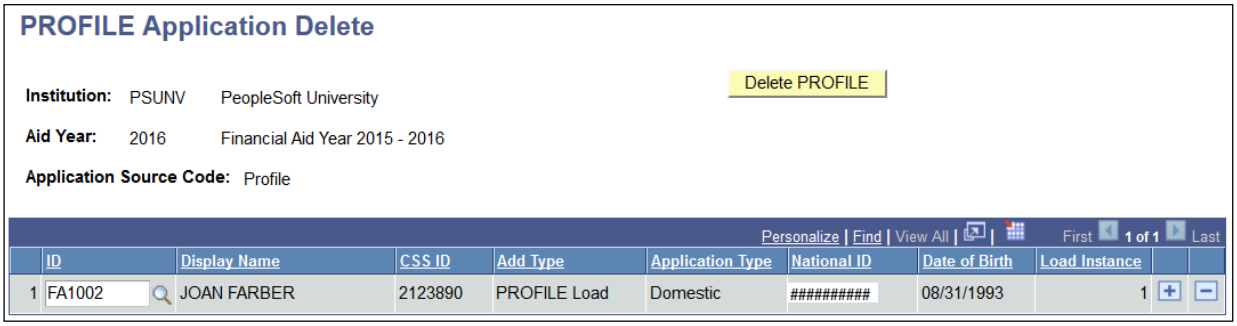
Access the PROFILE Application Delete page (Financial Aid, File Management, PROFILE Import, Delete PROFILE Records, PROFILE Delete Utility, PROFILE Application Delete).

Image: PROFILE Application Delete page

This example illustrates the fields and controls on the PROFILE Application Delete page. You can find definitions for the fields and controls later on this page.



You may delete PROFILE records for multiple students within an Aid Year in a single run of this process. This removes PROFILE records from the PROFILE Application Records table.

The corresponding staging table data is not deleted and is assigned a new Load Status of *User Delete*.

Using PROFILE Suspense Management, you can subsequently assign user-deleted PROFILE records (those with a Load Status of *User Delete*) to:

- a different ID within the same Institution.

  Note: If you assign a user-deleted PROFILE record to a different ID, be aware that the target ID's CSS ID is updated with the CSS ID of the source PROFILE XML record, and the target ID is always associated with that CSS ID moving forward. Also, the *Update Biographic/Demographic data* attribute on the PROFILE Data Load Parameters setup impacts whether or not the target ID's bio/demo data is updated in Campus Community.

- a different Institution.

  When you assign a PROFILE record to a different Institution, you designate an Alternate Institution, which is used as the key Institution when accessing the record in the Maintain Institutional Application component.

  Note: If you attempt to view or retrieve the original PROFILE record using the PROFILE Load Summary search, you must specify the original Institution to which that PROFILE record was loaded. However, the Load Summary > Load Information tab displays the (target) Alternate Institution.

  See Loading and Managing PROFILE Records.

Once a user-deleted PROFILE record is successfully processed (loaded into the Institutional Application tables) for the corresponding Institution and Aid Year, that PROFILE record is no longer accessible using PROFILE Suspense Management.

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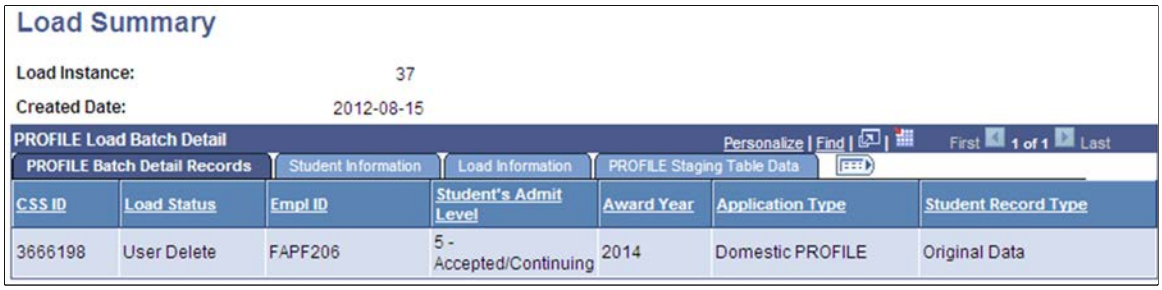
See Managing Suspended PROFILE Records.

Image: Load Summary page

This example illustrates the fields and controls on the Load Summary page.



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