

9.2 Reviewing and Resolving an ISIR vs Bio Demo Mismatch Checklist

Purpose: Use this document as a reference on how to review and resolve the ISIR vs Bio Demo Mismatch Checklist in ctLink.

Audience: Financial Aid Staff.

The **ISIR vs Bio Demo Mismatch Checklist** is assigned when there is a difference from biographical and/or demographic information on the ISIR in comparison to what has come over to Campus Community from the College Admission application (OAAP). The checklist assignment process specifically looks at:

- First name
- Last name
- Date of birth, and
- Citizenship.

When **Search Match** is performed at the time of ISIR load, an ISIR with this checklist is assigned because the ISIR passed ISIR Data Load Parameter severity levels and max match levels enough to load the ISIR, but in some instances, some lower severity level mismatching items such as name and citizenship need to be reviewed/resolved preemptively so as to prevent downstream impacts i.e., records being rejected by COD.

! You must have at least one of these local college managed security roles:

- ZZ FA ISIR Corrections

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

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Reviewing the ISIR vs Bio Demo Mismatch Checklist

Navigation: NavBar > Navigator > Financial Aid > Federal Application Data > Correct 20xx-20xx ISIR Records

1. The Correct 20xx-20xx ISIR Records search page displays.
2. Enter the following:
 - **ID**
 - **Academic Institution**
3. Select the **Search** button.

ISIR Corrections 20/21

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

| | | | |
|-----------------------------|---------------|----------------------|---|
| ID | begins with ▼ | <input type="text"/> | Q |
| Academic Institution | = ▼ | WA220 | Q |
| National ID | begins with ▼ | <input type="text"/> | |
| Campus ID | begins with ▼ | <input type="text"/> | |
| Last Name | begins with ▼ | <input type="text"/> | |

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

4. The Correct 20xx-20xx ISIR Records page displays.
5. Compare the column for **Actual Bio Demo Data** and the column for **ISIR Bio/Demo Data**.
6. The **Actual Bio Demo Data** column is populated from data the applicant entered into the **College Admissions Application**
7. The **ISIR Bio/Demo Data** is populated from the data the applicant entered into the FAFSA.
8. Compare the following fields in both columns and review for any differences:
 - **Student first name**
 - **Student last name**
 - **Citizenship**

Student Information | Parent Information | Assumptions/School Codes | EFC/DB Matches/Corr

Smith, Noelle | ID [REDACTED] | Institution WA220

Aid Year 2021 | 2020-2021 Financial Aid Year

ISIR Data

*Effective Date 05/13/2020 | Transaction Num 4 | Correction Status [REDACTED] | Status Date [REDACTED]

EFC Status Official | Primary EFC 0 | Prorated EFC 0 | FM | IM | Need Summary | INAS

Actual Bio/Demo Data

Correct Name

| | | | |
|------------|--------|--------|---|
| First Name | Noelle | Middle | B |
| Last Name | Smith | | |

Correct Address

Correct SSN

Correct Date of Birth

Correct Telephone

Correct Citizenship

5 Resident

Visa/Permit Number

Correct Email

ISIR Bio/Demo Data

| | | | |
|------------|----------------|--------|---|
| First Name | Noelle | Middle | B |
| Last Name | Smith-Ranniger | | |

ISIR Address

SSN [REDACTED]

Date of Birth [REDACTED]

Telephone Number [REDACTED]

Citizenship Status 2 Eligible non-citizen

Alien Registration Number [REDACTED]

Driver's License Number [REDACTED]

Driver's License State [REDACTED]

Email Address [REDACTED]

9. In the example above, note that there are differences in the **Student last name** values.
10. From the ISIR, the name has already passed SSA edits, so the name in the ISIR bio demo data is correct. The name will need to be updated on the student records side.
11. If it is citizenship that is mismatching, use the ISIR to see if the citizenship status passes USCIS or SSA edits.
12. Once you confirm with the student which items are correct, you can work with your Records and Enrollment staff to update the bio demo record in the Campus Community Add/Update a Person page to update the student's info.

 **Note** -- occasionally, you will review the first name, middle name, last name and citizenship and it will all be the same, but with slight variations.

For example, sometimes the name displays in ALL CAPS on the ISIR side and Lower and Upper case on the Records side. Both variations are acceptable.

Once satisfied with your review, if all the bio demo items are the same, you can mark the ISIR vs Bio Demo Mismatch checklist as Completed at your discretion.

If both the Records side and the ISIR side are the same, make a comment on the Checklist that the item was in fact reviewed and no discrepancies were noted at the time of review.

Resolving the ISIR vs Bio Demo Checklist

 You must have at least one of these local college managed security roles:

- ZD FA Director
- ZD FA Student Aid Info
- ZZ FA Student Aid Info

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Financial Aid > View Financial Aid Status

 Once you have confirmed Student Records has updated the mismatched data, now you must resolve the Checklist.

There are two ways to do this:

- 1) You can update it manually, or
- 2) If set up in your JobSet, the system will set the Checklist to Waived in the overnight process once the Records side correctly updates the Add/Update a Person page.

The steps below are for the manual process:

1. The Financial Aid Status page displays.
2. If manually updating, select the **ISIR vs. Bio Demo Mismatch** Item Code

Financial Aid Status

Smith ,Noelle B

ID [REDACTED]



Aid Year 2020-2021 Financial Aid Year
Institution WA220
National ID [REDACTED]
Campus ID [REDACTED]
Birthdate [REDACTED]
Dependency Independent w/Primary EFC
EFC Status Official
Date Application Received 02/26/2020
CPS Process Date 05/10/2020
Institution Process Date 05/13/2020
Correction Status
Correction Status Date

Packaging Status Summary

| | |
|--------------------------|--------------------------------|
| Aid Application Status | Application Active for All Aid |
| Package Status | Applied |
| SAP | SAP Undetermined |
| Review Status | Incomplete |
| INST Verification Status | Non Select |
| Verification Flag | Required to be Performed |
| Verification Status | Not Selected |
| Disbursement Hold | |

Checklists

| Item Code | Description | Status Date | Status |
|--------------------------|--------------------------------|-------------|-----------|
| 1 FTC027 | Stdnt/Spouse Tax Trnscrpt 2018 | 05/07/2020 | Waived |
| 2 FTC029 | Standard 2020-2021 | 05/07/2020 | Initiated |
| 3 ETC036 | Apply for Admissions | 05/07/2020 | Waived |
| 4 ETC038 | ISIR vs Bio Demo Mismatch | 05/07/2020 | Initiated |

- 3. The Checklist Management - Person page displays.
- 4. From the Checklist Management 2 tab, use the **Status** drop down box to change the checklist status from Initiated to **Completed**.
- 5. Select the **Save** button.

Checklist Management 1 | **Checklist Management 2**

Smith Noelle B ID [REDACTED]

Checklist Date Time 05/07/2020 2:40:44AM
Administrative Function Financial Aid **Status Completed**
Academic Institution Tacoma CC Status Date 03/22/2021
Checklist Code ISIR vs Bio Demo Mismatch Due Date 06/06/2020

Checklist Item Table

| | | | | | |
|--------------------------|--------------|---|--------------------------|-------------------------|----------------------|
| *Sequence 100 | *Item ETC038 | ISIRVsBio | *Status Completed | *Status Date 03/22/2021 | *Due Date 06/06/2020 |
| Responsible ID 201272057 | | Name Tacoma Community College, Financial Aid Services | | | |

Save | Return to Search | Notify | Add | Update/Display

- 6. Process complete.