

9.2 Understanding ISIR Search/Match

Purpose: Use this document as a reference for how to understand ISIR Search/Match in ctcLink.

Audience: FA Counselor/Technician.

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

- ZD FA Director
- ZD FA ISIR Data Mgmt
- ZZ FA ISIR Data Mgmt
- ZZ FA ISIR Processor

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

Understanding ISIR Search/Match

Navigation: NavBar > Navigation > Financial Aid > File Management > ISIR Import > 2017-2018 Suspense Management

1. The **ISIR Susp Management 17/18** search page displays.
2. Enter the Student **ID**.
3. Select the **Search** button.
4. The **ISIR Suspense Management 17/18** page displays.
5. Select the **ISIR Load Information** link to view the load and match information.

ISIR Suspense Management 17/18

EC Queue Instance/Seq Num 960 128 Transaction Receipt Date 08/10/2017 Load Status Loaded

ISIR Manual Load Parameters

ID 101000846 ☐ ID Lock ☐ Add ISIR ☐ Recycle ☒ Skip/Done

*Institution WA171 School Code 003793

Process Dt (Effdt) 08/11/2017 Alternate Effective Date

Student Information

Last Name	Ramos	First Name	Unique	MI
SAR ID	200-97-2618 RO 01	SSN	200-97-2618	Date of Birth
Dependency Status	Independent w/Primary EFC		Primary EFC	010443
Federal PELL Eligibility			Student's Admit Lvl	5 - Accepted/Continuing
ED Verification Status	Not Required	Verification Select/Tracking	N	
ISIR Load Information	CPS Generated Data	ISIR Reject Reasons		
Search Match				

6. The View ISIR Load Information page displays the **Load Information** and **School Choices**.

View ISIR Load Information

Load Information

Suspend Reason
Skip Reason
Error Code
Max Match Level 10
Process Instance 16409283
Process Date 08/15/2017

School Choices/Multiple School

1st Choice 003793
2nd Choice
3rd Choice
4th Choice
5th Choice
6th Choice
7th Choice
8th Choice
9th Choice
10th Choice

[Return](#)

7. The system searches on the match built in ctcLink by reviewing personal data until it finds a match. When the search and match process runs, the program starts with the first order number and moves through the order numbers until it finds a match. It does this with the search parameters built into ctcLink.
- A search parameter is a set of one or more search rules that are ordered sequentially with the lowest (or first) search order level as the most restrictive, and the highest (or last) search order level as the least restrictive.

8. The **Load Information** shows what level a student's ISIR matched on in the system.


View ISIR Load Information

Load Information

Suspend Reason

Skip Reason

Error Code

 **Max Match Level** 10

Process Instance 16409283

Process Date 08/15/2017

9. The example student shows a match of 10 resulting from matching on the following criteria:
- SSN,
 - DOB,
 - Last Name,
 - First Name (See Below)
10. The **ISIR Inst SearchMatch** table houses the parameters set to match an incoming ISIR to a student's institutional record through their admissions data.
11. If the student exists and a match is made, a match level number will be assigned.

Search by Order Number	
Search Order Number	Description
10	SSN, DOB, Lname4, Fname2
20	DOB, Lname10, Fname2
30	SSN, Lname6, Fname2
40	SSN, DOB
50	SSN only

12. If no match is made on the match level number with the update selected, then the ISIR is suspended.
13. A Search/Match can be performed by selecting the **Search Match** link at the bottom the ISIR Suspense Management 17/18 page.

ISIR Suspense Management 17/18

EC Queue Instance/Seq Num: 960 128 Transaction Receipt Date: 08/10/2017 Load Status: Loaded

ISIR Manual Load Parameters

ID: 101000846 ☐ ID Lock ☐ Add ISIR ☐ Recycle ☒ Skip/Done

*Institution: VA171 School Code: 003793

Process Dt (Effdt): 08/11/2017 Alternate Effective Date:

Student Information

Last Name: Ramos	First Name: Unique	MI:
SAR ID: 200-97-2618 RO: 01	SSN: 200-97-2618	Date of Birth: 01/30/1968
Dependency Status: Independent w/Primary EFC	Primary EFC: 010443	
Federal PELL Eligibility:	Student's Admit Lvl: 5 - Accepted/Continuing	
ED Verification Status: Not Required	Verification Select/Tracking: N	

[ISIR Load Information](#) [CPS Generated Data](#) [ISIR Reject Reasons](#)

Search Match

14. The **Search/Match** page displays.
15. Choose a **Search Type** of **Person**
16. Select a **Search Parameter** of **FA_ISIR_LOAD**
17. Select the **Search** button.

Search/Match

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

Search Criteria

Search Type: = Person

Search Parameter: begins with FA_ISIR_LOAD

Ad Hoc Search: ☐

Description: begins with

Search

18. Use the **Search Result Rule: PSCS_TRAD_RESUL** (Person Traditional Results).
19. In the Search Criteria section, enter:

- a. The student's **SSN** in the **National ID** field
- b. Populate the **Date of Birth**
- c. Enter the **Last Name**
- d. Enter the **First Name**

20. Select the **Search** button.

Search Criteria

Search Type: Person ☐ Ad Hoc Search

Search Parameter: FA_ISIR_LOAD fa isir load search/match

Search Result Rule

Search Result Code: PSCS_TRAD_RESUL CS_Person Traditional Results

Default search result code

Search Clear All Carry ID Reset

Search Criteria

Search Fields Value

National Id 200972618

Date of Birth 04/10/1981

Last Name Search RAMOS

First Name Search Unique

21. The Search Results page displays.

Note: The "Person Organization Summary" link under the Additional Information tab links to HCM. This link is non-functional for staff who do not have access to employment records in HCM. HCM employment records are not necessary to run Search/ Match.

Search Results

Search Type: Person ☐ Ad Hoc Search

Search Parameter: FA_ISIR_LOAD fa isir load search/match

Search Result Code: PSCS_TRAD_RESUL CS_Person Traditional Results

Search Results Summary Return to Search Criteria

Number of ID's Found: 1

Search Order Number: 10 SSN, DOB, Lname4, Fname2

Search Results Personalize Find View All First 1 of 1 Last

Results	Results2	Additional Information	Empl ID	Name Type	Name Effective Date	First Name	Middle Name	Last Name
1	Carry ID	Detail	101000846	PRI	01/01/1901	Unique		Ramos

23. Additional error messages include:
- a. **EFC Mismatch** – Controlled through configuration.
 - b. **Duplicate SSN Indicated** – Student has multiple ISIR transactions with the same SSN but different bio/demo information.
 - c. **ISIR Tran Number Out of Sequence** – The student has multiple ISIR transactions loaded into ctcLink out of sequence.
 - d. **Empl ID Not Found** - The student does not have an Empl ID in the system.
 - e. **Review St** - The View Packaging Status Summary page is set to complete.
 - f. **Verification Complete** - The Verification status on the View Packaging Status Summary page is complete.
24. Process complete.