Consolidation & Verification in Batch-102407

1. Begin by navigating to the **Batch Consolidation** page: **Financial Aid > Verification > Perform Batch Consolidation**.

2. To create a new **Run Control ID**, click the **Add a New Value** tab. Enter the name of the new Run Control ID. Do not use blanks.

3. Click the **Add** button.

4. Make sure that the correct Institution and Aid Year are entered.

5. Click the **Selection Criteria** list. You have a choice between processing all students in verification, or just the unconsolidated.

6. Click the **Run** button.

7. Use the **Process Scheduler Request** page to enter or update parameters such as the **Server Name** and output format. For this process, the Server Name should be blank.

8. Click the **OK** button.

9. Click the **Process Monitor** link.

10. Click the **Refresh** button from time to time until the **Run Status** is **Success** and the **Distribution Status** is **Posted**.

11. To view messages from this process, click the **Details** link.

12. Click the **View Log/Trace** link.

13. The **Message Log** will give you some information about success or failure of consolidation for the selected students.

14. Click the View Batch Consolidation link.

15. Make sure the correct **Institution** and **Aid Year** are entered. Click the **Search** button.

16. You see a list of the students whose data was consolidated. You can view the consolidated data in detail using the **Consolidated Tax Data** links.

17. The next step is to run the verification process. Click the **Perform Batch Verification** link.

18. Create a new **Run Control ID** or use an existing one.

19. Make sure that the correct **Institution** and **Aid Year** are entered. The **Verification Type** should be **Federal**. To perform field-level compare if you have any non-zero tolerances set up, change the **Pass/Fail Option** to **Field**. If all the tolerances are zero, then use either **Federal** or **Field** in the **Pass/Fail Option** field. Normally, the **Source** will be **Tax/Verif** and the **Target** will be **ISIR**.

   The **Application Type** is only used for Institutional Apps. Leave it blank.

20. Select a value for the **Student Selection** field. The choices are:
   - **Both**: Processes records with a verification status of either pending or required.
   - **Pending**: Processes records with a verification status of pending only.
   - **Required**: Processes records with a verification status of required only.
21. Select the **Auto Update Target Table** checkbox. Select the **Set Verification Complete** checkbox. Set the **Mark Assumptions as Verified** checkbox. Select the **Set to Send ISIR Correction** checkbox.

22. Click the **Run** button.

23. Select blank for the **Server Name**. Click the **OK** button.

24. Note the **Process Instance** number. You may use this later when checking the Verification Details from this process.

   Click the **Process Monitor** link.

25. Click **Refresh** from time to time until the **Run Status** is **Success**.

26. To see the results of the process, use the **View Verification Summary** and **View Verification Detail** components.

27. Click the View Verification Summary link.

28. Make sure the correct **Institution** and **Aid Year** are entered. Click the **Search** button.

29. Use the **Batch Verification Summary** page to view summary information such as the number of students selected, skipped, processed, passed and failed.

   Note the **Process Instance** number. You can use it when searching for the Verification Detail.

30. Click the **View Verification Detail** link.

31. You could enter a student's **ID** here or do a more general search. Make sure the correct Institution and Aid Year are entered. Use the **Process Instance** number to narrow the search. Click the **Search** button.

32. You see a list of all the students processed in the **Batch Verification** run.

   Click on a student to view the details.

33. **End of Procedure.**