

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 <i>Success</i> and the Distribution Status is <i>Posted</i> .
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 of 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 <i>Federal</i> . To perform field-level compare if you have any non-zero tolerances set up, change the Pass/Fail Option to <i>Field</i> . If all the tolerances are zero, then use either <i>Federal</i> or <i>Field</i> in the Pass/Fail Option field. Normally, the Source will be <i>Tax/Verif</i> and the Target will be <i>ISIR</i> . 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 <i>Success</i> .
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.