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Using Auto Verification

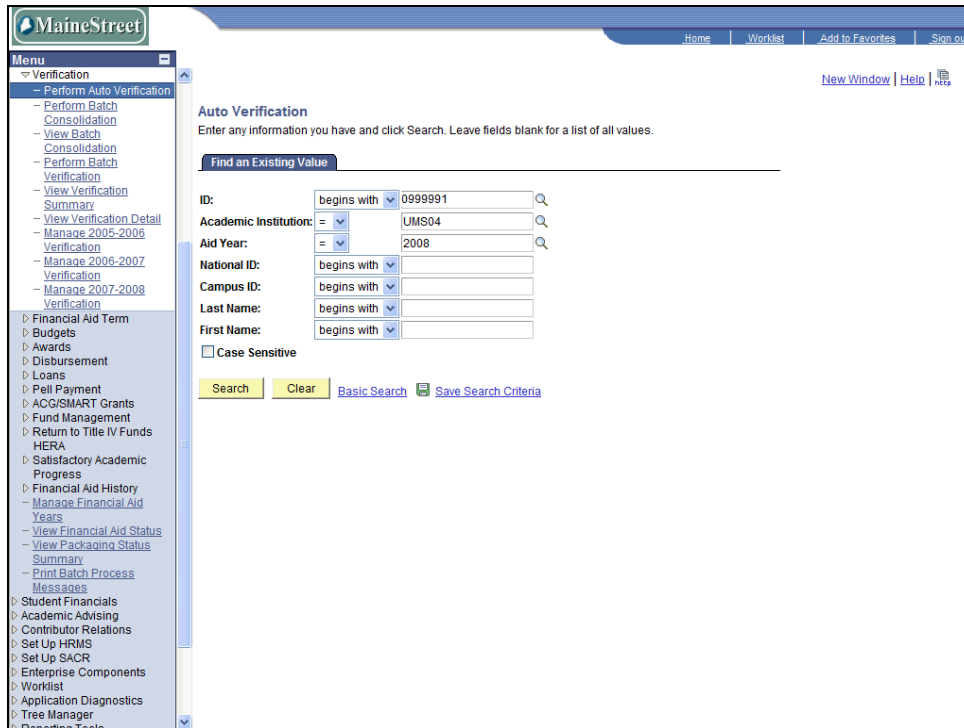
Concept

Once you have entered and consolidated all the income and resource data for a student and his/her family, you need to compare that data with the data reported on the student's ISIR. This can be done on a student-by-student basis using Auto Verification, or in a batch process.

In this document we will look at verifying a single student using Auto Verification.

Procedure

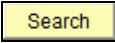
Step	Action
1.	Navigate: Financial Aid > Verification > Perform Auto Verification.

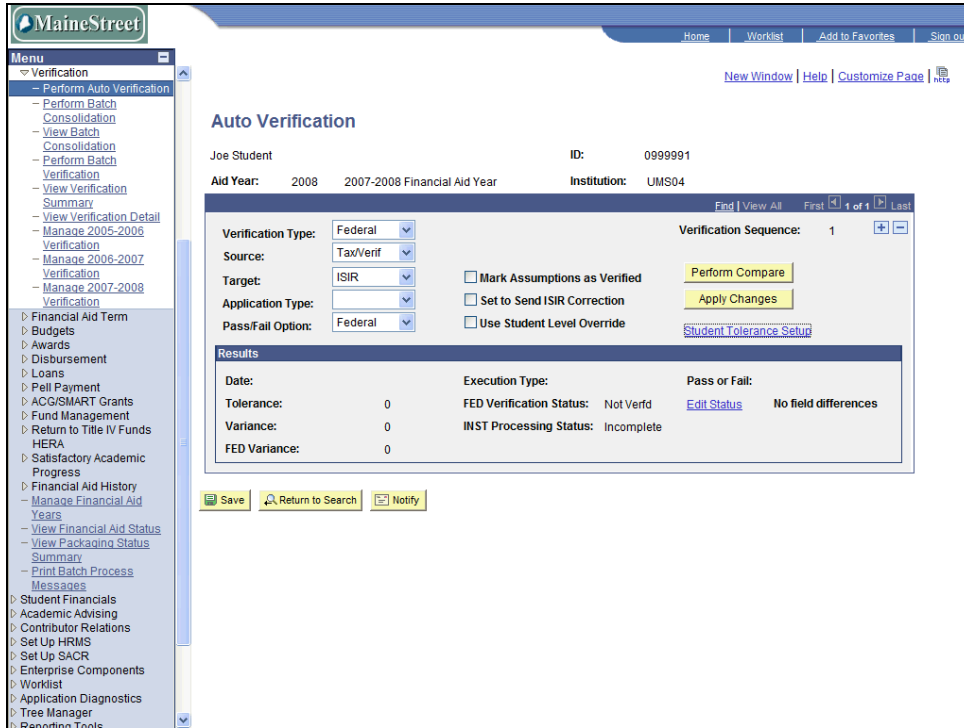


The screenshot shows the 'Auto Verification' page in the MaineStreet system. The left-hand menu is expanded to show 'Verification' options. The main content area contains a search form with the following fields and values:

- ID:** begins with 0999991
- Academic Institution:** UMS04
- Aid Year:** 2008
- National ID:** begins with
- Campus ID:** begins with
- Last Name:** begins with
- First Name:** begins with

There is a 'Case Sensitive' checkbox which is unchecked. At the bottom of the form are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

Step	Action
2.	Enter search criteria for the student such as the student's ID (or name). Enter the Institution and Aid Year. Click the Search button. 

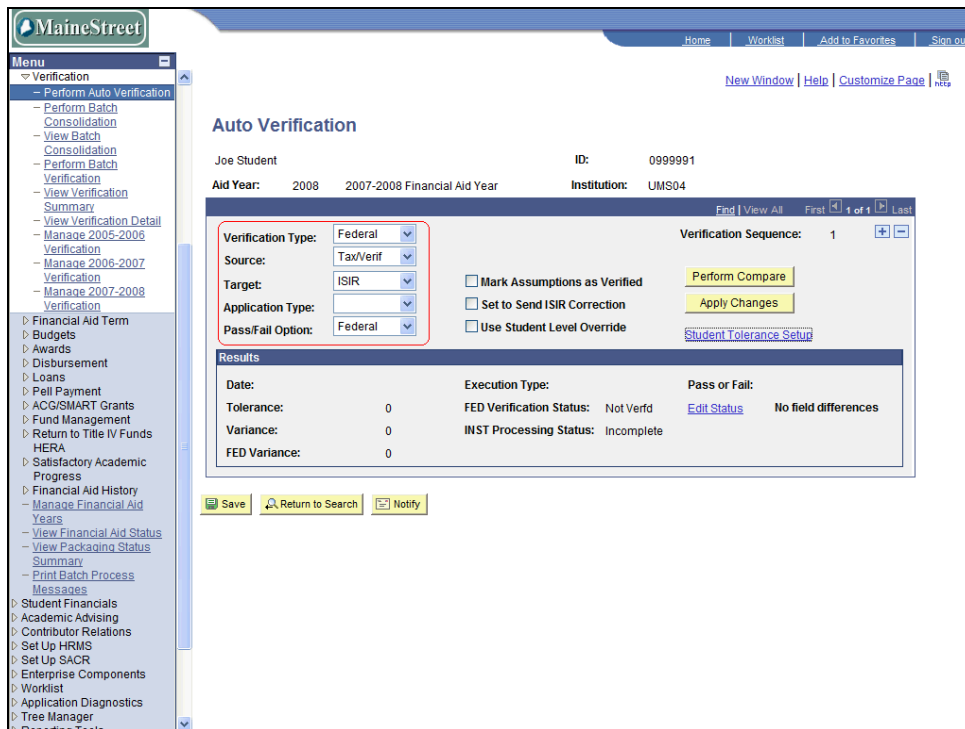


The screenshot shows the 'Auto Verification' page in the MaineStreet system. The page header includes 'MaineStreet' and navigation links for 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. A left-hand menu lists various system functions, with 'Verification' expanded to show options like 'Perform Auto Verification', 'Perform Batch Consolidation', and 'View Batch Consolidation'. The main content area displays the 'Auto Verification' form for a student named 'Joe Student' (ID: 0999991) at 'UMS04' for the '2008' aid year. The form includes dropdown menus for 'Verification Type' (Federal), 'Source' (Tax/Verif), 'Target' (ISIR), and 'Pass/Fail Option' (Federal). There are checkboxes for 'Mark Assumptions as Verified', 'Set to Send ISIR Correction', and 'Use Student Level Override'. Action buttons include 'Perform Compare', 'Apply Changes', and 'Student Tolerance Setup'. A 'Results' section shows 'Date', 'Execution Type', and 'Pass or Fail' information, with 'Tolerance' and 'Variance' both at 0, and 'FED Verification Status' as 'Not Verfd' and 'INST Processing Status' as 'Incomplete'. At the bottom, there are 'Save', 'Return to Search', and 'Notify' buttons.

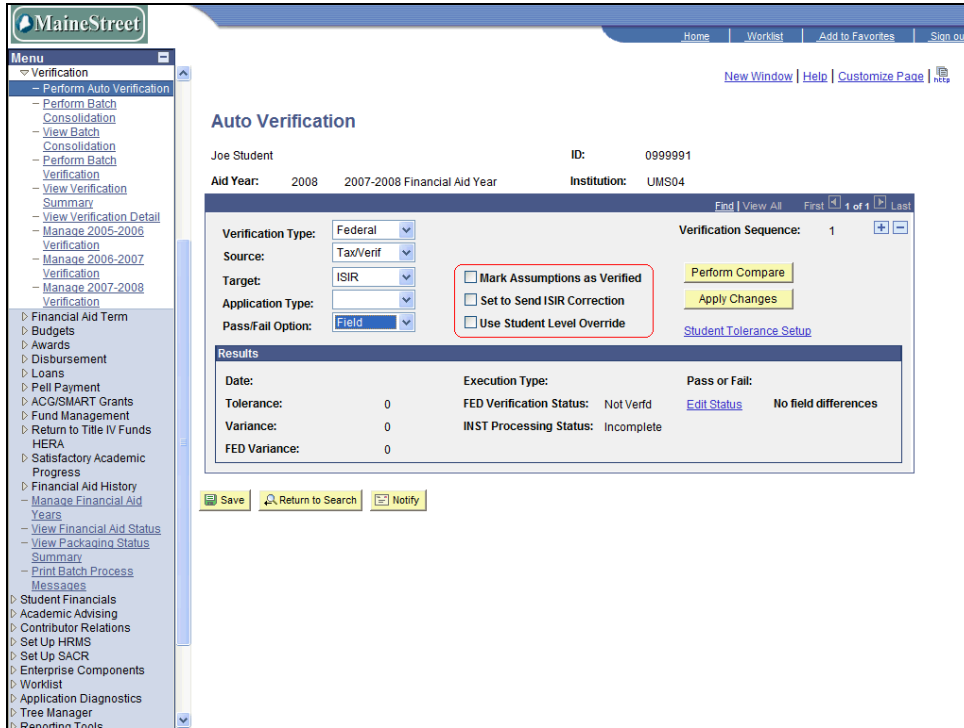
Step	Action
3.	<p>Use the Auto Verification page to perform the online automated verification process.</p> <p>Buttons and links on this page provide several independent routines. One is the ability to compare income documents to financial aid applications. Another is the ability to view comparison results and decide, field by field, whether to update the intended target (generally the ISIR) with updated information.</p>

Process Document

Financial Aid: Using Auto Verification-102207



Step	Action
4.	<p>The Verification Type should be set to <i>Federal</i>.</p> <p>Source should be <i>Tax/Verif</i>.</p> <p>Target should be <i>ISIR</i></p> <p>Pass/Fail Option should be either <i>Federal</i> or <i>Field</i>. If any of the verification tolerances in the set up are non-zero, and you want to do field by field comparison between the source and the target data, select <i>Field</i> for the Pass/Fail Option. If all your tolerances are zero, <i>Federal</i> and <i>Field</i> behave the same way - field by field compares.</p> <p>Application Type is left blank.</p>

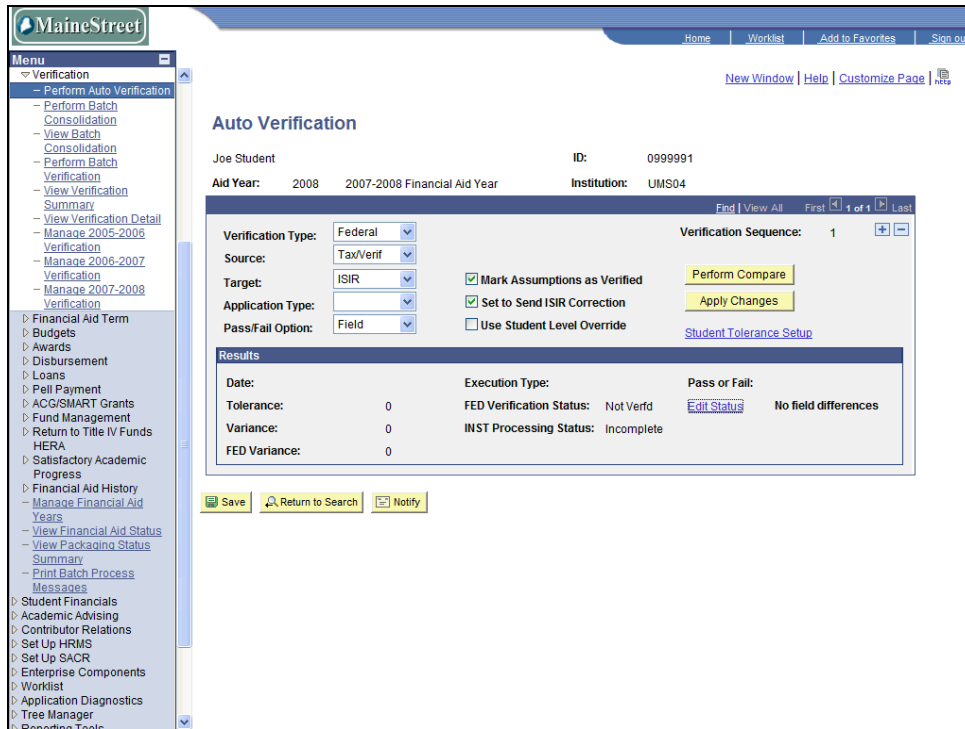


The screenshot shows the 'Auto Verification' page in the MaineStreet system. The page header includes 'MaineStreet' and navigation links like 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. A left-hand menu lists various system functions. The main content area displays student information for 'Joe Student' (ID: 0999991) and '2008' (2007-2008 Financial Aid Year) at 'UMS04' institution. Below this, there are configuration options for 'Verification Type' (Federal), 'Source' (Tax/Verif), 'Target' (ISIR), and 'Application Type' (Field). A 'Pass/Fail Option' is set to 'Field'. A red box highlights three checkboxes: 'Mark Assumptions as Verified', 'Set to Send ISIR Correction', and 'Use Student Level Override'. To the right, there are buttons for 'Perform Compare' and 'Apply Changes', and a link for 'Student Tolerance Setup'. A 'Results' section shows 'Date', 'Execution Type', and 'Pass or Fail' information, with 'Tolerance' and 'Variance' both at 0, and 'FED Verification Status' as 'Not Verfd' and 'INST Processing Status' as 'Incomplete'. At the bottom, there are 'Save', 'Return to Search', and 'Notify' buttons.

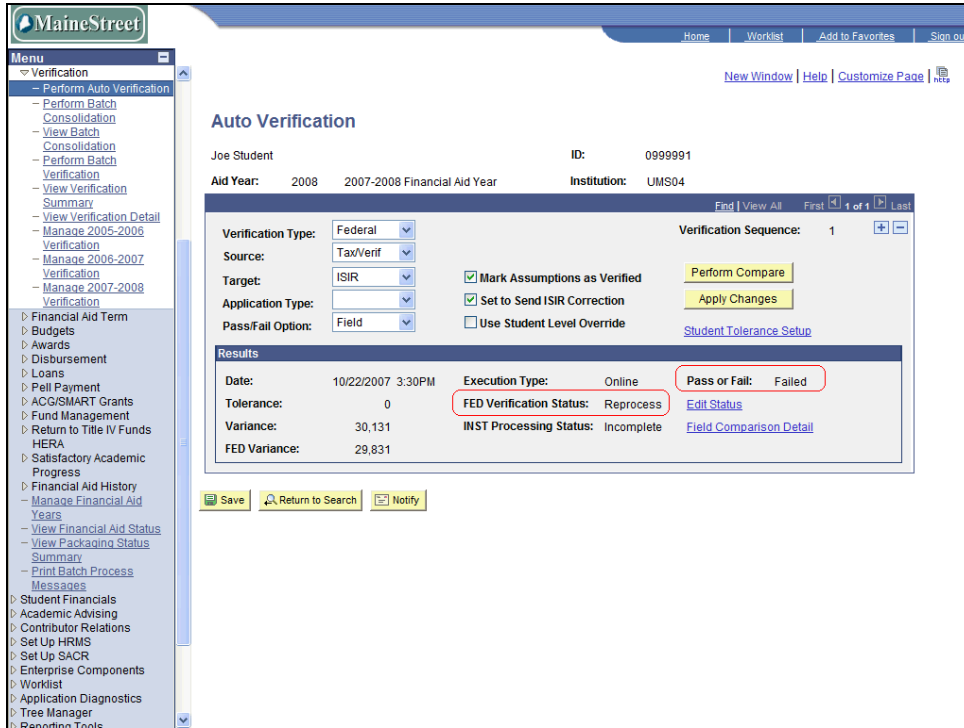
Step	Action
5.	<p>If you select Mark Assumptions as Verified, you are telling the CPS that you have verified the assumptions.</p> <p>Selecting Set to Send ISIR Correction will set the status to <i>Send</i> rather than <i>Pending</i> on the new correction row created by this process, which allows the record to be picked up the next time corrections are generated.</p> <p>If you want to set tolerances specifically for this student, check the Use Student Level Override box and click the Student Tolerance Setup link.</p>

Process Document

Financial Aid: Using Auto Verification-102207



Step	Action
6.	Use the Perform Compare button to launch the process that compares your target and source data and activates the Field Comparison Detail link when variances are found. <div style="border: 1px solid black; padding: 5px; margin-top: 10px; display: inline-block;"> Perform Compare </div>



MaineStreet Home Worklist Add to Favorites Sign out

New Window | Help | Customize Page |

Auto Verification

Joe Student ID: 0999991
Aid Year: 2008 2007-2008 Financial Aid Year Institution: UMS04

Find | View All First 1 of 1 Last

Verification Type: Federal
Source: Tax/Verif
Target: ISIR
Application Type:
Pass/Fail Option: Field

Verification Sequence: 1

Mark Assumptions as Verified
 Set to Send ISIR Correction
 Use Student Level Override

Perform Compare
Apply Changes
Student Tolerance Setup

Results

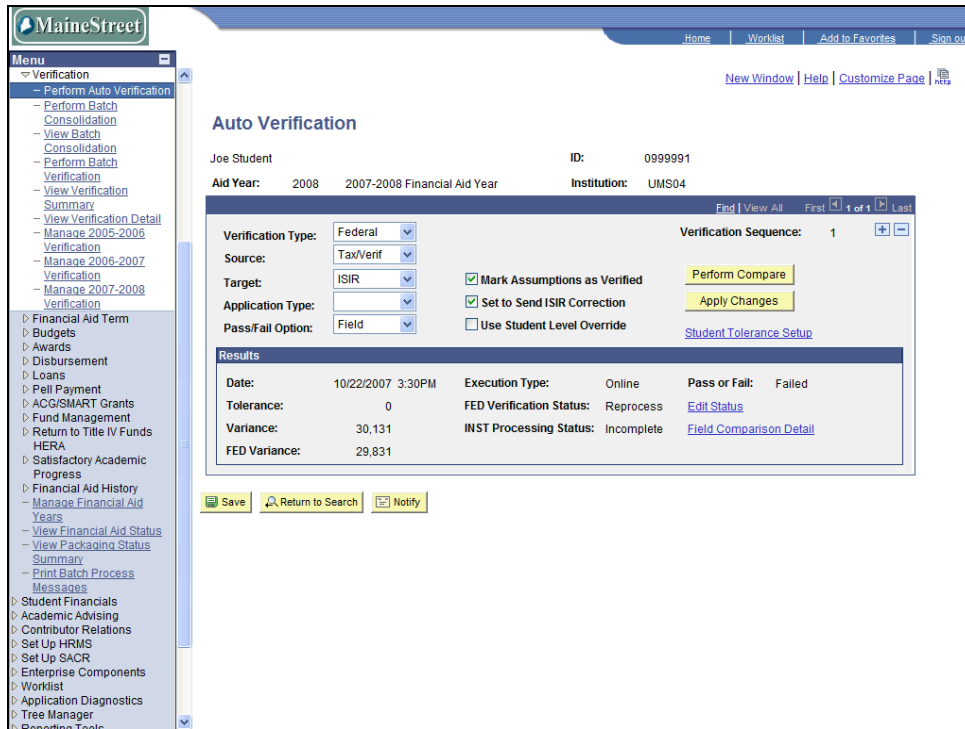
Date:	10/22/2007 3:30PM	Execution Type:	Online	Pass or Fail:	Failed
Tolerance:	0	FED Verification Status:	Reprocess	Edit Status	
Variance:	30,131	INST Processing Status:	Incomplete	Field Comparison Detail	
FED Variance:	29,831				

Save Return to Search Notify

Step	Action
7.	The student in this example failed verification. The FED Verification Status is set to Reprocess and Pass or Fail is set to Failed .

Process Document

Financial Aid: Using Auto Verification-102207



Auto Verification

Joe Student ID: 0999991
 Aid Year: 2008 2007-2008 Financial Aid Year Institution: UMS04

Verification Type: Federal
 Source: Tax/Verif
 Target: ISIR
 Application Type:
 Pass/Fail Option: Field

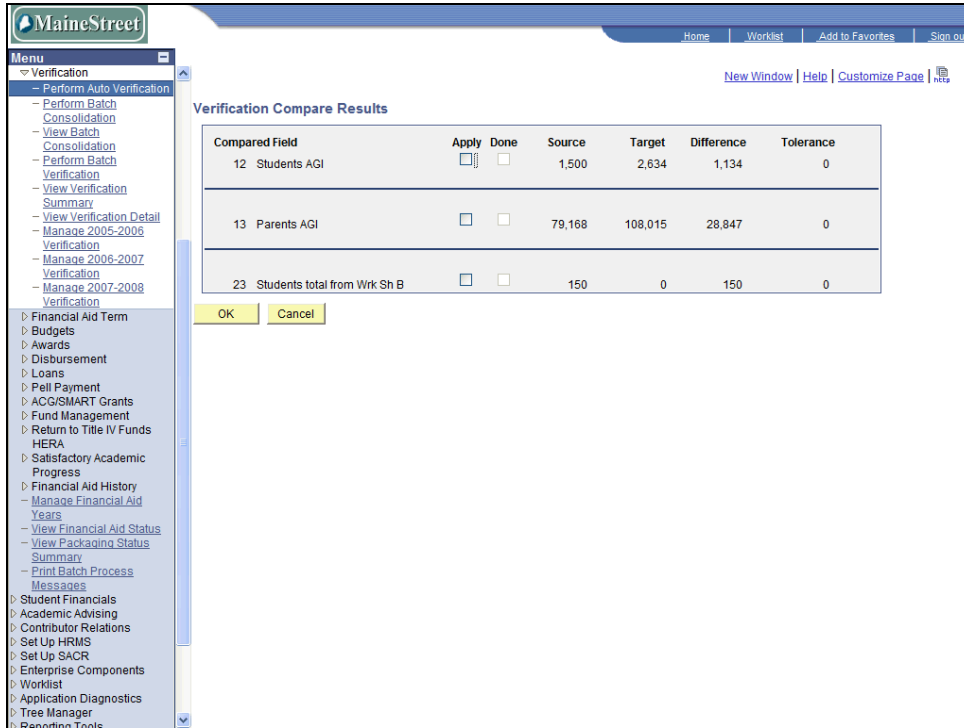
Verification Sequence: 1
 Mark Assumptions as Verified
 Set to Send ISIR Correction
 Use Student Level Override

Buttons: Perform Compare, Apply Changes, Student Tolerance Setup

Results			
Date:	10/22/2007 3:30PM	Execution Type:	Online
Tolerance:	0	FED Verification Status:	Reprocess
Variance:	30,131	INST Processing Status:	Incomplete
FED Variance:	29,831	Pass or Fail:	Failed

Buttons: Save, Return to Search, Notify

Step	Action
8.	<p>The system displays the Field Comparison Detail link after you click the Perform Compare button if there are variances.</p> <p>To view the variances, click the Field Comparison Detail link.</p> <p>Field Comparison Detail</p>



Verification Compare Results

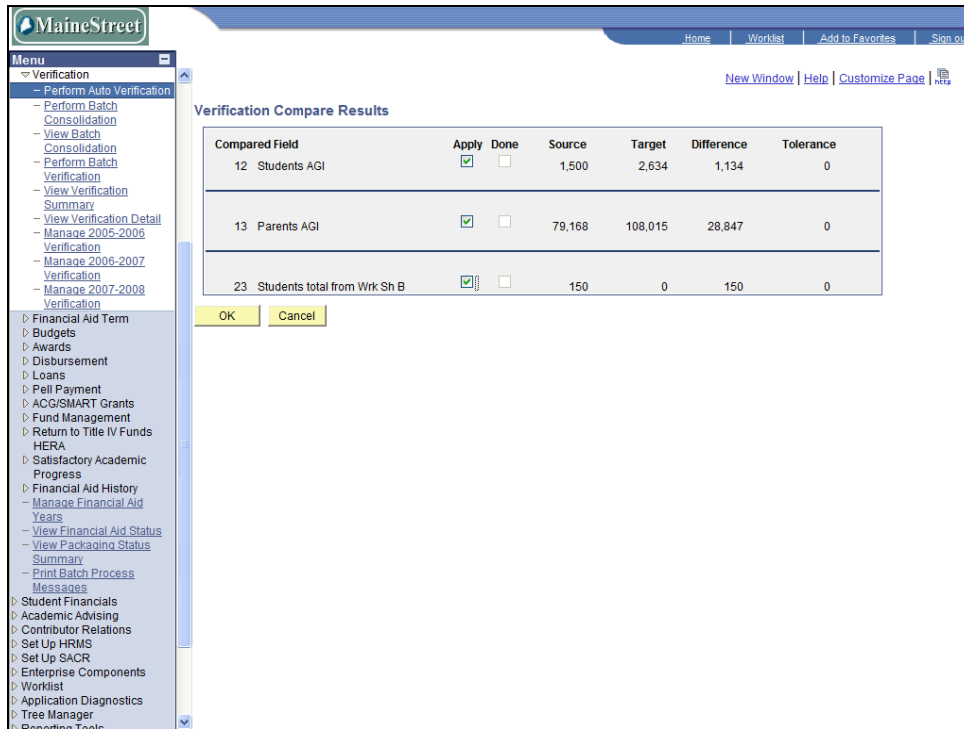
Compared Field	Apply	Done	Source	Target	Difference	Tolerance
12 Students AGI	<input type="checkbox"/>	<input type="checkbox"/>	1,500	2,634	1,134	0
13 Parents AGI	<input type="checkbox"/>	<input type="checkbox"/>	79,168	108,015	28,847	0
23 Students total from Wrk Sh B	<input type="checkbox"/>	<input type="checkbox"/>	150	0	150	0

OK Cancel

Step	Action
9.	<p>Use the Verification Compare Results page to view a summary of fields that were compared and for which the system found a variance.</p> <p>You choose which of these variances you want to be recorded in a correction to send to the CPS. Select by clicking in the Apply checkboxes.</p>

Process Document

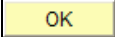
Financial Aid: Using Auto Verification-102207

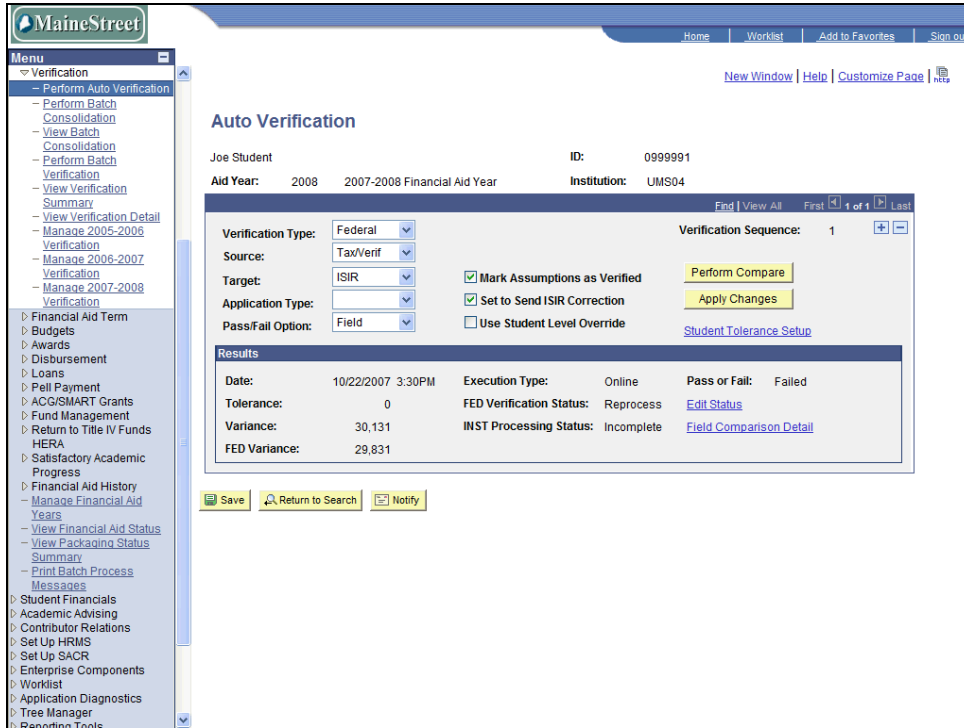


Verification Compare Results

Compared Field	Apply	Done	Source	Target	Difference	Tolerance
12 Students AGI	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1,500	2,634	1,134	0
13 Parents AGI	<input checked="" type="checkbox"/>	<input type="checkbox"/>	79,168	108,015	28,847	0
23 Students total from Wrk Sh B	<input checked="" type="checkbox"/>	<input type="checkbox"/>	150	0	150	0

OK Cancel

Step	Action
10.	<p>In this example, we have chosen to apply all three variances.</p> <p>Click the OK button.</p> <p></p>



The screenshot shows the 'Auto Verification' page in the MaineStreet system. The left sidebar contains a 'Menu' with various options like 'Verification', 'Financial Aid Term', 'Budgets', etc. The main content area displays the following information:

Auto Verification

Joe Student ID: 0999991
 Aid Year: 2008 2007-2008 Financial Aid Year Institution: UMS04

Verification Type: Federal
 Source: Tax/Verif
 Target: ISIR
 Application Type: [Dropdown]
 Pass/Fail Option: Field

Verification Sequence: 1

Mark Assumptions as Verified
 Set to Send ISIR Correction
 Use Student Level Override

Buttons: Perform Compare, Apply Changes, Student Tolerance Setup

Results

Date:	10/22/2007 3:30PM	Execution Type:	Online	Pass or Fail:	Failed
Tolerance:	0	FED Verification Status:	Reprocess	Edit Status	
Variance:	30,131	INST Processing Status:	Incomplete	Field Comparison Detail	
FED Variance:	29,831				

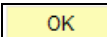
Buttons: Save, Return to Search, Notify


Step	Action
11.	Click the Edit Status link. Edit Status

The screenshot shows the 'MaineStreet' web application interface. On the left is a 'Menu' with various options under 'Verification' and other categories. The main content area is titled 'Edit Verification Status' and contains a 'Verification Status' section. This section includes the following fields:

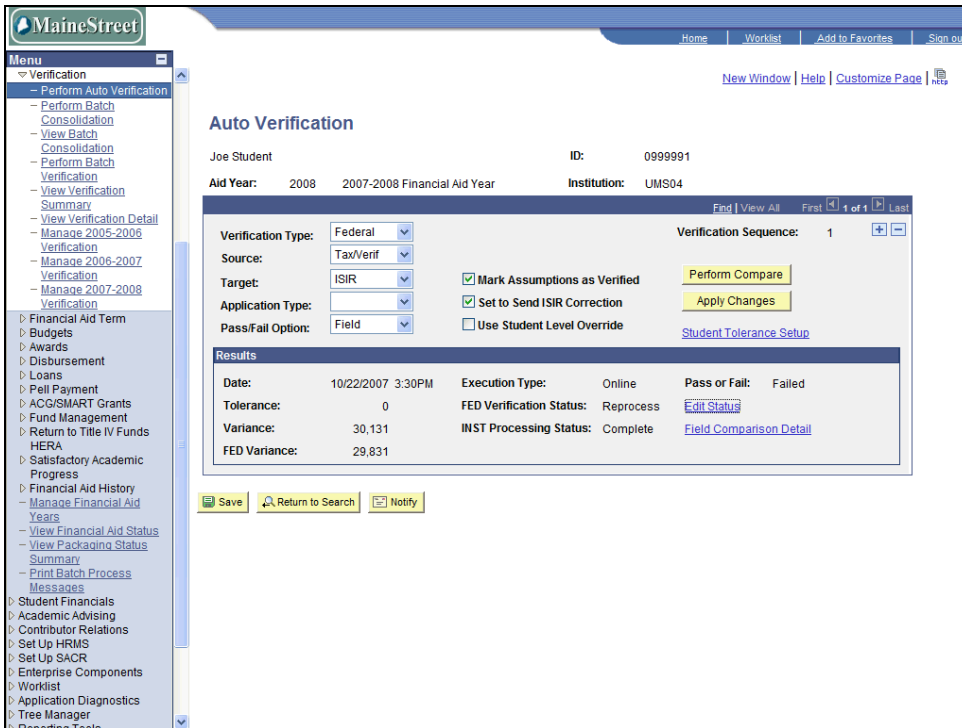
- ISIR Transaction Nbr: 1
- FED Verification Status: Reprocess (dropdown menu)
- FED Processing Status: Pending (dropdown menu)
- INST Verification Status: Select (dropdown menu)
- INST Processing Status: Incomplete (dropdown menu)

At the bottom of the form are two buttons: 'OK' and 'Cancel'.

Step	Action
12.	<p>The values here will be reflected for students on the Packaging Status Summary page. The FED fields will update automatically. Your Institutional business process determines whether or not you use the INST fields.</p> <p>Click OK.</p> 

 The terminology used for the verification status varies somewhat between the Edit Verification Status page and the Packaging Status Summary and Financial Aid Status pages.

On the Edit Verification Status page, Fed Verification Status is the same as Verification Status on the Financial Aid Status page. Inst Processing Status on Edit Verif. Status page is Review Status on the Financial Aid Status page. Finally, Fed Processing Status on Edit Verif. Status page is Verification Flag on Financial Aid Status page.



The screenshot shows the 'Auto Verification' page in the MaineStreet system. The page header includes 'MaineStreet' and navigation links like 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. A left-hand menu lists various financial aid options. The main content area displays the following information:

- Student Information:** Joe Student, ID: 0999991, Institution: UMS04
- Aid Year:** 2008, 2007-2008 Financial Aid Year
- Verification Settings:**
 - Verification Type: Federal
 - Source: Tax/Verif
 - Target: ISIR
 - Application Type: [Dropdown]
 - Pass/Fail Option: Field
 - Verification Sequence: 1
 - Options: Mark Assumptions as Verified, Set to Send ISIR Correction, Use Student Level Override
- Buttons:** Perform Compare, Apply Changes, Student Tolerance Setup
- Results Table:**

Date:	Execution Type:	Pass or Fail:
10/22/2007 3:30PM	Online	Failed
Tolerance: 0	FED Verification Status: Reprocess	Edit Status
Variance: 30,131	INST Processing Status: Complete	Field Comparison Detail
FED Variance: 29,831		
- Bottom Buttons:** Save, Return to Search, Notify

Step	Action
13.	Click the Apply Changes button to launch the process that creates a new effective dated row in the ISIR component and moves the marked fields from the Field Comparison Detail page to the ISIR record. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Apply Changes</div>
14.	Click Perform Compare again to verify that all variances have been verified. If all changes were applied, the student's pass or fail status should now be Passed.
15.	Click Save . You have successfully verified a student's information using auto verification.
16.	End of Procedure.