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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Navigate: <strong>Financial Aid &gt; Verification &gt; Perform Auto Verification.</strong></td>
</tr>
</tbody>
</table>

![Screenshot of the MainesStreet interface showing Auto Verification settings and search fields](image)

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<tr>
<td>2.</td>
<td>Enter search criteria for the student such as the student's ID (or name). Enter the Institution and Aid Year.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
3. | Use the **Auto Verification** page to perform the online automated verification process.

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.
Step | Action
--- | ---
4. | The **Verification Type** should be set to *Federal*.  
**Source** should be *Tax/Verif.*  
**Target** should be *ISIR*  
**Pass/Fail Option** should be either *Federal* or *Field*. 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 *Field* for the **Pass/Fail Option**. If all your tolerances are zero, *Federal* and *Field* behave the same way - field by field compares.  
**Application Type** is left blank.
<table>
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<td>5.</td>
<td>If you select <strong>Mark Assumptions as Verified</strong>, you are telling the CPS that you have verified the assumptions.</td>
</tr>
</tbody>
</table>

Selecting **Set to Send ISIR Correction** will set the status to **Send** rather than **Pending** on the new correction row created by this process, which allows the record to be picked up the next time corrections are generated.

If you want to set tolerances specifically for this student, check the **Use Student Level Override** box and click the **Student Tolerance Setup** link.
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<td>6.</td>
<td>Use the <strong>Perform Compare</strong> button to launch the process that compares your target and source data and activates the <strong>Field Comparison Detail</strong> link when variances are found.</td>
</tr>
</tbody>
</table>

![Auto Verification Image]

**Auto Verification**

- **Verification Type:** Federal
- **Target:** TaxForm
- **Application Type:** ISIR
- **Pass/Fail Option:** Pass2

**Result**

<table>
<thead>
<tr>
<th>Date</th>
<th>Execution Type</th>
<th>Fail or Pass</th>
<th>Field Differences</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Verification Details**

**Source:**
- **Verification Sequence:** 1
- **Mark Assumptions as Verified**
- **Set to Send ISIR Correction**
- **Apply Changes**

**Field Comparison Detail**

- **Student Name**
- **Student ID**
- **Academic Program**
- **Financial Aid History**
- **ISIR Processing Status**
- **Field Differences**
The student in this example failed verification. The **FED Verification Status** is set to **Reprocess** and **Pass or Fail** is set to **Failed**.
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<tr>
<td>8.</td>
<td>The system displays the <strong>Field Comparison Detail</strong> link after you click the <strong>Perform Compare</strong> button if there are variances. To view the variances, click the <strong>Field Comparison Detail</strong> link.</td>
</tr>
</tbody>
</table>

Field Comparison Detail
Step | Action
--- | ---
9. | Use the **Verification Compare Results** page to view a summary of fields that were compared and for which the system found a variance.

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.
10. In this example, we have chosen to apply all three variances.

Click the **OK** button.
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<tr>
<td>11.</td>
<td>Click the <strong>Edit Status</strong> link.</td>
</tr>
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</table>

[Edit Status]
### Step 12

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.

Click **OK**.

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.

## Step 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.

### Apply Changes

## Step 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.

## Step 15

Click **Save**.

You have successfully verified a student's information using auto verification.

## Step 16

**End of Procedure.**