Verification Using Consolidation Page

Concept

For information on the full verification process, please refer to the lesson "Entering Verification Data".

In this topic you will see how to use a shortcut method of entering verification data for a single student using the following steps:
1. Verify that all required tax documents have been received.
2. Complete the tax information for the student (and parent if dependent) on the verification pages.

Following this procedure, you would use Auto or Batch Verification to compare and update the tax return information on the student's ISIR.
### Procedure

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>One way to determine if all required documents have been received is to navigate to the <strong>Financial Aid Status</strong> page. Navigate: <strong>Financial Aid &gt; View Financial Aid Status.</strong></td>
</tr>
<tr>
<td>2.</td>
<td>Make sure the correct <strong>Institution</strong> and <strong>Aid Year</strong> are entered. Enter search criteria to identify the student, such as the <strong>ID</strong>. Click <strong>Search.</strong></td>
</tr>
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<td>3.</td>
<td>One or more checklists are applied to the student when verification is required. As the documents are provided by the student the checklist items are marked completed. The <strong>Financial Aid Status</strong> page only shows checklist items that are not complete. If there are no items showing in the Checklist area of this page, it means all the required documents have been received.</td>
</tr>
<tr>
<td>4.</td>
<td>To enter the verification data, navigate: <strong>Financial Aid &gt; Verification &gt; Manage 20xx-20yy Verification</strong> (where 20xx-20yy is the correct aid year).</td>
</tr>
</tbody>
</table>
Step | Action
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5. | Make sure the correct student **ID, Institution** and **Aid Year** are entered. Click **Search**.
Step | Action
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6. | Click the checklist icon in the upper right corner of this page to view or update the status of the student's verification checklist items.

Click the icon.
### Step 7

On the **Item Update** page you can view any uncompleted verification checklist items. You can change the **Item Status** on any of the checklist items if needed.

To change the **Item Status**, click the pull-down **Item Status** list.

- **Initiated**

### Step 8

If you select the Completed or Waived status, the checklist item is treated as satisfied and will no longer appear in the Item Update page.

To save changes, click the **OK** button. To return to the **Manage Verification** page without saving changes, click **Cancel**.
9. Click the **Get Fed Data** button to bring in the data from the latest ISIR.

**Get Fed Data**
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<td>10.</td>
<td>For independent students one row will appear (for the student). For dependent students there will be two rows: one for the student and one for the parents.</td>
</tr>
</tbody>
</table>

Click the **Tax Data Consolidation** tab.
Step | Action
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11. | Click the **Consolidate** button.

**Note:** do not consolidate unless you have all the required documents.
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<td>12.</td>
<td>A new link appears: <strong>Consolidated Tax Data</strong>. Click the link.</td>
</tr>
</tbody>
</table>
Step | Action
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13. | On the Consolidated Tax Data page you have a section for the student and (if the student is dependent) a section for the parents.

You can enter the data changes on this page.

When done, scroll down to the bottom of the page and click **OK**.
14. Click **Save**.

This completes the entry of the verification data. Following this, use **Auto** or **Batch Verification** to compare the new data with the ISIR and to generate a correction ISIR if required. Please refer to the documentation on **Auto Verification** and **Batch Verification**.

15. **End of Procedure**.