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Verification Using Consolidation Page

Concept

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

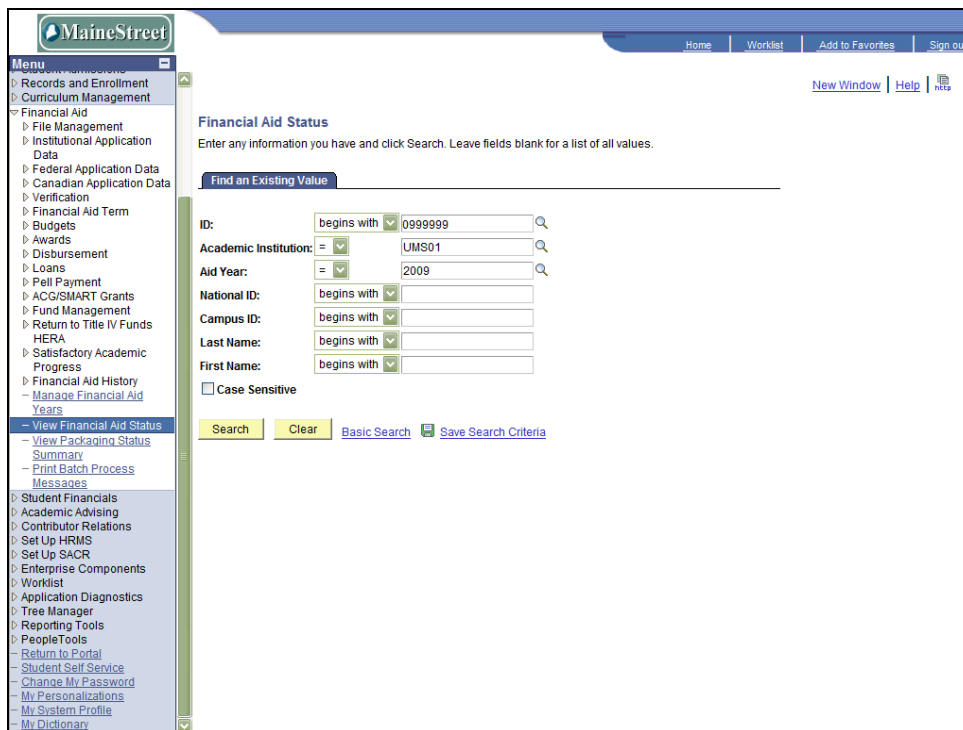
In this topic you will see how to use a shortcut method of entering verification data for a single student using the following steps:

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

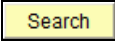
Step	Action
1.	One way to determine if all required documents have been received is to navigate to the Financial Aid Status page. Navigate: Financial Aid > View Financial Aid Status.




The screenshot shows the 'Financial Aid Status' search interface. On the left is a navigation menu with 'View Financial Aid Status' selected. The main content area has a search form with the following fields and values:

- ID:** begins with 0999999
- Academic Institution:** UMS01
- Aid Year:** 2009
- National ID:** begins with
- Campus ID:** begins with
- Last Name:** begins with
- First Name:** begins with

Buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' are visible at the bottom of the form.

Step	Action
2.	Make sure the correct Institution and Aid Year are entered. Enter search criteria to identify the student, such as the ID . Click Search . 



Financial Aid
Financial Aid Status

Footram, Hepzibah ID: 0999999

Aid Year: 2008-2009 Financial Aid Year
Institution: UMS01
National ID: 999999999
Campus ID:
Dependency: Dependent w/Primary EFC
EFC Status: Official
App Date: 01/30/2008
Cor Status: **Date:**

Packaging Status Summary

Aid Application Status: Active
Package Status: Applied
SAP: Undetermine
Review Status: Incomplete
INST Verification Status: Non Select
Verification Flag: Required
Verification Status: Not Select

Checklists Customize | End | View All | First 1 of 1 Last

Item Code	Status Date	Description	Status

Communications Customize | End | View All | First 1 of 1 Last

Method	Date Completed	Direction	Letter Code	Description

Comments Customize | End | View All | First 1 of 1 Last

Category	Comment Date	Comment

FA Term Info Customize | End | View All | First 1-3 of 3 Last

Term	Career	Academic Plan	HSLS Loan Year
0920	UGRD	LIB-BA	3rd Year

Step	Action
3.	<p>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.</p> <p>The Financial Aid Status 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.</p>
4.	<p>To enter the verification data, navigate: Financial Aid > Verification > Manage 20xx-20yy Verification (where 20xx-20yy is the correct aid year).</p>

Process Document

Financial Aid: Verification Using Consolidation Page-042808



MaineStreet Home | Worklist | Add to Favorites | Sign out

New Window | Help | nts

Menu

- Verification
 - Perform Auto Verification
 - Perform Batch Consolidation
 - View Batch Consolidation
 - Perform Batch Verification
 - View Verification Summary
 - View Verification Detail
 - Manage 2006-2007 Verification
 - Manage 2007-2008 Verification
 - Manage 2008-2009 Verification
- Financial Aid Term
- Budgets
- Awards
- Disbursement
- Loans
- Pell Payment
- ACG/SMART Grants
- Fund Management
- Return to Title IV Funds
 - HERA
 - Satisfactory Academic Progress
 - Financial Aid History
 - Manage Financial Aid Years
 - View Financial Aid Status
 - View Packaging Status Summary
 - Print Batch Process Messages
- Student Financials
- Academic Advising
- Contributor Relations
- Set Up HRMS
- Set Up SACR
- Enterprise Components
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools

App Data Verification 08/09

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

ID:

Academic Institution:

Aid Year:

National ID:

Campus ID:

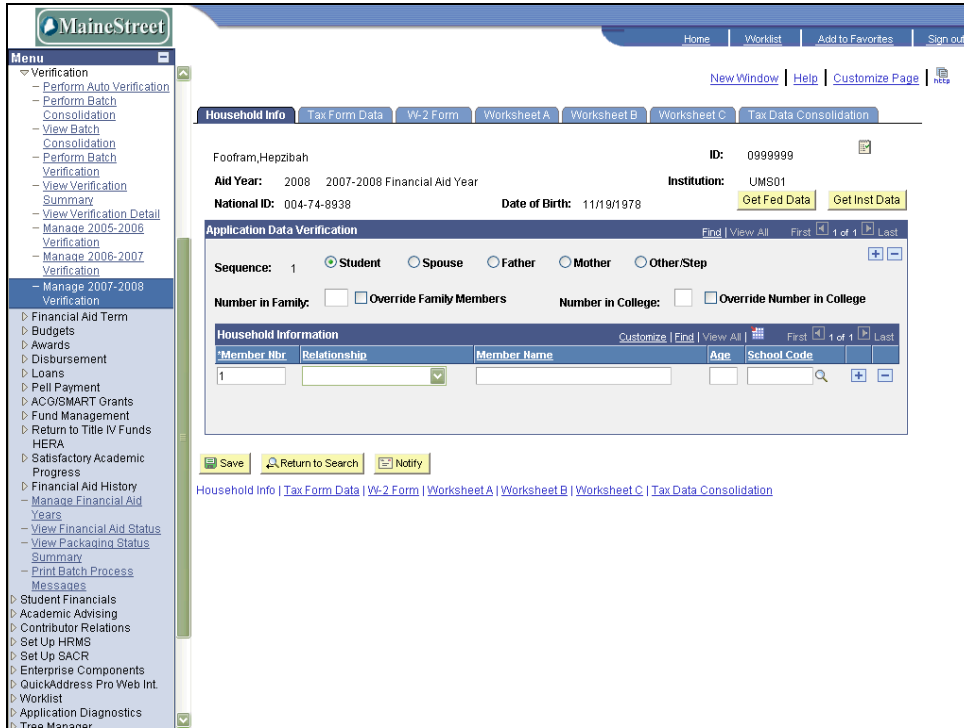
Last Name:


First Name:

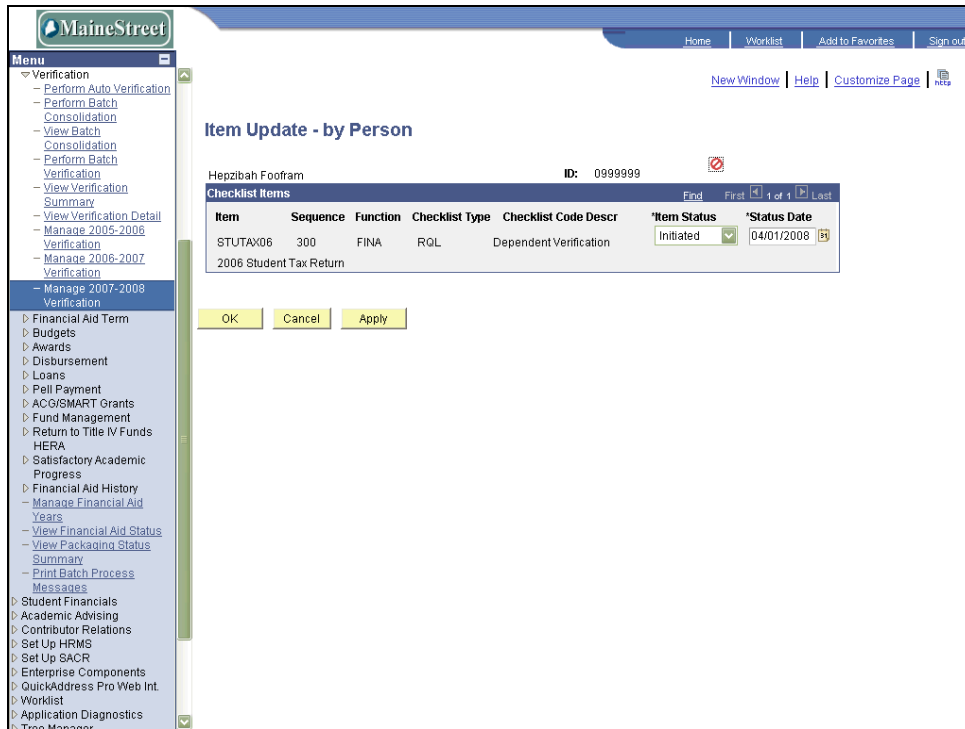
Case Sensitive



[Basic Search](#)

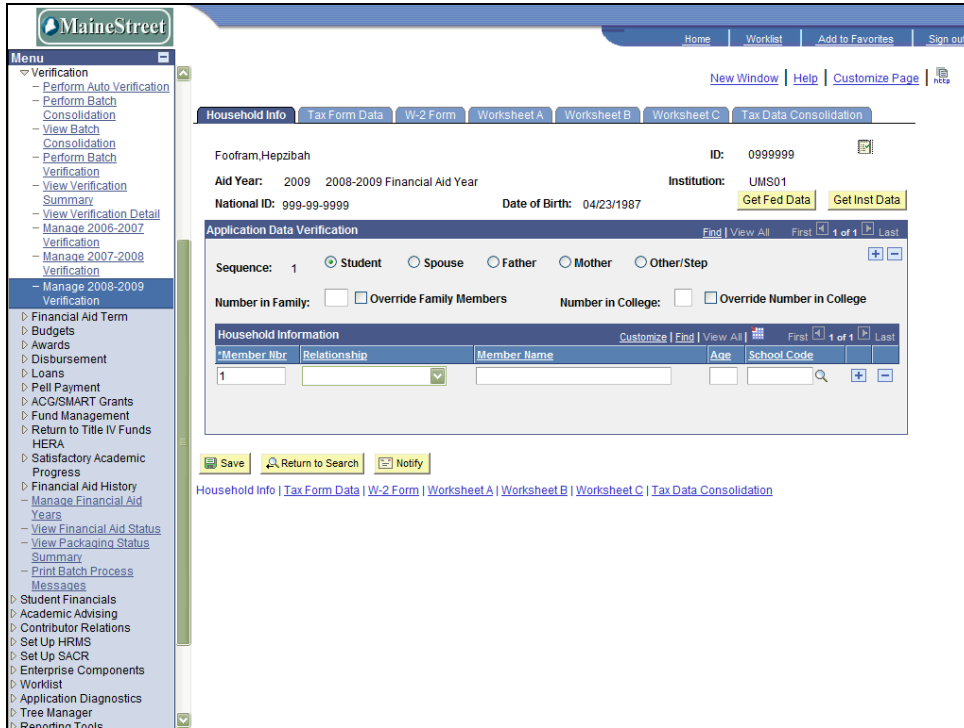
Step	Action
5.	<p>Make sure the correct student ID, Institution and Aid Year are entered. Click Search.</p> <p><input type="button" value="Search"/></p>




Step	Action
6.	<p>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.</p> <p>Click the icon.</p> 



Step	Action
7.	<p>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.</p> <p>To change the Item Status, click the pull-down Item Status list.</p> 
8.	<p>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.</p> <p>To save changes, click the OK button. To return to the Manage Verification page without saving changes, click Cancel.</p> 



Step	Action
9.	Click the Get Fed Data button to bring in the data from the latest ISIR. 

Process Document

Financial Aid: Verification Using Consolidation Page-042808



MaineStreet

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page | nts

Household Info | Tax Form Data | W-2 Form | Worksheet A | Worksheet B | Worksheet C | Tax Data Consolidation

Footram,Hepzibah ID: 0999999

Aid Year: 2009 2008-2009 Financial Aid Year Institution: UMS01

National ID: 999-99-9999 Date of Birth: 04/23/1987 [Get Fed Data](#) [Get Inst Data](#)

Application Data Verification Find | View All First 1 of 2 Last

Sequence: 1 Student Spouse Father Mother Other/Step

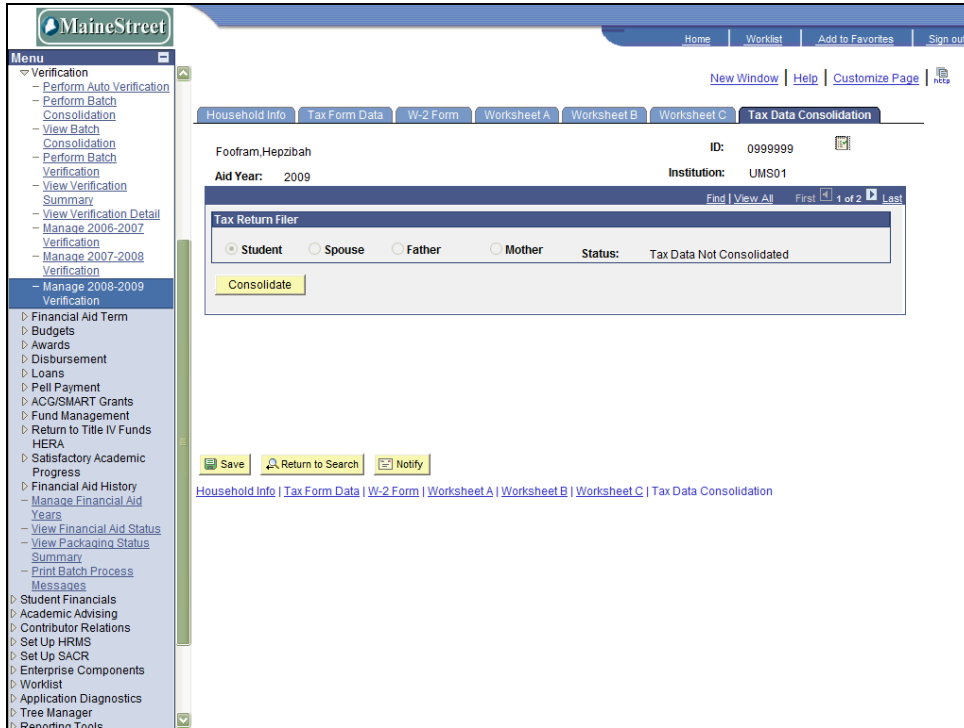
Number in Family: Override Family Members Number in College: Override Number in College

Member Id	Relationship	Member Name	Age	School Code
1				

[Save](#) [Return to Search](#) [Notify](#)

Household Info | Tax Form Data | W-2 Form | Worksheet A | Worksheet B | Worksheet C | Tax Data Consolidation

Step	Action
10.	<p>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.</p> <p>Click the Tax Data Consolidation tab.</p> <p>Tax Data Consolidation</p>



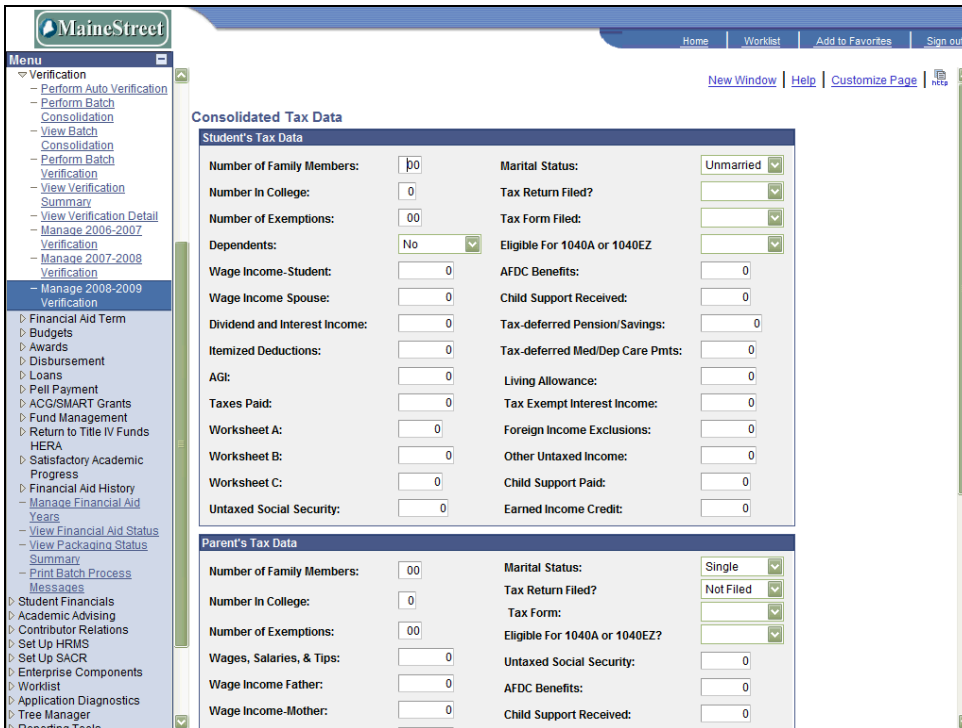
Step	Action
11.	<p>Click the Consolidate button.</p> <p>Note: do not consolidate unless you have all the required documents.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Consolidate</div>

Process Document

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Step	Action
12.	A new link appears: Consolidated Tax Data . Click the link. Consolidated Tax Data




Step	Action
13.	<p>On the Consolidated Tax Data page you have a section for the student and (if the student is dependent) a section for the parents.</p> <p>You can enter the data changes on this page.</p> <p>When done, scroll down to the bottom of the page and click OK.</p>

Process Document

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The screenshot shows the MaineStreet web application interface. On the left is a vertical menu with options like 'Verification', 'Financial Aid Term', and 'Academic Advising'. The top navigation bar includes 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below this are tabs for 'Household Info', 'Tax Form Data', 'W-2 Form', 'Worksheet A', 'Worksheet B', 'Worksheet C', and 'Tax Data Consolidation'. The main content area displays student information for 'Foofram, Hepzibah' with ID '0999999' and institution 'UMS01'. A 'Tax Return Filer' section has radio buttons for 'Student' (selected), 'Spouse', 'Father', and 'Mother', and a 'Status' of 'Tax Data Consolidated'. A yellow 'Consolidate' button is visible. At the bottom, there are 'Save', 'Return to Search', and 'Notify' buttons.

Step	Action
14.	<p>Click Save.</p> <p>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.</p> 
15.	End of Procedure.