

Test Drive the ISIR Analysis Tool and Improve Verification Hands-On Activities

In this session participants will:

- ✓ Run reports and view data from the ISIR Analysis Tool Demonstration site.
- ✓ Learn a new approach for identifying parameters for selecting student records for Federal and/or discretionary verification.

Exercise 1: Access the FAA Access Demo System

 To start, click on the Internet Explorer icon found on your desktop.

 Type <http://fafsademotest.ed.gov/> in the Address bar. Hit **enter**.

If you are prompted for a User name and a Password,

 For the User name, enter **eddemo**.

 For the Password, enter **fafsatest**.

 If check box appears next to “**Remember my password**” place a checkmark there. Select **OK**.

 Scroll to bottom of the page and select the orange box “**FAA Access to CPS On Line Demo System**”.

 Select **Next** - If a Security Alert dialog is displayed, select **Yes**.

*Note: This dialog is only displayed on the demo site we are using for this session. It is not displayed on the live site. Select **ISIR Analysis Tool***

 **Type for the TG Number 99999 and use your Federal School Code and select award year 2009-2010 and Select Next.**

Destination/Federal School Code Entry

We need you to provide us with the TG# for your Destination Point, your Federal School Code, and the school year. After you have entered your TG#, Federal School Code, and school year, select **Next** to continue.

What is the TG# for your Destination Point? Enter this number without the 'TG'.	TG <input type="text"/>
What is your Federal School Code?	<input type="text"/>
For which school year are you logging in? The 2009-2010 School Year (July 1st, 2009 - June 30th, 2010) The 2008-2009 School Year (July 1st, 2008 - June 30th, 2009)	Select <input type="text"/>

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End of Exercise 1

Exercise #2 – The ISIR Analysis Tool Homepage and Navigation Features

Learn how to navigate within the ISIR Analysis Tool and explore the functions on the homepage.

 From the left navigation bar, you will see **Data Request**. It is not available in the demo site but is active in the Live Site.



The two functions under Data Request are to upload data. Specifically, 1. ISIR Data 2. User Specified Fields

Note: Users cannot upload records using the **Data Request** function in the demo site environment. There are 332 records pre-populated in the database. Maximum number of records that can be uploaded into the tool = **1500**

 From the left navigation bar, left click the mouse and select **User Specified Fields**

Select the down arrow and the three functions under User Specified Fields are:

1. View Only 2. Add Fields 3. Delete Fields

 From the left navigation bar, left click the mouse and select **Current Status**

Note: user-specified fields allow the user to add non-ISIR information to records uploaded into the database. Users can add, view and delete user-specified fields in the demo environment

How many records are in the database? 332 with both initial and paid on records.

 From the left navigation bar, left click the mouse and select **Student Listing**

Note: The Student Listing allows the user to see a listing of all records in the database.

A drop down menu of options will display. The demo site only displays view only however, the live site provides two additional options: [Update records or delete records](#).

 From the left navigation bar you will see **Export**. It is not available in the demo site but is active in the Live Site.

Note: Users can **export** a full SSN list to their schools SAIG mailbox

The Export Function allows the user to export a full SSN list to their schools SAIG mailbox.

 From the left navigation bar you will see **Data Validation**. It is not available in the demo site but is active in the Live Site.

Note: Analysis of Data allows you to view and run standard and custom reports in the ISIR Analysis Tool. It's the first step to take to learn about how to analyze verification data.

Selecting Data validation ensures that you have a paid on and an initial ISIR record loaded into the tool. If not, the record is automatically deleted. Data validation has already been performed for this demo exercise.

 From the left Navigation bar, left click the mouse and select **Analysis of Data**. Select **Continue**.

End of exercise 2

Exercise #3 – DASHBOARD DIAGNOSTICS



Understand the data provided in the two dashboard panes, the Sample Summary Report and Verification Status Report.

 To expand the Sample Summary Report displayed on the top part Of the dashboard click the  icon to expand the report. Note the following descriptive information about the data currently in the Tool:

Report Sample Size	332
Total Dependent Pell Eligible	231
Total Dependent Pell Ineligible	73
Total Independent Pell Eligible	18
Total Independent Pell Ineligible	10
Total EFC Changes	7,420
Total Pell Changes	244
Total Initial Pell Award	\$883,954
Total Paid-On Pell Award	\$847,928

Note: Dashboard reports provide the user with a quick “diagnostic” overview of the ISIR information uploaded into the Tool. Both dashboard reports are also available within the standard report folder.

To close Sample Summary Report window, select the **red X** in top right hand corner of the screen.

 To expand the Verification Summary by Dependency Status Report on the bottom of the dashboard, click the  icon to maximize the report. Two color bar graphs will display (Dependent and Independent). Using the report legend and by placing your cursor over the following bars in the graphs see the answers to the following questions :

How many Dependent Records were selected by the CPS?	219
How Many Independent Records were selected by the CPS? (Hint: find the Independent Graph on the second half of the screen).	12
For the Dependent Records selected by the CPS, how many had an EFC Decrease? 51 EFC Increase? 106 (Hint: find the dependent records on the top half of the screen).	
Which of the bars is higher? EFC Increase	
Is CPS catching more over or under payments? Over Awards	

Note: Users can “drill down” from the Verification Summary by Dependency Status report by clicking on any of the bars in the graph. By clicking on a bar in the graph, the Field Change report will display that provides information specific to the records that were selected in the previous report.

To close Verification Summary Report window, select the **red X** in top right hand corner of the screen.

End of Exercise #3

Exercise #4 – Running Standard Reports and Filtering Options



Familiarize yourself with the Standard Reports and how to use filters to capture specific information on a report.

From the dashboard select **IA Tool 09-10** (left click your mouse) from the Domain Tree on the far left side of the dashboard.

Click the **Standard Report** icon from the left navigation bar. And select **IA Tool 09-10**. The Standard Report folder will expand.

Select **Field Change Report** (Report #4). Right click your mouse and Select “Run.” or left click to run the report (you have two options). A Filters Page that allows you to focus analysis on a subset of records will Display. (If you receive a message “Do you want to display non secure items, select Yes”).

On the Filters Page scroll down to Dependency Status and Select “**Dependent**” from the down box, and

Scroll down to the **CPS Verification Flag filter**, from the drop down box select “**YES.**”

Click **Submit** at the bottom of the page.

The Field Change Report is displayed.

Note the information that appears in the upper left of the report indicates what types of records appear in the report and how many there are:

Criteria: Dependent CPS selected records

Report Sample Size: 219

Left click on the link on top of the Field Change Report (**EFC Critical ISIR Fields Link**) to view the Field Change Report including only ISIR fields that factor into EFC calculation.

Note the answers to the following questions in the Field Change Report:

What ISIR Field is listed first? Parents’ Untaxed Income Total

How many records were corrected as a result? 87

Were there more Pell Increases or Pell Decreases? Pell decreases

What percent of records were selected by CPS? 100% - should be because that is what we filtered on.

Consumer Information Benefits: The tool can assist in identifying ISIR fields that have EFC changes of 50% or higher. Perhaps include those ISIR items in your consumer information.

FYI. From the standard reports you have two options to run the reports. You can right click the mouse and select run or you can left click the mouse to run the reports.

On the Field Change Report, left click on the first ISIR Field listed- click on the words **(Parent’s Untaxed Income Total)** to drill down to the Field Increment Report. (If you receive a message “Do you want to display non secure items, select Yes”).

- 🖥️ A select field page will display. Select **“Primary EFC** from the drop down box and then click **SUBMIT**.

The Field Increment Report is displayed. Note the following information from the Field Increment Report:

Changes to the Parent’s Untaxed Income occur only in the EFC increments 5,000 and below.

Only dependent records selected by the CPS selected with a change to Parent’s Untaxed Income are included in this report.

- 🖥️ To return to the Field Change Report click the **back** button on your browser **two times**. (If you receive a message “Do you want to display non secure items” - select “Yes”). The Field Change Report will display.
- 🖥️ On the Field Change Report, for ISIR Field **“Parent’s Untaxed Income Total”**, click on **43.5%** which is located in the second column for “Records Corrected” that is to the right of the ISIR Field listed first .

The **Pell Eligibility by Dependency Status Report** is displayed. Review the report and note the answer to the following question:

What percentage of dependent students selected by the CPS with a change to Parents Untaxed Income were Pell eligible? **100%**

- 🖥️ To obtain a listing of Dependent Pell Eligible Students selected For verification by CPS, click on the column **“EFC Increase,” – 62.1%**, to drill down to the Student Listing Report.

Note: The Field Increment Report can answer the following question: Are changes to a particular field concentrated within a particular value range of that or some other field?

Users can run the Field increment from the Standard Report folder or by drilling down from the Field Change Report.

Note: The Pell Eligibility by Dependency Status Report shows the relationship between changes to ISIR Fields and Dependency and Eligibility Status.

The **Student Listing Report** is displayed.

Look at the report criteria. What subset of student records are you analyzing now?

Dependent, CPS selected, Parents Untaxed Income Total, Pell Eligible, EFC Increase.

Were there any records that did not experience a Pell Grant Change? **Yes, 5 records**



Would you want to include those records in your 30 percent population? **Possibly – if the EFC change would have affected Campus Based funds, but if you were not going to verify some of the records selected by the CPS those without a Pell change would be better to leave out than those with Pell changes.**

 Click on the first **student SSN** in the Student Listing Report ([547010002](#)) to drill down to the **Student Detail Report**.

The Student Detail Report is displayed.

Note the following:

The 3 ISIR Fields that changed the most after the initial application?

1. Parents' Untaxed Income Total
2. Student Adjusted Gross Income
3. Parents' Income Tax Paid

These 3 fields were the primary reason for changes to EFC. Would improved consumer information/educational outreach reduce corrections to these problematic ISIR Fields? **Possibly**

Note: The Student Listing report provides the user with a listing of student records and can assist you in determining if records selected by the CPS experience a change in aid eligibility. Users can then look at individual records for further analysis. Users

Note: You can drill down to an individual record by clicking on the SSN associated with the record found in the first column of the report.

Note: Remember users can run all of the standard reports from the Standard Reports Folder.

Note: The Student Detail Report displays a listing of all ISIR elements that changed between the initial and paid-on transaction.

End of Exercise #4

Exercise #5 –EFC Impact Analysis Report

Run the EFC Impact Analysis Report to determine which EFC critical ISIR fields were corrected most often between the Initial and Paid on transactions.



Click the **X** in the upper right hand corner of the screen to close out of all reports and return to the Domain tree on the left hand side of the Dashboard.

Select **EFC Impact Analysis Report #3** from the Standard Report Folder. Right click your mouse and select “Run.” (If you receive A message “Do you want to display non secure items, select “Yes”).

A Filters Page will Display.

On the Filters Page scroll down to **Dependency Status**, from the drop down box select “**Dependent**”. Scroll down to **CPS Verification Flag**. From the drop down menu select “**YES**.”

Scroll to the bottom of the Filters Page and click **Submit**.

The EFC Impact Analysis Report is displayed.

Click on “**View Report as Text**” link to view the report in text format.

Review the EFC Impact Analysis Report and review the answers to the following questions:

Out of the 5 ISIR Fields displayed, which 3 fields had the most changes?

1. Parents’ Untaxed Income Total
2. Parents’ U.S. Income Taxes Paid
3. Students’ Tax Return Completed

What EFC ranges did most of the changes occur?

1-4,617

What EFC ranges experience little or no change?

4618 - 99999



Could this information be used to identify a schools 30% population?

Yes, those records selected by the CPS and were Pell eligible.

Note: The EFC Impact Analysis Report displays in graph format but can also display in text format. The report illustrates changes to EFC critical ISIR fields as they are distributed across initial EFC value ranges.

End of Exercise #5

Exercise #6 – Putting it All Together



Use the scenario below to run a report and analyze the results. Follow the “clues” to stay on track.

Scenario

During your weekly staff meeting, staff members indicated that they would like to identify which ISIR data elements are most likely to be corrected when verifying students selected by the CPS. The staff would like to use this information to improve consumer information and educational outreach for students and parents.

Think through how to use the ISIR Analysis Tool to identify the ISIR Elements that changed most frequently between the initial and paid-on transactions. You can practice this analysis on the demo site, but would need to upload your own data into the real ISIR Analysis Tool to see what is going on at your school.

Answers for this section are provided at the end of this exercise.

Note: Schools may find it useful to use the Tool to determine if there are particular ISIR Fields that are problematic when completing the FAFSA. Identifying ISIR elements that change most frequently can assist aid office staff in better educating parents and students about common errors that are made while completing the application. This is useful information to include in consumer information and shared with potential students during college night presentations.

-  From the dashboard select click the **Standard Report** icon from the left navigation bar and select **the Standard Report that will provide a list of ISIR Field Changes. What Report will you choose?**

1. Hint: ISIR Field Changes

 Select the appropriate report from the Standard Report Folder. Right Click the mouse and select **“Run.”** The Filters page is displayed.

Do you want to use Filters? Identify the filters below:

2. _____

-  Scroll to the bottom of the **Filters page** and click **“Submit.”**

Is there a way to view only changes that impact the EFC? What do you do?

3. _____

 Review the report to obtain the following information:

4. List the top three ISIR Fields that had the highest number of records corrected.

5. From the ISIR Fields listed above record the percentages of EFC increases and decreases:

ISIR Field #1: EFC % Decrease _____ EFC % Increase _____

ISIR Field #2: EFC % Decrease _____ EFC % Increase _____

ISIR Field #2: EFC % Decrease _____ EFC % Increase _____

6. From the ISIR Fields listed above record the percentages of Pell increases and decreases:

ISIR Field #1: Pell % Decrease _____ Pell % Increase _____

ISIR Field #2: Pell % Decrease _____ Pell % Increase _____

ISIR Field #2: Pell % Decrease _____ Pell % Increase _____

7. How would you drill down from the report you generated to a report that displays the distribution of corrections to a specific across value ranges of a selected ISIR field?

8. How would you drill down to see how changes to a specific field were distributed across dependency and Pell Grant eligibility status?

End of exercise 6

Answers to Exercise # 6 Scenario

- #1 The Field Change report will provide a list of ISIR Field Changes.
- #2 Keeping the scenario in mind, you will need to select records selected by the CPS to analyze and any other filter(s) you would like to analyze. Perhaps you want to filter on dependency status (dependent or independent).
- #3 Yes, Select the EFC Critical ISIR Field Link.
- #4 Answers will depend on what you filtered on – it will be the top three listed.
- #5 Answers will be found on the screen for each ISIR Field. Look for appropriate column.
- #6 Answers will be found on the screen for each ISIR Field. Look for appropriate column.
- #7 In the Field Change Report, click on the name of the desired ISIR Field. Select a field to use for the value ranges, click submit.
- #8 In the Field Change Report, click on the percent corrected entry for the desired ISIR field. Note clicking on the other numbers will generate a Pell Eligibility by Dependency Status Report for the records with corrections that fit the description of that entry, e.g., EFC decrease, Pell increase, etc.

DISCUSSION



Based on the information above, can the data be used to improve a schools approach to verifying records selected for federal verification?

Yes, but keep in mind when reviewing the top ISIR fields with changes. There may be many changes but it may not have impacted the EFC. Perhaps the analysis can assist you in which 30% you will select to verify and/or how to improve your consumer information to assist students in avoiding mistakes that can impact their EFC. Also remember that when you use filters to restrict reports to only those records currently being selected by the CPS, your analysis will not address potential corrections that are not being addressed by current verification efforts.



What about discretionary verification? How can the tool help a school fine tune its discretionary verification criteria?

You can also upload records into the tool that you chose to verify in addition to the CPS records. Determine if the EFC impact is greater or less than you had anticipated. The information can assist you in what types of student you select for discretionary verification next year or which data elements to target in your consumer information.

RESOURCES

Navigate the ISIR Tool and Review Standard Reports

Question	Answer:
What menu item allows you to upload data or up load user defined field?	Data Request
What menu item allows me to create a user defined field (i.e. Verification Criteria 01)?	User-Specified Fields
What menu item tells me how many students are in the database and if the records have been validated or not?	Current Status
What menu item lists the students in the data base and displays the user defined data?	Student Listing
What menu item must I use to validate my records?	Data Validation
What menu item allows me to export a file?	Export
What menu item allows me to begin my analysis of data?	Analysis of Data
What link will provide me with what is new with the ISIR Analysis Tool?	<ul style="list-style-type: none"> ■ What's New for 2008-2009 in the ISIR Analysis Tool?
What link(s) will provide information on Add User Defined Fields?	Add user defined fields: <ul style="list-style-type: none"> ■ School Verification Flag ■ Other Fields
Is their a Frequently Asked Question Link located on the home page?	Home Help FAQs

The Reports available in the ISIR Analysis Tool

The table below summarizes the reports of the ISIR Analysis Tool by identifying the research questions each addresses.

ISIR Analysis Tool	Research Questions Addressed
Sample Summary	What students are in my database? What was the aggregate impact of change in eligibility?
Verification Summary	Which records were selected for CPS verification? Which records were selected for discretionary verification? Which CPS verified records experienced an increase or decrease to EFC? Which institutionally verified records experienced an increase or decrease to EFC?
EFC Impact Analysis Report	How are changes to EFC critical ISIR fields distributed across initial EFC values ranges?
Field Change	Which ISIR fields were most likely to be corrected? Which corrections were most likely to be associated with a change to aid eligibility? Which corrections were most likely to be selected by school and CPS verification criteria?
Field Increments	Are changes to a particular field concentrated within a particular value range of that or some other field? Are corrections to a critical ISIR field concentrated within a particular value range of that or some other field?
Pell Eligibility By Dependency Status	Are changes to the selected field related to Pell eligibility and dependency status? How many students with changes to the selected field does CPS or discretionary verification select?
Student Listing	Which records selected by CPS did not experience a change in aid eligibility? Which records selected for school/discretionary verification did NOT experience a change in aid eligibility?
Student Detail	What was the impact on this student's EFC? What ISIR information changed after the initial application? What was the primary reason for observed changes to EFC?
Verification Tracking Flags	Which CPS Verification Tracking Flags experienced the highest percentages of changes to EFC and Pell Eligibility?

Orange = Reports that are part of the Dashboard. Once you upload your records, perform Data Validation and click the Analysis of Data button, the reports will automatically run and will be included in the Dashboard. You can also run these reports from the Standard Reports Folder.

Blue = Reports often used for analysis. The Field Change Report is the place to begin. Then drill down to the Field Increment Report, Pell Eligibility by Dependency Status Report, Student Listing Report and Student Detail Report. You can access the reports without using the drill down feature. If you run the reports from the Standard Reports Folder, you can take advantage of additional filtering options that are not available in drill down.

Green = The Verification Tracking Flags Report is interesting to review for informational purposes, but since Verification Tracking Flag values change each year, assumptions cannot be made that specific codes will have the same meaning in subsequent award years.