Session 5

FAA Access to CPS Online for EDExpress Users - Hands-on

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Agenda

- Enhancements to EDExpress and FAA Access for 2005-2006
- Hands-on exercises
EDExpress and FAA Access Enhancements for 2005-2006
Securing FAA Identifiers

- FAA’s SSN and DOB will be masked (will appear as asterisks) on the FAA login screen
Securing FAA Identifiers

• The EDExpress Access Database has been password protected

• FAA authentication data has been encrypted within the EDExpress Access database tables
New Web links

- Added links from EDExpress to the R2T4 and ISIR Analysis Tool home pages
- If an FAA provides authenticating data in EDExpress setup, the FAA will be able to link directly to the home pages, bypassing the FAA Access login pages.
Demographic data from the open record in EDExpress is pre-filled into an initial FAFSA

- When linking to FAA Access via the FAFSA tab
- Will not overwrite what is already in a Renewal or Correction FAFSA
Accessing Saved Records

- Records entered and saved prior to submission can now be retrieved
  - by going to FAA Access directly, or
  - by linking to FAA Access through EDExpress
  - regardless of whether the record was entered and saved from the EDExpress interface or directly into FAA Access
Simplified Data Entry Process

- Reduced the number of keystrokes for those who use the keyboard to navigate through a record by:
  - Setting the initial cursor focus to the first entry field
  - Removing the Step links
  - Moving the Student and Parent Taxes Paid Calculation buttons to the bottom of the page
  - Pre-filling the “Born before?” question based on the Date of Birth
Updated Responses

- All fields with a selectable list of responses are now prefaced with the numeric equivalent of the response
- Reduced the choices for questions 33 and 71 (Type of tax return filed) from 12 to 4 to match the FAFSA
<table>
<thead>
<tr>
<th>Number</th>
<th>Question</th>
<th>Worksheet</th>
<th>Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>31</td>
<td>Drug Conviction Affecting Eligibility?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>2004 tax return filed:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>Type of 2004 tax return used:</td>
<td>Select</td>
<td></td>
</tr>
<tr>
<td>34</td>
<td>Eligible to file 1040A or 1040EZ?</td>
<td>Select</td>
<td>1-IRS 1040</td>
</tr>
<tr>
<td>35</td>
<td>2004 Adjusted Gross Income:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>36</td>
<td>2004 U.S. income tax paid:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>37</td>
<td>2004 Exemptions claimed:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>38</td>
<td>2004 Student's income:</td>
<td></td>
<td>.00</td>
</tr>
<tr>
<td>39</td>
<td>2004 Spouse's income:</td>
<td></td>
<td>.00</td>
</tr>
<tr>
<td>40</td>
<td>Total from Worksheet A:</td>
<td></td>
<td>.00</td>
</tr>
<tr>
<td>41</td>
<td>Total from Worksheet B:</td>
<td></td>
<td>.00</td>
</tr>
<tr>
<td>42</td>
<td>Total from Worksheet C:</td>
<td></td>
<td>.00</td>
</tr>
<tr>
<td>43</td>
<td>Cash, savings, and checking accounts:</td>
<td></td>
<td>.00</td>
</tr>
<tr>
<td>44</td>
<td>Current net worth of investments:</td>
<td></td>
<td>.00</td>
</tr>
<tr>
<td>45</td>
<td>Current net worth of business/farm:</td>
<td></td>
<td>.00</td>
</tr>
<tr>
<td>46</td>
<td>Number of Months' VA benefits received:</td>
<td></td>
<td>.00</td>
</tr>
<tr>
<td>47</td>
<td>Monthly VA education benefits:</td>
<td></td>
<td>.00</td>
</tr>
<tr>
<td>48</td>
<td>Born before January 1, 1982?</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>49</td>
<td>Working on a master's or doctorate in 2005-2006?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Redesigned Correction Entry

- Added a column to display just the values being corrected
  - Can now view the values as they appear on the selected ISIR transaction as well as the corrected values

- Added a List Changes button
  - allows the user to view a list of those values that have been corrected or confirmed
  - list can be printed

- No longer be required to provide Housing Plans
  - for colleges other than your own when making corrections.
**Redesigned Correction Entry**

**FAFSA Application Correction**

**2005-2006 FAFSA Application Correction**

Make corrections to values that appear in the "Selected ISIR Value" column by entering the new value in the associated "Enter Correct Value" field, or select an option from the last column to indicate that you wish to confirm that a selected ISIR value is correct (Data is Correct) or change a selected ISIR value to blank (Correct to Blank).

If you enter a value in the "Enter Correct Value" field and choose Data is Correct or Correct to Blank in the last column, the last action that you took will override any previous action for that field.

Note: If a field is highlighted on the student’s SAR because the CPS determined that the data is questionable, you should choose Data is Correct in the last column if you want to eliminate the highlight on subsequent transactions.

Fields that have been corrected on a previous transaction are marked with an ‘@’ (at) sign
Fields that have been corrected on the current transaction are marked with a ‘#’ (pound) sign
Fields that have been assumed are marked with an ‘*’ (asterisk) sign

**Student ID**

**Transaction # Selected**

<table>
<thead>
<tr>
<th>Step One: The Student</th>
<th>Selected ISIR Value (Transaction # 01)</th>
<th>Enter Correct Value</th>
<th>For Selected ISIR: Data is Correct or Correct to Blank</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Last Name:</td>
<td>LASTNAME</td>
<td></td>
<td>Select</td>
</tr>
<tr>
<td>2. First Name:</td>
<td>FIRSTNAME</td>
<td></td>
<td>Select</td>
</tr>
<tr>
<td>3. Middle Initial:</td>
<td>M</td>
<td></td>
<td>Select</td>
</tr>
<tr>
<td>4. Address:</td>
<td>STREET ADDRESS</td>
<td></td>
<td>Select</td>
</tr>
<tr>
<td>5. City:</td>
<td>MARYTOWN</td>
<td></td>
<td>Select</td>
</tr>
</tbody>
</table>

Provided instructions on how to use this correction page

Added separate column for making corrections

For this transaction
List Changes Page

Field Changes

This is a list of the fields that changed or were verified in the current correction.

To print this page, select Print This Page.

To view this page, move your browser's vertical scroll bar upward or downward, or press the Page Up or Page Down key on the right side of your computer keyboard.

Fields that have been verified are marked with a '#' (pound) sign.

Student ID 220010122 LA 01

Step 1. (Q1 - Q31)
- Citizenship Status: U.S. CITIZEN
- Date you Became a Legal Resident: 011980

Step 2. (Q32 - Q47)

Step 3. (Q48 - Q54)

Step 4. (Q55 - Q83)

Step 5. (Q84 - Q85)

Step 6. (Q86 - Q98, Q101 - Q102)
Added a new ISIR Compare function to Student Inquiry
  - Similar to the ISIR Review feature in EDExpress
  - Displays more FAA fields than ISIR Review
  - Provides the ability to sort data so that all fields with differences appear at the top of the grid
Student Inquiry-SAR Transactions

FAA Access to CPS Online - Student Inquiry

SAR Transactions

Below is a list of the 2005-2006 transactions we have processed for 220010062 LASTNAME 07/17/1982 at the U.S. Department of Education as of 01/18/2005. You can select any of the transaction numbers to view the complete details for that transaction. To compare two transactions, select the checkbox next to the two you would like to compare and select the Compare ISIRs button. Select this link if you would like to view this student's 2004-2005 processed transactions.

<table>
<thead>
<tr>
<th>ISIR Compare</th>
<th>Transaction Number</th>
<th>Processed Date</th>
<th>Expected Family Contribution (EFC)</th>
<th>Transaction Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>02</td>
<td>01/17/2005</td>
<td>2005</td>
<td>Corrections on the Web</td>
</tr>
<tr>
<td>02</td>
<td>01</td>
<td>01/18/2005</td>
<td>1005</td>
<td>Paper FAFSA</td>
</tr>
</tbody>
</table>

Put a check in the box of the ISIRs you wish to compare.
ISIR Compare (Sorted by Differences)

The data below can be sorted by field number or difference. Select the 'Field' column heading to sort the data by field number (default). Select the 'Difference' column heading to sort the fields with differences to the top (ordered by field number).

You may also select either of the 'Transaction' column headings to view the transaction individually.

When you are finished, select the Previous button to return to the student's transaction list.

<table>
<thead>
<tr>
<th>Field</th>
<th>Transaction 01</th>
<th>Transaction 03</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>38. Student's Income Earned from Work</td>
<td>$ 3,000</td>
<td>$ 5,000</td>
<td>Y</td>
</tr>
<tr>
<td>39. Spouse's Income Earned from Work</td>
<td>$ 3,000</td>
<td>$ 5,000</td>
<td>Y</td>
</tr>
<tr>
<td>40. Total Amount from FAFSA Worksheet A</td>
<td>$ 1,000</td>
<td>$ 2,000</td>
<td>Y</td>
</tr>
<tr>
<td>Processed Record Type</td>
<td>Original Application (from any source)</td>
<td>History Correction (from any source)</td>
<td>Y</td>
</tr>
<tr>
<td>Source of Correction</td>
<td>CPS</td>
<td></td>
<td>Y</td>
</tr>
<tr>
<td>Correction Applied Against Transaction Number</td>
<td></td>
<td>02</td>
<td></td>
</tr>
<tr>
<td>CPS Pushed ISIR Flag</td>
<td>Transaction not automatically sent to school</td>
<td>Transaction automatically sent to school</td>
<td>Y</td>
</tr>
<tr>
<td>NSLDS Match Flag</td>
<td>Applicant has at least one reported default and Pell overpayment</td>
<td>Applicant has at least one reported default</td>
<td>Y</td>
</tr>
<tr>
<td>NSLDS Post-screening Reasons</td>
<td></td>
<td>No longer exceeding subsidized loan status</td>
<td>Y</td>
</tr>
</tbody>
</table>
Enhanced Verification Tool

- Added a Calculate button
- Added a Difference column to more easily identify those fields that are discrepant
- Display message when a correction is required
- Must now link into Correction Entry to submit corrections
- Users that wish to maintain an electronic copy can save the printable version to a file
- Users will no longer be required to submit corrections in order to leave the page
**Verification Tool**

Enter the student's Verification Tool values in the TaxTool column below. If you need to make corrections to the student's ISIR data, select **Make Corrections at the bottom of the page**.

**Student's SSN:** 220-01-0122  
**Student's Name:** FIRSTNAME LASTNAME  
**Transaction:** 01

<table>
<thead>
<tr>
<th>Student Information</th>
<th>ISIR</th>
<th>Tax/Tool</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number in Household:</td>
<td>3</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Number in College:</td>
<td>1</td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Tax return filed:</td>
<td>WILL FILE</td>
<td>1 - Already completed</td>
<td>Yes</td>
</tr>
<tr>
<td>Type of Tax Form:</td>
<td>1040</td>
<td>Select</td>
<td>No</td>
</tr>
<tr>
<td>Eligible to file 1040A/1040EZ:</td>
<td>YES</td>
<td>Select</td>
<td>No</td>
</tr>
<tr>
<td>AGI:</td>
<td>10000</td>
<td>5000</td>
<td>Yes</td>
</tr>
<tr>
<td>U.S. Income Tax Paid:</td>
<td>3000</td>
<td>0</td>
<td>Yes</td>
</tr>
<tr>
<td>Student's income from Work:</td>
<td>5000</td>
<td>0</td>
<td>Yes</td>
</tr>
<tr>
<td>Spouse's income from Work:</td>
<td>0</td>
<td>0</td>
<td>Yes</td>
</tr>
<tr>
<td>Total from Worksheet A:</td>
<td>1000</td>
<td>0</td>
<td>Yes</td>
</tr>
<tr>
<td>Total from Worksheet B:</td>
<td>2000</td>
<td>0</td>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Totals:</th>
<th>ISIR</th>
<th>Tax/Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verification Total:</td>
<td>187300</td>
<td>176300</td>
</tr>
<tr>
<td>Verification Tolerance:</td>
<td>15000</td>
<td>15000</td>
</tr>
</tbody>
</table>

If any of the following are true, you must submit a correction:
1. Verification Tolerance is $400 or greater.
2. Income from Work was updated for a tax filer.
3. Number in Household or Number in College was updated.

**New Name**  
**Differences Column added**  
**Directions on next steps**  
**New Calculate Button**
Updated Application Status Check within student Inquiry to allow FAAs to submit signatures

- When Signature Status indicates that student and/or parent signatures is missing from a transaction, the FAA can access a page to:
  - Print a Signature Page
  - Submit a signature flag for the student and/or parent
- Remains on Signature Status for 14 days
Added a Title field to each request

- Title is included in the first record of the ISIR file resulting from the request
- Upon import of the ISIR file into EDExpress, the Import Edit Report will include the title

**FAA Access to CPS Online - ISIR Request**

**Selection Criteria**

- **Destination Code:** T053275
- **School Year:** 2005-2006
- **Request Title:**
EDExpress will create an Import ID for each ISIR file imported

- Import ID will print on the Import Edit Report
- Import ID can be used as selection criteria when printing ISIRs or lists of ISIRs
- Import ID consists of the date and time that the import began
Additional Information
Demo Site for FAFSA on the Web and FAA Access

- Purpose: For FAAs to learn and to train staff
- fafsademo.test.ed.gov
  - User Name: eddemo
  - Password: fafsatest
- Documented in the 2004-2005 CPS Test System User Guide
  - fsadownload.ed.gov/CPSTestSys0405.htm
Technical Assistance

We appreciate your feedback and comments.

CPS/SAIG Technical Support can be reached at:

Phone: 1-800-330-5947
Fax: 319-665-7662
E-mail: cpssaig@ed.gov
Questions and Comments

- Need more information while at the conference?
  - Attend Session 49 – FAA Access to CPS Online and the ISIR Datamart
  - Come to the PC Lab for assistance with
    - FAA Access to CPS Online
    - SAIG Enrollment
    - EDExpress
Hands-on Exercises