Validate and Edit ISIR Data

STAFF

Workday Student

This tip sheet is intended for Financial Aid Administrators.

Validate Institutional Student Information Record (ISIR) data

1. Access the student's record by entering their name in using the Workday Search bar.
2. Navigate to the Student's ISIR information by expanding the "Financial Aid" section and select the "ISIR" tab at the top of the window.
3. Expand the relevant award year by choosing the desired Award Year from the list to This will display the ISIRs received for that the selected award year.
4. Use the grid to view ISIR details and status. The grid will show the different ISIR transactions for that student and award year, including the Transaction ID, rejection status, if the ISIR is locked, and Student Aid Index (SAI). To view detailed information for a specific ISIR, select the related actions (next to magnifying glass) corresponding ISIR ID in the grid.
5. To review verification status within the ISIR details, you'll find information related to the ISIR's status, including whether it's been matched to a student record and its verification status (e.g., whether it needs verification, if it's been verified, and the Verification Group).

Consider These Key Options:

- Professional Judgment Indicator: Use this to indicate that you are altering data based on professional judgment for calculating:
  - Expected Family Contribution (EFC) for award years before 2024-2025.
  - Student Aid Index (SAI) for the 2024-2025 award year and after.
- Dependency Override Indicator: Select the reason for changing the student from Dependent to Independent.
- Grade Level Group: Update the student's grade level in college if necessary.

6. To make and submit changes, select "Edit ISIR" from the drop down. After making the necessary edits, click Submit.
   - If applicable, click **Calculate SAI** (or **Calculate EFC** for earlier award years) to send the ISIR transaction to FPS for federal verification.

7. Monitor approval by checking if FAFSA Processing System (FPS) will either approve or reject your edits, so keep track of the transaction status.