

# Oracle Student Financial Aid

## Update 24B Spotlight

Desiree Dreszer  
Director, Product Management  
Cloud Applications



Hello, I am Desiree Dreszer, Director of Product Management on the Oracle Student Financial Aid team, and in this spotlight I will be covering the capabilities in update 24B.

# Oracle Student Financial Aid | Update 24B

## Aid Eligibility (ISIR)

- Support of ED April 24/25 ISIR Updates
- Adjustment to Verification Configuration due to ED March 24/25 ISIR Updates
- Configuration to Trigger Document Request for CHF and IASG

## Packaging & Awarding

- Optimizing Need with SAI for Less than 9 Months
- Enhancing UI with Updated 24/25 Terminology
- Integrating with COD for 24/25 Award Year
- Automated Selective Packaging Before Verification

## Self Service

- College Financing Plan for 24/25 Award Year

## Reports and Letters

- Reporting Data Models & Letter Config for 24/25



With 24B we are delivering 7 features and a number of baseline configuration updates. You can see that this release was mostly focused on completing the remaining updates needed to support FAFSA Simplification and processing financial aid for the 2024-25 Award Year in Oracle Student Financial Aid.

In addition to that we are also delivering a highly voted idea, that we previewed during our last event, that will allow you to package your students while still processing their ISIRs.

I am going to review each of these areas starting with aid eligibility.

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For aid eligibility, we are delivering support for recent Department of Education updates to the ISIR Record layout and baseline configuration updates.

## Support of ED April 24/25 ISIR Updates

Ability to support updates published by Department of Education on April 3, 2024 to the ISIR Record Layout Volume 4 (Record Layouts and Processing Codes) and Volume 5 (Edits and Rejects).

CHANGES IMPACTING SFA	PRODUCT UPDATE	IMPACT TO EXISTING ISIRs
15 NSLDS fields within the ISIR were updated to add N/A as valid content	ISIR processing updated to accept N/A for these fields and send FAH and TSM NSLDS request files.	NSLDS request files will not trigger when the ISIR is received with N/As for any of these fields. System will retroactively trigger the NSLDS request files for impacted students with 24B.
ISIR Correction field length for High School Name was updated from 50 to 60 characters	ISIR correction files updated to send 60 characters for this field.	Schools will still be able to send corrections for this field for up to 50 characters until this is fixed.
5 Reject Code mapping to comment codes were updated	ISIR processing logic updated to adjust reject code mapping. Baseline configuration updated within ISIR_REJECT_TO_C_CODES and ISIR_C_CODES.	ISIRs loaded prior to 24B it will display the prior mapping with incorrect comment code text on ISIR Codes UI within the Admin UI. After 24B, subsequent ISIRs will include corrected reject comment code mapping.
2 Reject Codes reasons were updated	ISIR processing logic updated to adjust reject code reasons.	N/A – Baseline config does not contain any rejects that are not mapped to comment codes and this text will not display.

On April 3rd, the Department of Ed published updates to the ISIR Record Layout - Volumes 4 and 5, and in order to support these changes there are a number of updates that we are in the process of making. I am going to go over the updates that had an impact to the product, as well as the impact it will have on existing students and ISIRs if you have already loaded them into the system with 24A.

For the first one, there were a number of fields that the valid content was updated to include N/A as a possible value. In 24B we will be making an update to accept N/A for these fields and send the FAH and TSM NSLDS request files that are triggered when an ISIR is matched to a student. Since ED had already sent ISIRs with N/As prior to making the update to the ISIR Tech Ref, if you have already loaded the ISIRs into the system, the NSLDS request files were not triggered. However, when we include this update we will also trigger the request for existing impacted students.

An additional change that was made by ED, was to extend the ISIR correction field length for the High School Name from 50 to 60 characters. After 24B, and once the Dept allows schools to send corrections, we will include up to 60 characters. If a correction for this field is sent prior to 24B it will be capped at 50 characters, but there are no other downstream impacts.

For rejects, the comment codes mapping were updated for 5 reject codes, which will require system logic to be updated as well as baseline configuration updates. For these reject codes if an ISIR is loaded in prior to the update, it will display the prior mapping with incorrect comment code text on ISIR Codes UI within the Admin UI.

And lastly, 2 reject code reasons were updated which require ISIR processing updates. If you are using our baseline configuration, there will not be an impact to your students as our delivered configuration does not contain any rejects that are not mapped to comment codes, which is the only time this text would display.

# Updates to Aid Eligibility Baseline Configuration

## Department of Ed's ISIR Record Layout Updates

### April 3, 2024 Updates

Updated comment code mapping for reject codes D, 6, 9, 31, and 34, and clearing logic/notification messages for comment codes 57 and 301

ISIR\_REJECT\_TO\_C\_CODES  
ISIR\_C\_CODES

### March 5, 2024 Updates

ED updated the IRS Response Code fields for each contributor to include blank values. Since we use these fields to determine if documents need to be requested we updated our baseline configuration for our standard and aggregate verification groups.

ISIR\_VERIFICATION\_CODES

Support requesting documentation for students that are self identifying for [IASG/CFH eligibility](#)

IASG CFH Self Declaration lifetime document configured to allow students to certify that they eligible under the new regulatory criteria.

DOCUMENTS  
DOCMETADATA

ISIR discrepancy logic configured for Parent Killed in Line of Duty field to trigger a document if student answered yes, and the IASG Indicator and CFH Indicator ISIR fields are not eligible. Once document is accepted, a Complete ISIR review task is created for manual review to make correction.

ISIR\_DISCREP



Moving now onto the baseline configuration updates that were made within aid eligibility.

The first one here was made to support the ISIR Record Layout updates I just mentioned. We updated comment code mapping for reject codes D, 6, 9, 31, and 34, and clearing logic/notification messages for comment codes 57 and 301.

ED also published late updates on March 5th, which updated the IRS Response Code fields for each contributor to include blank values. Since we use these fields to determine if documents need to be requested, we updated our baseline configuration for our standard and aggregate verification groups. Your school may have already made these changes as we posted the logic on Cloud Customer Connect on March 6th, but it will now also be included in our delivered baseline configuration.

In addition to the Department of Education updates, we also enhanced our logic for CFH and IASG eligibility. We have added logic that will trigger a document request for a student to verify that they are eligible for CFH or IASG if they have answered yes to Parent Killed in Line of Duty on the FAFSA. Once the document is accepted, a Complete ISIR review task will be created for manual review to make the ISIR correction.

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Next I will cover the features impacting packaging and awarding.



# Optimizing Need with SAI for Less than 9 Months

Updated summer need calculation will use the Cost of Attendance (COA) and Other Financial Assistance (OFA) for standard term periods to reduce need analysis burden.

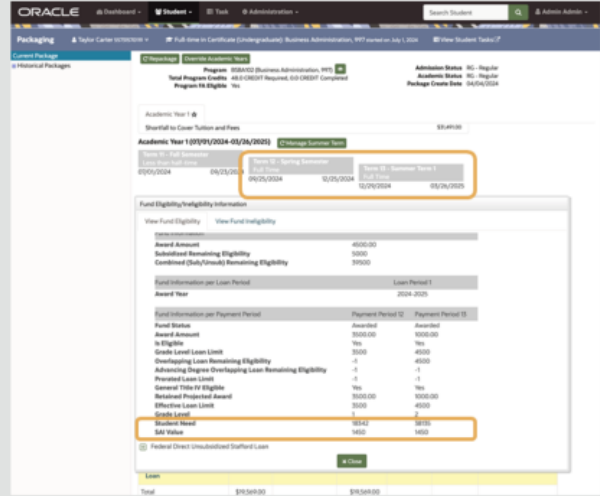
If separate summer need is configured, summer will use the entire loan period and standard terms will use the loan period established when your standard terms were awarded.

If the student is ineligible for Sub in standard terms, a Summer-only loan period is established.

Fall Term    Spring Term    Summer Term

If the student is eligible for Sub in standard terms, the loan period for Summer will extend the full year.

Fall Term    Spring Term    Summer Term



The first one is around enhancing our need calculation when periods are Less than 9 Months. As mentioned in prior events, the department of Ed will not be prorating the SAI which does causes the student to have less need during periods that are less than 9 months. Through the design review council we were able to collaborate with customers on a solution that meets department requirements while still reducing need burden on students.

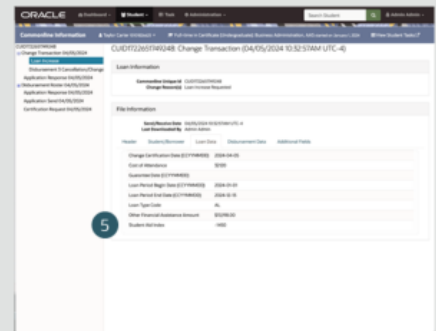
If you are a school that has configured for there to be a separate summer need, the summer logic has been enhanced to use the entire loan period, and standard terms will continue to use the loan period established when your standard terms were awarded.

So you can see in these examples and in the screenshot after your standard terms have been awarded, and summer is packaged, the system will determine the length of the loan period which will include the standard terms if the student is receiving Sub in them, and use the COA and OFA from all applicable terms.

Please make sure to watch the training available for this feature on release readiness, which covers a number of examples in greater detail.

# Enhancing UI with Updated 24/25 Terminology

Aligning UI with new 24/25 ISIR fields within packaging and awarding of Title IV and CommonLine funds.



- Separate ISIR data tables displayed for each award year used in packaging
- Ability to access all 24/25 ISIR fields by selecting ISIR
- Key 24/25 ISIR fields displayed when viewing eligibility per fund
- ISIR fields presented when editing or adding 24/25 funds were updated
- UI labeling for ISIR fields sent in CommonLine files were updated to match 24/25 terminology



Next, we are enhancing the UI in a number of places to align with the new 24/25 ISIR fields. Our focus for the last release was giving you the ability to process ISIRs and award your students, so in 24A you may have noticed some of the terminology on the UI had not been updated yet. We are excited with 24B to complete the UI enhancements and improve usability for your financial aid advisors.

Within packaging, there are now separate ISIR data tables that are conditionally displayed for each award year being used in packaging and they show the key data points for each applicable year. If you select the 24/25 year in the table you now have the ability to access all ISIR fields within packaging similar to how you have that functionality for 23/24.

When viewing eligibility per fund we have added the key data fields used when determining their aid. For instance for Pell, we've added fields such as Pell Enrollment Intensity, Pell Min and Max Codes, Pell COA to name a few. And we also updated the ISIR fields presented when editing or adding 24/25 funds.

For CommonLine in 24A we updated the logic to send the correct ISIR fields in CommonLine files, and with 24B we updated the UI labeling to match 24/25 terminology.

We also made another of other minor updates through the system such as when the UUID exceeds the allotted number of characters. So this release should help to alleviate any confusion on our Admin UI with these new 24/25 ISIR fields.

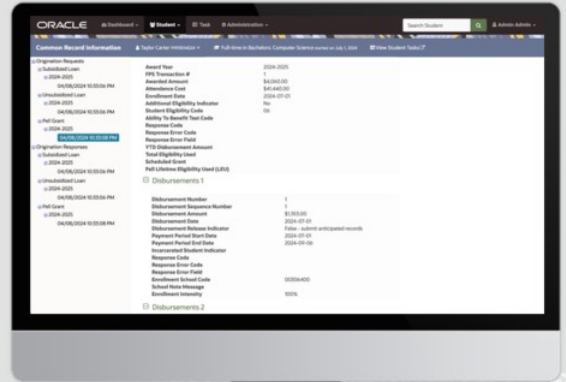


# Integrating with COD for the 24/25 Award Year

Allowing you to originate and disburse Title IV funds with COD for the new aid year.

## COD Common Record Updates

- Ability to originate and disburse 24/25 Title IV funds using COD Common Record XML Schema Version 5.0b
  - Updates to program CIP codes, first and middle name, postal code, and phone number
  - Removal of a number of fields including EFC related fields, CPS data, Pell eligibility fields
  - Added fields including enrollment intensity, name suffix, FPS data, IASG and CFH eligibility
  - Support of additional country codes
  - Processes new COD edits
- Leverage 24/25 ISIR fields to populate required data
- Ability to receive EC, Plus App, MPN, and Credit Status files used for determining and processing financial aid



Alright one of the most impactful features with 24B is supporting COD integration, which will give you the ability to originate and disburse your Title IV funds for the 24/25 Award Year.

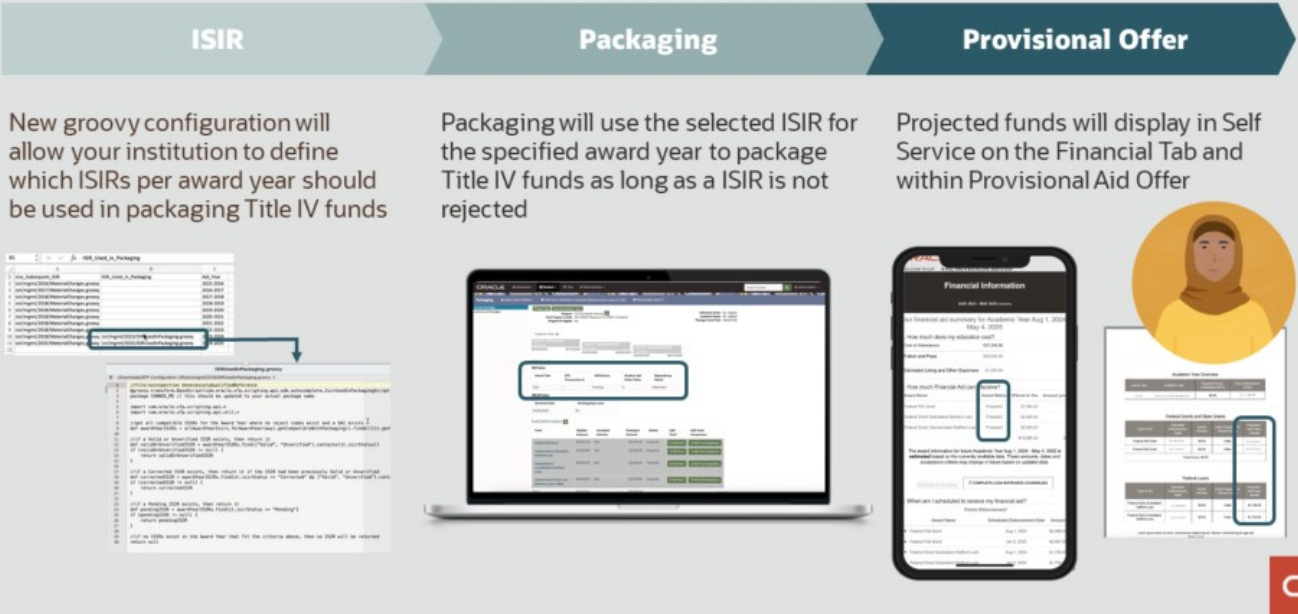
Once the Department of Ed allows COD processing for the 24/25 award year, and you have enabled the functionality in the product, we will begin transmitting files using the new COD Common Record XML Schema Version 5.0b. This includes a number of updated fields, removal of old fields that are not applicable to 24/25, and additional fields being added including enrollment intensity, name suffix, FPS data, IASG and CFH eligibility.

With 24B we are also supporting the added country codes and new COD edits.

This release will also give you the ability to accept Entrance Counseling files, Plus Applications, MPNs, and Credit Status Decision files used for determining and processing financial aid.

# Automated Selective Packaging before Verification

Eliminate delays in packaging funds for your students by leveraging ISIRs that are still being processed.



And the final feature within packaging and awarding is Automated Selective Packaging before Verification, which will be especially helpful this award year in getting your students packaged while ISIR processing is still being completed. The feature will expedite getting this information to your students, allowing them to understand what their potential financial aid packages will be.

New groovy configuration will allow you to define which ISIR's should be selected to be used in packaging and we have included baseline configuration for both the 23/24 and 24/25 award years. That configuration is based on best practices we have learned when meeting with our design review council. And this is one of those features where you can easily uptake the feature using the delivered configuration or you can add additional logic based on our institutional policy or to work around some of the Department of Education's known issues with the ISIR this year. As an example, our baseline configuration will not select the ISIR if the SAI is not present.

Once an ISIR is selected based on your configuration, the system will use the ISIR to package Title IV funds and if the ISIR is pending the funds will remain projected. Those funds will then be displayed to the student within self-service and included in the provisional aid offer.

This feature will greatly enhance your students experience, creating transparency and allowing them to make informed decisions about their education earlier on in the process.

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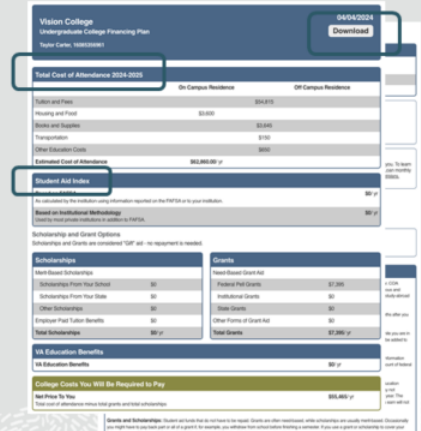
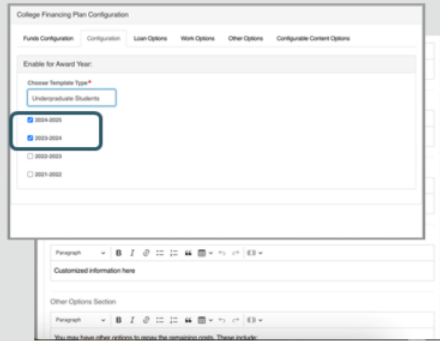
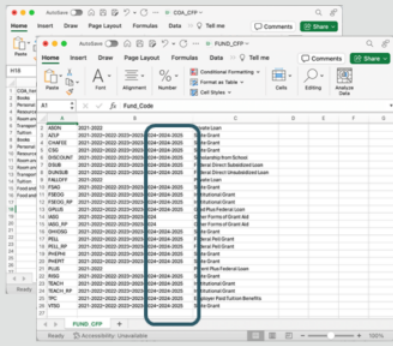
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Moving now onto the updates made with our self-service.

# College Financing Plan for the 24/25 Award Year

Leverage updated templates for the new award year and ensure students can access their College Financing Plan within Self-Service.



1 Configure COA and Funds for the 24/25 Award Year to be leveraged in the new College Financing Plan templates

2 Enable College Financing Plan for the new aid year within Self Service

- Set values in the Loan Options, Work Options and the Configurable Content sections

3 New templates display updated award year, PDF download within CFP, SAI, and additional text updates.

You now have the ability to provide your students with a College Financing Plan using the updated Undergraduate and Graduate/Professional templates for the 24/25 Award Year, allowing them to compare costs and the expected financial aid that they will receive at your institution.

As with prior award years, configuration will allow you to drive the category a cost of attendance item should be displayed under and whether it applies to on or off campus residences. Additionally, you will need to configure which category each fund should be tied, driving how the fund information should be calculated and displayed within the templates.

Within the Self Service UI, when enabling the 24/25 Award Year you have the ability to set configurable content per template including settings for loan and work options. Additionally for the Loan Amounts and Other Options sections, Student Financial Aid will deliver the default text as provided in the Department of Education's College Financing Plan templates.

The College Financing Plan will generate using the new templates which includes displaying the updated award year, a button to download a PDF version, the EFC being replaced with the SAI information, and number of additional minor text updates throughout.

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And the last feature I will be covering is related to Reports and Letters.







# June Maintenance Pack | Update 24B

## Aid Eligibility (ISIR)

### *ISIR Processing of April 24/25 ISIR Comment Code Updates*

On April 11, 2024, ED updated Volume 7 Comment Code guide with a number of updates impacting processing of the students' ISIRs.

### *Updates to Baseline Configuration*

Updates to support ED's changes to comment codes.

ISIR Discrepancy updates to ensure that duplicate ISIR Verification Tasks are not created.

## Packaging & Awarding

### *General Title IV Eligibility to Support April 24/25 ISIR Comment Code Updates*

On April 11, 2024, ED updated Volume 7 Comment Code guide with new comment codes requiring resolution for Title IV funding eligibility.

### *Visibility into FSEOG Need for Non-Term*

Student Need results are now available within the packaging eligibility and add/edit fund outputs for FSEOG for non-term academic models.

## Reports & Letters

### *Mask SSNs on Product Reports*

Meet increased security measures with ability to mask SSNs when running all product reports.

### *Reporting Views*

New reporting views displaying latest configuration loaded within COA.csv and FUND\_CFP.csv.

Updates to document reporting views to include the document owner.

### *New Data Model Report*

Allows you to view all existing product delivered data models and respective product reports using them.



With the June Maintenance Pack for 24B, we delivered 4 additional features and a number of configuration and reporting updates.

Within Aid Eligibility, we released support for 24/25 ISIR updates that the Department of Education released on April 11th. The changes to the Volume 7 Comment Codes Guide required several updates to ISIR processing to ensure we are communicating the correct comment code descriptions, and that we accounted for several comment codes that were added and removed. As part of this update we also released baseline configuration to align to these changes.

In addition to ED updates, we also released a change to our ISIR Discrepancy configuration to ensure that duplicate ISIR Verification Tasks are not created.

Within Packaging and Awarding, we also had to account for the April 11th 24/25 ISIR updates. We added additional logic to packaging to evaluate new comment codes that require resolution for Title IV funding eligibility.

Additionally, we increased visibility for the FSEOG need calculated by the system. We now include Student Need results within the packaging eligibility and add/edit fund outputs for FSEOG for non-term academic models.

Within reports and letters we delivered a number of improvements.

We are excited to deliver a customer logged idea that includes the ability to mask social security numbers when running product reports. This capability allows you to control how sensitive data, in this case the student's social security number, is displayed when rendering product reports. Allowing for scheduled reports to be generated, with increased security measures in place, for automated delivery.

We also created new reporting views to display the latest configuration loaded within COA and FUND\_CFP workbooks, and updated document reporting views to include the document owner.

And lastly, a new product report was delivered that allows you to view all existing product delivered data models and the respective product reports using them. We advise that you use this report before creating any custom data models to see if a product data model or report already exists that fits your needs, or if a product data model can be used as a template for updates.

## Resources

Oracle Cloud

<https://oracle.com>

Oracle Cloud Readiness Content

<https://oracle.com/readiness>

Oracle Cloud Customer Connect

<https://cloudcustomerconnect.oracle.com>

Oracle Documentation

<https://docs.oracle.com>



For more information on Oracle Student Financial Aid, see the What's New documentation at [oracle.com/readiness](https://oracle.com/readiness) and these other resources.

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Thank You.

**Desiree Dreszer**  
Director, Product Management  
Cloud Applications



Thank You for listening to our spotlight for 24B.

ORACLE