



CampusIvy



Using Technology to Navigate 2024-25 Changes



CampusIvy

Agenda

FAFSA/ISIR



PELL



2024-25 FAFSA/ISIR

- 15.2M Submitted
- 15.1M Processed
- 55 FAFSA Issues with 22 still outstanding
- Over 24 ISIR Issues with 7 still outstanding



2025-26 FAFSA/ISIR

- In Beta Testing
- 3,045 Students & 2,280 Contributors
- 2,270 Forms & 10,140 ISIRs
- Over 24 ISIR Issues with 7 still outstanding



ISIR

Award Year	ISIR #	Dependency	EFC/SAI	Verification		
				Selected	DC	IC
2024-2025	02	D	-1500	N		
2024-2025	01	D	-1500	N		

ISIR(s)

Award Year	ISIR #	Dependency	EFC/SAI	Verification		
				Selected	DC	IC
2024-2025	02	I	1508	N		
2024-2025	01	I	1341	N		
2023-2024	01	I	003995	Y - V4		
2022-2023	01	I	002683	Y - V4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Report

Dependency	EFC/SAI	Is Selected	Comment Codes	Campus Name	Action	Unaffected ISIR
I	-1500	N	146,148	Tucson	View	No
I	4101	N	146,148,291	Tucson	View	Yes
D	3214	N	146,148	Tucson	View	Yes
I	-1500	N	146,148	Tucson	View	Yes
I	-1500	N	146,148	Tucson	View	Yes
I	-1500	N	018,145,146,148	Tucson	View	Yes
I	-1500	N	146,148,285	Tucson	View	Yes

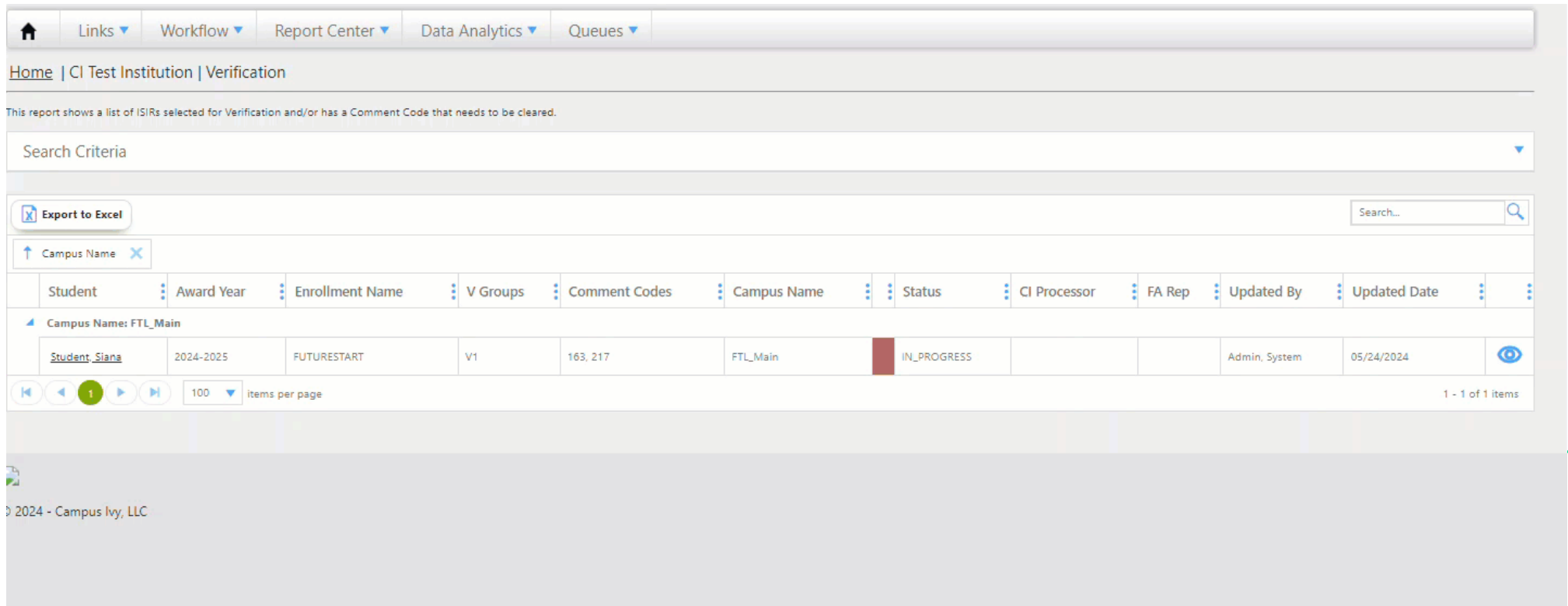
- ✓ Processed accurately
- ✓ Processed with DDX data errors & Reprocessed
- ✓ Processed without DDX errors but have potential conflicts on ISIR.
- ✓ Easy to use Reports that identify all categories of ISIRs.

✓ Reprocessed ISIRs captured in SAI Change Batch

Student ██████████ Gabriel	Program ESTX10040	Start Date 10/14/2024	Units Earned 0	Reason Dependency Change: X to D SAI Decrease: 0 to -1500
Student Id ██████████ 048 *****1250	Location ██████████ College of Technology	Grad Date 10/08/2025	Units Scheduled 0	
POG High School Diploma	Enroll. Status Future Start - FUTURESTART	Withdrawn Date LDA	Units Attempted 0	
	SAP New		Units Transferred 0	
Manually Approved <input type="checkbox"/>			Acad. Year Units. 0	
Student ██████████ Jenita	Program MAPX10022	Start Date 10/14/2024	Units Earned 0	Reason Dependency Change: X to D SAI Decrease: 0 to -1500
Student Id ██████████ 68 *****4305	Location ██████████ Technical Institute	Grad Date 07/03/2025	Units Scheduled 0	
POG High School Diploma	Enroll. Status Future Start - FUTURESTART	Withdrawn Date LDA	Units Attempted 0	
	SAP New		Units Transferred 0	
			Acad. Year Units. 24	

ISIR

- ✓ Auto trigger documents based on new C Codes
 - ✓ Parent Killed in Line of Duty
- ✓ Automate Verification to include spouse information
- ✓ Automation to help with additional data fields on ISIR

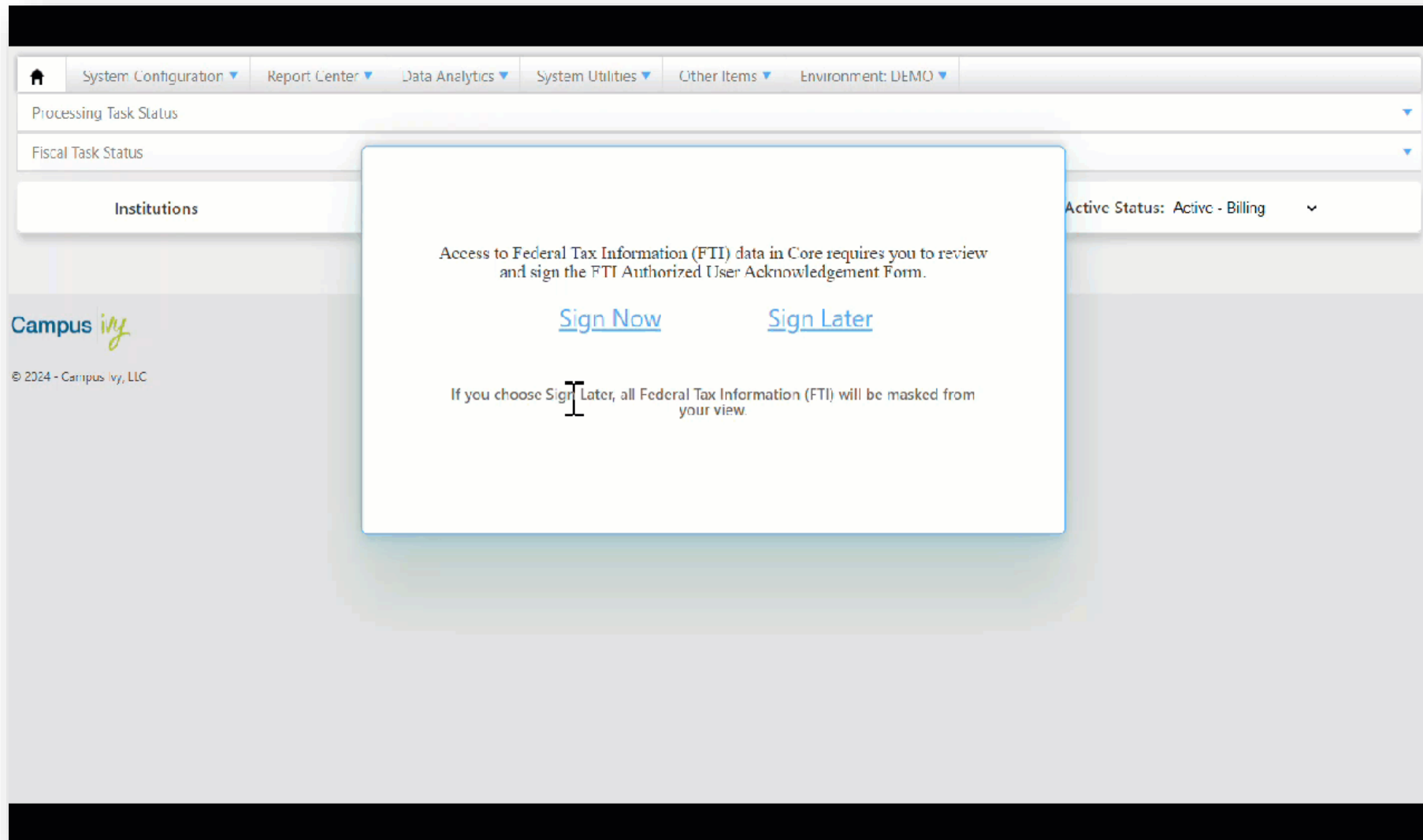


The screenshot displays the 'Verification' report interface in CampusIvy. At the top, there is a navigation bar with links for Home, Links, Workflow, Report Center, Data Analytics, and Queues. Below this, the breadcrumb path is 'Home | CI Test Institution | Verification'. A descriptive text states: 'This report shows a list of ISIRs selected for Verification and/or has a Comment Code that needs to be cleared.' A search criteria dropdown is present. An 'Export to Excel' button is visible on the left, and a search input field is on the right. The main table has columns for Student, Award Year, Enrollment Name, V Groups, Comment Codes, Campus Name, Status, CI Processor, FA Rep, Updated By, and Updated Date. A filter for 'Campus Name: FTL_Main' is applied. The table contains one row with the following data: Student: [Student_Siana](#), Award Year: 2024-2025, Enrollment Name: FUTURESTART, V Groups: V1, Comment Codes: 163, 217, Campus Name: FTL_Main, Status: IN_PROGRESS, CI Processor: (blank), FA Rep: (blank), Updated By: Admin, System, Updated Date: 05/24/2024. The table includes pagination controls showing '100 items per page' and '1 - 1 of 1 items'. A footer at the bottom left reads '© 2024 - Campus Ivy, LLC'.

Student	Award Year	Enrollment Name	V Groups	Comment Codes	Campus Name	Status	CI Processor	FA Rep	Updated By	Updated Date
Student_Siana	2024-2025	FUTURESTART	V1	163, 217	FTL_Main	IN_PROGRESS			Admin, System	05/24/2024

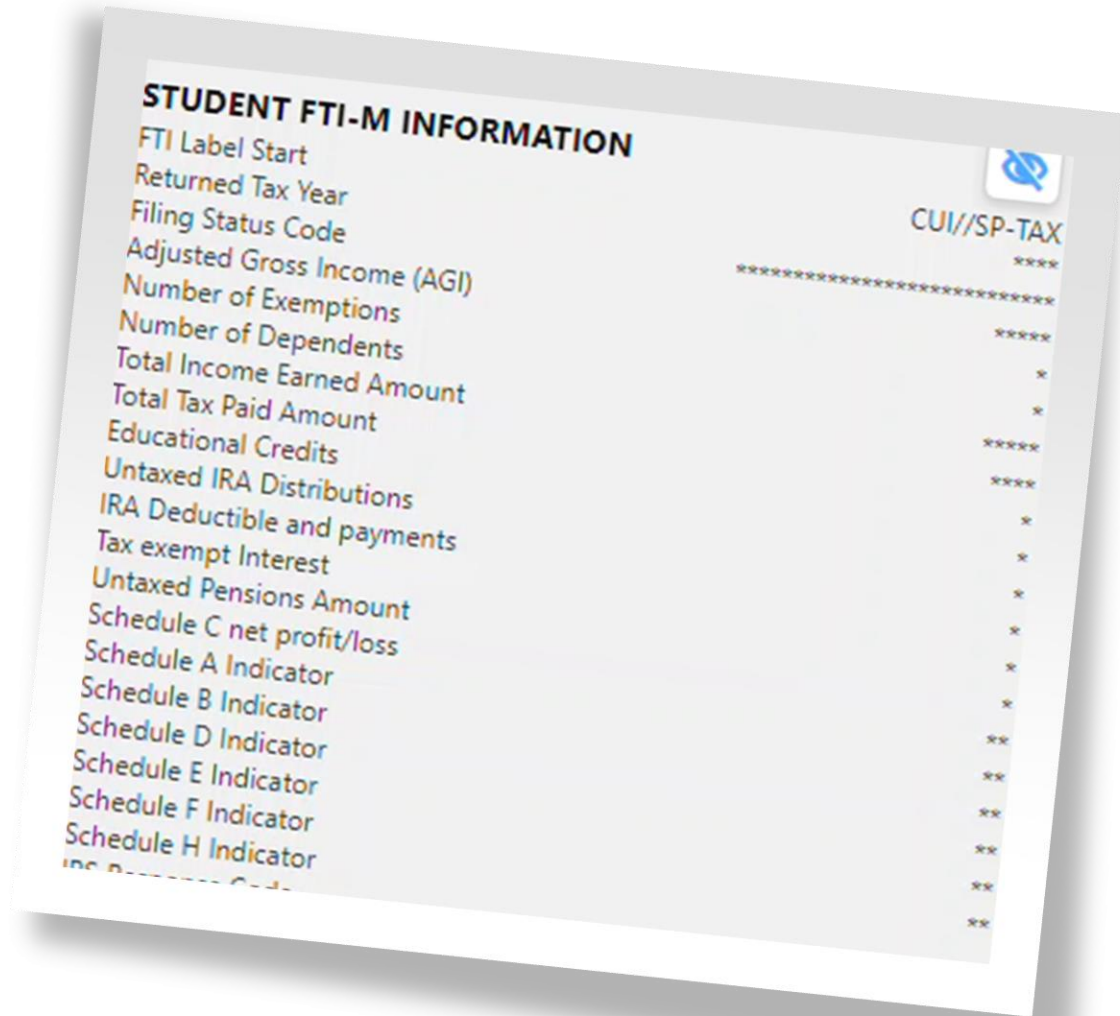
ISIR

- ✓ Federal Tax Information FTI
- ✓ User Access Driven
- ✓ Automated Acknowledgement E Form



The screenshot displays the ISIR system interface. At the top, there is a navigation bar with a home icon and several menu items: System Configuration, Report Center, Data Analytics, System Utilities, Other Items, and Environment: DEMO. Below the navigation bar, there are two dropdown menus for Processing Task Status and Fiscal Task Status. The main content area features a section titled "Institutions" and a dropdown for Active Status: Active - Billing. A modal dialog is centered on the screen, containing the following text: "Access to Federal Tax Information (FTI) data in Core requires you to review and sign the FTI Authorized User Acknowledgement Form." Below this text are two buttons: "Sign Now" and "Sign Later". At the bottom of the dialog, it states: "If you choose Sign Later, all Federal Tax Information (FTI) will be masked from your view." The CampusIvy logo and copyright notice "© 2024 - Campus Ivy, LLC" are visible in the bottom left corner of the interface.

ISIR



STUDENT FTI-M INFORMATION	
FTI Label Start	
Returned Tax Year	
Filing Status Code	
Adjusted Gross Income (AGI)	*****
Number of Exemptions	*****
Number of Dependents	x
Total Income Earned Amount	x
Total Tax Paid Amount	*****
Educational Credits	*****
Untaxed IRA Distributions	x
IRA Deductible and payments	x
Tax exempt Interest	x
Untaxed Pensions Amount	x
Schedule C net profit/loss	x
Schedule A Indicator	x
Schedule B Indicator	x
Schedule D Indicator	**
Schedule E Indicator	**
Schedule F Indicator	**
Schedule H Indicator	**
IRS Reporting Code	**

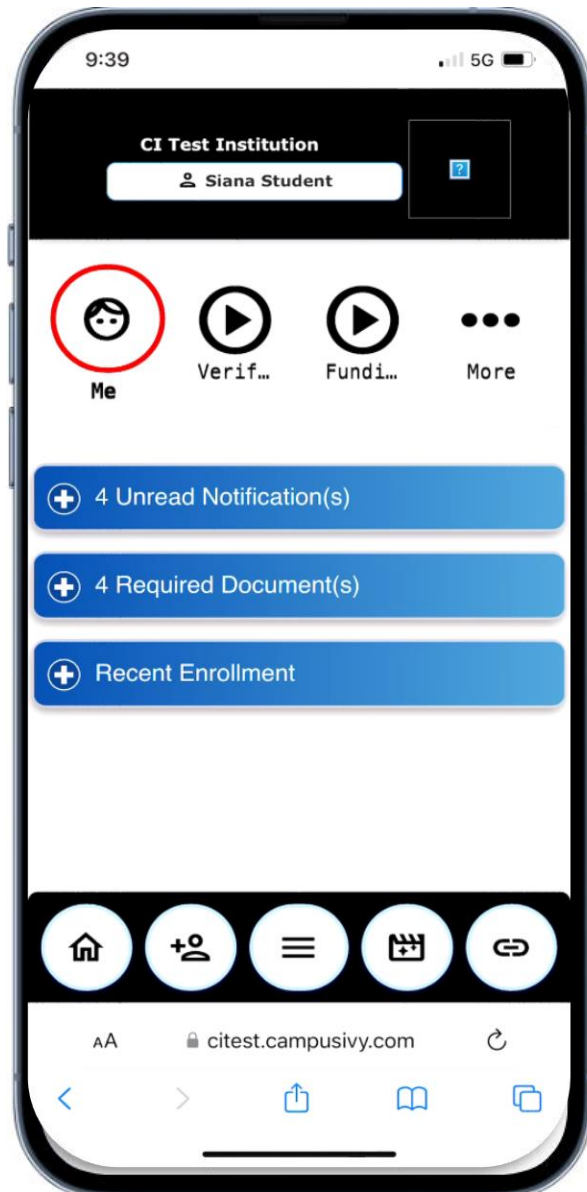
- ✓ New Layout with headers for each section
- ✓ Protected Data

Compu Med Vocational Careers

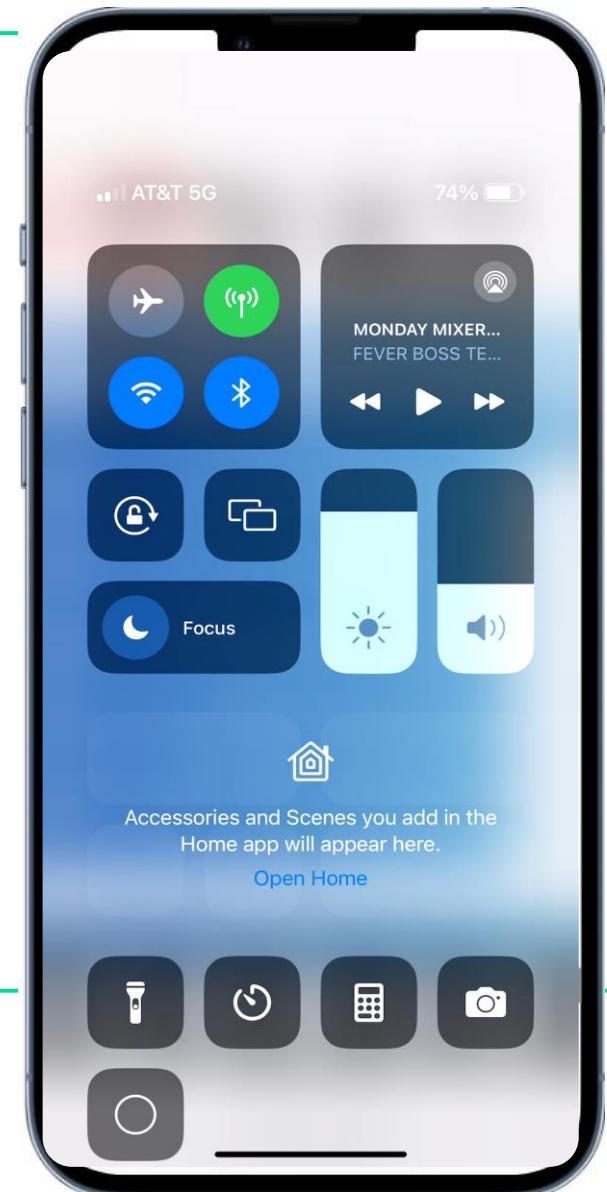


- ✓ First ISIR received 03/14/2024, the day of release
 - ✓ 900 2024-25 Verification & C Code (2 verifications)
 - ✓ Clearance - average of 16 days prior to start date
 - ✓ No delays in Packaging
-

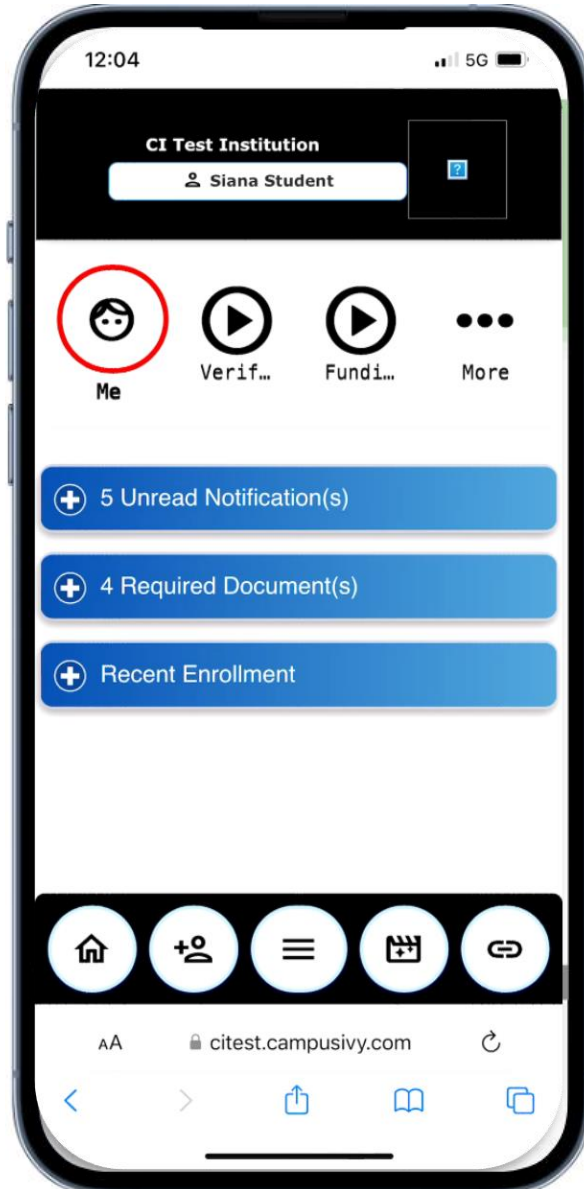
ISIR



- ✓ Student notified in real-time
- ✓ Student Mobile Friendly Portal
- ✓ E-Forms, pics and document uploads

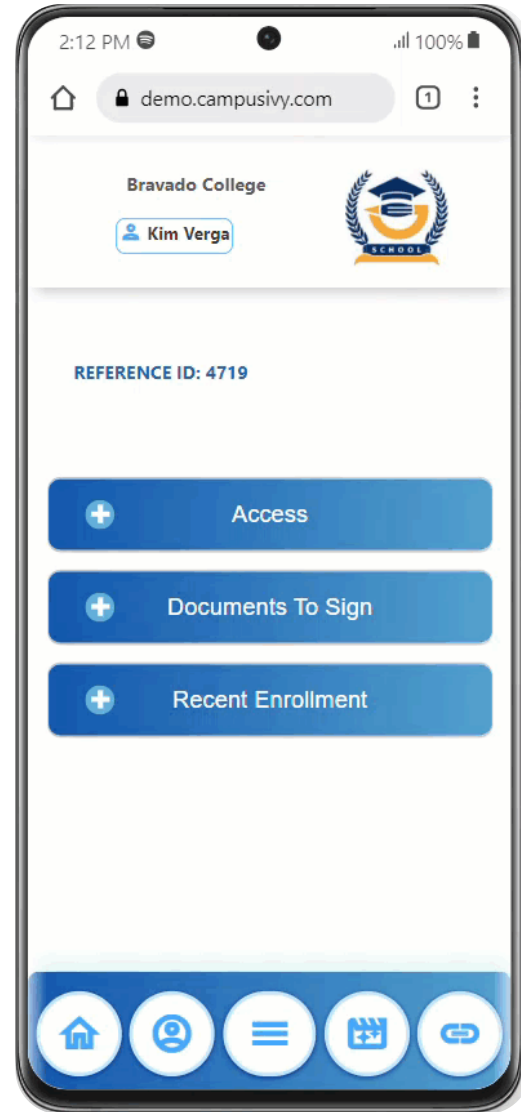


ISIR



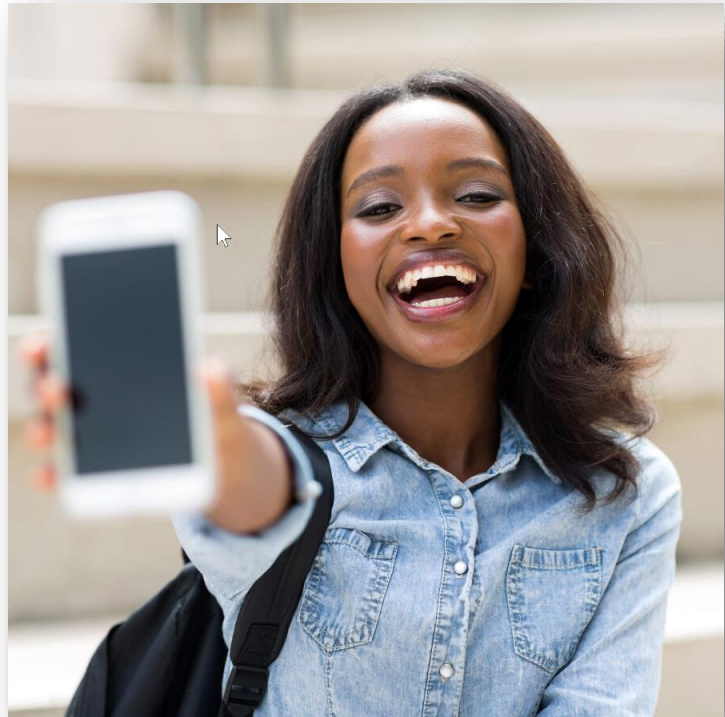
-
- ✓ Contributor Mobile Friendly Portal
 - ✓ Spouse, Parent, Parent Spouse
 - ✓ FERPA Compliant
-

ISIR



-
- ✓ Contributor E Signature
 - ✓ Contributor Document Submittal
 - ✓ One Stop Shop
-

Compu Med Vocational Careers



- ✓ Students find the portal easy to use
 - ✓ Faster access to parents and spouse
 - ✓ More accurate documents with E-Forms
-

2024-25 Pell _____

- ✓ Automate
- ✓ Intensity

INTENSITY

Pell Calculation - Automation

New Funding Estimate

Student Information

Student Name Siana
SSN 553716734
DateOfBirth 05/25/1982
Last Name (1st 2 Char.) St

Enrollment Information

Location -- Select Location --
Start Date 1/1/0001
Program -- Select Program --
Academic Level -- Select Academic Level --
Tuition (ISIR may update this value)
Scenario -- Select Tuition Scenario --
Enrollment Status -- Select Enrollment Status --

Auto-fill the fields on the left from an existing package:
-- Select Existing Package --

ISIR Information

Student Aid Index (SAI) 0
Est. Contribution 0
Dependency Status -- Select Dependency Status --
Prior Pell Used in Award Year \$0.00
Pell L.E.U. 0.00 %
Agg. Sub. Total \$0.00
Agg. Unsub. Total \$0.00
Has Bachelor's Degree -- Select --

Auto-fill the fields on the left from an existing ISIR:
-- Select Existing ISIR --

Core Funding Estimate

2024-25


Year 1


Estimated Financial Aid Award (Federal loan origination fees are reflected in the gross loan amount awarded)


27.00 Credits

Academic Year Start Date

Academic Year End Date







Federal Funding

	Term 1 Date / Credit	Term 2 Date / Credit	Term 3 Date / Credit
Term/Credit	8/12/2024 <input type="text" value="9.00"/>	11/11/2024 <input type="text" value="12.00"/>	2/17/2025 <input type="text" value="6.00"/>

	Disbursement Date 1	Disbursement Date 2	Disbursement Date 3
Disbursement Dates	9/11/2024 <input type="text"/>	11/11/2024 <input type="text"/>	2/17/2025 <input type="text"/>

	Max Elig.	Gross Amt.	Net Amt.	Max Elig.	Gross Amt.	Net Amt.	Max Elig.	Gross Amt.	Net Amt.	Net Total
Pell Grant	\$1,849.00	\$1,849.00	\$1,849.00	\$2,465.00	\$2,465.00	\$2,465.00	\$1,233.00	\$1,233.00	\$1,233.00	\$5,547.00
Subsidized Loan	\$1,167.00	\$1,167.00	\$1,155.00	\$1,167.00	\$1,167.00	\$1,155.00	\$1,166.00	\$1,166.00	\$1,154.00	\$3,464.00
Unsubsidized Loan	\$2,000.00	\$2,000.00	\$1,979.00	\$2,000.00	\$2,000.00	\$1,979.00	\$2,000.00	\$2,000.00	\$1,979.00	\$5,937.00
Plus Loan	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Totals	\$5632.00	\$5,016.00	\$4,983.00	\$5632.00	\$5632.00	\$5599.00	\$5631.00	\$4,399.00	\$4,366.00	

Enrollment Intensity – Standard Term

Core Funding Estimate

2024-25

Federal Funding

Term/Credit		Term 1 Date / Credit		Term 2 Date / Credit		Term 3 Date / Credit		Term 4 Date / Credit		Term 5 Date / Credit	
		7/8/2024	4.00	8/19/2024	8.00	9/30/2024	2.00	11/11/2024	3.00	12/30/2024	6.00
Direct Loan Disb Dates		Disbursement Date 1		Disbursement Date 2		Disbursement Date 3		Disbursement Date 4		Disbursement Date 5	
		8/7/2024		8/26/2024		10/7/2024		11/18/2024		1/6/2025	
Grants & Other Aid Disb Dates		Disbursement Date 1		Disbursement Date 2		Disbursement Date 3		Disbursement Date 4		Disbursement Date 5	
		7/15/2024		8/26/2024		10/7/2024		11/18/2024		1/6/2025	

Title IV Awards

Max Eliq.	Gross Amt.	Net Amt.	Max Eliq.	Gross Amt.	Net Amt.	Max Eliq.	Gross Amt.	Net Amt.	Max Eliq.	Gross Amt.	Net Amt.	Max Eliq.	Gross Amt.	Net Amt.	Net Total
Pell Grant															
\$1,228.00	\$1,228.00	\$1,228.00	\$1,479.00	\$1,479.00	\$1,479.00	\$621.00	\$621.00	\$621.00	\$932.00	\$932.00	\$932.00	\$1,479.00	\$1,479.00	\$1,479.00	\$5,739.00
Subsidized Loan															
\$700.00	\$700.00	\$693.00	\$700.00	\$700.00	\$693.00	\$0.00	\$0.00	\$0.00	\$700.00	\$700.00	\$693.00	\$700.00	\$700.00	\$693.00	\$2,772.00
Unsubsidized Loan															
\$1,200.00	\$1,200.00	\$1,188.00	\$1,200.00	\$1,200.00	\$1,188.00	\$0.00	\$0.00	\$0.00	\$1,200.00	\$1,200.00	\$1,188.00	\$1,200.00	\$1,200.00	\$1,188.00	\$4,752.00
Plus Loan															
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Totals															
\$3379.00	\$3,128.00	\$3,109.00	\$3379.00	\$3,379.00	\$3,360.00	\$3379.00	\$621.00	\$621.00	\$3379.00	\$2,832.00	\$2,813.00	\$3379.00	\$3,379.00	\$3,360.00	

Enrollment Intensity – Nonstandard term

Pell Calculation

ISIR Information

Dependency Status Independent ▾

Has Bachelor's Degree No ▾

Agg. Unsub. Total \$11,562.00

Agg. Sub. Total \$11,250.00

Packaging Mode Entire Program

Pell L.E.U. 383.960 %

Student Aid Index (SAI) 5200

Default to ISIR EFC/SAI

Transaction Number 02

Award Year 2024-2025

Prior Pell Used in Award Year \$0.00

Calculated Schedule Pell ▾

2024-2025 : 7,395.00

PE Max Min IASG CFH

- ✓ Eligibility Flags
- ✓ Scheduled Pell

Cost of Attendance

Tuition & Fee	Registration Fee
\$22,500.00	\$100.00
Books and Supplies	Food expense
\$350.00	\$10,000.00
Direct Cost	\$32,950.00
Total Cost	\$32,950.00
Total Direct Cost	\$32,950.00
PELL COA	\$40,532.50

Pell Calculation

ISIR Information

Dependency Status: Independent

Has Bachelor's Degree: No

Agg. Unsub. Total: \$0.00

Agg. Sub. Total: \$0.00

Packaging Mode: Entire Program

Pell L.E.U.: 0.000 %

Student Aid Index (SAI): 5200

Default to ISIR EFC/SAI:

Award Year: 2024-2025

Prior Pell Used in Award Year: \$0.00

Calculated Schedule Pell

2024-2025 : 2,195.00

PE Max Min IASG CFH

- ✓ Max Pell – SAI <= COA
- ✓ Calculated Scheduled Pell rounded to nearest 5

Cost of Attendance

Tuition & Fee	Registration Fee
\$22,500.00	\$100.00
Books and Supplies	Food expense
\$350.00	\$10,000.00
Direct Cost	\$32,950.00
Total Cost	\$32,950.00
PELL COA	\$40,532.50

Pell Calculation - Intensity

- ✓ Automated intensity adjustment calculator
 - ✓ Projected Funds
 - ✓ Term Based

Edit Disbursement

🔄 \$1,479.00

Current Gross Amount	\$1,479.00
Adjustment (Gross)	<input type="text" value="\$0.00"/> Calculate From Enrollment Intensity
Is Stipend	<input type="checkbox"/>
Disb. #	<input type="text" value="1"/>
Disbursement Status	<input type="text" value="Projected"/>
Term Dates	<input type="text"/>
Disb. Date	<input type="text" value="8/26/2024"/> 📅
Payment Period Start Date	<input type="text" value="8/19/2024"/> 📅
Payment Period End Date	<input type="text" value="9/27/2024"/> 📅
Enrollment Intensity	<input type="text" value="100"/>

2024-25



Edit Disbursement
\$1,645.00

Current Gross Amount	\$1,645.00	
Adjustment (Gross)	\$0.00	Calculate From Enrollment Intensity
Is Stipend	<input type="checkbox"/>	
Disb. #	1	
Disbursement Status	Projected	
Term Dates		
Disb. Date	9/30/2024	
Payment Period Start Date	9/30/2024	
Payment Period End Date	12/20/2024	
Enrollment Intensity	100	

Intensity Recalculation – Projected Disbursements

- Enter new intensity value and click ‘Calculate From Enrollment Intensity’ link
- New Adjusted amount will auto calculate
- New disbursement amount will display
- Once save button is clicked, the changes will be saved and sent to COD



Pell Calculation Quarter/Trimester
 $4,935 \times 0.8 = 3,948.00$
 $3,948.00 / 3 = 1,316$

Adjustment
 $1,316.00 - 1,645.00 = -329.00$

Edit Disbursement
\$1,316.00

Current Gross Amount	\$1,645.00	
Adjustment (Gross)	(\$329.00)	Calculate From Enrollment Intensity
Is Stipend	<input type="checkbox"/>	
Disb. #	1	
Disbursement Status	Projected	
Term Dates		
Disb. Date	9/30/2024	
Payment Period Start Date	9/30/2024	
Payment Period End Date	12/20/2024	
Enrollment Intensity	80	

Enrollment Intensity – Recalculation

2024-25



Edit Disbursement		\$1,479.00
Current Gross Amount	\$1,479.00	
Adjustment (Gross)	\$0.00 Calculate From Enrollment Intensity	
Is Stipend	<input type="checkbox"/>	
Disb. #	1	
Disbursement Status	Projected	
Term Dates		
Disb. Date	7/15/2024	
Payment Period Start Date	7/8/2024	
Payment Period End Date	8/16/2024	
Enrollment Intensity	100	

Intensity Recalculation – Projected Disbursements

- Enter new intensity value and click ‘Calculate From Enrollment Intensity’ link
- New Adjusted amount will auto calculate
- New disbursement amount will display
- Once save button is clicked, the changes will be saved and sent to COD



Pell Calculation – Non-Standard
 $7,395.00 \times 0.6 = 4,437.00$
 (30 Wks. / 6 Wks. = 5 Disb.)
 $4,437.00 / 5 = 887.00$

Adjustment
 $887.00 - 1,479.00 = -592.00$

Edit Disbursement		\$887.00
Current Gross Amount	\$1,479.00	
Adjustment (Gross)	(\$592.00) Calculate From Enrollment Intensity	
Is Stipend	<input type="checkbox"/>	
Disb. #	1	
Disbursement Status	Projected	
Term Dates		
Disb. Date	7/15/2024	
Payment Period Start Date	7/8/2024	
Payment Period End Date	8/16/2024	
Enrollment Intensity	60	

Enrollment Intensity – Recalculation

2024-25

Units				
TR	EN	AT	SC	Y
0.00	0.00	12.00	12.00	36.00

Edit Disbursement

Current Gross Amount \$1,645.00

Adjustment (Gross) (\$329.00) [Calculate From Enrollment Intensity](#)

Is Stipend

Disb. # 1

Disbursement Status Projected

Term Dates

Disb. Date 9/30/2024

Payment Period Start Date 9/30/2024

Payment Period End Date 12/20/2024

Enrollment Intensity 80

\$1,316.00

Intensity Recalculation Automation – Projected Disbursements

- Process will automatically run for all Term Based programs after student data is imported.
- Will run only for scheduled credit changes within the current term
- Will only run for projected funds
- Will have the ability to pause after freeze dates

Enrollment Intensity – Recalculation

Pell Calculation - Adjustment

- ✓ Automated Batch Process
 - ✓ Calculates Adjustment Amount
 - ✓ Allows for batch update

Edit Disbursement

Current Gross Amount	\$3,698.00
Adjustment (Gross)	(\$629.00) Calculate From Enrollment Intensity
Is Stipend	<input type="checkbox"/>
Disb. #	1
Disbursement Status	Projected
Term Dates	
Disb. Date	5/5/2024
Payment Period Start Date	5/5/2024
Payment Period End Date	8/16/2024
Enrollment Intensity	83

Edit Disbursement

Current Gross Amount	
Adjustment (Gross)	
Is Stipend	
Disb. #	1
Disbursement Status	Projected
Term Dates	
Disb. Date	5/5/2024
Payment Period Start Date	5/5/2024
Payment Period End Date	8/16/2024
Enrollment Intensity	83

SSN	Student ID	Student Name	Enrl. Id	Status	Camp
*****5858	na585858	Student, Excellent		Active	FTL_Ma

Student Info	
Address	1180 SW 36th Avenue Pompano Beach FL 33069
Country Code	US
Email	sstewart@campusivy.com
Email2	Null
Phone No	9543662607
SMS - Opt Out	N
Gender	M
Date Of Birth	*****1998
Is Citizen	Y

2024-25



Edit Disbursement \$1,234.00

Current Gross Amount	\$1,316.00
Adjustment (Gross)	(\$82.00) Calculate From Enrollment Intensity
Refund Type	Non R2T4 Refund
Is Stipend	<input type="checkbox"/>
Disb. #	1
Disbursement Status	Disbursed
Term Dates	
Disb. Date	4/20/2024
Payment Period Start Date	9/30/2024
Payment Period End Date	12/20/2024
Enrollment Intensity	75

Intensity Recalculation – Disbursed Disbursements Reduction

- Enter new intensity value and click ‘Calculate From Enrollment Intensity’ link
- New Adjusted amount will auto calculate
- New disbursement amount will display
- Once save button is clicked, a new transaction / sequence will be created, and any refund will be added to a disbursement batch
- Once batch is processed, it will be sent to COD.



Pell Calculation
 $4,935 \times 0.75 = 3,701.25$
 $3,701.25 / 3 = 1,233.75$

Adjustment
 $1,233.75 - 1,316.00 = -82.00$

Transmission Status: **HOLD**

Disbursement Transactions

Seq. No	Batch	Amounts/Adjs				
		Gross	Loan Fee	Rebate	Net	Net (Running)
Paid						
1		\$1,316.00	\$0.00	\$0.00	\$1,316.00	\$1,316.00
Pending/Projected Payment						
2	102648	(\$82.00)	\$0.00	\$0.00	(\$82.00)	\$1,234.00

Enrollment Intensity – Recalculation

2024-25



Edit Disbursement

↻ \$1,481.00

Current Gross Amount	\$1,398.00	
Adjustment (Gross)	\$83.00	Calculate From Enrollment Intensity
Is Stipend	<input type="checkbox"/>	
Disb. #	1	
Disbursement Status	Disbursed	
Term Dates		
Disb. Date	4/20/2024	
Payment Period Start Date	9/30/2024	
Payment Period End Date	12/20/2024	
Enrollment Intensity	90	

Intensity Recalculation – Disbursed Disbursements Increase

- Enter new intensity value and click ‘Calculate From Enrollment Intensity’ link
- New Adjusted amount will auto calculate
- New disbursement amount will display
- Once save button is clicked, a new transaction / sequence will be created, and any additional disbursement will be flagged as ready to pay.
- Once batch is processed, it will be sent to COD.



Pell Calculation

$$4,935 \times 0.9 = 4441.50$$

$$4,441.50 / 3 = 1,481.00$$

Adjustment

$$1,481.00 - 1,398.00 = 83.00$$



Disbursement Transactions

Seq. No	Batch	Amounts/Adjs			
		Gross	Loan Fee	Rebate	Net
Paid					
1		\$1,316.00	\$0.00	\$0.00	\$1,316.00
2	102648	\$82.00	\$0.00	\$0.00	\$82.00
Pending/Projected Payment					
3	102648	\$83.00	\$0.00	\$0.00	\$83.00

Enrollment Intensity – Recalculation

Compu Med Vocational Careers



ISIR Information  

Dependency Status Independent ▾

Has Bachelor's Degree No ▾

Agg. Unsub. Total \$11,562.00

Agg. Sub. Total \$11,250.00

Packaging Mode Entire Program

Pell L.E.U. 383.960 %

Student Aid Index (SAI) -1500

Default to ISIR EFC/SAI

Transaction Number 02

Award Year 2024-2025

Prior Pell Used in Award Year \$0.00

Calculated Schedule Pell ▾

2024-2025 : 7,395.00

PE Max Min IASG CFH

- ✓ Low learning curve on Pell Calculation using automated Funding Estimate
- ✓ Automated Intensity recalculation removes manual work

Q & A

Resources

[FAFSA Simplification Information Page](#)

[FAFSA Beta 2025-26](#)

[ISIR Technical FAQ and Known Issues](#)

Contact: Noel Suarez

Email: info@campusivy.com



CampusIvy