

Appendix A-2: Cases Picklists

Picklist Display Name: Original Issue Category, Revised Issue Category

Picklist Name: PickList SR Area

Values:

Account Balance	Disaster Area	Tax Refund Offset
Balance Dispute	Loan Discharge	Student Eligibility
Bankruptcy	Loan Cancellation	Social Security Number
Collection Practices	Forbearance Granted	Service Quality
Credit Report	Forbearance	School Refund
Default	Discharge Denied	Repayment Plans/Amounts
Deferment	Deferment Granted	Quality of Education
Disability Discharge	Credit Bureau Report	NSLDS
Discharge - Death	Consolidation	Closed School

Picklist Display Name: Original Issue Sub-Category, Revised Issue Sub-Category

Picklist Name: PickList SR Hierarchical Sub-Area

(note: All values from PickList SR Area have "None" as a sub-category)

Sub-Category of: Balance Dispute

Values:

Disputes Late Charges
Incorrect
Interest Accrual
Payments Posted Incorrectly
Payments Refused
Payments Not Posted

Sub-Category of: Bankruptcy

Values:

Cust. Believes Loans Discharge
Loan Holder Contact Cust. During Bankruptcy

Sub-Category of: Closed School

Values:

Discharge Never Processed
Wants Discharge

Sub-Category: Collection Practices

Values:

Agency Calling At All Hours	Cust. Wants CA To Stp Call Wrk
CA Will Not Work With Customer	Disputes Fees
Wants Fees Removed	Fees Too High

Sub-Category of: Consolidation

Values:

Balance Incorrect
Wants To Consolidate
Wants To Add Loans
Not All Loans Included

Sub-Category of: Credit Report

Values:

Ln Shows Default On Credit Rpt

Sub-Category of: Default

Values:

Default In Error

Sub-Category of: Deferment

Values:

Economic Hardship	Unemployment	NOAA
Graduate Fellowship	Temporary/Total Disability	Mil Or Pub Health Services
In-School Full-time	Teacher Shortage Area	In-School Half-time
Internship/Residency	Rehabilitation Training	
Mother Entering Workforce	Parental Leave	

Sub-Category of: Deferment Applied

Values:

Parental Leave

Sub-Category of: Forbearance

Values:

Disaster Area
Emergency Mobilization
Internship/Residency
Hardship

Sub-Category of: Loan Cancellation

Values:

Child or Family Service Agency	Teach Ser-Shortage Area	Military Service
Teacher Service-Low Income	Teach Ser-Handicapped Stu	Law Enforcement
Teach Ser-Special ED	Peace Corps/Action	Health Care
	Volunteers	Early Intervention

Sub-Category of: Loan Discharge

Values:

Ability to Benefit	Bankruptcy	False Signature
Closed School	Death	Disability

Sub-Category of: NSLDS

Values:

Default record incorrect

Loan Paid In Full

Sub-Category of: Quality of Education

Values:

Cust. Didn't Get Job Trained For

School D/N Offer Classes Advertised

Sub-Category of: Repayment Plans/Amounts

Values:

Serv Won't Altr Payment Amt

Payments Too High

Sub-Category of: School Refund

Values:

Never Credited To Loan

Never Received

Not Enough Refunded

Sub-Category of: Service Quality

Values:

Error Correction Too Slow

Incomplete Service

Representative Rude

Poor Explanation of Options

Notices/Bills Lt/Nvr

Received

Sub-Category of: Social Security Number

Values:

Duplicate
Incorrect on Loan

Sub-Category of: Tax-Refund Offset

Values:

Not Applied
Wants Returned

Sub-Category of: Wage Garnishment

Values:

Not Applied
Wants Returned

Picklist Display Name: Referred By

Picklist Name: PickList SR Source

Values:

Collection Agency	OGC	Secretary's Office
Congressional Office	Other	Self
FSAIC	Other ED Office	SFA Collections
Guaranty Agency	Other SFA Office	SFA Communications/OPA
Loan Servicer	School	White House

Picklist Display Name: Customer Expectation Category

Picklist Name: OCTS Customer Expec PickList

Values:

AWG Hearing Granted	Loan Cancelled	False Certification
Account Balance Corrected	Late Charges Removed	Wage Garnishment
Collection Costs Discounted	Interest Written Off	Teacher Cancellation
Credit Report Updated	Interest Reduced	Tax Refund Offset Returned
Debt Discharge	Forbearance Applied	Tax Offset
Deferment Applied	Payment Processing	School Refund Posted
Disbursement	Other	SSN Corrected
Due Diligence	No Change	Repayment TermsRecords
Discharge Granted	NSLDS Updated	Corrected
Loan Servicing	N/A	Principal Written Off
Loan Sale	Loans Consolidated	Principal Reduced
Loan Repurchased	Loan Written Off	Economic Hardship

Picklist Display Name: Customer Expectation Sub-Category

Picklist Name: OCTS Customer Expec Hierarchical
(note: All values from OCTS Customer Expec PickList have “None” as a sub-category)

Sub-Category of: Deferment Applied

Values:

Econ Hardship
Grad Fell
In-School
Military
None
Teacher Shortage
Temp/Total Disability
Unemployment

Sub-Category of: Discharge Granted

Bankruptcy
Closed School
Death
Disability
False Cert - False Signature
False Cert -Ability of Benefit

Sub-Category of: Forbearance Applied

Values:

Disaster Area
Emergency Mobilization
Hardship
Internship/Residency

Sub-Category of: Wage Garnishment

Values:

Economic Hardship