

Implementation Specification

Table of Contents

| | |
|---|-------------------------------------|
| Requirements Matrix | 3 |
| OCTS 2.0 Screens and Views | 4 |
| “Cases” Screen | 5 |
| My Cases View | 6 |
| My Team’s Cases View | Error! Bookmark not defined. |
| All Cases View | Error! Bookmark not defined. |
| Activities View | Error! Bookmark not defined. |
| Customer Satisfaction Survey | Error! Bookmark not defined. |
| Case Issues View | Error! Bookmark not defined. |
| Results Search View | Error! Bookmark not defined. |
| Charts View | 21 |
| Issues Screen | 24 |
| All Issues View | Error! Bookmark not defined. |
| Activities View: | Error! Bookmark not defined. |
| Attachments View | 8 |
| Results View | Error! Bookmark not defined. |
| Charts View | Error! Bookmark not defined. |
| Accounts Screen | 9 |
| My Accounts View | Error! Bookmark not defined. |
| My Team’s Accounts View | Error! Bookmark not defined. |
| All Accounts View | Error! Bookmark not defined. |
| Activities View | Error! Bookmark not defined. |
| Attachments View | Error! Bookmark not defined. |
| Cases View | Error! Bookmark not defined. |
| Contacts View | Error! Bookmark not defined. |
| Loans View | Error! Bookmark not defined. |
| Notes View | Error! Bookmark not defined. |
| Partners View | Error! Bookmark not defined. |
| Charts View | Error! Bookmark not defined. |
| Contacts Screen | 10 |
| My Contacts View | Error! Bookmark not defined. |
| My Team’s Contacts View | Error! Bookmark not defined. |
| All Contacts View | Error! Bookmark not defined. |
| Activities View | Error! Bookmark not defined. |
| Attachments View | 56 |
| Notes View | 57 |
| All Customers View | Error! Bookmark not defined. |
| All Partners View | 59 |
| Cases View | Error! Bookmark not defined. |
| Charts View | Error! Bookmark not defined. |
| Activities Screen | 12 |
| My Activities View | Error! Bookmark not defined. |
| My Team’s Activities View | Error! Bookmark not defined. |
| All Activities View | 67 |
| My To Do List View | Error! Bookmark not defined. |
| Attachments View | Error! Bookmark not defined. |

| | |
|---|-------------------------------------|
| Literature Screen | Error! Bookmark not defined. |
| Literature View | Error! Bookmark not defined. |
| Results Screen | 15 |
| All Results View | Error! Bookmark not defined. |
| Resolution Documents View | Error! Bookmark not defined. |
| Smartsript View | Error! Bookmark not defined. |
| Appendices | 17 |
| Appendix A - Data Requirements | 81 |
| Appendix B - Data Mapping | 95 |

Insert 'Requirements Matrix' Here

OCTS 2.0 Screens and Views

This section will provide a screen by screen description of the functionality of OCTS 2.0. Each screen section is divided into subsections, 1 section for each view available on the screen. Each view subsection provides a sample screen print of the view, a summary of the main purpose of the view, and a summary of the major features of each applet that comprise a view.

“Cases” Screen

Screen Description:

The “Cases” Screen contains nine views that are dedicated to entering, displaying, and using case data. The first three screens focus specifically on case information. The rest of the views provide the ability to create activities related to specific cases, attach files such as customer documentation to the case, create sub-issues for complex cases, gain access to the system encyclopedia, and monitor case metrics via the charts section. A customer satisfaction survey is also available to monitor how well the customers perceive the service provided.

Following is a list of the views that comprise the “Cases” Screen. More details for each view are available in the subsequent pages of this document.

- My Cases
- My Team's Cases
- All Cases
- Activities
- Attachments
- Customer Satisfaction Survey
- Case Issues
- Results Search
- Charts

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For a detailed data mapping please refer to Appendix B-2

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[\\DCCFS1030_FS1\VOL2\Group_Share\OMBUDSMAN\Deliverables\Implementation Specs\New Doc\Customer Satisfaction Survey.doc](#)

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Issues Screen

Screen Description:

The Issues Screen contains five views that are dedicated to entering, displaying, and using issue data. The primary purpose of this screen is to view all issues, to add results to issues, and monitor issue metrics via the charts view. Activities and attachments may be added to issues within the views of this screen, but caution must be used because activities and attachments associated with an issue will not be associated directly with case.

Following is a list of views that comprise the Issues Screen. More details for each screen are available in the subsequent pages of this document

- All Issues
- Activities
- Attachments
- Results
- Charts

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Attachments View

The screenshot shows the Siebel CRM interface for the 'Attachments View' of an 'Issue'. The window title is 'SIEBEL'. The menu bar includes 'File', 'Edit', 'View', 'Screen', 'Go', 'Query', and 'Help'. The toolbar contains various navigation and action icons. The main navigation bar includes 'Cases', 'Issues', 'Accounts', 'Contacts', 'Activities', 'Literature', 'Results', 'Calendar', and 'Script'. The left sidebar shows 'Issues' with sub-items: 'All Issues', 'Activities', 'Attachments', 'Results', and 'Charts'. The main content area is titled 'Issue' and contains the following fields:

- Issue # (Text): 1-3WE
- Category (Dropdown): Delement
- Case # (Text): 1-JK
- Sub Category (Dropdown): Economic Hardship
- Summary (Text): Summary
- Issue Status and Ownership:
 - Intake (Text): MRODRIGUEZ
 - Ombudsman (Text): ACST
 - Status (Dropdown): Closed
 - Date Received (Text): 09/01/2000 5:01:0
 - Sub-Status (Dropdown): Resolved
 - Date Closed (Text): 09/31/2000 9:25:0
- Close Note (Text): This is a test

Below the issue details is an 'Attachments' section with a table header:

| Name | Size | Type | Modified | Auto Update | Comments |
|------|------|------|----------|-------------|----------|
|------|------|------|----------|-------------|----------|

The table is currently empty. At the bottom of the window, the status bar shows 'Item: 1 of 11+'.

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Accounts Screen

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[\\DCCFS1030_FS1\VOL2\Group_Share\OMBUDSMAN\Deliverables\Implementation Specs\New Doc\Activities View.doc](#)

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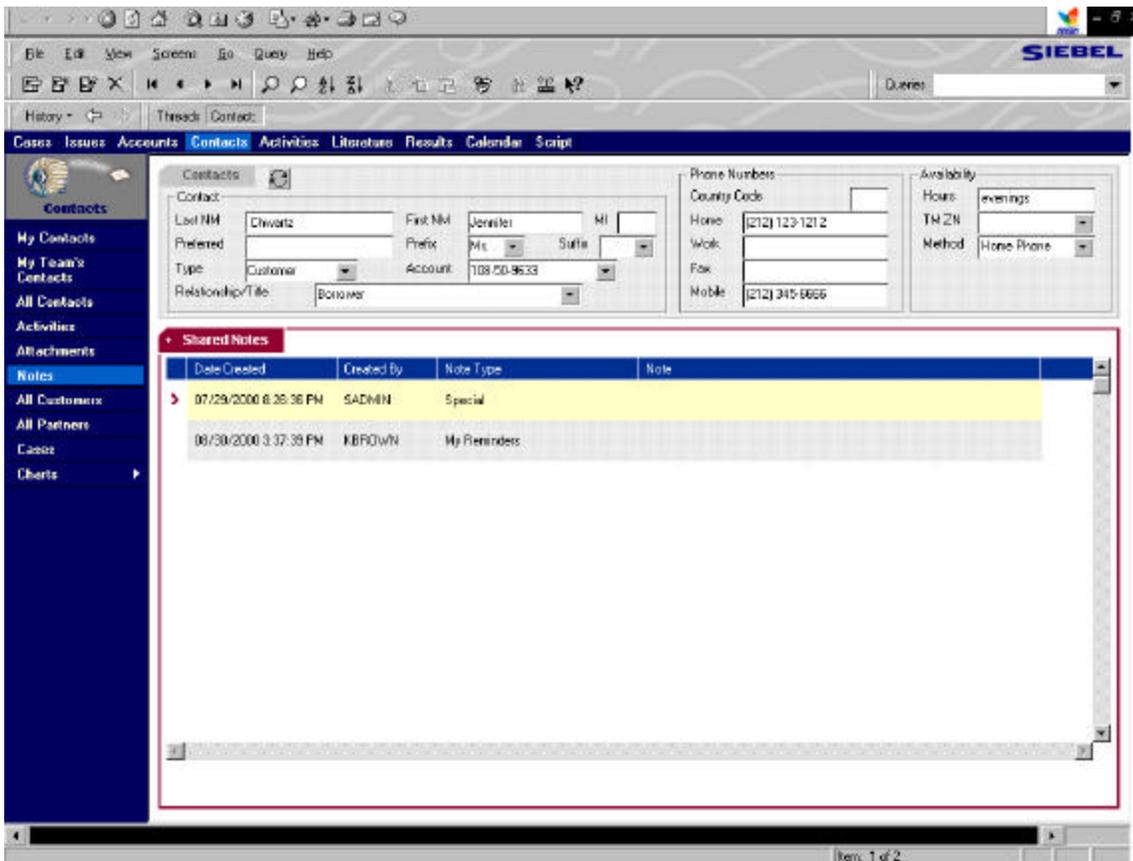
Contacts Screen

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All Partners View

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The screenshot displays the Siebel CRM interface for the 'All Partners View'. The top navigation bar includes 'Cases', 'Issues', 'Accounts', 'Contacts', 'Activities', 'Literature', 'Results', 'Calendar', and 'Script'. The left sidebar shows navigation options like 'My Contacts', 'My Team's Contacts', 'All Contacts', 'Activities', 'Attachments', 'Notes', 'All Customers', 'All Partners', 'Cases', and 'Charts'. The main content area features a table of partners and a detailed form for the selected contact, Bob Ego.

| Contact Type | Relationship/Title | Account | First Name | Last Name | Suffix | MI |
|--------------|----------------------------|-------------|------------|-----------|--------|----|
| Partner | Co-signer/Co-maker | 955-88-9090 | Bob | Ego | II | |
| Partner | Co-signer/Co-maker | 955-88-9090 | Bob | Ego | II | A |
| Partner | Borrower's Spouse | | Lizy | Ego | IV | A |
| Partner | Borrower's Parent/Guardian | | Dochar | Ego | II | |
| Partner | Special Case Contact | 002-38-2534 | Scott | Slavens | II | B |
| Partner | Special Case Contact | Siebel | Bob | Slone | | A |

The detailed form for Bob Ego includes the following fields:

- Contact Information:** Last Name (Ego), First Name (Bob), MI (II), Preferred (), Suffix (II), Type (Partner), Account (955-88-9090), Relationship/Title (Co-signer/Co-maker).
- Address:** Street (56 Bob Ln), City (Ego), State (VA), ZIP (22015), Country (USA).
- Phone Numbers:** Home, Work, Fax, Mobile, and County Code.
- Availability:** Hours, Method (Home Phone).
- E-mail:** 1st, 2nd, and Special Note/SME.

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[Doc\Charts Vie1.doc](#)

Activities Screen

Screen Description:

The Activities Screen contains seven views that are dedicated to entering, displaying, and using activity data. The first four views focus specifically on activity information. The rest of the views provide the ability to create and track “to do” items based on a specific activity, attach files such as customer documentation to the activity, and monitor activity metrics via the charts section.

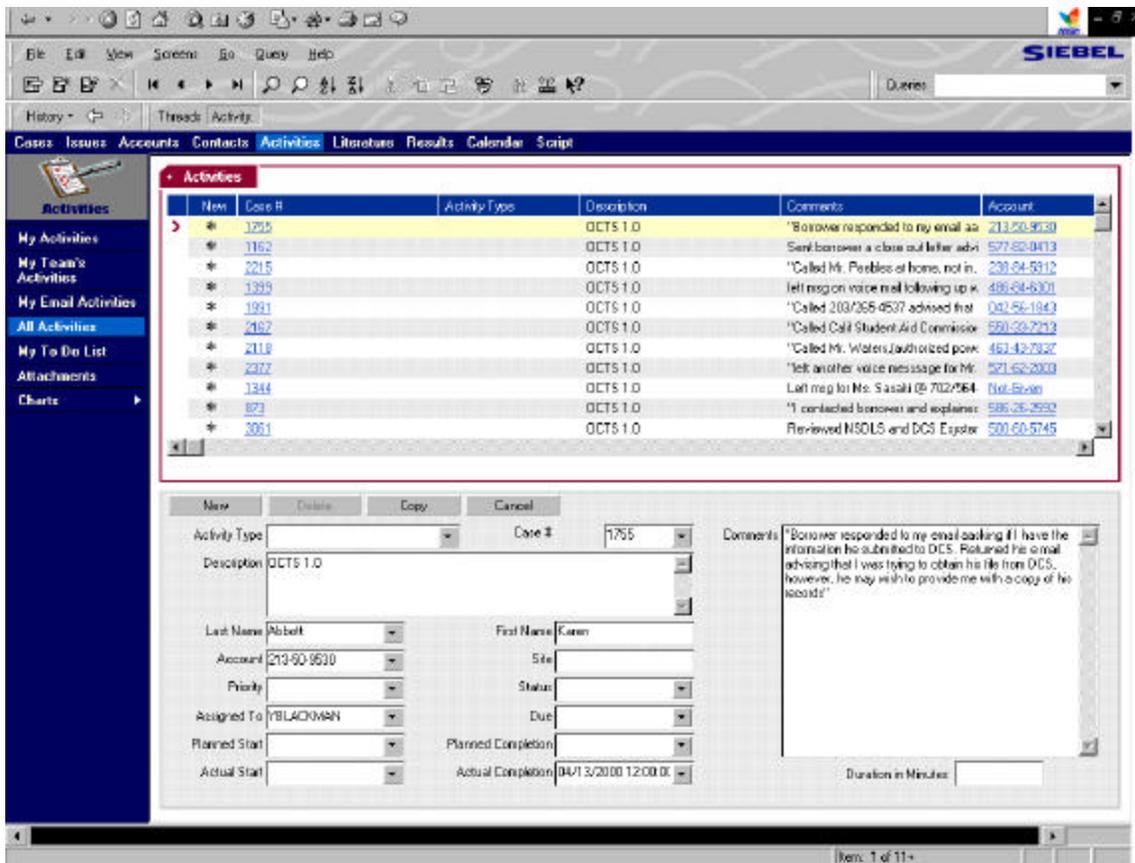
Following is a list of the views that comprise the Activity Screen. More details for each view are available in the subsequent pages of this document.

- My Activities
- My Team’s Activities
- All Activities
- My To Do List
- Attachments
- Charts

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All Activities View



View Description:

This view's primary purpose is to allow quick searches for specific activities, to display full details for a particular activity while viewing a list of all activities, and to enter a new activity.

OCTS Activity List Applet: *top half of view*

The list applet allows the user to scroll through a list of all activities, or to select a subset of activities to view by using the query feature. To facilitate efficient work on an activities, hyperlinks in some fields provide quick navigation to a different screen/view to provide detailed case information.

For a detailed data mapping please refer to Appendix B-9

OCTS Activity Form Applet: *bottom half of view*

The form applet displays all pertinent activity information for a given activity in a single, scroll-free display. The data displayed is that of the active activity in the list applet above (the selected activity with the red arrow in left-most column). A "New" button quickly creates a new activity, and the form applet provides an intuitive, efficient method of activity data entry.

For a detailed data mapping please refer to Appendix B-10

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[\\DCCFS1030_FS1\VOL2\Group_Share\OMBUDSMAN\Deliverables\Implementation Specs\New Doc\Literature.doc](#)

Results Screen

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View Description:

Smartscripts are designed to help the Intake Specialist gather data from a caller in an accurate and consistent manner. The client has expressed concern that many fields within OCTS 1.0 were not routinely populated. Smartscripts will help to facilitate this by outlining various scenarios that will guide the Intake Specialists from taking a callers information and creating and transcribing a case and/or case related information.

The scenarios are listed below:

Scripting Scenarios:

1. New Customer/New Case – Borrower Calls: Utilized to create a new case when the caller is the borrower and has not called the OMBUDSMAN office before. **(See scripting scenarios requirements 1 & 2, following)**
2. New Customer/New Case – Third Party Calls: Utilized to create a new case when the caller is a third party and has not called the OMBUDSMAN office before. **(See scripting scenarios requirements 3, following)**
3. Existing Customer/Existing Case – Status or Demographic Update: Utilized when an existing customer calls back to the OMBUDSMAN office to request a status update or make changes to information they provided earlier. **(See scripting scenarios requirements 4, following)**
4. Existing Customer/New Case – Borrower Calls: Utilized when a customer exists in the database but is creating a new case. The caller is the borrower. **(See scripting scenarios requirements 5, following)**
5. Existing Customer/New Case – Third Party Calls: Utilized when a customer exists in the database but is creating a new case. The caller is a third party. **(See scripting scenarios requirements 5, following)**

Appendix

Appendix B-3: Issues List Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Field Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|----------------------|---------------------------|---------------|--------------------------------|---------------------------|--------------------------------------|
| N | N | Issue # | Issue Number | DEFECT_NUM | S_PROD_DEFECT | | Application Generated |
| Y | Y | Issue Category | OI Category | ATTRIB_01 | S_PROD_DEFECT_X | | SR Area Pick Applet |
| Y | Y | Issue Sub Category | OI Sub Category | ATTRIB_02 | S_PROD_DEFECT_X | | SR Sub Area Hierarchical Pick Applet |
| Y | N | Issue Summary | OI Summary | ATTRIB_47 | S_PROD_DEFECT_X | | User Entry |
| N | N | Intake | Created By Name | LOGIN | CREATED BY PERSON system field | | Application Populated |
| N | Y | Status | Status | STATUS_CD | S_PROD_DEFECT | | PickList SR Status |
| N | Y | Sub-Status | Sub_Status | SUB_STATUS_CD | S_PROD_DEFECT | | PickList PD Sub-Status |
| N | N | Ombudsman | Owner | LOGIN | S_EMPLOYEE | | Application Populated |
| N | N | Date Received | Date Opened | OPEN_DT | S_PROD_DEFECT | | Application Populated |
| N | N | Date Closed | Date Closed | CLOSE_DT | S_PROD_DEFECT | | User Entry/Calendar |
| N | N | Close Notes | Description | DESC_TEXT | S_PROD_DEFECT | | User Entry |
| Y | N | Case # | SR Number | SR_NUM | S_SRV_REQ | | Application Populated |

Appendix B-4: Issues Form Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Field Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|----------------------|---------------------------|---------------|--------------------------------|---------------------------|--------------------------------------|
| N | N | Issue # | Issue Number | DEFECT_NUM | S_PROD_DEFECT | | Application Generated |
| Y | Y | Issue Category | OI Category | ATTRIB_01 | S_PROD_DEFECT_X | | SR Area Pick Applet |
| Y | Y | Issue Sub Category | OI Sub Category | ATTRIB_02 | S_PROD_DEFECT_X | | SR Sub Area Hierarchical Pick Applet |
| Y | N | Issue Summary | OI Summary | ATTRIB_47 | S_PROD_DEFECT_X | | User Entry |
| N | N | Intake | Created By Name | LOGIN | CREATED BY PERSON system field | | Application Populated |
| N | Y | Status | Status | STATUS_CD | S_PROD_DEFECT | | PickList SR Status |
| N | Y | Sub-Status | Sub_Status | SUB_STATUS_CD | S_PROD_DEFECT | | PickList PD Sub-Status |
| N | N | Ombudsman | Owner | LOGIN | S_EMPLOYEE | | Application Populated |
| N | N | Date Received | Date Opened | OPEN_DT | S_PROD_DEFECT | | Application Populated |
| N | N | Date Closed | Date Closed | CLOSE_DT | S_PROD_DEFECT | | User Entry/Calendar |
| N | N | Close Notes | Description | DESC_TEXT | S_PROD_DEFECT | | User Entry |
| Y | N | Case # | SR Number | SR_NUM | S_SRV_REQ | | Application Populated |

Appendix B-5: Account List Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Field Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|----------------------|---------------------------|-----------------|-------------|---------------------------|-----------------------------|
| Y | N | Last NM | Last Name | ATTRIB_34 | S_ORG_EXT_X | | User Entry |
| Y | N | First NM | First Name | ATTRIB_38 | S_ORG_EXT_X | | User Entry |
| Y | N | MI | Middle Name | ATTRIB_05 | S_ORG_EXT_X | | User Entry |
| Y | N | Preferred | Preferred Name | ATTRIB_37 | S_ORG_EXT_X | | User Entry |
| Y | N | Prefix | M/M | ATTRIB_06 | S_ORG_EXT_X | | PickList MrMs |
| Y | N | Suffix | Suffix | ATTRIB_07 | S_ORG_EXT_X | | OCTS Suffix Picklist |
| N | N | Account Type | Type | OU_TYPE_CD | S_ORG_EXT | | PickList Account Type |
| N | Y | Account | Name | NAME | S_ORG_EXT | Account/Cases | User Entry |
| Y | N | DOB | Birth Date | EXCH_DT | S_ORG_EXT | | User Entry/Cale ndar |
| N | N | Address | Street Address | ADDR | S_ADDR_ORG | | User Entry |
| N | N | City | City | CITY | S_ADDR_ORG | | User Entry |
| N | N | State | State | STATE | S_ADDR_ORG | | PickList State |
| Y | N | Zip | Postal Code | ZIPCODE | S_ADDR_ORG | | User Entry |
| Y | N | Country | Country | COUNTRY | S_ADDR_ORG | | PickList Country |
| N | N | Site | Location | LOC | S_ORG_EXT | | User Entry |
| Y | N | Country Code | Assignment Country Code | ASGN_PH_CC | S_ORG_EXT | | User Entry |
| Y | N | Home Phone Number | Main Phone Number | MAIN_PH_NUM | S_ORG_EXT | | User Entry |
| N | N | Work Phone Number | Work Phone Number | PH_NUM | S_ADDR_ORG | | User Entry |
| Y | N | Fax Phone Number | Main Fax Number | MAIN_FAX_PH_NUM | S_ORG_EXT | | User Entry |
| Y | N | Mobile Phone | Mobile Phone Number | FAX_PH_NUM | S_ADDR_ORG | | User Entry |

| | | | | | | | |
|---|---|-----------------|-----------------|----------------|-------------|--|---------------------------------------|
| | | Number | | | | | |
| Y | N | 1st E-mail | Home Page | URL | S_ORG_EXT | | User Entry |
| Y | N | 2nd E-mail | Secondary Email | EMAIL_ADDR | S_ADDR_ORG | | User Entry |
| Y | N | Hours Available | Hrs Avail | ATTRIB_01 | S_ORG_EXT_X | | User Entry |
| Y | N | Time Zone | Time Zone | TAX_EXEMPT_NUM | S_ORG_EXT | | PickList TimeZone |
| N | Y | Contact Method | Contact Method | ATTRIB_39 | S_ORG_EXT_X | | OCTS Contact Method Picklist |
| N | N | Comments | Description | DESC_TEXT | S_ORG_EXT | | User Entry |
| N | N | Reminders | Reminders | ATTRIB_36 | S_ORG_EXT_X | | Siebel VB Code |

Appendix B-6: Account Form Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Field Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|----------------------|---------------------------|-----------------|-------------|---------------------------|-----------------------------|
| Y | N | Last NM | Last Name | ATTRIB_34 | S_ORG_EXT_X | | User Entry |
| Y | N | First NM | First Name | ATTRIB_38 | S_ORG_EXT_X | | User Entry |
| Y | N | MI | Middle Name | ATTRIB_05 | S_ORG_EXT_X | | User Entry |
| Y | N | Preferred | Preferred Name | ATTRIB_37 | S_ORG_EXT_X | | User Entry |
| Y | N | Prefix | M/M | ATTRIB_06 | S_ORG_EXT_X | | PickList MrMs |
| Y | N | Suffix | Suffix | ATTRIB_07 | S_ORG_EXT_X | | OCTS Suffix Picklist |
| N | N | Account Type | Type | OU_TYPE_CD | S_ORG_EXT | | PickList Account Type |
| N | Y | Account | Name | NAME | S_ORG_EXT | | User Entry |
| Y | N | DOB | Birth Date | EXCH_DT | S_ORG_EXT | | User Entry/Calen dar |
| N | N | Address | Street Address | ADDR | S_ADDR_ORG | | User Entry |
| N | N | City | City | CITY | S_ADDR_ORG | | User Entry |
| N | N | State | State | STATE | S_ADDR_ORG | | PickList State |
| Y | N | Zip | Postal Code | ZIPCODE | S_ADDR_ORG | | User Entry |
| Y | N | Country | Country | COUNTRY | S_ADDR_ORG | | PickList Country |
| N | N | Site | Location | LOC | S_ORG_EXT | | User Entry |
| Y | N | Country Code | Assignment Country Code | ASGN_PH_CC | S_ORG_EXT | | User Entry |
| Y | N | Home Phone Number | Main Phone Number | MAIN_PH_NUM | S_ORG_EXT | | User Entry |
| N | N | Work Phone Number | Work Phone Number | PH_NUM | S_ADDR_ORG | | User Entry |
| Y | N | Fax Phone Number | Main Fax Number | MAIN_FAX_PH_NUM | S_ORG_EXT | | User Entry |
| Y | N | Mobile Phone | Mobile Phone Number | FAX_PH_NUM | S_ADDR_ORG | | User Entry |

| | | | | | | | |
|---|---|-----------------|-----------------|----------------|-------------|--|---------------------------------------|
| | | Number | | | | | |
| Y | N | 1st E-mail | Home Page | URL | S_ORG_EXT | | User Entry |
| Y | N | 2nd E-mail | Secondary Email | EMAIL_ADDR | S_ADDR_ORG | | User Entry |
| Y | N | Hours Available | Hrs Avail | ATTRIB_01 | S_ORG_EXT_X | | User Entry |
| Y | N | Time Zone | Time Zone | TAX_EXEMPT_NUM | S_ORG_EXT | | PickList TimeZone |
| N | Y | Contact Method | Contact Method | ATTRIB_39 | S_ORG_EXT_X | | OCTS Contact Method Picklist |
| N | N | Comments | Description | DESC_TEXT | S_ORG_EXT | | User Entry |
| N | N | Reminders | Reminders | ATTRIB_36 | S_ORG_EXT_X | | Siebel VB Code |

Appendix B-7: Contact List Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Field Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|----------------------|---------------------------|------------------|-------------|---------------------------|--|
| N | Y | Last NM | Last Name | LAST_NAME | S_CONTACT | Contacts/ Activities | Pick Map/User Entry |
| N | Y | First NM | First Name | FST_NAME | S_CONTACT | | Pick Map/User Entry |
| N | N | MI | Middle Name | MID_NAME | S_CONTACT | | Pick Map/User Entry |
| Y | N | Preferred | Alias | ALIAS_NAME | S_CONTACT | | Pick Map/User Entry |
| N | N | Prefix | M/M | PER_TITLE | S_CONTACT | | Pick Map/'PickList MrMs' - Picklist |
| Y | N | Suffix | Suffix | PER_TITLE_SUFFIX | S_CONTACT | | Pick Map/'OCTS Suffix Picklist' - Picklist |
| Y | N | Contact Type | Contact Type | CON_CD | S_CONTACT | | 'OCTS Contact Type Picklist' - Picklist |
| N | N | Account | Account | NAME | S_ORG_EXT | Account/ Contacts | 'OCTS Account Pick Applet' - Pick Applet |
| Y | Y | Relationship/Title | Job Title | JOB_TITLE | S_CONTACT | | 'OCTS Relationship to Case/Issue' - Picklist |
| N | N | Address | Address | ATTRIB_47 | S_CONTACT_X | | Pick Map/User Entry |
| N | N | City | Contact City | MAIDEN_NAME | S_CONTACT | | Pick Map/User Entry |
| N | N | State | Contact State | NATIONALITY | S_CONTACT | | Pick Map/'PickList |

| | | | | | | | |
|---|---|---------------------|------------------|------------------|-------------|--|--|
| | | | | | | | State' – Picklist |
| N | N | Zip | Zip Code | EMP_NUM | S_CONTACT | | Pick Map/User Entry |
| N | N | Country | Contact Country | EMPLMNT_STAT_CD | S_CONTACT | | Pick Map/'PickList Country' – Picklist |
| Y | N | Country Code | Country Code | ALT_PH_NUM | S_CONTACT | | Pick Map/User Entry |
| N | N | Home Phone Number | Home Phone # | HOME_PH_NUM | S_CONTACT | | Pick Map/User Entry |
| N | N | Work Phone Number | Work Phone # | WORK_PH_NUM | S_CONTACT | | Pick Map/User Entry |
| N | N | Fax Phone Number | Fax Phone # | FAX_PH_NUM | S_CONTACT | | Pick Map/User Entry |
| N | N | Mobile Phone Number | Cellular Phone # | CELL_PH_NUM | S_CONTACT | | Pick Map/User Entry |
| N | N | 1st E-mail | Email Address | EMAIL_ADDR | S_CONTACT | | Pick Map/User Entry |
| Y | N | 2nd E-mail | Secondary Email | NICK_NAME | S_CONTACT | | Pick Map/User Entry |
| Y | N | Hours Available | Hrs Avail | CON_MANAGER_NAME | S_CONTACT | | Pick Map/User Entry |
| Y | N | Time Zone | Time Zone | TMZONE_CD | S_CONTACT | | Pick Map/'PickList TimeZone' – Picklist |
| Y | Y | Contact Method | Assistant | CON_ASST_NAME | S_CONTACT | | Pick Map/'OCTS Contact Method Picklist' – Picklist |
| Y | N | Special Note/SME | Comment | COMMENTS | S_CONTACT | | User Entry |
| Y | Y | Loan Status | Loan Status | ATTRIB_40 | S_SRV_REQ_X | | User Entry |

Appendix B-8: Contact Form Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Field Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|----------------------|---------------------------|------------------|-------------|---------------------------|--|
| N | Y | Last NM | Last Name | LAST_NAME | S_CONTACT | | Pick Map/User Entry |
| N | Y | First NM | First Name | FST_NAME | S_CONTACT | | Pick Map/User Entry |
| N | N | MI | Middle Name | MID_NAME | S_CONTACT | | Pick Map/User Entry |
| Y | N | Preferred | Alias | ALIAS_NAME | S_CONTACT | | Pick Map/User Entry |
| N | N | Prefix | M/M | PER_TITLE | S_CONTACT | | Pick Map/'PickList MrMs' - Picklist |
| Y | N | Suffix | Suffix | PER_TITLE_SUFFIX | S_CONTACT | | Pick Map/'OCTS Suffix Picklist' - Picklist |
| Y | N | Contact Type | Contact Type | CON_CD | S_CONTACT | | 'OCTS Contact Type Picklist' - Picklist |
| N | N | Account | Account | NAME | S_ORG_EXT | | 'OCTS Account Pick Applet' - Pick Applet |
| Y | Y | Relationship/Title | Job Title | JOB_TITLE | S_CONTACT | | 'OCTS Relationship to Case/Issue' - Picklist |
| N | N | Address | Address | ATTRIB_47 | S_CONTACT_X | | Pick Map/User Entry |
| N | N | City | Contact City | MAIDEN_NAME | S_CONTACT | | Pick Map/User Entry |
| N | N | State | Contact State | NATIONALITY | S_CONTACT | | Pick Map/'PickList State' - Picklist |
| N | N | Zip | Zip Code | EMP_NUM | S_CONTACT | | Pick Map/User Entry |
| N | N | Country | Contact Country | EMPLMNT_STAT_CD | S_CONTACT | | Pick Map/'PickList Country' - Picklist |
| Y | N | Country Code | Country Code | ALT_PH_NUM | S_CONTACT | | Pick Map/User Entry |
| N | N | Home Phone Number | Home Phone # | HOME_PH_NUM | S_CONTACT | | Pick Map/User Entry |
| N | N | Work Phone Number | Work Phone # | WORK_PH_NUM | S_CONTACT | | Pick Map/User Entry |
| N | N | Fax Phone Number | Fax Phone # | FAX_PH_NUM | S_CONTACT | | Pick Map/User Entry |
| N | N | Mobile Phone Number | Cellular Phone # | CELL_PH_NUM | S_CONTACT | | Pick Map/User Entry |
| N | N | 1st E-mail | Email Address | EMAIL_ADDR | S_CONTACT | | Pick Map/User Entry |

| | | | | | | | |
|---|---|------------------------|-----------------|------------------|-----------|--|--|
| Y | N | 2 nd E-mail | Secondary Email | NICK_NAME | S_CONTACT | | Pick Map/User Entry |
| Y | N | Hours Available | Hrs Avail | CON_MANAGER_NAME | S_CONTACT | | Pick Map/User Entry |
| Y | N | Time Zone | Time Zone | TMZONE_CD | S_CONTACT | | Pick Map/'PickList TimeZone' - Picklist |
| Y | Y | Contact Method | Assistant | CON_ASST_NAME | S_CONTACT | | Pick Map/'OCTS Contact Method Picklist' - Picklist |
| Y | N | Special Note/SME | Comment | COMMENTS | S_CONTACT | | User Entry |
| N | Y | | | | | | |

Appendix B-9: Activities List Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Display Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|------------------------|---------------------------|------------------------|------------|---------------------------|-----------------------------|
| N | Y | Activity Type | Type | TODO_CD | S_EVT_ACT | Activities / Attachments | PickList Action Type |
| Y | N | Case # | SR Number | SR_NUM | S_SRV_REQ | | Pick Map |
| N | Y | Description | Description | NAME | S_EVT_ACT | | User Entered |
| N | N | Last Name | Contact Last Name | LAST_NAME | S_CONTACT | | SR Contact Pick Applet |
| N | N | First Name | Contact First Name | FST_NAME | S_CONTACT | | SR Contact Pick Applet |
| N | N | Created By | Created By Name | CREATOR_LOGIN | S_EVT_ACT | | |
| N | N | Account | Account Name | NAME | S_ORG_EXT | | OCTS SR Account Pick Applet |
| N | N | Site | Account Location | LOC | S_ORG_EXT | | Pick Map |
| N | N | Created | Created | System Generated Field | N/A | | Application Populated |
| N | N | Priority | Priority | EVT_PRIORITY_CD | S_EVT_ACT | | PickList Activity Priority |
| N | N | Status | Status | EVT_STAT_CD | S_EVT_ACT | | PickList Action Status |
| N | Y | Assigned To | Owned By | OWNER_LOGIN | S_EVT_ACT | | PickList Owned By |
| N | N | Due | Start Date | APPT_START_DT | S_EVT_ACT | | User Entry / Calendar |
| N | N | Planned Start | Planned | TODO_PLAN_START_DT | S_EVT_ACT | | User Entry / Calendar |
| N | N | Planned Completion | Planned Completion | TODO_PLAN_END_DT | S_EVT_ACT | | User Entry / Calendar |

| | | | | | | | |
|---|---|-------------------|------------------|------------------------|-----------|--|-------------------------------|
| N | N | Actual Start | Started | TODO_ACTL_ST ART_DT | S_EVT_ACT | | User Entry / Calendar |
| N | N | Actual Completion | Done | TODO_ACTL_EN D_DT | S_EVT_ACT | | User Entry / Completion |
| Y | N | Duration | Duration Minutes | ACD_CALL_DUR ATION | S_EVT_ACT | | Calculated |
| Y | N | Comments | Comment | COMMENTS | S_EVT_ACT | | User Entry |
| N | Y | New | Row Status | ROW_STATUS | S_EVT_ACT | | Application Populated |

Appendix B-10: Activities Form Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Display Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|------------------------|---------------------------|------------------------|------------|---------------------------|-----------------------------------|
| N | Y | Activity Type | Type | TODO_CD | S_EVT_ACT | | PickList Action Type |
| Y | N | Case # | SR Number | SR_NUM | S_SRV_REQ | | Pick Map |
| N | Y | Description | Description | NAME | S_EVT_ACT | | User Entered |
| N | N | Last Name | Contact Last Name | LAST_NAME | S_CONTACT | | SR Contact Pick Applet |
| N | N | First Name | Contact First Name | FST_NAME | S_CONTACT | | SR Contact Pick Applet |
| N | N | Account | Account Name | NAME | S_ORG_EXT | | OCTS SR Account Pick Applet |
| N | N | Site | Account Location | LOC | S_ORG_EXT | | Pick Map |
| N | N | Created | Created | System Generated Field | N/A | | Application Populated |
| N | N | Priority | Priority | EVT_PRIORITY_CD | S_EVT_ACT | | PickList Activity Priority |
| N | N | Status | Status | EVT_STAT_CD | S_EVT_ACT | | PickList Action Status |
| N | Y | Assigned To | Owned By | OWNER_LOGIN | S_EVT_ACT | | PickList Owned By |
| N | N | Due | Start Date | APPT_START_DT | S_EVT_ACT | | User Entry / Calendar |
| N | N | Planned Start | Planned | TODO_PLAN_START_DT | S_EVT_ACT | | User Entry / Calendar |
| N | N | Planned Completion | Planned Completion | TODO_PLAN_END_DT | S_EVT_ACT | | User Entry / Calendar |
| N | N | Actual Start | Started | TODO_ACTL_START_DT | S_EVT_ACT | | User Entry / Calendar |

| | | | | | | | |
|---|---|-------------------|------------------|-----------------------|-----------|--|-------------------------------|
| N | N | Actual Completion | Done | TODO_ACTL_EN D_DT | S_EVT_ACT | | User Entry / Completion |
| Y | N | Duration | Duration Minutes | ACD_CALL_DUR ATION | S_EVT_ACT | | Calculated |
| Y | N | Comments | Comment | COMMENTS | S_EVT_ACT | | User Entry |

Appendix B-11: OCTS Literature List Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Field Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|----------------------|---------------------------|-------------------|------------|---------------------------|-----------------------|
| N | N | Name | Name | NAME | S_LIT | To actual document | Application Populated |
| N | N | Description | Description | DESC_TEXT | S_LIT | | User Entry |
| N | N | Literature Type | Sales Tools Type | LIT_CD | S_LIT | | User Entry |
| N | N | Local | Local | | S_LIT | | User Entry |
| N | N | Request | LitFileDockReqFlg | FILE_DOCK_REQ_FLG | S_LIT | | User Entry |
| N | N | Size | LitFileSize | FILE_SIZE | S_LIT | | Application Populated |
| N | N | File Type | LitFileExt | FILE_EXT | S_LIT | | Application Populated |
| N | N | Modified | LitFileDate | FILE_DATE | S_LIT | | Application Populated |
| N | N | Auto Update | LitFileAutoUpdFlg | FILE_AUTO_UPD_FLG | S_LIT | | User Entry |
| N | N | Internal | Internal | INT_FLG | S_LIT | | User Entry |
| N | N | Literature Items | Form Factor | | S_LIT | | User Entry |
| N | N | # of Pages | # of Pages | | S_LIT | | User Entry |
| N | N | In Stock? | In Stock? | | S_LIT | | User Entry |

Appendix B-12: OCTS Literature Form Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Field Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|----------------------|------------------------|-----------------------------|----------------------------------|--------------------|-------------------|----------------------------------|-----------------------------|
| N | N | Name | Name | NAME | S_LIT | To actual document | Application Populated |
| N | N | Description | Description | DESC_TEXT | S_LIT | | User Entry |

Appendix B-13: Results List Applet (Cases Screen) Data Mapping

| Custom Field? | Required Field? | OCTS View Display Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|------------------------|---------------------------|------------------|-------------|---------------------------|--------------------------------------|
| N | Y | Name | Name | NAME | S_RESITEM | | User Entry |
| Y | Y | Category | Category | RESITEM_TYPE | S_RESITEM | | SR Area Pick Applet |
| Y | Y | Sub Category | Sub Category | FILE_SRC_TYPE | S_RESITEM | | SR Sub-Area Hierarchical Pick Applet |
| Y | N | Party Effecting | Party Effecting | ORIG_FILE_NAME | S_RESITEM | | User Entry |
| Y | N | Party Effecting Date | Party Effecting Date | X_ATTRIB_04 | S_RESITEM_X | | User Entry |
| Y | N | Party Proposing | Party Proposing | FILE_NAME | S_RESITEM | | User Entry |
| Y | N | Party Proposing Date | Party Proposing Date | FILE_DATE | S_RESITEM | | User Entry |
| N | N | Comments | SR Comments | COMMENTS | S_RESITEM | | User Entry |
| N | N | Result | Solution | RESOLUTION_TEXT | S_RESITEM | | User Entry |
| N | N | Created By | Created By Name | LOGIN | S_EMPLOYEE | | Application Populated |
| N | N | Created | Created | System Generated | N/A | | Application Populated |
| Y | N | FAQ | FAQ | FAQ_QUES_TEXT | S_RESITEM | | Application Populated |
| N | N | Status | Status | STATUS_CD | S_RESITEM | | PickList Solution Status |

Appendix B-14: Results Form Applet (Case Screen) Data Mapping

| Custom Field? | Required Field? | OCTS View Display Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|------------------------|---------------------------|------------------|-------------|---------------------------|--------------------------------------|
| N | Y | Name | Name | NAME | S_RESITEM | | User Entry |
| Y | Y | Category | Category | RESITEM_TYPE | S_RESITEM | | SR Area Pick Applet |
| Y | Y | Sub Category | Sub Category | FILE_SRC_TYPE | S_RESITEM | | SR Sub-Area Hierarchical Pick Applet |
| Y | N | Party Effecting | Party Effecting | ORIG_FILE_NAME | S_RESITEM | | User Entry |
| Y | N | Party Effecting Date | Party Effecting Date | X_ATTRIB_04 | S_RESITEM_X | | User Entry |
| Y | N | Party Proposing | Party Proposing | FILE_NAME | S_RESITEM | | User Entry |
| Y | N | Party Proposing Date | Party Proposing Date | FILE_DATE | S_RESITEM | | User Entry |
| N | N | Comments | SR Comments | COMMENTS | S_RESITEM | | User Entry |
| N | N | Result | Solution | RESOLUTION_TEXT | S_RESITEM | | User Entry |
| N | N | Created By | Created By Name | LOGIN | S_EMPLOYEE | | Application Populated |
| N | N | Created | Created | System Generated | N/A | | Application Populated |
| Y | N | FAQ | FAQ | FAQ_QUES_TEXT | S_RESITEM | | Application Populated |
| N | N | Status | Status | STATUS_CD | S_RESITEM | | PickList Solution Status |

Appendix B-15: Results Attachments List Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Field Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|----------------------|---------------------------|--------------------|------------|---------------------------|-----------------------|
| N | Y | File Name | ResFileName | FILE_NAME | S_RESITEM | To attached document | User Selected |
| N | NW | Size | ResFileSize | FILE_SIZE | S_RESITEM | | Application Generated |
| N | N | Type | ResFileExt | FILE_EXT | S_RESITEM | | Application Generated |
| N | N | Auto Update | ResFileAutoUpdFlg | FILE_AUTO_UPD_FLG | S_RESITEM | | Application Generated |
| N | N | Created On | Created | System Generated | S_RESITEM | | Application Generated |
| N | N | Created By | Created By Name | LOGIN | S_RESITEM | | Application Generated |
| N | N | Description | Description | DESC_TEXT | S_RESITEM | | Application Generated |
| N | N | Local | ResFileDockStatFlg | FILE_DOCK_STAT_FLG | S_RESITEM | | Application Generated |
| N | N | Request | ResFileDockReqFlg | FILE_DOCK_REQ_FLG | S_RESITEM | | Application Generated |
| N | N | Last Updated | Updated | System Generated | S_RESITEM | | Application Generated |
| N | N | Updated By | Updated By Name | LOGIN | S_RESITEM | | Application Generated |

Appendix B-16: Attachments List Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Field Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|----------------------|---------------------------|-------------------|----------------|---------------------------|-----------------------|
| N | N | Name | ActivityFileName | FILE_NAME | S_ACTIVITY_ATT | To attached document | Application Generated |
| N | N | Size | ActivityFileSize | FILE_SIZE | S_ACTIVITY_ATT | | Application Generated |
| N | N | Type | ActivityFileExt | FILE_EXT | S_ACTIVITY_ATT | | Application Generated |
| N | N | Modified | ActivityFileDate | FILE_DATE | S_ACTIVITY_ATT | | Application Generated |
| N | N | Auto Update | ActivityFileAutoUpdFlg | FILE_AUTO_UPD_FLG | S_ACTIVITY_ATT | | Application Generated |
| N | N | Comments | Comment | COMMENTS | S_ACTIVITY_ATT | | User Entry |

Appendix B-17: Loan List Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Field Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|-------------------------|---------------------------|--------------|------------|---------------------------|----------------------|
| N | N | Product Id/Product Name | Product Id/Product Name | PROD_ID | S_ASSET | | Interface/Conversion |
| Y | N | Guaranty Amount | Guaranty Amount | ATTRIB_18 | S_ASSET_X | | Interface/Conversion |
| Y | N | Guaranty Amount Cd | Guaranty Amount Cd | ATTRIB_04 | S_ASSET_X | | Interface/Conversion |
| Y | N | Academic Level Cd | Academic Level Cd | ATTRIB_05 | S_ASSET_X | | Interface/Conversion |
| Y | N | Interest Rate Cd | Interest Rate Cd | ATTRIB_06 | S_ASSET_X | | Interface/Conversion |
| Y | N | Loan Status Cd | Loan Status Cd | ATTRIB_07 | S_ASSET_X | | Interface/Conversion |
| N | N | Enrollment Cd | Enrollment Cd | BUILD | S_ASSET | | Interface/Conversion |
| N | N | Loan Seq No | Loan Seq No | SERIAL_NUM | S_ASSET | | Interface/Conversion |
| N | N | Lender Cd | Lender Cd | REF_NUMBER_1 | S_ASSET | | Interface/Conversion |
| N | N | Lender Servicer Cd | Lender Servicer Cd | REF_NUMBER_2 | S_ASSET | | Interface/Conversion |
| N | N | School Type | School Type | REF_NUMBER_3 | S_ASSET | | Interface/Conversion |
| Y | N | Program Length | Program Length | ATTRIB_34 | S_ASSET_X | | Interface/Conversion |
| Y | N | OPEID | OPEID | ATTRIB_35 | S_ASSET_X | | Interface/Conversion |
| Y | N | Interest Rate Type | Interest Rate Type | ATTRIB_36 | S_ASSET_X | | Interface/Conversion |
| Y | N | Program Length Descr | Program Length Descr | ATTRIB_37 | S_ASSET_X | | Interface/Conversion |
| Y | N | School Type Descr | School Type Descr | ATTRIB_38 | S_ASSET_X | | Interface/ |

| | | | | | | | |
|---|---|------------------------------------|------------------------------------|-----------------|------------|--|--------------------------|
| | | | | | | | Conversion |
| N | N | Product Description | Product Description | DESC_TEXT | S_ASSET | | Interface/ Conversion |
| N | N | Primary Contact Id | Primary Contact Id | PR_CON_ID | S_ASSET | | Interface/ Conversion |
| Y | N | Guaranty Agency Name | Guaranty Agency Name | ATTRIB_40 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Lender Name | Lender Name | ATTRIB_41 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Academic Level Name | Academic Level Name | ATTRIB_42 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Loan Status Descr | Loan Status Descr | ATTRIB_43 | S_ASSET_X | | Interface/ Conversion |
| Y | N | School Location | School Location | ATTRIB_01 | S_ASSET_X | | Interface/ Conversion |
| N | N | Data Provider Loan Id | Data Provider Loan Id | OWNER_ASSET_NUM | S_ASSET | | Interface/ Conversion |
| N | N | Birth Date | Birth Date | BIRTH_DT | S_CONTACT. | | Interface/ Conversion |
| N | N | Guaranty Date | Guaranty Date | INSTALL_DT | S_ASSET | | Interface/ Conversion |
| Y | N | Outstanding Principal Balance Date | Outstanding Principal Balance Date | ATTRIB_26 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Outstanding Interest Balance Date | Outstanding Interest Balance Date | ATTRIB_27 | S_ASSET_X | | Interface/ Conversion |
| N | N | Disbursement Date | Disbursement Date | SHIP_DT | S_ASSET | | Interface/ Conversion |
| Y | N | Cancellation Date | Cancellation Date | ATTRIB_28 | S_ASSET_X | | Interface/ Conversion |
| N | N | GA Resp Begin Date | GA Resp Begin Date | START_DT | S_ASSET | | Interface/ Conversion |
| N | N | GA Resp End Date | GA Resp End Date | END_DT | S_ASSET | | Interface/ Conversion |
| Y | N | Lender Resp Begin | Lender Resp Begin Date | ATTRIB_29 | S_ASSET_X | | Interface/ |

| | | | | | | | |
|---|---|---------------------------------|---------------------------------|-----------------------|-----------|--|--------------------------|
| | | Date | | | | | Conversion |
| Y | N | Lender Resp End Date | Lender Resp End Date | ATTRIB_30 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Lender Servicer Resp Begin Date | Lender Servicer Resp Begin Date | ATTRIB_12 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Lender Servicer Resp End Date | Lender Servicer Resp End Date | ATTRIB_13 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Loan Status Date | Loan Status Date | ATTRIB_31 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Enrollment Effective Date | Enrollment Effective Date | ATTRIB_32 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Anticipated Completion Date | Anticipated Completion Date | ATTRIB_33 | S_ASSET_X | | Interface/ Conversion |
| N | N | Date Entered Repayment | Date Entered Repayment | REGISTERED_DT | S_ASSET | | Interface/ Conversion |
| N | N | Period Begin Date | Period Begin Date | WARRANTY_STA RT_DT | S_ASSET | | Interface/ Conversion |
| N | N | Period End Date | Period End Date | WARRANTY_EN D_DT | S_ASSET | | Interface/ Conversion |
| Y | N | Interest Rate | Interest Rate | ATTRIB_14 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Outstanding Principal Balance | Outstanding Principal Balance | ATTRIB_15 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Outstanding Interest Balance | Outstanding Interest Balance | ATTRIB_16 | S_ASSET_X | | Interface/ Conversion |
| N | N | Total Disbursed | Total Disbursed | QTY | S_ASSET | | Interface/ Conversion |
| Y | N | Total Cancelled | Total Cancelled | ATTRIB_17 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Current Lender Servicer Name | Current Lender Servicer Name | ATTRIB_02 | S_ASSET_X | | Interface/ Conversion |

Appendix B-19: Loan Form Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Field Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|-------------------------|---------------------------|--------------|------------|---------------------------|-----------------------|
| N | N | No Display | Loan Type Cd | NAME | S_PROD_INT | | Interface/ Conversion |
| N | N | Product Id/Product Name | Product Id/Product Name | PROD_ID | S_ASSET | | Interface/ Conversion |
| Y | N | Guaranty Amount | Guaranty Amount | ATTRIB_18 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Guaranty Amount Cd | Guaranty Amount Cd | ATTRIB_04 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Academic Level Cd | Academic Level Cd | ATTRIB_05 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Interest Rate Cd | Interest Rate Cd | ATTRIB_06 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Loan Status Cd | Loan Status Cd | ATTRIB_07 | S_ASSET_X | | Interface/ Conversion |
| N | N | Enrollment Cd | Enrollment Cd | BUILD | S_ASSET | | Interface/ Conversion |
| N | N | No Display | Loan Seq No | SERIAL_NUM | S_ASSET | | Interface/ Conversion |
| N | N | Lender Cd | Lender Cd | REF_NUMBER_1 | S_ASSET | | Interface/ Conversion |
| N | N | Lender Servicer Cd | Lender Servicer Cd | REF_NUMBER_2 | S_ASSET | | Interface/ Conversion |
| N | N | School Type | School Type | REF_NUMBER_3 | S_ASSET | | Interface/ Conversion |
| Y | N | Program Length | Program Length | ATTRIB_34 | S_ASSET_X | | Interface/ Conversion |
| Y | N | No Display | OPEID | ATTRIB_35 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Interest Rate Type | Interest Rate Type | ATTRIB_36 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Program Length | Program Length Descr | ATTRIB_37 | S_ASSET_X | | Interface/ |

| | | Descr | | | | | Conversion |
|---|---|------------------------------------|------------------------------------|-----------------|------------|--|--------------------------|
| Y | N | School Type Descr | School Type Descr | ATTRIB_38 | S_ASSET_X | | Interface/ Conversion |
| N | N | No Display | Product Description | DESC_TEXT | S_ASSET | | Interface/ Conversion |
| N | N | Primary Contact Id | Primary Contact Id | PR_CON_ID | S_ASSET | | Interface/ Conversion |
| Y | N | Guaranty Agency Name | Guaranty Agency Name | ATTRIB_40 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Lender Name | Lender Name | ATTRIB_41 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Academic Level Name | Academic Level Name | ATTRIB_42 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Loan Status Descr | Loan Status Descr | ATTRIB_43 | S_ASSET_X | | Interface/ Conversion |
| Y | N | No Display | School Location | ATTRIB_01 | S_ASSET_X | | Interface/ Conversion |
| N | N | Data Provider Loan Id | Data Provider Loan Id | OWNER_ASSET_NUM | S_ASSET | | Interface/ Conversion |
| N | N | Birth Date | Birth Date | BIRTH_DT | S_CONTACT. | | Interface/ Conversion |
| N | N | Guaranty Date | Guaranty Date | INSTALL_DT | S_ASSET | | Interface/ Conversion |
| Y | N | Outstanding Principal Balance Date | Outstanding Principal Balance Date | ATTRIB_26 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Outstanding Interest Balance Date | Outstanding Interest Balance Date | ATTRIB_27 | S_ASSET_X | | Interface/ Conversion |
| N | N | Disbursement Date | Disbursement Date | SHIP_DT | S_ASSET | | Interface/ Conversion |
| Y | N | Cancellation Date | Cancellation Date | ATTRIB_28 | S_ASSET_X | | Interface/ Conversion |
| N | N | GA Resp Begin Date | GA Resp Begin Date | START_DT | S_ASSET | | Interface/ Conversion |
| N | N | GA Resp End Date | GA Resp End Date | END_DT | S_ASSET | | Interface/ Conversion |

| | | | | | | | |
|---|---|---------------------------------|---------------------------------|-------------------|-----------|--|--------------------------|
| | | | | | | | Conversion |
| Y | N | Lender Resp Begin Date | Lender Resp Begin Date | ATTRIB_29 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Lender Resp End Date | Lender Resp End Date | ATTRIB_30 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Lender Servicer Resp Begin Date | Lender Servicer Resp Begin Date | ATTRIB_12 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Lender Servicer Resp End Date | Lender Servicer Resp End Date | ATTRIB_13 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Loan Status Date | Loan Status Date | ATTRIB_31 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Enrollment Effective Date | Enrollment Effective Date | ATTRIB_32 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Anticipated Completion Date | Anticipated Completion Date | ATTRIB_33 | S_ASSET_X | | Interface/ Conversion |
| N | N | Date Entered Repayment | Date Entered Repayment | REGISTERED_DT | S_ASSET | | Interface/ Conversion |
| N | N | Period Begin Date | Period Begin Date | WARRANTY_START_DT | S_ASSET | | Interface/ Conversion |
| N | N | Period End Date | Period End Date | WARRANTY_END_DT | S_ASSET | | Interface/ Conversion |
| Y | N | Interest Rate | Interest Rate | ATTRIB_14 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Outstanding Principal Balance | Outstanding Principal Balance | ATTRIB_15 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Outstanding Interest Balance | Outstanding Interest Balance | ATTRIB_16 | S_ASSET_X | | Interface/ Conversion |
| N | N | Total Disbursed | Total Disbursed | QTY | S_ASSET | | Interface/ Conversion |
| Y | N | Total Cancelled | Total Cancelled | ATTRIB_17 | S_ASSET_X | | Interface/ Conversion |
| Y | N | Current Lender Servicer Name | Current Lender Servicer Name | ATTRIB_02 | S_ASSET_X | | Interface/ Conversion |

Appendix B-19: Customer Satisfaction Survey Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Field Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|-------------------------|---|------------------|---------------|---------------------------|-----------------------|
| N | N | Survey Date | Created | System Generated | N/A | | Application populated |
| N | N | Service Accessible? | How easy or hard was it to reach us? | ACCESSIBLE_CD | ACCESSIBLE_CD | | User Entered |
| N | N | Knowledgeable Reps? | Were the reps you talked to knowledgeable? | KNOWLEDGABLE_CD | ACCESSIBLE_CD | | User Entered |
| N | N | Timely Resolution? | Was your issue addressed in a timely manner? | TIMELY_CD | ACCESSIBLE_CD | | User Entered |
| N | N | Resolved Satisfactorily | Is your issue truly resolved? | RESOLVED_CD | ACCESSIBLE_CD | | User Entered |
| N | N | Overall Rating | How would you rate your overall satisfaction? | OVERALL_CD | ACCESSIBLE_CD | | User Entered |
| N | N | Additional Comments | Comments | COMMENTS | ACCESSIBLE_CD | | User Entered |

Appendix B-20: Notes List Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Field Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|----------------------|------------------------|-----------------------------|----------------------------------|--------------------|-------------------|----------------------------------|-----------------------------|
| N | N | Date Created | Created | CREATED | S_NOTE_ACCNT | | User Entry |
| N | N | Created By | Created By Name | LOGIN | S_EMPLOYEE | | Application Populated |
| N | N | Note | Note | NOTE | S_NOTE_ACCNT | | User Entry |
| N | N | Note Type | Note Type | NOTE_TYPE | S_NOTE_ACCNT | | User Entry |

Appendix B-21: My To Do List Applet Data Mapping

| Custom Field? | Required Field? | OCTS View Display Name | Siebel Logical Field Name | Column Name | Table Name | Hyperlink To: Screen/View | Method of Population |
|---------------|-----------------|------------------------|---------------------------|-------------------|------------|----------------------------|----------------------|
| N | N | Completed | Done Flag | | S_EVT_ACT | | User Entry |
| N | | Priority | Priority | EVT_PRIORITY_CD | S_EVT_ACT | | User Entry |
| N | N | Due | Start Date | APPT_START_DT | S_EVT_ACT | | User Entry |
| N | N | Description | Description | NAME | S_EVT_ACT | Activities/ Attachments | User Entry |
| N | N | Actual Completion | Done | TODO_ACTL_ENDD_DT | S_EVT_ACT | | User Entry |