

## 1 Appendix C – Website Help

The following list provides the Website Help for the Login-Menu, Financial Aid, Enrollment, Organization, Exception Reports, Transfer Student Monitoring, and Admin/Support modules. A user can access these screens by clicking the help icon at the top of the screen. If a specific section on screen has a help icon, the help window will open, but the user will be directed to the specific section in the help page.

The user also has access to a full list of the Glossary (See Appendix A: Section 1.29). The Glossary screen is accessed by clicking the “G” (Glossary) icon at the top of the help screen. If the user clicks the Close pushbutton, the window will close and the focus will be put back to the NSLDS II website.

### 1.1 Login-Menu

#### 1.1.1 System Log On



### System Logon

**Purpose of this page**

The System Logon page enables you to logon to the NSLDS FAP Web site, which requires a User ID and Password. After successfully logging on and accepting the Privacy Act page terms and conditions, the Menu appears.

**Sign-Up Information/System Requirements/News & Events/Change Password/FAQ/Download Help**

The Sign-Up Information, System Requirements, News & Events, Change Password, FAQ, and Download Help links appear at the top of this page:

- If you are not an authorized user and would like information on how to become one, click **Sign-Up Information**.
- If you have any questions about the browser configuration, click **System Requirements**.
- If you want to read the latest information about the NSLDS, click **News & Events**.
- If you to change your password, click **Change Password**.
- If you have any other questions about the NSLDS, click **FAQ** to review a list of Frequently Asked Questions.
- If you wish to download all or part of the help pages, click **Download Help**.

**How to log on**

Below the Sign-Up Information, System Requirements, News & Events, Change Password, FAQ, and Download Help links, the User ID and Password boxes appear.

To logon:

1. Type **User ID** in the box.
2. Type **Password** in the box.
3. Click **Logon**.

#### Tips

- Passwords must be six to eight characters in length.
- At least one character must be a number; however, the first character must be a letter.
- The new password must be different from your last four passwords.
- Passwords are valid for 120 days.
- After three unsuccessful logon attempts, your access to the NSLDS will be revoked.
- If you need a copy of the Adobe Acrobat Reader, click on the Adobe Acrobat Reader icon next to the links.
- If you have any problems accessing the NSLDS, call the Customer Service Center at **1-800-999-8219**, Monday through Friday from 8 a.m. to 8 p.m. ET.

Last updated: October 29, 2001

### 1.1.2 Privacy Act

This screen does not require a Help Screen.

### 1.1.3 Menu

#### Menu

#### Purpose of this page

The Menu page allows you to view system messages and access Financial Aid and Enrollment data.

#### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### System Help Links

- Click **Change Password** to change your password.
- Click **System Requirements** for instructions on the minimum system requirements and how to download and configure the Netscape Navigator or Microsoft Internet Explorer browser.
- Click **Contact Us** for the Customer Service Center phone number, e-mail address, and hours of operation.
- Click **FAQ** to view the list of Frequently Asked Questions about this site.
- Click **Download Help** to download all or part of the Help page.

### Messages

A list of system messages appears under the Messages heading on the Menu page. Each line of the list displays the date a message was posted and the beginning words of the message. To display the full message, click it. The message text appears at the bottom of the Menu page.

### Financial Aid

Links to the Financial Aid pages appear under the Financial Aid heading on the Menu page. The Financial Aid pages contain data about a borrower's loans, grants, and overpayments. Based on your access authority, you can view some or all of these pages.

To access a borrower's financial aid data:

1. Type the **SSN, First Name, and DOB** of the borrower.
2. Click one of the following links:
  - **Loan History** to view a complete history of the student's Title IV loan portfolio as reported to the NSLDS database.
  - **Overpayment History** to view or update any Perkins Loan, SEOG, or Pell Grant overpayments.
  - **Pell Grant** to view all the Pell Grants that have been reported for a student.
  - **Student Access Interface** to go to the Student Access Interface page.

### Enrollment

Links to the Enrollment pages appear under the Enrollment heading on the Menu page. The Enrollment pages contain information about student enrollment at every school where enrollment has been reported for a student. Based on your access authority, you can view some or all of these pages.

To access a borrower's enrollment data:

1. Type the **SSN, First Name, and DOB** of the borrower.

2. Click one of the following links:

- **Enrollment Summary** for a quick overview of a student's current enrollment status.
- **Enrollment Add** to retrieve student records to add enrollment information on the Enrollment Maintenance page.
- **Enrollment Update** to retrieve enrollment information for students attending your school to be updated on the Enrollment Maintenance page.
- **Enrollment Reporting Schedule** to view a user profile as well as current and past schedules for organizations that report or receive information about the enrollment status of students receiving federal student aid.

### Transfer Monitoring

Links to the Transfer Monitoring pages appear under the Transfer Monitoring heading on the Menu page. The Transfer Monitoring pages contain data about the students your school has submitted for Transfer Monitoring. Based on your access authority, you can view some or all of these pages.

To access your school's transfer monitoring data, click one of the following links:

- **Transfer Monitoring List** to view your school's list of students being monitored by the NSLDS.
- **Monitoring Alert Review** to view the list of students for whom your school has received alerts.
- **School Transfer Profile** to review and/or update your school's Transfer Monitoring Profile.

**Note:** The access privilege you requested in the NSLDS section of the Title IV Enrollment document determines the pages you can access. To review or update your form, go to [www.sfawebenroll.ed.gov](http://www.sfawebenroll.ed.gov), or contact the SAIG Customer Service Center at 1-800-330-5947.

Last updated: September 16, 2002

- If Navigation is clicked, see Section 1.2.1.1.

## 1.1.4 Change Password

<input type="checkbox"/>
<b>Change Password</b>
<b>Purpose of this page</b>
This page allows you to change your current password. The NSLDS web site requires you to enter your NSLDS User ID and current password. After successfully logging on and accepting the Privacy Act page terms and conditions, the Main Menu appears.
<b>How to change your password</b>

To change your password:

1. Enter your **User ID** and current **Password**.
2. In the **New Password** area, enter a new password. Then enter the new password in the **Confirm Password** area.
3. Click **Change Password**. An icon and message appear indicating that your password updated successfully.

**Note:** If you are already logged onto the NSLDS web site and do not wish to change your password, click **Continue** to flow to the Main Menu.

#### Tips

- Passwords must be six to eight characters in length.
- At least one character must be a number; however, the first character must be a letter.
- The new password must be different from your last four passwords.
- Passwords are valid for 120 days.
- After three unsuccessful logon attempts, your access to the NSLDS will be revoked.
- If you have any problems accessing the NSLDS, call the Customer Service Center at **1-800-999-8219**, Monday through Friday from 8 a.m. to 8 p.m. ET.

Last updated: June 23, 2000



### 1.1.5 System Requirements

This screen does not require a Help Screen.

### 1.1.6 Security

This screen does not require a Help Screen.

### 1.1.7 Contact Us

This screen does not require a Help Screen.

### 1.1.8 Frequently Asked Questions

This screen does not require a Help Screen.

### 1.1.9 Download Help

This screen does not require a Help Screen.

## 1.2 Financial Aid

### 1.2.1 Loan History

### Loan History

**Purpose of this page**

The Loan History page displays a borrower's Title IV Aggregate Loan information and summaries.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to access a student's Loan History**

To access a student's loan history:

1. Type **SSN, First Name**, and **DOB**.
2. Click **Retrieve**.

**How to add information to Transfer Monitoring List**

Directly below the student identifiers is a message that states whether this student is on the school's Transfer Monitoring list. If the student is not on the Transfer Monitoring List for your school, there is a message that states, "Student is not on Transfer Monitoring List." If the student is on the Transfer Monitoring List for your school, there is a message that states, "Student is on Transfer Monitoring List." To add a student to Transfer Monitoring List:

- Click **Add Student to Monitoring List**.

To view this student's information on the Transfer Monitoring List:

- Click **Student Monitoring Detail**.

### How to interpret Warning Symbols and Information Icons

Warning symbols and/or information icons are displayed below the Transfer Monitoring information. The warning symbols and information icons are defined as follows:

- **Additional Unsub**—The student has one or more Additional Unsubsidized loans.
- **Bankruptcy**—One or more of the borrower loans has a Bankrupt status.
- **Defaulted**—One or more of the borrower loans has a Defaulted status.
- **Discharge**—One or more of the borrower loans has a Discharge status.
- **Overpayment**—The student has one or more active overpayments in the NSLDS database.
- **Pell Grant**—The student has one or more Pell Grants in the NSLDS database.

### How to interpret the Aggregate Loan Information

The Aggregate Loan Information table displays the Loan Type, Outstanding Principal Balance, Pending Disbursements, and Total.

- The Aggregate Loan types are defined as follows:
  - **Subsidized Loans**—Direct Stafford Subsidized (D1), FFEL Stafford Subsidized (SF), Direct Consolidation Stafford Subsidized (D6).
  - **Unsubsidized Loans**—Direct Stafford Unsubsidized (D2), Direct Consolidation Unsubsidized (D5), FFEL Refinanced Loan (RF), Non-subsidized FFEL Stafford Loan (SF), FFEL Supplemental Loan (SL), FFEL Stafford Unsubsidized (SU).
  - **Combined Loans**—Direct Stafford Subsidized (D1), Direct Stafford Unsubsidized (D2), Direct Consolidation Unsubsidized (D5), Direct Consolidation Subsidized (D6), FFEL Refinanced Loan (RF), Subsidized and Non-subsidized FFEL Stafford Loan (SF), FFEL Subsidized Loan Supplemental (SL), FFEL Unsubsidized Stafford Loan (SU).
  - **FFEL Consolidated**—FFEL Consolidation (CL).
  - **Perkins**—Federal Perkins Loans - National Defense Loan (DU), Perkins Expanded Lending (EU), National Direct Student Loan (NU), Federal Perkins Loan (PU).
- **Outstanding Principal Balance**—The cumulative dollar value due for this aggregate. This amount is calculated by comparing the Approved/Guaranteed Amount, the Disbursed Amount, and Outstanding Principle Balance amounts on each loan listed. Then the lesser of those three amounts is added to the total.
- **Pending Disbursements**—The cumulative net loan amount that is awaiting disbursement to a borrower for this aggregate.
- **Total**—The Outstanding Principal Balance, as calculated above, plus Pending Disbursements.

**Note** The sorting and filtering on the Loan Summary table below does not affect these aggregates.

### How to interpret Master Promissory Notes

The Master Promissory Notes box indicates whether NSLDS has received notification that the student has a Master Promissory Note (MPN) under the Direct Loan program. The codes are defined as follows:

- **A**—Active Status
- **C**—Closed Status
- **I**—Inactive Status
- **N**—No loans with an MPN
- **N/A**—Not Available

**Note** If the student has multiple MPNs, the code that takes precedence and is viewed online is the A status.

#### How to sort and filter the Loan Summary

The Loan Summary displays data for each loan. The loans are sorted by Loan Date. Each loan that a student has borrowed is listed in this table. If a student's parent borrowed PLUS loans on behalf of the student, those loans are also listed, but not added into the student's aggregate. The parent's name displays in the Loan Type—Detail page.

You may choose which loans to display and the sort order by using the Sort by and Display Only options.

To use Sort by:

1. In the **Sort by** list, select a sort option.
2. Click **Submit**.
3. The page is updated with the new sequence numbers.

To use Display Only:

1. In the **Display Only** list, select an option.
2. Click **Submit**.

Below the Loan Summary, the sorting and filtering options that are currently in use are displayed. The page is updated with only the selected loans. Please remember that some of a student's loans may be omitted from the page when using this option.

Only 20 loans display per page. If the student has more than 20 loans, the Next Group arrow icon appears. Click this to view the next page of loans. Click the Previous Group arrow icon to view the previous page of loans.

D6	Direct Consolidation Subsidized Loan
D7	Direct Consolidation PLUS Loan
DU	National Defense Loan
EU	Perkins Expanded Lending
FI	Federally Insured Student Loan (FISL)
IC	Income Contingent Loan (ICL)
NU	National Direct Student Loan (NDSL)
PL	FFEL PLUS Loan
PU	Federal Perkins Loan
RF	FFEL Refinanced Loan
SF	FFEL Stafford Subsidized Loan
SL	Supplemental Loan (SLS)
SU	FFEL Stafford Unsubsidized Loan

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- **Additional Unsub**—Indicates whether the loan was awarded as an Additional Unsubsidized loan. The codes that indicate why the Additional Unsubsidized loan was awarded:
  - **P**—Awarded due to a PLUS loan denial.
  - **H**—Awarded for students enrolled in eligible Health Profession programs.
  - **B**—Awarded for both PLUS denial and students enrolled in eligible Health Profession programs.
- **Status**—The two-character code and description indicating the status of a loan. If the status indicates a discharged loan, a red 'D' appears before the code. The loan status codes are defined as follows:

Loan Status Code	Definition
AL	Abandoned Loan
BC	Bankruptcy Claim, Discharged
BK	Bankruptcy Claim, Active
CA	Canceled
CS	Closed School Discharge
DA	Deferred
DB	Defaulted, Then Bankrupt, Active, Chapter 13
DC	Defaulted, Compromise
DD	Defaulted, Then Died
DF	Death

DF	Defaulted, Unresolved
DI	Disability
DK	Defaulted, Then Bankrupt, Discharged, Chapter 13
DL	Defaulted, In Litigation
DN	Defaulted, Paid in Full Through Consolidation Loan
DO	Defaulted, Then Bankrupt, Active, other
DP	Defaulted, Paid in Full
DR	Defaulted Loan in Roll-Up Loan
DS	Defaulted, Then Disabled
DT	Defaulted, Collection Terminated
DU	Defaulted, Unresolved
DW	Defaulted, Write-off
DX	Defaulted, Six Consecutive Payments
DZ	Defaulted, Six Consecutive Payments, then missed payment
FB	Forbearance
FC	False Certification Discharge
IA	Loan Originated
ID	In School or Grace Period
IG	In Grace Period
IM	In Military Grace
IP	In post-deferment grace (Perkins only)
OD	Defaulted, Then Bankrupt, Discharged, Other
PC	Paid in Full Through Consolidation Loan
PF	Paid in Full
PM	Presumed Paid in Full
PN	Non-Defaulted, Paid in Full Through Consolidation Loan
RF	Refinanced
RP	In Repayment
UA	Temporarily Uninsured-No Default Claim Requested
UB	Temporarily Uninsured-Default Claim Denied
UC	Permanently Uninsured-No Default Claim Requested
UD	Permanently Uninsured-Default Claim Denied
UI	Unreinsured
XD	Defaulted, six consecutive payments

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- The loan status code is blue and underlined if the student is not in default, yellow and underlined if the student is in default. The loan status codes are hyperlinks back to the Loan Status Code list above.
- **School name and OPEID**—The school that the student attended when the loan was obtained.
- **Guaranteed Amt** (for FFEL)—The original amount, before any cancellations.
- **Approved Amt** (for Direct Loans and Perkins Loans)—The original amount, before any cancellations.
- **Disbursed Amt**—The cumulative net amount of the loan actually disbursed to a borrower.
- **OPB (Outstanding Principal Balance)**—The cumulative dollar value of the OPB due on a loan. If a red exclamation mark comes before the balance, there is capitalized interest. If there is no dollar value in this field, but the loan is still in an open status, there is an informational icon in this field. Pass your cursor over the icon for a definition. The definition is also found at the bottom of the page.
- **Agg OPB**—The amount added into the Aggregate Total.
- **Acad. Lv (Academic Level)**—The student's academic level at the time the loan was provided.
- **Loan Date**—For FFEL, the date the loan was originally guaranteed; for Direct Loan and Perkins loans, the date the loan was originally approved.
- **Sep. Loan Ind (Separate Loan Indicator)**—An indicator used to differentiate among multiple loans of the same loan date for the same borrower or student attending the same school. This field is used mostly by Guaranty Agencies.
- **Last Disbursement Amt**—The dollar amount of the most recent disbursement to the borrower for a specific loan.
- **Loan Disbursement Date**—The date of the most recent disbursement to the borrower for a specific loan.
- **Loan Period**—The period begin and end date covered by the loan.
- **GA (Guaranty Agency)**—The name of the Guaranty Agency.
- **Lender**—The name of the lender.

When reviewing the Loan Summary information, keep in mind the following:

- The lock icon may appear to the left of the Loan Type, which indicates the loan is locked. If the lock icon does not appear, the loan is unlocked.
- Income Contingent Loans (IC) and Federally Insured Student Loans (FI) are listed in Loan Summary; however, they are not added to the Aggregate totals.
- PLUS loans (FFEL PLUS Loan (PL), Direct PLUS (D4), Direct Consolidation PLUS (D7) appear in a student's Loan Summary information; however, they are not added to the Aggregate totals.
- PLUS Loans are added to the Aggregate Totals on the parent's Loan History.

In addition, you can obtain detailed information about each loan. To display Loan Detail, click the shaded

number next to the loan. The numbering of the list is for display purposes only. Sorting or filtering the list renumbers it.

At the bottom of the page, links are provided to view the next page of the student's record, to view the previous page or the top of the current page or to view the Privacy Act page. There is also a legend defining the various icons that may appear within the Loan Summary section of this page.

Last updated: March 29, 2002



### 1.2.1.1 Navigation

If Navigation is clicked, the following website displays:

## Navigation

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The Navigation page lists the Navigation Tabs that allow you to link to the main pages of each section of the NSLDS FAP Web site. It also provides a glossary of the icons and symbols used.

- Click **Menu** to access the Menu page.
- Click **Aid** to access the Loan History page.
- Click **Enroll** to access the Enrollment Summary page.
- Click **Org** to access the Organization Contact List page.
- Click **Report** to access the Report List page.
- Click **Tran** to access the Transfer Monitoring List.

The Navigation Bar is directly below the Navigation Tabs, and includes links to the other pages within that section. Your name and your institution's name display below the specified links.

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	Contact icon links you to the NSLDS contact information page for help by phone or email.
	Help icon links you to the specific Help page.
	Exit icon logs you off and returns you to the Logon page.
	Colored tab with white text indicates that you are in the active subject area.
	Tan tab with black text indicates that other subject areas are available to you by clicking that tab.
	Popup text appears near the mouse pointer explaining an icon's function. (This is an example of that text.)
	Underlined <a href="#">blue</a> text links you to additional information.
	Left arrow icon returns you to a specified page. For example:  Return to Menu.
	Right arrow icon links you to the next page in a series of pages. For example:  Go to Report Log.
	Previous group arrow icon links you to the previous list of items for this page.
	Next group arrow icon links you to the next list of items for this page.
	Alert symbol warns you of critical information that is not in error. For example: The borrower has defaulted loans.
	Information symbol notifies you that additional facts are available. For example: The borrower has received Pell Grants.
	Error symbol alerts you of an error. If the error is an entry error, the prompt for the box is displayed in bold <b>RED</b> .
	Discharge symbol warns you that loans have been discharged from repayment.
	Discharge symbol warns you that the identified loan has been discharged from repayment.
	Capitalized Interest symbol notifies you that the identified Outstanding Principal Balance contains Capitalized Interest.

	Lock icon indicates the loan is locked and cannot be updated.
	History icon links you to the Borrower Name History page or Borrower SSN History page if history exists in the database.
	Active Bullet Number icon allows you to update, delete, or see more details. Blue is the active selection color.
	Inactive Bullet Number indicates that no additional information is available regarding this item.
	Plus symbol provides you more detailed information. It is activated when the mouse pointer is on the symbol.
	Report Log Page icon links you to the Report Log.
	E-mail icon links you to e-mail.
	Glossary icon links you to the Glossary page.
	Print icon allows you to print the Help page.
	Close icon allows you to close the Help page.

Last updated: April 8, 2002

### 1.2.2 Student/PLUS Borrower Name Search

**Student/PLUS Borrower Name Search**

**Purpose of this page**

The Student/PLUS Borrower Name Search page allows you to search for records in the NSLDS database by complete or partial name, rather than SSN.

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to search for a Student/PLUS Borrower by Name

Under Student/PLUS Borrower Name Search, you can search by last name, first and last name, and by a partial or exact match type. You can also search for students or PLUS borrowers or both. A name alias is also allowed for a search.

To search by borrower name:

1. In the **Last Name** box, type the last name (for example, for John Doe, you may type Doe, Do, or D). You must have at least one character typed in the Last Name box.
2. In the Last Name **Match Type** box, click **Partial** or **Exact**.
3. In the **First Name** box, type the first name (for example, for John Doe, you may type John, Joh, Jo, J, or Jonathon if **Aliases** is selected as the First Name Match Type).
4. In the First Name **Match Type** box, click **Partial**, **Exact**, or **Aliases**.
5. In the **Search For** box, click **Student Names Only**, **PLUS Borrower Names Only**, or **Both**.
6. Click **Retrieve**.

Under First Name Aliases, the various aliases recognized by the NSLDS for the first name typed in the Student/PLUS Borrower Name Search display, if applicable. For example, if you search on 'Bill', the First Name Aliases displays: 'BILL', 'BILLE', 'BILLIE', 'BILLY', 'WLILAM', 'WILL', 'WILLAM', 'WILLE', 'WILLI', 'WILLIA', 'WILLIAM', 'WILLIAMS', 'WILLIAN', 'WILLIE', 'WILLIEMAE', 'WILLIS', 'WILLIAM', 'WM'. These are considered nicknames, likely misspellings, permutations, or full name possibilities that the NSLDS accepts for the name 'Bill'. The NSLDS will return a list of those records that match the search criteria listed above. This list will be in alphabetical order by last name, then alphabetical by first name, and contains the following:

- **Last Name**-The last name on the borrower's record.
- **First Name**-The first name on the borrower's record.
- **MI**-The middle initial, if any, on the borrower's record.
- **DOB**-The Date of Birth on the borrower's record.
- **SSN**-The Social Security Number on the borrower's record.
- **Type**-Identifies whether the record is that of a Student or PLUS borrower.
- **Cur**-Identifies whether the Name associated with the SSN is the Current name. This box will display **Y** if the name is current, or **N** if the name is historical.

This list will display the first 50 records that match your search criteria. If there are more than 50 matches, there will be a "Next" arrow will appear at the bottom of the page. Click the down arrow to retrieve the next 50 records. To access a student's record, click the numbered bullet next to the name.  
Last updated: December 11, 2001



- If Navigation is clicked, see Section 1.2.1.1.

### 1.2.3 Borrower Name History

## Borrower Name History

**Purpose of this page**

The Borrower Name History page lists name changes for a borrower in the NSLDS.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to interpret the Borrower Name History**

The borrower's Name, SSN, and Date of Birth display in the identifier box. In the table below, you can view the history of first and last names provided to NSLDS. The names are listed with the most recent first.

**Note:**  
If the history icon (the letter **H**) displays next to the borrower's SSN, click the icon to navigate to the **Borrower SSN History** page.

Last updated: July 1, 2001

- If Navigation is clicked, see Section 1.2.1.1.

### 1.2.4 Borrower SSN History

## Borrower SSN History

**Purpose of this page**

The Borrower SSN History page lists the Social Security Numbers with which the borrower has been reported in the past.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to interpret the Borrower SSN History**

The borrower's Name, SSN, and Date of Birth display in the identifier box. In the table below, you can view the borrower's list of previous SSNs, which are listed with the most recent first.

If the history icon (the letter **H**) displays next to the borrower's name, click the icon to link to the Borrower Name History page.

Last updated: November 15, 2001  
The Details for Loan table displays the following information:

- **Loan Type**—The type of Title IV award made with a formal agreement for repayment with interest. The loan types are defined as follows:
- If Navigation is clicked, see Section 1.2.1.1.

## 1.2.5 Loan Detail

To update a loan:

1. Click **Update Loan** at the top of the page.

2. The Loan Detail Update page appears.

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

The Loan Detail page displays historical information for a loan: loan details; loan amounts; loan activities; loan status changes; loan claim details; loan collection details; and Guaranty

1. Click **Delete Loan** at the top of the page.

2. The Loan Detail page redisplay with the information symbol and confirmation message appearing at the top of the page.

3. Click **Confirm** at the bottom of the page to delete the loan.

4. Click **Cancel** at the bottom of the page if you do not wish to delete the loan.

Loan Type	Definition
CL	FFEL Consolidation Loan
D1	Direct Stafford Subsidized Loan
D2	Direct Stafford Unsubsidized Loan
D4	Direct PLUS Loan
D5	Direct Consolidation Unsubsidized Loan
D6	Direct Consolidation Subsidized Loan
D7	Direct Consolidation PLUS Loan
DU	National Defense Loan
EU	Perkins Expanded Lending
FI	Federally Insured Student Loan (FISL)
IC	Income Contingent Loan (ICL)
NU	National Direct Student Loan (NDSL)
PL	FFEL PLUS Loan
PU	Federal Perkins Loan
RF	FFEL Refinanced Loan
SF	FFEL Stafford Subsidized Loan
SL	Supplemental Loan
SU	FFEL Stafford Unsubsidized Loan

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- **Loan Period Start**—The beginning date of when classes are (or were) to begin for the period covered by the loan.
- **Loan Period End**—The ending date of when classes ended (or were to end) for the period covered by the loan.
- **Date Entered Repayment**—The date the student entered or is scheduled to enter repayment.
- **Borrowed at OPEID**—The eight-digit ED code for the school where the student was enrolled or accepted for enrollment at the time the loan was originated.
- **Borrowed at Name**—The name of the school where the student was enrolled or accepted for enrollment at the time the loan was originated. Click the name of the organization to link to its Organization Contact list. *Default School for Consolidated Loans* is listed as a school name when the loan is an FFEL Consolidation Loan. This is in accordance with reporting requirements and has no bearing on the status of the loan. These loans may be entered into when a student completes his/her program of study at a particular school and wants to consolidate loans received from different schools.
- **Academic Level**—The student's academic level at the time the loan was provided. The codes are defined as follows:

Code	Definition
1	Freshman/First Year (including proprietary institution programs that are less than 1 year in duration)
2	Sophomore/Second Year
3	Junior/Third Year
4	Senior/Fourth Year
5	Fifth/Other Undergraduate (may include sixth year undergraduate and continuing education students)
A	First Year Graduate/Professional
B	Second Year Graduate/Professional
C	Third Year Graduate/Professional
D	Beyond Third Year Graduate/Professional
G	Graduate/Professional, year of study unknown
N	Not available (to be used only if the date of the first disbursement is prior to July 23, 1992, and data provider does not have required attribute)

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- **Data Provider Loan ID**—A code used by the data provider (Guaranty Agency, Direct Loan Servicer, Debt Collection Service or Perkins school) for internal loan identification.
- **Separate Loan Ind**—An indicator used to differentiate among multiple loans of the same loan date for the same borrower or student attending the same school. This field is used mostly by Guaranty Agencies.
- **Interest Rate**—The interest rate that is applied to the loan. A variable interest rate is indicated by the abbreviation VAR.

#### How to interpret Amounts for Loan

The Amounts for Loan table displays the loan amount, outstanding principal balance, and outstanding interest:

- **Date**
  - **Loan**—The date the loan was originated.
  - **Outstanding Principal Balance**—The date the outstanding principal balance was updated.
  - **Outstanding Interest**—The date the outstanding interest balance was updated.
- **Amount**
  - **Loan**—The original loan amount before any cancellations.
  - **Outstanding Principal Balance**—The cumulative dollar value due on a loan.
  - **Outstanding Interest**—The cumulative accrued outstanding interest balance on the loan.

- **Other Fees**—The accumulated fees added to late or defaulted loans. Examples of other fees are late fees, collection costs, or court costs.

#### How to Interpret Activities for Loan

The Activities for Loan table displays the disbursement, canceled, refund, and deferment activities for each loan. The table shows the date and amount for each activity. If the loan has no event activity, the table displays N/A (not available) for the disbursements.

- **Action Date**

- **Disbursements**—The date that the latest loan disbursement was made.
- **Canceled**—The date when all or part of the Title IV loan was canceled.
- **Refunds**—The date that a lender received a refund from the school.

- **Amount**

- **Disbursements**—The amount of disbursements released to a borrower.
- **Canceled**—The cumulative amount of the Title IV loan that was canceled.
- **Refunds**—The amount of refund paid to a lender on a loan.

- **Start Date**

- **Deferments**—The date when a legal deferment actually begins.

- **End Date**

- **Deferments**—The date when a legal deferment is projected to end or actually ends. Includes post-deferment grace period if applicable.

- **Type**

- **Deferments**—One of the legal reasons for postponing repayment of loan principal and interest. The codes for the deferment types are defined as follows:

---

HD	Head Start
HS	Hardship
HT	Half-Time Student
IR	Internship/Residency
LE	Law Enforcement
LF	Deferred Pending Loan Forgiveness Cancellation
NO	National Oceanic and Atmospheric Administration Corps
PC	Peace Corps
PL	Parental Leave
PP	Parental PLUS Borrower
RT	Rehabilitation Training
TD	Temporary Disability
TE	Tax-Exempt Organizations
TL	Teacher Low-Income Institution
TS	Teacher Shortage
UE	Unemployment less than 3 years
UN	Unemployment less than 2 years
WM	Working Mother

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#### How to interpret Status Changes for Loan

The Status Changes for Loan table displays a history of the loan status code and the dates the statuses became effective for the loan. The most current loan status and effective date are displayed at the top of the list:

- **Date Changed**—The date a loan status first became effective, with no interruptions. (This date is not necessarily the date the status was reported to the NSLDS. A loan status may have changed but not been updated in NSLDS for various reasons until months or years after the fact.)
- **Status**—The two-character code and description indicating the status of a loan. The loan status codes are defined as follows:

Loan Status Code	Definition
AL	Abandoned Loan
BC	Bankruptcy Claim, Discharged
BK	Bankruptcy Claim, Active
CA	Canceled
CS	Closed School Discharge
DA	Deferred

DB	Defaulted, Then Bankrupt, Active, Chapter 13
DC	Defaulted, Compromise
DD	Defaulted, Then Died
DE	Death
DF	Defaulted, Unresolved
DI	Disability
DK	Defaulted, Then Bankrupt, Discharged, Chapter 13
DL	Defaulted, In Litigation
DN	Defaulted, Paid in Full Through Consolidation Loan
DO	Defaulted, Then Bankrupt, Active, other
DP	Defaulted, Paid in Full
DR	Defaulted Loan Included in Roll-Up Loan
DS	Defaulted, Then Disabled
DT	Defaulted, Collection Terminated
DU	Defaulted, Unresolved
DW	Defaulted, Write-off
DX	Defaulted, Six Consecutive Payments
DZ	Defaulted, Six Consecutive Payments, then missed payment
FB	Forbearance
FC	False Certification Discharge
IA	Loan Originated
ID	In School or Grace Period
IG	In Grace Period
IM	In Military Grace
IP	In post-deferment grace (Perkins only)
OD	Defaulted, Then Bankrupt, Discharged, Other
PC	Paid in Full Through Consolidation Loan
PF	Paid in Full
PM	Presumed Paid in Full
PN	Non-defaulted, Paid in Full Through Consolidation Loan
RF	Refinanced
RP	In Repayment
UA	Temporarily Uninsured - No Default Claim Requested
UB	Temporarily Uninsured - Default Claim Denied
IIC	Permanently Uninsured-No Default Claim Requested

UD	Permanently Uninsured-Default Claim Denied
UI	Uninsured/Unreinsured
XD	Defaulted, six consecutive payments

•

**How to interpret Claim Details for Loan**

The Claim Details for Loan table displays the following information:

- **Date**
  - **Insurance Claim Payment**—The date when a Guaranty Agency paid an insurance claim or supplemental claim to a lender. (The *Loan Record Detail Report (LRDR)* may show an insurance claim payment date that is different than the one that displays here.)
  - **Insurance Claim Refund**—The date when a Guaranty Agency received an insurance claim refund from a lender.
  - **Reinsurance Claim Payment**—The date when a Guaranty Agency requested reinsurance.
  - **Bankruptcy Claim Refund**—The date when a bankruptcy claim (previously paid as a reinsurance claim) was refunded to ED by a Guaranty Agency.
  - **Supplemental Reinsurance Payment Request**—The date when a supplemental reinsurance claim request is submitted to ED by a Guaranty Agency
  - **Repurchase Amount**—The date when a loan previously paid by a claim is repurchased by a lender (reasons may include loan rehabilitation).
- **Cumulative Amount**
  - **Insurance Claim Payment**—The cumulative amount of principal and interest including supplemental claims paid to a lender by a Guaranty Agency for an insurance claim on an FFELP loan. Amount does not include claims that were made prior to repurchase.
  - **Insurance Claim Refund**—The cumulative dollar amount of refund(s) from a lender to a Guaranty Agency. Refunds may occur because of an overpayment of a claim, late refunds from the institution to the lender, or borrower payments to the lender after default and prior to the request for reinsurance. If reinsurance has been requested from ED, report the amount as a collection. Amount does not include refunds that were made prior to repurchase.
  - **Reinsurance Claim Payment**—The dollar amount of a reinsurance claim requested of ED by a Guaranty Agency. Amount does not include claims that were made prior to repurchase.
  - **Bankruptcy Claim Refund**—The cumulative amount remitted to ED for bankruptcy claim refund(s) on a loan. A guarantor refunds reinsurance to ED after the following sequence of events: the guarantor pays a bankruptcy claim to a lender before the bankruptcy court decides whether the loan is discharged; the guarantor collects reinsurance from ED; and the loan is not discharged by bankruptcy court. Amount does not include refunds that were made prior to repurchase.

- **Supplemental Reinsurance Payment Request**—The cumulative dollar amount of supplemental reinsurance claim request(s) of ED by a Guaranty Agency. Amount does not include requests that were made prior to repurchase.
- **Repurchase Amount**—The total (non-cumulative) amount paid to a Guaranty Agency by a lender when an FFELP loan is repurchased (including repurchases of bankruptcy claims).

- **Reason Code**

- **Insurance Claim Payment**—The code indicating the reason the latest insurance claim, including supplemental claims, was paid to a lender.
- **Reinsurance Claim Payment**—The code indicating the reason the latest reinsurance claim, including supplemental insurance, was paid to a Guaranty Agency.

The reason codes include the following:

Reason Code	Description
IX	Direct Loan Default
IN	Income Contingent Negative Amortization
FC	False Certification
EX	Exempt
BO	Bankruptcy, Other
BC	Bankruptcy, Chapter 13
DI	Disability
DF	Default
DE	Death
CS	Closed School

- **Paid Date**

- **Reinsurance Claim Payment**—The date when the government pays a reinsurance claim to a guaranty agency.

- **Rate Code**

- **Reinsurance Claim Payment**—The code indicating the rate at which the government paid a claim to the Guaranty Agency on a specific loan. The rate codes include: Code 1 (100%); Code 2 (90%); Code 3 (80%); Code 0 (0%).

- **Ind. of Rehab.**

- **Repurchase Amount**—The indicator that a repurchased loan was a rehabilitated loan.

### How to interpret Collection Details for Loan

The Collections for Loan table displays the following:

- **Date**
  - **TOP**—The date when the Guaranty Agency last applied TOP (formerly IRS) offset principal and/or interest collections to a loan.
  - **Collection**—The date when the Guaranty Agency last applied default collections (excluding TOP [formerly IRS] offset) or bankruptcy recovery to the loan principal and/or interest.
- **Cumulative Principle Amount**
  - **TOP**—The cumulative amount collected and applied to principal through TOP (formerly IRS) offset. Amount does not include collections that were made prior to repurchase.
  - **Collection**—The cumulative amount of Guaranty Agency default collections (excluding TOP [formerly IRS] collections) or bankruptcy recovery applied to loan principal. Amount does not include collections that were made prior to repurchase. Collections such as administrative wage garnishment (AWG) and state tax offsets are included.
- **Cumulative Interest Amount**
  - **TOP**—The cumulative amount collected and applied to interest through TOP (formerly IRS) offset. Amount does not include collections that were made prior to repurchase.
  - **Collection**—The cumulative amount of Guaranty Agency default collections (excluding TOP [formerly IRS] collections) or bankruptcy recovery applied to loan interest. Amount does not include collections that were made prior to repurchase. Collections such as administrative wage garnishment (AWG) and state tax offsets are included.

### How to interpret Guaranty Agency/Lender/Servicer Agent History

The Guaranty Agency/Lender/Servicer Agent History table displays a history of the holders of the loan:

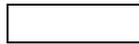
- **Start**
  - **Guaranty Agency**—The date the agency started overseeing the loan.
  - **Lender**—The date the lender started holding the loan.
  - **Servicer Agent**—The date the agent started servicing the loan.
- **End**
  - **Guaranty Agency**—The date the agency stopped overseeing the loan. The value of Current indicates the agency is overseeing the loan now.
  - **Lender**—The date the lender stopped holding the loan. The value of Current indicates the lender is holding the loan now.
  - **Servicer Agent**—The date the servicing agent stopped servicing the loan. The value of Current indicates the agent is servicing the loan now.

- **Code**—An ED-assigned number for each GA, Lender, or Servicer Agent for the specified loan.
- **Name**—The name of the GA, Lender, or Servicer Agent for the specified loan. Click the name of the Guaranty Agency, Lender, or Servicer Agent to link to its Organization Contact List.

When viewing the Loan Detail page, keep in mind the following:

- PLUS Loan information may appear at the top of this page below the Identifier information. It displays either the PLUS borrower's or the student's Name, SSN, and DOB (that is, you can view information on this loan by either typing the PLUS borrower's SSN or by typing the child's SSN when accessing Loan History).
- A PLUS Loan is a loan whereby the borrower is a parent who borrows on behalf of a student. Any PLUS loans appear on the student's Loan History. They are not added into the student's aggregate amounts, nor does a default status on any PLUS loans prevent a student from borrowing for himself or herself.

Last updated: April 18, 2002



- If Navigation is clicked, see Section 1.2.1.1.

## 1.2.6 Loan Detail Update

### Loan Detail Update

**Purpose of this page**

The Loan Detail Update page allows you to update: loan details; loan amounts; loan activities; loan status changes; loan claim details; loan collection details; and Guaranty Agency/Lender/Servicer Agent History. It also allows you to lock the loan as it currently displays without updates, or lock the loan with the updates that you submit to NSLDS.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to lock the loan**

To lock the loan as it currently displays:

1. Click **Lock Loan** at the top of the page.
2. The loan is locked. The lock icon appears on the Loan History page.

**How to update the Student's Identifiers information**

To update the Student's Identifiers information:

1. Click **Update Identifiers**.
2. The Update Student's Identifiers pop-up window displays.
3. Make updates in the Update Student's Identifiers pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to update the PLUS Borrower's Identifiers information

To update the PLUS Borrower's Identifiers information:

1. Click **Update Plus Borrower Identifiers**.
2. The Update PLUS Borrower's Identifiers pop-up window displays.
3. Make updates in the Update PLUS Borrower's Identifiers pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to update the Details for Loan information

To update the Details for Loan information:

1. Click **Update Loan Details**.
2. The Update Loan Details pop-up window displays.
3. Make updates in the Update Loan Details pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.

6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to update the Amounts for Loan information

To update the Amounts for Loan information:

1. Click **Update Loan Amounts**.
2. The Update Loan Amounts pop-up window displays.
3. Make updates in the Update Loan Amounts pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### Activities for Loan

#### How to add the Disbursements information

To add the Disbursements information:

1. Click **Add**.
2. The Add Disbursement pop-up window displays.
3. Type/select information in the Add Disbursement pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to update the Disbursements information

To update the Disbursements information:

1. Click **Update**.
2. The Update Disbursement pop-up window displays.

3. Make updates in the Update Disbursement pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to add the Canceled information

To add the Canceled information:

1. Click **Add**.

To update the Canceled information:

1. The Add Cancellations pop-up window displays.
2. Click **Update**.
3. Type/select information in the Add Cancellations pop-up window. For help using the pop-up window, click the Help icon.
3. Make updates in the Update Cancellations pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

### How to add the Refunds information

To add the Refunds information:

1. Click **Add**.
2. The Add Refund pop-up window displays.
3. Type/select information in the Add Refund pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

### How to update the Refunds information

To update the Refunds information:

1. Click **Update**.
2. The Update Refund pop-up window displays.
3. Make updates in the Update Refunds pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

### How to add the Deferments information

To add the Deferments information:

1. Click **Add**.
2. The Add Deferment pop-up window displays.
3. Type/select information in the Add Deferment pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the

option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.

6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to update the Deferments information

To update the Deferments information:

1. Click **Update**.
2. The Update Deferment pop-up window displays.
3. Make updates in the Update Deferment pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### Status Changes for Loan

#### How to add the Status information

To add the Status information:

1. Click **Add Loan Status**.
2. The Add Status for Loan pop-up window displays.
3. Type/select information in the Add Status for Loan pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to update the Status information

To update the Status information:

1. Click **Update Loan Status**.

2. The Update Status for Loan pop-up window displays.
3. Make updates in the Update Status for Loan pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

### Claim Details for Loan

#### How to add the Insurance Claim Payment information

To add the Insurance Claim Payment information:

1. Click **Add**.
2. The Add Insurance Claim Payment pop-up window displays.
3. Type/select information in the Add Insurance Claim Payment pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to update the Insurance Claim Payment information

To update the Insurance Claim Payment information:

1. Click **Update**.
2. The Update Insurance Claim Payment pop-up window displays.
3. Make updates in the Update Insurance Claim Payment pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.

6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to add the Insurance Claim Refund information

To add the Insurance Claim Refund information:

1. Click **Add**.
2. The Add Insurance Claim Refund pop-up window displays.
3. Type/select information in the Add Insurance Claim Refund pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to update the Insurance Claim Refund information

To update the Insurance Claim Refund information:

1. Click **Update**.
2. The Update Insurance Claim Refund pop-up window displays.
3. Make updates in the Update Insurance Claim Refund pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to add the Reinsurance Claim Payment information

To add the Reinsurance Claim Payment information:

1. Click **Add**.
2. The Add Reinsurance Claim Payment pop-up window displays.
3. Type/select information in the Add Reinsurance Claim Payment pop-up window. For help using the pop-up window, click the Help icon.

4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to update the Reinsurance Claim Payment information

To update the Reinsurance Claim Payment information:

1. Click **Update**.
2. The Update Reinsurance Claim Payment pop-up window displays.
3. Make updates in the Update Reinsurance Claim Payment pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to add the Bankruptcy Claim Refund information

To add the Bankruptcy Claim Refund information:

1. Click **Add**.
2. The Add Bankruptcy Claim Refund pop-up window displays.
3. Type/select information in the Add Bankruptcy Claim Refund pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to update the Bankruptcy Claim Refund information

To update the Bankruptcy Claim Refund information:

1. Click **Update**.
2. The Update Bankruptcy Claim Refund pop-up window displays.
3. Make updates in the Update Bankruptcy Claim Refund pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to add the Supplemental Reinsurance Payment Request information

To add the Supplemental Reinsurance Payment Request information:

1. Click **Add**.
2. The Add Supplemental Reinsurance Payment Request pop-up window displays.
3. Type/select information in the Add Supplemental Reinsurance Payment Request pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to update the Supplemental Reinsurance Payment Request information

To update the Supplemental Reinsurance Payment Request information:

1. Click **Update**.
2. The Update Supplemental Reinsurance Payment Request pop-up window displays.
3. Make updates in the Update Supplemental Reinsurance Payment Request pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.

6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to add the Repurchase information

To add the Repurchase information:

1. Click **Add**.
2. The Add Repurchase pop-up window displays.
3. Type/select information in the Add Repurchase pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to update the Repurchase information

To update the Repurchase information:

1. Click **Update**.
2. The Update Repurchase pop-up window displays.
3. Make updates in the Update Repurchase pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

### Collection Details for Loan

#### How to add the TOP Offset information

To add the TOP Offset information:

1. Click **Add**.
2. The Add TOP (Treasury Offset Program) pop-up window displays.

3. Type/select information in the Add TOP (Treasury Offset Program) pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

### How to update the TOP Offset information

To update the TOP Offset information:

1. Click **Update**.

To add the Collection Principal information:

1. Click **Add**.
2. The Update TOP (Treasury Offset Program) pop-up window displays.
3. Make updates in the Update TOP (Treasury Offset Program) pop-up window. For help using the pop-up window, click the Help icon.
4. Type/select information in the Add Collection pop-up window. For help using the pop-up window, click the Help icon.
5. On the Loan Detail Update page, review the information that you just updated.
6. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

### How to update the Collection Principal information

To update the Collection Principal information:

1. Click **Update**.
2. The Update Collection pop-up window displays.
3. Make updates in the Update Collection pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

### Guaranty Agency/Lender/Service Agent History

### How to transfer the Guaranty Agency information

To transfer the Guaranty Agency information:

1. Click **Transfer**.
2. The Transfer Guaranty Agency for Loan pop-up window displays.
3. Type/select information in the Transfer Guaranty Agency for Loan pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

### How to update the Guaranty Agency information

To update the Guaranty Agency information:

1. Click **Update**.
2. The Update Guaranty Agency for Loan pop-up window displays.
3. Make updates in the Update Guaranty Agency for Loan pop-up window. For help using the pop-up window, click the Help icon.

4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to add the Lender information

To add the Lender information:

1. Click **Add**.
2. The Add Lender for Loan pop-up window displays.
3. Type/select information in the Add Lender for Loan pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to update the Lender information

To update the Lender information:

1. Click **Update**.
2. The Update Lender for Loan pop-up window displays.
3. Make updates in the Update Lender for Loan pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to add the Servicer Agent information

To add the Servicer Agent information:

1. Click **Add**.
2. The Add Servicer Agent for Loan pop-up window displays.
3. Type/select information in the Add Servicer Agent for Loan pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

#### How to update the Servicer Agent information

To update the Servicer Agent information:

1. Click **Update**.
2. The Update Servicer Agent for Loan pop-up window displays.
3. Make updates in the Update Servicer Agent for Loan pop-up window. For help using the pop-up window, click the Help icon.
4. On the Loan Detail Update page, review the information that you just updated.
5. At the bottom of the page, you can submit the updated information to NSLDS. You have the option to submit the updates and lock them by clicking **Submit and Lock**, or submit the updates without locking them by clicking **Submit without Lock**. After submitting the updates, you return to the Loan History page.
6. Click **Cancel** to return to the Loan History page, which does not display any updated information.

When updating information on the Loan Detail Update page, keep in mind the following:

- If you have to make updates in different sections, you may make the updates in all the sections first, and then submit the updates to NSLDS all at once. For example, if you need to update the Detail for Loan, Activities for Loan, Claim Details for Loan, and Collection Details for Loan sections, you may update the information in each first, and then submit the updates to NSLDS at the bottom of the page.
- The status icons (*New, Revised, Delete*) display next to information to indicate what type of update has occurred. If you add information, the New icon displays. If you update information, the Revised icon displays. If you delete information, a line is drawn through the information. The status icons display until your NSLDS session ends; for example, if you add information during one session, which has a New icon, that information during the next session does not have a New icon next to it.

Last updated: May 6, 2002



- If Navigation is clicked, see Section 1.2.1.1.

## 1.2.7 Overpayment History List

### Overpayment History

**Purpose of this page**

The Overpayment History page summarizes past and present Perkins Loan, Supplemental Educational Opportunity Grant (SEOG), and Pell Grant overpayments for students. You can add or update an overpayment if you have authorized access.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to add and update an Overpayment**

- To add an Overpayment, click **Add Overpayment**.
- To update the Overpayment History, click the number icon.
- To access the Organization Contact page, click the school name.

**How to interpret the Overpayment History**

The Overpayment History table, sorted in ascending order by school, school branch, disbursement date, and type, displays the following information:

- **Type**—The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. Three types are maintained in NSLDS:
  - **Perkins**—Federal Perkins Loans. These loans include the National Defense Loan (DU), the Perkins Expanded Lending (EU), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).
  - **SEOG**—Federal Supplemental Education Opportunity Grant, a campus-based program. These grants go to undergraduate students of exceptional financial need who have not completed their first baccalaureate degree and who are financially in need of this grant to enable them to pursue their education.
  - **Pell Grant**—A federal award to help undergraduates pay for their education after high school.
- **Ind**—One of three identifiers that indicate the status of the overpayment.
  - **Overpayment**—This is the value that a school uses when first entering an active

overpayment into the system. It means that the student owes the overpayment, has not made satisfactory arrangements to repay, and should be considered ineligible for additional Title IV aid until the overpayment is repaid or otherwise resolved.

- **Repaid**—This value means that a previously reported overpayment that was in either an active Overpayment or Satisfactory Arrangement Made status has been fully repaid by the student. Schools should update the NSLDS when the final payment has been made. The date that the final payment of the overpayment was made should be entered at that time. A value of Repaid will not produce the Overpayment flags and messages on SARs and ISIRs.
- **Satisfactory Arrangement Made**—This value means that while the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. This status, when reported to other schools on a SAR or ISIR (or in the FAT process of the NSLDS), will provide documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made with the school for the arrangements to repay, the school should immediately reset the Overpayment Indicator to Overpayment. A status of Satisfactory Arrangement Made will not produce the Overpayment flags and messages on SARs and ISIRs.
- **Disbursement Date**—Date the award was made.
- **Repayment Date**—Date the overpayment was satisfied.
- **Create Date**—Date the overpayment was entered into NSLDS. This is automatically updated with the system date.
- **Source**—Codes identifying where the overpayment exists:
  - **Transfer**—When a school has transferred an overpayment to the Department of Education's Debt Collection Service (DCS), the school should update the previously reported overpayment information in NSLDS by changing the Source field from SCH to TRF. This change will not invalidate the overpayment, but it will inform any user of the system that the debt is in the process of being transferred from the school to DCS.
  - **School**—Whenever a school is attempting to add a new or update an existing overpayment record, this field is automatically updated with SCH.
  - **ED Region**—The debt is now held by one of the U.S. Department of Education's Debt Collection Service regional offices.
- **Updated**—The date the overpayment was last updated and the person performing the update is shown under the Source. This information is automatically updated by the system.

Last updated: August 14, 2001



- If Navigation is clicked, see Section 1.2.1.1.

## 1.2.8 Overpayment Add



## Overpayment Add

### Purpose of this page

The Overpayment Add page allows you to add overpayment information about a Title IV grant or a Perkins loan.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to add Overpayment information

To add overpayment information:

1. In the **School OPEID** box, type the school code.
2. In the **Type** list, click an option. (See list of definitions below)
3. In the **Disbursement Date** box, type the Disbursement Date.
4. In the **Indicator** list, click an option. (See list of definitions below)
5. In the **Repayment Date** box, type the Repayment Date, if applicable.
6. In the **Source** list, click an option. (See list of definitions below)
7. Click **Submit**.

#### Notes:

1. The **School OPEID** will automatically appear if you represent a school.
2. **Org Search** allows you to search and select a **School OPEID**. Click **Org Search** and select a School OPEID by clicking the numbered bullet next to the school. Your selection will appear in the School OPEID box.

### How to interpret Overpayment Add information

The Overpayment Add page displays the following information:

- **School OPEID**—An eight-digit ED OPE code used to identify the school and school branch.
- **Type**—The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. The following Types are maintained in the NSLDS:
  - **FEDERAL PELL GRANT**—A Federal award. These grants help undergraduates pay for their education.
  - **PERKINS LOAN**—Federal Perkins Loans. These loans include the National Defense

Loan (DU), the Perkins Expanded Lending (EU), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).

- **SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANT**—Federal Supplemental Education Opportunity Grant. A campus-based grant program based on financial need for undergraduate students who have not completed their first baccalaureate degree.
- **Disbursement Date**—The date the aid was disbursed. It is important to note that the Disbursement Date the school uses must be the same date that the school used on the letters and forms assigning the obligation to Debt Collection Service.
- **Indicator**—One of three codes identifying the status of the overpayment:
  - **OVERPAYMENT**—A school uses this Indicator when first entering an active overpayment into the system. It means that the student owes the overpayment and has not made a satisfactory arrangement to repay. Therefore, the student should be considered ineligible for additional Title IV aid until the overpayment is repaid or otherwise resolved.

**Note:** When OVERPAYMENT is selected and submitted, the **Ind** box on the Overpayment History page will display OVERPAYMENT in red shading.
  - **SATISFACTORY ARRANGEMENT MADE**—This Indicator means that although the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. A status of S reported to other schools on a SAR or ISIR (or in the FAT process of the NSLDS) will provide documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made with the school for the arrangements to repay, the school should immediately reset the Indicator to OVERPAYMENT.

**Note:** When SATISFACTORY ARRANGEMENT MADE is selected and submitted, the **Ind** box on the Overpayment History page will display SATISFACTORY ARRANGEMENT MADE.
  - **REPAID**—This Indicator means that a previously reported overpayment in an active OVERPAYMENT or SATISFACTORY ARRANGEMENT MADE status has been fully repaid by the student. Schools should update the NSLDS when the final payment has been made. The date that the final payment of the overpayment was made should be entered at that time. A REPAID status will not produce the overpayment flags and messages on SARs and ISIRs.

**Note:** When REPAID is selected and submitted, the **Ind** box on the Overpayment History page will display REPAID.
- 
- **Repayment Date**—The date the overpayment was paid in full.
- **Source**—One of three codes identifying where the overpayment exists:
  - **EDR - ED Region**—The debt is now held by one of the U.S. Department of Education's Debt Collection Service regional offices. This will also show the number assigned to the region currently holding the debt.
  - **TRF - Transfer**—When a school has transferred an overpayment to the Debt Collection Service (DCS), the school should update the previously reported overpayment

information in the NSLDS by changing the Source from School to Transfer. This change will not invalidate the overpayment, but it will indicate that the debt is in the process of being transferred from the school to DCS.

- **SCH - School**—Whenever a school is attempting to add a new or update an existing overpayment record, this box is automatically updated with School.

Last updated: August 14, 2001

- If Navigation is clicked, see Section 1.2.1.1.

## 1.2.9 Overpayment Add and Student Add

### Overpayment Add and Student Add

#### Purpose of this page

The Overpayment Add and Student Add page allows you to add student identifier information for a student who owes an overpayment on a Title IV grant or a Perkins loan.

#### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

#### How to add Student Details and Overpayment Details

If you represent a school, the school OPEID will automatically appear. If you represent the Department of Education, you may enter the school OPEID.

To add Student Details and Overpayment Details:

1. In the **First Name** box, type student's first name.
2. In the **Middle Initial** box, type student's middle initial.
3. In the **Last Name** box, type student's last name.
4. In the **Date of Birth** box, type student's date of birth.
5. In the **School OPEID** box, type the school code.
6. In the **Type** list, click an option. (See list of definitions below)
7. In the **Disbursement Date** box, type the Disbursement Date.

8. In the **Indicator** list, click an option. (See list of definitions below)
9. In the **Repayment Date** box, type the Repayment Date, if applicable.
10. In the **Source** list, click an option. (See list of definitions below)
11. Click **Submit**.

**Notes:**

- The **Social Security Number** will automatically appear because the student's SSN was typed in previously.
- The **School OPEID** will automatically appear if you represent a school.
- **Org Search** allows you to search and select a **School OPEID**. Click **Org Search** and select a School OPEID by clicking the numbered bullet next to the school. Your selection will appear in the School OPEID box.

#### How to interpret the Overpayment Details

The text boxes in Overpayment Details are defined as follows:

- **School OPEID**—An eight-digit ED OPE code used to identify the school and school branch.
- **Type**—The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. The following types are maintained in the NSLDS:
  - **FEDERAL PELL GRANT**—A Federal award. These grants help undergraduates pay for their education.
  - **PERKINS LOAN**—Federal Perkins Loans. These loans include the National Defense Loan (DU), the Perkins Expanded Lending (EU), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).
  - **SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANT**—Federal Supplemental Education Opportunity Grant. A campus-based program based on financial need for undergraduate students who have not completed their first baccalaureate degree.
- **Disbursement Date**—The date the aid was disbursed. It is important to note that the Disbursement Date the school uses must be the same date that the school used on the letters and forms assigning the obligation to Debt Collection Service.
- **Indicator**—One of three options identifying the status of the overpayment:
  - **OVERPAYMENT**—A school uses this indicator when first entering an active overpayment into the system. It means that the student owes the overpayment and has not made satisfactory arrangements to repay. Therefore, the student should be considered ineligible for additional Title IV aid until the overpayment is repaid or otherwise resolved.  
  
**Note:** When OVERPAYMENT is selected and submitted, the **Ind** box on the Overpayment History page will display OVERPAYMENT in red shading.
  - **SATISFACTORY ARRANGEMENT MADE**—This indicator means that although the student still owes the overpayment, he or she has made arrangements that are

satisfactory to the school to repay the overpayment. A status of **S** reported to other schools on a SAR or ISIR (or in the FAT process of the NSLDS) will provide documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made with the school for the arrangements to repay, the school should immediately reset the Indicator to OVERPAYMENT.

**Note:** When SATISFACTORY ARRANGEMENT MADE is selected and submitted, the **Ind** box on the Overpayment History page will display SATISFACTORY ARRANGEMENT MADE.

- **REPAID**—This Indicator means that a previously reported overpayment in an active OVERPAYMENT or SATISFACTORY ARRANGEMENT MADE status has been fully repaid by the student. Schools should update the NSLDS when the final payment has been made. The date that the final payment of the overpayment was made should be entered at that time. A REPAID status will not produce the overpayment flags and messages on SARs and ISIRs.

**Note:** When REPAID is selected and submitted, the **Ind** box on the Overpayment History page will display REPAID.

- **Repayment Date**—The date the overpayment was paid in full.
- **Source**—One of three codes identifying where the overpayment exists.
  - **EDR - ED Region**—The debt is now held by one of the U.S. Department of Education's Debt Collection Service regional offices. This will also show the number assigned to the region currently holding the debt.
  - **TRF - Transfer**—When a school has transferred an overpayment to the Debt Collection Service (DCS), the school should update the previously reported overpayment information in NSLDS by changing the Source from School to Transfer. This change will not invalidate the overpayment, but it will indicate that the debt is in the process of being transferred from the school to DCS.
  - **SCH - School**—Whenever a school is attempting to add a new or update an existing overpayment record, this box is automatically updated with School.

Last updated: July 1, 2001



- If Navigation is clicked, see Section 1.2.1.1.

## 1.2.10 Overpayment Display

**Overpayment Display**

**Purpose of this page**

The Overpayment Display page displays a selected Overpayment listed on the Overpayment History page, which can be updated or deleted.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to update and delete an Overpayment

To update an overpayment:

- Click **Update**.

To delete an overpayment:

- Click **Delete**.

### How to interpret the Overpayment Display

The Overpayment Display table displays the following information, if applicable:

- **School**—The school the student was attending when the Overpayment occurred.
- **Type**—The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. Three types are maintained in NSLDS:
  - **FEDERAL PELL GRANT**—Federal award to help undergraduates pay for their education after high school.
  - **PERKINS LOAN**—These Federal loans include the National Defense Loan (DU), the Perkins Expanded Lending (EU), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).
  - **SUPPLEMENTAL EDUCATION OPPORTUNITY GRANT**—A campus-based grant program for undergraduate students of exceptional financial need who have not completed their first baccalaureate degree.
- **Disbursement Date**—The date the student was issued the aid.
- **Ind (Indicator Code)**—One of three identifiers that indicate the status of the overpayment:
  - **OVERPAYMENT**—This is the value that a school uses when first entering an active overpayment into the system. It means that the student owes the overpayment, has not made satisfactory arrangements to repay, and should be considered ineligible for additional Title IV aid until the overpayment is repaid or otherwise resolved.
  - **REPAID**—This value means that a previously reported overpayment that was in either an active Overpayment or Satisfactory Arrangement Made Overpayment status has been fully repaid by the student. Schools should update the NSLDS when the final payment has been made. The date that the final payment of the overpayment was made should be entered at that time. A status of Repaid will not produce the Overpayment flags and messages on SARs and ISIRs.
  - **SATISFACTORY ARRANGEMENT MADE**—This value means that while the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. This status reported to other schools on a SAR or

ISIR (or in the FAT process of NSLDS) will provide documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made with the school for the arrangements to repay, the school should immediately reset the overpayment Indicator field to Overpayment. A status of Satisfactory Arrangement Made will not produce the Overpayment flags and messages on SARs and ISIRs.

- **Repayment Date**—Date the overpayment was satisfied.
- **Source**—The Codes that identify where the overpayment exists:
  - **School**—The school currently holds the Overpayment.
  - **Transfer**—When a school has transferred an overpayment to the Department of Education's Debt Collection Service (DCS), the school will update the previously reported overpayment information in NSLDS by changing the Source field from School to Transfer. This change does not invalidate the overpayment, but it does mean that the debt is in the process of being transferred from the school to DCS.
  - **EDR** — ED Region. The debt is now held by one of the U.S. Department of Education's Debt Collection Service regional offices.
  - **Region Code**—If the debt is now held by the Department of Education's Debt Collection Service, this code indicates which office holds the debt.

Last updated: July 1, 2001



- If Navigation is clicked, see Section 1.2.1.1.

## 1.2.11 Overpayment Update

### Overpayment Update

**Purpose of this page**

The Overpayment Update page allows you to update the overpayment status (Indicator), the repayment date, the source of overpayment, and the region, depending on access authority.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to update an overpayment**

To update an overpayment:

1. In the **Indicator** list, click an overpayment status. (See list of definitions below.)
2. In the **Repayment Date** box, type the date the overpayment was repaid (if applicable).
3. In the **Source** list, click a source. (See list of definitions below.)
4. In the **Region Code** list, click a region code. (Only applicable to Department of Education users.)
5. Click **Submit**.

#### How to interpret the Indicator list

- **Indicator**—One of three options identifying the status of the overpayment:
  - **OVERPAYMENT**—This is the value that a school uses when first entering an active overpayment into the system. It means that the student owes the overpayment, has not made satisfactory arrangements to repay, and should be considered ineligible for additional Title IV aid until the overpayment is repaid or otherwise resolved.
  - **REPAID**—This value means that a previously reported overpayment that was in either an active Overpayment or Satisfactory Arrangement Made status has been fully repaid by the student. Schools should update the NSLDS when the final payment has been made. The date that the final payment of the overpayment was made should be entered at that time. A status of Repaid will not produce the Overpayment flags and messages on SARs and ISIRs.
  - **SATISFACTORY ARRANGEMENT MADE**—This value means that while the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. This status, when reported to other schools on a SAR or ISIR (or in the FAT process of NSLDS), will provide documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made with the school for the arrangements to repay, the school should immediately reset the overpayment Indicator field to Overpayment. A status of Satisfactory Arrangement Made will not produce the Overpayment flags and messages on SARs and ISIRs.

#### How to interpret the Source list

- **Source**—One of three options identifying where the overpayment exists:
  - **SCH - School**—The school currently holds the Overpayment.
  - **TRF - Transfer**—When a school has transferred an overpayment to the Department of Education's Debt Collection Service (DCS), the school should update the previously reported overpayment information in NSLDS by changing the Source field from School to Transfer. This change will not invalidate the overpayment, but it will inform any user of the system that the debt is in the process of being transferred from the school to DCS.
  - **EDR (ED Region)**—The debt is now held by one of the U.S. Department of Education's Debt Collection Service regional offices.
- **Region Code**—Numerical code of a Department of Education region.

Last updated: July 1, 2001

- If Navigation is clicked, see Section 1.2.1.1.

### 1.2.12 Overpayment Delete Confirmation

## Overpayment Delete

**Purpose of this page**

The Overpayment Delete Confirmation page allows you to delete an Overpayment added in error.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to Delete an overpayment**

1. Read the Confirmation statement.
2. Review the Overpayment information displayed below the Confirmation statement.
3. To delete, click **Confirm**.
4. If you do not want to delete, click the **Return to Overpayment Display** icon in the upper left corner of the page.

Last updated: July 1, 2001

- If Navigation is clicked, see Section 1.2.1.1.

### 1.2.13 Pell Grant History

## Pell Grant History

**Purpose of this page**

The Pell Grant History page allows you to view Pell Grants that a student has been awarded.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to add and view the Transfer Monitoring information

Directly below the student identifiers is a message that states whether this student is on the school's Transfer Monitoring list. If the student is not on the Transfer Monitoring List for your school, there will be a message that states *Student is not on your school's Transfer Monitoring List*. If the student is on the Transfer Monitoring List for your school, there will be a message that states *Student is on your school's Transfer Monitoring List*.

To add student to Transfer Monitoring List:

- Click **Add Student to Monitoring List**.

To view this student's information on the Transfer Monitoring List:

- Click **Student Monitoring Detail**.

### How to interpret Pell Grant History

The Pell Grant History table displays:

- **Award Year**—The school year in which the student received a Pell Grant, as reported by the awarding campus.
- **Scheduled Amount**—Scheduled amount of the Pell Grant award.
- **Award Amount**—The amount of the Pell Grant the school expects to pay the student based on the student's enrollment and school's cost of attendance.
- **Disbursed Amount**—The amount of the Pell Grant the school has disbursed to the student.
- **Remaining Amount**—The amount of the Pell Grant the school still expects to give the student for the remainder of the award year.
- **% Scheduled Used**—Percent of eligibility the student has used.
- **As of Date**—Latest date the Federal Pell Grant Program processed the payment record.  
**Note:**  
Beginning with the school year 1999/2000, this field is the date a disbursement is made to the student.
- **Tran**—Transaction number on the SAR or ISIR for the payment accepted by the school.
- **School and OPEID**—School's name and their Department of Education eight-digit identification code. From this field, you can link to the Organization Contact List page.
- **Disb. Post Date**—The date when the Pell Grant is listed as disbursed on the Recipient Financial Management System (RFMS).
- **EFC**—(Expected Family Contribution) Index produced by the Congressional Methodology (CM) program that assesses an applicant's financial needs.

- **Ver. Flag**—Result of verification by school. The flag values are defined as follows:

Flag	Value
N	Not selected by CPS (Central Processing System)
A	Accurate
W	Without documentation
T	Tolerance
C	Calculated
R	Reprocessed
S	Selected, not verified

Last updated: November 14, 2001

- If Navigation is clicked, see Section 1.2.1.1.

## 1.2.14 Student Access History

### Student Access Interface

**Purpose of this page**

The Student Access Interface page links the NSLDS Financial Aid Professional (NSLDSFAP) Web site to the NSLDS Student Access (NSLDS) Web site. This interface allows you to view the borrower's financial aid records as the borrower would view them.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to link to the Student Access Web site**

1. Enter the **SSN, Last Name** (First 2 characters), and **DOB**.
2. Click **Link**.
3. To return to the NSLDSFAP Web site, click **Back to FAP** at the bottom of the Financial Aid Review page.

**Note:** If you stay in the Student Access Web site for over 30 minutes, you will be *timed out* of the NSLDS FAP Web site.

Last updated: July 1, 2001



- If Navigation is clicked, see Section 1.2.1.1.

## 1.3 Enrollment

### 1.3.1 Enrollment Summary

### Enrollment Summary

**Purpose of this page**

The Enrollment Summary page provides a quick overview of a student's most recent status at every school where enrollment has been reported for that student. To view a detailed history of a student's enrollment status, use the Enrollment Detail page. To view a chronology of the student's enrollment status, use the Enrollment Timeline page.

Wherever possible, the Enrollment Summary page displays enrollment information reported by schools. It only displays information reported by guaranty agencies or other non-school organizations when they have reported on a particular student but the school has not.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

The buttons beneath the page title allow you to navigate to the following pages populated with information about the student displayed on Enrollment Summary:

- Enrollment Detail
- Enrollment Timeline
- Enrollment Maintenance

Clicking the active number icon to the left of an Enrollment Summary record links you to the Enrollment Detail page for the student at that school.

**How to interpret the Enrollment Summary**

The Enrollment Summary page displays the following information:

- **School Name**—The name of the school at which enrollment was reported for the student. Click the school name to link to the school's Organization Contact List page. If the information about the student's enrollment at this school was not reported by the school itself, a small warning icon appears after the school's name.

- **OPEID**—The eight-digit Office of Postsecondary Education Identification number for the school at which enrollment was reported.
- **Most Recent Status**—The status most recently reported for the student at that school. Users wanting to view the full history of a student's status at one or more schools should navigate to the Enrollment Detail page.
- **Eff. Date**—The Effective Date, which is the date when the most recently reported status took effect. The following special rules apply:
  - NSLDS sets Effective Date equal to Certification Date for Enrollment Status 'X' (Never Attended) and 'Z' (No Record Found) when the date is not reported by the school.
  - The NSLDS sets Effective Date equal to 12/31/9999 when it is not supplied by the school for records with an Enrollment Status of 'D' (Deceased).
- **ACD**—The Anticipated Completion Date, which is the date the student completed, or was expected to complete, his or her studies. The following special rules apply:
  - The NSLDS sets Anticipated Completion Date to 01/01/0001 for Enrollment Status 'Z' (No Record Found), 'W' (Withdrawn), and 'L' (Less Than Half Time).
  - The NSLDS sets Anticipated Completion Date to 12/31/9999 for Enrollment Status 'D' (Deceased).
  - The NSLDS sets Anticipated Completion Date equal to Effective Date for Enrollment Status 'G' (Graduated).
- **Cert. Date**—The Certification Date, which is the date as of which the school certified the enrollment information.
- **Cert. Method**—The method the school used to certify the enrollment information.
  - *School Batch*—The school certified the enrollment information through the batch enrollment reporting process.
  - *NSLDS Web*—The school certified the enrollment information using the Enrollment Maintenance page.

Sources other than schools do not certify enrollment data. So if an Enrollment Summary record is based on non-school data, the Cert. Date and Cert. Method boxes for that record display 'N/A' (Not Applicable).  
Last updated: April 18, 2002

- If Navigation is clicked, see Section 1.2.1.1.

### 1.3.2 Student/PLUS Borrower Name Search

<input type="text"/> <b>Student/PLUS Borrower Name Search</b>	<input type="text"/>
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### Purpose of this page

The Student/PLUS Borrower Name Search page allows you to search for records in the NSLDS database by complete or partial name, rather than SSN.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to search for a Student/PLUS Borrower by Name

Under Student/PLUS Borrower Name Search, you can search by last name, first and last name, and by a partial or exact match type. You can also search for students or PLUS borrowers or both. A name alias is also allowed for a search.

To search by borrower name:

1. In the **Last Name** box, type the last name (for example, for John Doe, you may type Doe, Do, or D). You must have at least one character typed in the Last Name box.
2. In the Last Name **Match Type** box, click **Partial** or **Exact**.
3. In the **First Name** box, type the first name (for example, for John Doe, you may type John, Joh, Jo, J, or Jonathon if **Aliases** is selected as the First Name Match Type).
4. In the First Name **Match Type** box, click **Partial**, **Exact**, or **Aliases**.
5. In the **Search For** box, click **Student Names Only**, **PLUS Borrower Names Only**, or **Both**.
6. Click **Retrieve**.

Under First Name Aliases, the various aliases recognized by the NSLDS for the first name typed in the Student/PLUS Borrower Name Search display, if applicable. For example, if you search on 'Bill', the First Name Aliases displays: 'BILL', 'BILLE', 'BILLIE', 'BILLY', 'WLILAM', 'WILL', 'WILLAM', 'WILLE', 'WILLI', 'WILLIA', 'WILLIAM', 'WILLIAMS', 'WILLIAN', 'WILLIE', 'WILLIEMAE', 'WILLIS', 'WILLIAM', 'WM'. These are considered nicknames, likely misspellings, permutations, or full name possibilities that the NSLDS accepts for the name 'Bill'. The NSLDS will return a list of those records that match the search criteria listed above. This list will be in alphabetical order by last name, then alphabetical by first name, and contains the following:

- **Last Name**-The last name on the borrower's record.
- **First Name**-The first name on the borrower's record.
- **MI**-The middle initial, if any, on the borrower's record.
- **DOB**-The Date of Birth on the borrower's record.
- **SSN**-The Social Security Number on the borrower's record.
- **Type**-Identifies whether the record is that of a Student or PLUS borrower.
- **Cur**-Identifies whether the Name associated with the SSN is the Current name. This box will display **Y** if the name is current, or **N** if the name is historical.

This list will display the first 50 records that match your search criteria. If there are more than 50 matches, there will be a "Next" arrow will appear at the bottom of the page. Click the down arrow to retrieve the next 50 records. To access a student's record, click the numbered bullet next to the name. Last updated: December 11, 2001

- If Navigation is clicked, see Section 1.2.1.1.

### 1.3.3 Enrollment Detail

## Enrollment Detail

**Purpose of this page**

The Enrollment Detail page displays a detailed history of a student's enrollment status at one or more schools. To view a brief overview of a student's current enrollment status, use the Enrollment Summary page. To view a chronology of the student's enrollment status, use the Enrollment Timeline page.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to use the Advanced Display Options**

The Advanced Display Options allow you to filter and sort the enrollment information displayed by Enrollment Detail. The following Advanced Display Options are available:

- **Enrollment At**—Allows you to select enrollment information about all the schools the student has attended or about an individual school identified by name and OPEID
- **Show Records**—Allows you to select which records to view:
  - *All Active and Inactive*—Allows you to view a complete record of what enrollment information was reported to the NSLDS and when it was reported. If you select this option, you should distinguish between active records, which contain current information about a student's enrollment history, and inactive records, which contain enrollment information previously reported to the NSLDS but no longer current.
  - *Active Only*—Active records collectively constitute the NSLDS's current understanding of a student's enrollment history. (Inactive records contain enrollment information that was reported to the NSLDS at some time in the past but then corrected at a later date.) Showing all active records allows you to view a complete record of a student's enrollment history as the NSLDS currently understands it.
  - *Active Only, Changes Only, Earliest Certified*—Allows you to view only active records that contain a change in Enrollment Status, Effective Date, or Anticipated Completion

Date from the previous record reported to the NSLDS. If you select this option, records containing such changes are displayed together with the first Certification Date on which they took effect.

- *Active Only, Changes Only, Latest Certified (Default Setting)*—Allows you to view only active records that contain a change in Enrollment Status, Effective Date, or Anticipated Completion Date from the previous record reported to the NSLDS. If you select this option, records containing such changes are displayed together with the last Certification Date on which they were in effect.
- **Reported By**—Allows you to restrict the enrollment information that displays to what was reported by specific types of organizations.
  - *All*—Allows you to view information reported by both schools and non-school organizations such as guaranty agencies and lenders.
  - *Schools (Default Setting)*—Allows you to view only information reported by schools.
  - *Non-Schools*—Allows you to view only information reported by organizations other than schools, including guaranty agencies and lenders.
- **Sort Schools By**—Allows you to select the order in which the schools students have attended are displayed on the page.
  - *OPEID (Default Setting)*—Orders the schools numerically by their eight-digit Office of Postsecondary Education Identification number (OPEID).
  - *Name*—Orders the schools alphabetically by their names. If you cannot find the records for a school when you select this option, try school name variations (for example, “Alaska, University of” rather than “University of Alaska”).
  - *Merge Schools*—Combines enrollment information from all the schools the student attended in a single table.
- **Sort Records By**—Allows you to select the order in which records for a student’s enrollment at a given school are displayed.
  - *Reported By, Certification Date (Default Setting)*—Performs a primary sort on Reported By and a secondary sort on Certification Date.
  - *Reported By, Effective Date*—Performs a primary sort on Reported By and a secondary sort on Effective Date.
  - *Reported By, Anticipated Completion Date*—Performs a primary sort on Reported By and a secondary sort on Anticipated Completion Date.
  - *Date Received*—Performs a single sort on the date when the NSLDS received the information. This sort is the only sort that mixes records reported by schools with records reported by guaranty agencies and other organizations. It can help you determine the order in which enrollment information was reported to the NSLDS, regardless of effective date.
- **Begin Effective Date**—Allows you to display only records with an Effective Date later than or equal to the date you enter.

- **End Effective Date**—Allows you to display only records with an Effective Date earlier than or equal to the date you enter.

#### How to interpret the Enrollment Detail

The Enrollment Detail table displays the following information for each enrollment record that matches the Advanced Display Options you selected:

- **School Name and OPEID**—The name and OPEID of the school where enrollment has been reported for a student. These normally display on a separate row that divides the records for enrollment at one school from the records for enrollment at another school. When you select Merge Schools as the option for Sort Schools By, schools' OPEIDs display in a single column at the left side of the Enrollment Detail table.
- **Reported By**—Identifies the type of organization that reported the enrollment information.
- **Reported By ID**—Contains the organizational code, such as the OPEID or guaranty agency number, for the organization that reported the enrollment information.
- **Status**—The student's enrollment status.
- **Eff. Date**—The Effective Date, which is the date when the reported enrollment status took effect. The following special rules apply:
  - NSLDS sets Effective Date equal to Certification Date for Enrollment Status 'X' (Never Attended) and 'Z' (No Record Found) when the date is not reported by the school.
  - NSLDS sets Effective Date equal to 12/31/9999 when it is not supplied by the school for records with an Enrollment Status of 'D' (Deceased).
- **Active**—A flag identifying whether a record reflects the NSLDS's current understanding of a student's enrollment history.
  - *Yes*—Indicates that the record is active and reflects the NSLDS's current understanding of a student's enrollment history.
  - *No*—Indicates that the record is no longer active. It contains enrollment information that was reported to the NSLDS at some point in the past but was subsequently corrected by a later submission.
- **ACD**—The Anticipated Completion Date, which is the date the student completed, or was expected to complete, his or her studies. The following special rules apply:
  - The NSLDS sets Anticipated Completion Date to 01/01/0001 for Enrollment Status 'Z' (No Record Found), 'W' (Withdrawn), and 'L' (Less Than Half Time).
  - The NSLDS sets Anticipated Completion Date to 12/31/9999 for Enrollment Status 'D' (Deceased).
  - The NSLDS sets Anticipated Completion Date equal to Effective Date for Enrollment Status 'G' (Graduated).
- **Cert. Date**—The Certification Date, which is the date as of which the school certified that the enrollment information was accurate.

- **Cert. Method**—The method the school used to certify the enrollment information.
  - *School Batch*—The school certified the enrollment information through the batch enrollment reporting process.
  - *NSLDS Web*—The school certified the enrollment information using the Enrollment Maintenance page on this site.
- **Date Received**—Indicates the day when the NSLDS processed the enrollment information. In cases where different organizations were reporting different information about the same student, or where you suspect that an organization may not have reported information in a timely fashion, you can use the Date Received to determine when information was reported to the NSLDS and in what order.

Sources other than schools do not certify enrollment information. So if an Enrollment Detail record is based on non-school data, the Cert. Date and Cert. Method boxes for that record display 'N/A' (Not Applicable).

Last updated: April 18, 2002

- If Navigation is clicked, see Section 1.2.1.1.

### 1.3.4 Enrollment Timeline

## Enrollment Timeline

**Purpose of this page**

The Enrollment Timeline page displays a chronological view of a student's enrollment history. Within each time period displayed on this page, no organization reported a change in the student's enrollment status at any school. When any organization did report a new enrollment status for the student at any school, a new time period begins. This page is intended to help users, especially lenders, see all of a student's enrollment statuses at a given time in the past and how long those statuses remained in effect.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to use the Advanced Display Options**

To use the advanced display options:

1. In the **Reported By** list, click a selection.
2. Type a date in the **Date** box.

3. Click **Apply**.

#### How to interpret the Advanced Display Options

The following advanced display options are available:

- **Reported By**—Allows you to restrict the enrollment information that displays to what was reported by specific types of organizations.
  - *All*—Allows you to view information reported by both schools and non-school organizations, including guaranty agencies and lenders.
  - *Schools (Default Setting)*—Allows you to view only information reported by schools.
  - *Non-Schools*—Allows you to view only information reported by organizations other than schools, including guaranty agencies and lenders.
- **Date**—Causes the time range that contains the date you type to display at the top of your screen. You will still be able to scroll up or down to earlier or later time periods.

#### How to interpret the Enrollment Timeline

The Enrollment Timeline table displays the following information in descending chronological order, from the present to the earliest time period for which any enrollment was reported. All the enrollment information displayed on the timeline is ordered by Effective Date. Within any time period, no organization reported a new enrollment status for the student at any school.

- **Statuses in Effect**—The dates within which a set of enrollment statuses were in effect. This information occupies the banners that extend across the page and divide one time period from the next.
- **School OPEID**—The Office of Postsecondary Education Identification number (OPEID) of the school for which enrollment was reported.
- **Reported By**—Identifies the type of organization that reported the enrollment information.
- **Reported By ID**—Identifies the organizational code, such as OPEID or guaranty agency number, for the organization that reported the enrollment information.
- **Status**—The student's enrollment status.
- **Eff. Date**—The Effective Date, which is the date when the status took effect. The following special rules apply:
  - NSLDS sets Effective Date equal to Certification Date for Enrollment Status 'X' (Never Attended) and 'Z' (No Record Found) when the date is not reported by the school.
  - NSLDS sets Effective Date equal to 12/31/9999 when it is not supplied by the school for records with an Enrollment Status of 'D' (Deceased).
- **Last ACD**—The Anticipated Completion Date most recently reported to NSLDS for that status. The Anticipated Completion Date is the date when the student completed, or was expected to complete, his or her studies. The following special rules apply:
  - The NSLDS sets Anticipated Completion Date to 01/01/0001 for Enrollment Status 'Z' (No Record Found), 'W' (Withdrawn), and 'L' (Less Than Half Time).

- The NSLDS sets Anticipated Completion Date to 12/31/9999 for Enrollment Status 'D' (Deceased).
- The NSLDS sets Anticipated Completion Date equal to Effective Date for Enrollment Status 'G' (Graduated).

Last updated: April 18, 2002

- If Navigation is clicked, see Section 1.2.1.1.

### 1.3.5 Enrollment Maintenance

## Enrollment Maintenance

**Purpose of this page**

The Enrollment Maintenance page allows school users to update enrollment information for students attending their school.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

Enrollment Maintenance displays up to thirty student records at a time. If the search options you typed retrieve more than thirty records, those records are spread across as many pages as are necessary to display them thirty at a time. Use the Next and Previous arrows to move from page to page.

You must submit and confirm any changes to the enrollment records displayed on an individual Enrollment Maintenance page before navigating to another page. Clicking the Previous or Next arrow, or otherwise navigating to another page, before submitting and confirming changes causes any new data you typed to be lost.

**How to retrieve student enrollment information**

If you linked to Enrollment Maintenance from Enrollment Update, any Advanced Search Options you set on Enrollment Update remain in effect on Enrollment Maintenance. To change them, you must return to Enrollment Update. For your convenience, all the Search Options currently in effect are displayed in the shaded block at the top of Enrollment Maintenance.

If you navigated to Enrollment Maintenance from Enrollment Summary or Enrollment Add, you can only update enrollment information for the student(s) already displayed on the earlier screen. You cannot initiate a new search for different student enrollment information.

To retrieve student enrollment information:

1. In the **Retrieve/Sort by** list, click a selection.

2. In the **Begin Value** box, type a Begin Value.
3. Check **Exact Match Only** if you want an exact match for the Begin Value you typed.
4. Verify that the Primary Search Options you have selected do not contradict any Advanced Search Options you selected earlier on Enrollment Update.
5. Click **Retrieve**.
6. The Enrollment Maintenance page redisplay with the student records retrieved by your search.

#### How to update student enrollment information

To update student enrollment information:

1. Type a recertification date in the **Recertification Date** box, or accept the default date (the current date) displayed by the page. This date is used to populate the Cert. Date box of the individual student records you select in step 2 below.
2. Select the student enrollment records you want to certify. There are two ways to do this:
  - a. Select the records individually by clicking the check box to the far left of the row with the student's SSN, name, and DOB.
  - b. Select all the records displayed on the page by clicking **Check All** at the top of the form.
3. Update as necessary the information in the following boxes:
  - a. Cert. Date (Certification Date)
  - b. Enroll. Code (Enrollment Code)
  - c. Eff. Date (Effective Date)
  - d. ACD (Anticipated Completion Date)
  - e. Student Designator
4. Click **Certify Checked Students**.
5. If the information you submitted passes the edits applied by the NSLDS, the Enrollment Maintenance Confirm page displays.

When updating student enrollment information, keep in mind the following:

- If you check records (Step 2) but then decide that you do not want to certify them, uncheck the records individually or click **Uncheck All** at the top of the form. When you uncheck a record, the Cert. Date reverts to whatever date it was set to before you selected the record, but any other changes you made to enrollment information remain.
- If you click **Reset**, Enrollment Maintenance redisplay with whatever information it displayed after its last trip to the mainframe. This creates two possibilities:
  1. If you have not clicked Submit, Enrollment Maintenance redisplay with the information it displayed when you first navigated to it.

2. If you have clicked Submit one or more times, Enrollment Maintenance redisplay with the information it displayed after you last clicked Submit.
- Sometimes, submitting and confirming an update to a student's enrollment status causes that student to "disappear" from the Enrollment Maintenance page. This happens because your school no longer has any obligation to report enrollment information for a student under the following circumstances:
    - There is no longer any lending institution with an interest in tracking the enrollment status of the student. The NSLDS only tracks enrollment information for students with an open FFELP or Direct loan. When you update a student's enrollment status, the NSLDS also verifies that the student still holds an open loan and so is of interest to some lending institution. If the student no longer holds an open loan, the NSLDS removes that student from the Enrollment Maintenance page for your school, regardless of the student's enrollment status.
    - You update a student's enrollment status to Withdrawn ('W') or Deceased ('D') with an Effective Date more than 180 days in the past.
    - You update a student's enrollment status to Graduated ('G') with an Effective Date more than 180 days in the past, and the student has a loan with a status of Loan Originated ('IA'), In Grace Period ('IG'), In Military Grace ('IM'), or In School or Grace Period ('ID').
    - You update a student's enrollment status to No Record Found ('Z').

Even if a student does "disappear" from the Enrollment Maintenance page after you update his or her enrollment information, the NSLDS still stores the information you updated. To display that information, navigate to the Enrollment Summary page and use that page's Student Search to find the student.

#### How to confirm updates to student enrollment information

To confirm updates to student enrollment information:

1. Verify the updated enrollment information displayed on the Enrollment Maintenance Confirm page to make sure it is correct and up-to-date.
2. Click **Confirm**.
3. The Enrollment Maintenance page redisplay with the updated enrollment information.

#### How to correct errors displayed by Enrollment Maintenance

If the information you submitted does not pass the edits applied by the NSLDS, Enrollment Maintenance redisplay with any rows that contained errors preceded by a small error icon. Place your cursor over the icon to display the error message as a ToolTip. There are several ways to correct errors so the enrollment information you updated passes all edits:

- Edit the data in the boxes for Cert. Date, Enroll. Code, Eff. Date, ACD, and Student Designator record-by-record.
- If you are unable to correct an individual record so that NSLDS accepts it, uncheck that record so it is not submitted when you resubmit the other student records you want to certify. Then write down the student identifiers for the record, or identify some search criteria that allow you to retrieve and certify it later, after you have done the research needed to submit information

acceptable to the NSLDS.

- If the records you want to certify have become hopelessly full of errors or failed edits, use the Primary Search Options at the top of Enrollment Maintenance to retrieve your school's student enrollment records afresh, or return to Enrollment Update to select new Advanced Search Options and retrieve a different set of records.

The NSLDS applies the following edits to enrollment updates:

Code	Description
15	Anticipated Completion Date must be a valid date in mm/dd/ccyy format when Enrollment Status Code is 'A', 'F', or 'H'.
16	Anticipated Completion Date cannot be more than ten years after the Certification Date.
21	Effective Date must be a valid date in mm/dd/ccyy format. It must be greater than both Certification Date minus 45 years and Date of Student's Birth plus 12 years.
22	You cannot report an Enrollment Code of 'Z' for a student if an enrollment history (Enrollment Code of 'F', 'H', 'A', or 'L') already exists for that student at your school.
23	Effective Date must be a valid date in mm/dd/ccyy format. This edit is not applied to Enrollment Status 'D', 'X', or 'Z' if the Effective Date is not populated.
26	Anticipated Completion Date must be greater than Certification Date when you report an Enrollment Code of 'A', 'F', or 'H'. The NSLDS substitutes the ACD on its database when you leave this box blank, but the substituted ACD is still subject to this edit.
30	Certification Date must be greater than or equal to Effective Date.
32	You cannot report a new Certification Date earlier than the Certification Date currently on the NSLDS database while at the same time reporting a change to Enrollment Code, Effective Date, or Anticipated Completion Date. You can, however, report an earlier Certification Date if Enrollment Code, Effective Date, and Anticipated Completion Date are unchanged.
33	Anticipated Completion Date must be greater than or equal to Effective Date for Enrollment Codes 'F', 'H', and 'L'.
34	Effective Date cannot equal Certification Date if the Enrollment Code is 'F', 'H', or 'A' and remains unchanged.
35	Certification Date cannot be more than 180 days after Effective Date for Enrollment Code 'A'.
37	Certification Date must be a valid date in mm/dd/ccyy format.
38	Certification Date cannot be more than 72 days prior to the current date.
39	Certification Date cannot be a date in the future.

The date edits include the following:

- Anticipated Completion Date is adjusted by NSLDS to 0001-01-01 for Enrollment Status 'X', 'Z', 'W', and 'L'.
- Anticipated Completion Date is adjusted by NSLDS to 9999-12-31 for Enrollment Status 'D'.
- Anticipated Completion Date is adjusted by NSLDS to Enrollment Status Effective Date for Enrollment Status 'G'.
- Enrollment Status Effective Date is adjusted by NSLDS to Certification Date when not supplied by the school and the Enrollment Status is 'X' or 'Z'.
- Enrollment Status Effective Date is adjusted by NSLDS to 9999-12-31 when not supplied by the

school and Enrollment Status is 'D'.

### How to use the Primary Search Options

The Primary Search Options at the top of the Enrollment Maintenance page give you these options:

- **Retrieve/Sort by**—Allows you to retrieve and display student enrollment records by:
  - *SSN (Default)*—Displays student records in ascending numeric order by student Social Security Number.
  - *Last Name*—Displays student records in ascending alphabetic order by student last name.
  - *Student Designator*—Displays student records ordered by the identifier you use on your internal system, provided that you report that identifier to the NSLDS as part of the Enrollment Reporting process.
- **Begin Value**—Allows you to set a lower limit for retrieving and displaying records. If you leave Exact Match Only unchecked, Enrollment Update retrieves any student records that match the Begin Value you type or come after it in ascending alphanumeric order.
- **Exact Match Only**—Must be used in combination with a Begin Value. Allows you to retrieve only records that match exactly with the Begin Value you typed. When used with SSN or a unique Student Designator, Exact Match Only returns no more than one student record. When used with Last Name, Exact Match Only returns records for all students with that last name.

### Understanding search options

Beneath the Primary Search Options at the top of the Enrollment Maintenance page, a shaded block displays the search options currently in effect. These options determine what records are retrieved from the NSLDS database and displayed on Enrollment Maintenance.

To change the search options in effect, do the following:

- To change Primary Search Options, follow the directions in the previous section of this Help page.
- To change Advanced Search Options, return to the Enrollment Update page and follow the directions in the Help for that page.

### Understanding student enrollment records

The Enrollment Maintenance page displays individual student records across two rows. The first row is shaded and contains the following items, from left to right:

- **Check Box**—Click this box to select a record for certification. You can check records one-by-one, or you can check all the records on the page by clicking **Check All**.
- **Active Number Icon**—Each record on the page is identified by an active number icon. Clicking an icon links you to the Enrollment Summary page for that student. Records are numbered in ascending sequence and displayed in groups of 30. As you update those records, some may "disappear," leaving gaps in the numbering sequence. This happens under the following circumstances:
  - You update a record with information that falls outside the search options in effect. For example, if you display only records with Full Time status and update some of them to Half Time, the Half Time records are not displayed after you confirm the updates.

- You update a record to a status that no longer requires your school to report enrollment information for that student.

Although individual records may "disappear" in this fashion, the group of records displayed on the page retains its integrity until you retrieve a new set of records or leave Enrollment Maintenance entirely. This means that a record that originally displayed on the third page of records returned by Enrollment Maintenance continues to display on the third page no matter how many other records are updated or "disappear." It does not migrate to the second or fourth page as you page up or down.

- **SSN**—The student's Social Security Number.
- **Name**—The student's full name (first name, middle initial, and last name).
- **DOB**—The student's date of birth.

Although you can retrieve enrollment records by SSN alone, the NSLDS identifies individual students by SSN, name, and DOB. Because duplicate SSNs are possible, you should make it a habit to verify all three student identifiers before certifying any student record. Not doing so creates a risk that you may certify enrollment information for the wrong student.

The second row is unshaded and contains the following items, from left to right:

- **Cert. Date**—The Certification Date, which is the date as of which you certify that a student's enrollment information is accurate and up-to-date. There are two ways to change the Certification Date for an individual enrollment record:
  1. Type a new Recertification Date at the top of the page and then check the enrollment record. By default, the Recertification Date is set to the current date.
  2. Check the enrollment record first and then edit the contents of the Cert. Date box directly.
- **Enroll. Code**—The Enrollment Code identifying a student's current enrollment status. Valid values are:
  - 'A'—Approved Leave of Absence
  - 'D'—Deceased
  - 'F'—Full Time
  - 'G'—Graduated
  - 'H'—Half Time or More, But Less Than Full Time
  - 'L'—Less Than Half Time
  - 'W'—Withdrawn
  - 'X'—Never Attended
  - 'Z'—No Record Found
- **Eff. Date**—The Effective Date, which is the date when the student's current status first took effect.

- **ACD**—The Anticipated Completion Date, which is the date you expect a student to graduate or otherwise complete a course of studies.
- **Student Designator**—Any code you use to identify students on your own database or tracking system.

Last updated: April 25, 2002

- If Navigation is clicked, see Section 1.2.1.1.

### 1.3.6 Enrollment Add

## Enrollment Add

**Purpose of this page**

The Enrollment Add page allows school users to retrieve student records so they can update enrollment information for those students on the Enrollment Maintenance page.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to retrieve student records**

To retrieve student records:

1. Type student identifiers for the students whose enrollment information you want to update in the **SSN** (Social Security Number), **First Name**, and **DOB** (Date of Birth) boxes.
2. Click **Retrieve** at the bottom of the page.
3. The Enrollment Maintenance page displays enrollment records for the students.

You can either type information in all three boxes (First Name, DOB, and SSN), or only type information in the SSN box.

- If you type SSN only, and that SSN is shared by two or more students, Enrollment Add will require you to type First Name and DOB as well to retrieve a student.
- If you retrieve students by SSN alone, check all three identifiers of the student records that display on the Enrollment Maintenance page to make sure that Enrollment Add has retrieved the students you want.

To clear the SSN, First Name, and DOB boxes on a given row, click **Clear**.

**How to identify errors**

Enrollment Add performs a number of edits on the identifiers you type. The page will not retrieve any

students for display on the Enrollment Maintenance page until all the identifiers you typed pass those edits. If any identifiers fail edits, Enrollment Add displays a general error message at the top of the page. In addition, it displays small error icons before each row of identifiers containing an error. To see the error message for a particular row, run your cursor over the small error icon, and the error message displays as a ToolTip.

#### How to correct errors

To correct errors, you may have to adopt one or more of the following strategies:

- Correct any typographical errors or omissions.
- Verify that you are searching for the right student.
- Verify that the student you are searching for exists in the NSLDS database.

If you are unable to correct an error no matter what you do, click the **Clear** button to the left of any identifiers that have been flagged as containing errors; then retrieve the remaining students whose identifiers have passed all edits.

#### What displays on the Enrollment Maintenance page

When you access the Enrollment Maintenance page from Enrollment Add, the information that displays on that page depends upon the student's prior enrollment history at your school.

- If you have never reported the student as attending your school, only the student's SSN, Name, and DOB will display on the Enrollment Maintenance page. The boxes for enrollment information will all be blank.
- If you have previously reported the student as attending your school, the student's SSN, Name, and DOB will display on the Enrollment Maintenance page. In addition, the boxes for enrollment information will be populated with the enrollment information you most recently reported for that student. You will be able to update those boxes as necessary.

Last updated: November 26, 2001

- If Navigation is clicked, see Section 1.2.1.1.

### 1.3.7 Enrollment Update

#### Enrollment Update

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site. The Enrollment Update page allows school users to retrieve enrollment information for students

### How to retrieve student enrollment information

To retrieve a student using the Primary Search Options:

1. In the **Retrieve/Sort by** list, click a selection.
2. In the **Begin Value** box, type a Begin Value.
3. Click the **Exact Match Only** check box if you want an exact match for the Begin Value you typed.
4. Click **Retrieve**.
5. The Enrollment Maintenance page displays.

To retrieve a student using the Advanced Search Options:

1. Select the Primary Search Options you want.
2. Select the Advanced Search Options you want.
3. Click **Retrieve**.
4. The Enrollment Maintenance page displays.

#### Notes:

- If you do not enter any Primary or Advanced Search Options and accept the default sort on Student SSN, your organization's entire Student Portfolio displays in SSN order on the Enrollment Maintenance page.
- Advanced Search options are evaluated together with Primary Search options. Neither supersedes the other. This means that if your Primary and Advanced Search Options contradict each other, Enrollment Update will not find any records, even though each individual part of the combination would find and display records. For example, if you select an exact match on Student SSN 111-11-1111 as your Primary Search Option and Student SSNs between 555-55-5555 and 888-88-8888 as your Advanced Search Option, Enrollment Update will not find any records, even though the NSLDS contains enrollment records for a student with SSN 111-11-1111 and for students with SSNs between 555-55-5555 and 888-88-8888.
- Any search options you select on the Enrollment Update page remain in effect for subsequent searches on the Enrollment Maintenance page that displays the results of your initial search. To change search options, you must return to Enrollment Update.

### How to use the Primary Search Options

The Primary Search Options include the following:

- **Retrieve/Sort by**—Allows you to retrieve and display student enrollment records by:
  - *SSN (Default)*—Displays student records in ascending numeric order by student Social Security Number.
  - *Last Name*—Displays student records in ascending alphabetic order by student last

name.

- *Student Designator*—Displays student records ordered by the identifier you use on your internal system, provided that you report that identifier to the NSLDS as part of the Enrollment Reporting process.
- **Begin Value**—Allows you to set a lower limit for retrieving and displaying records. That limit should be numeric if you are retrieving by SSN and alphabetic if you are retrieving by Last Name. The Begin Value for retrieving by Student Designator can be either numeric or alphabetic, depending upon the format you use for designators. If you leave Exact Match Only unchecked, Enrollment Update retrieves any student records that match the Begin Value you type or come after it in numeric or alphabetic order.
- **Exact Match Only**—Must be used in combination with a Begin Value. It allows you to retrieve only records that match exactly with the Begin Value you typed. When it is used with SSN or a unique Student Designator, Exact Match Only returns only one student record. When it is used with Last Name, Exact Match Only returns records for all students with that last name.

#### How to use the Advanced Search Options

The Advanced Search Options include the following:

- **Last Name Begin / End**—Allow you to retrieve records for students whose last names fall within an alphabetic range. Be careful when typing the End value. A single letter End value (such as 'B') will not retrieve names that begin with that letter (such as 'Bennett') since the names come after the letter alphabetically. Type the next letter after the initial letter of the name(s) you seek, or do not specify an End value. To search for last names that begin with 'Z', leave the End value blank or type 'ZZZZZZZZZZ'.
- **SSN Begin / End**—Allow you to retrieve records for students whose Social Security Numbers fall within a numeric range. Be careful when typing the End value. An End value containing fewer than nine digits (such as '99') will not retrieve SSNs that begin with that number but contain more digits (such as '990-00-0000'), since the longer number comes after the shorter one numerically.
- **Student Designator Begin / End**—Allow you to retrieve records for students whose designators fall within an alphanumeric range. Be careful when typing the End value.
- **Certification Date Begin / End**—Allow you to retrieve records for students who have been certified within a specified date range. The Begin and End values are inclusive; that is, records with a Certification Date equal to the Begin or End date are retrieved, as well as records certified between those two dates. You can use these options to retrieve records of students you have not re-certified for more than a given period of time. If you re-certify a group of students online, you can, at some later time, set the End date equal to the day before the earlier online session to retrieve all the records you did not re-certify in that session.
- **Anticipated Completion Date Begin / End**—Allow you to retrieve records for students whose Anticipated Completion Date (ACD) falls within a specific date range. The Begin and End values are inclusive; that is, records with an ACD equal to the Begin or End date are retrieved, as well as records with an ACD between those two dates. You can use these options to retrieve all students who are scheduled to graduate at the end of a given semester.
- **Enrollment Codes**—Allow you to search for records with specific Enrollment Codes. By default, Enrollment Update searches for all Enrollment Codes.

Last updated: November 26, 2001

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- If Navigation is clicked, see Section 1.2.1.1.

### 1.3.8 Enrollment Reporting Schedule

## Enrollment Reporting Schedule

**Purpose of this page**

The Enrollment Reporting Schedule page displays a user profile as well as current and past schedules for organizations that report or receive information about the enrollment status of students receiving federal student aid. The current schedule extends one year into the future; the past schedule extends one year into the past.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site. The buttons beneath the page title allow you to navigate to the following pages:

- Enrollment Reporting Schedule Create
- Enrollment Reporting Schedule Modify

**How to interpret the User Profile**

The User Profile displays different user options depending upon the type of organization and the particular values the organization has selected. The user options are defined as follows:

- **Distribution Medium**—How enrollment information is sent to the organization. Valid values are:
  - Student Aid Internet Gateway (SAIG)
  - Tape
- **Distribution SAIG User ID**—For organizations that receive enrollment information by the Student Aid Internet Gateway, the address of the mailbox to which that information is sent.
- **Servicer Name (Schools Only)**—For schools that use a third-party servicer to send enrollment information to NSLDS, the name of the servicer.
- **Split Files Indicator (Schools Only)**—For schools that use a third-party servicer, a Yes or No option indicating whether the servicer submits enrollment information for all the schools it services as a single file (No) or as a series of separate files (Yes).
- **Record Format (Non-Schools Only)**—The format in which a guaranty agency, lender, or

lender servicer receives enrollment information. Valid values are:

- SSCR Standard
- Common Account Maintenance (CAM)
- **Records Received (Non-Schools Only)**—What records a guaranty agency, lender, or lender servicer receives. Valid values are:
  - *All Records*—All current enrollment records regardless of whether they contain any changes since the last Notification file
  - *Changes Only*—Only records that contain a change to a value other than Certification Date since the last Notification file

**Note:** Organizations are assigned User Profile values when they first sign up for the NSLDS. To change a profile value for your organization, contact the Customer Service Center.

#### How to Interpret the Current and Past Schedules

The Current Schedule and Past Schedule display the following information:

- **Date**—The date when the NSLDS will send an organization a Student Status Confirmation Report (SSCR) if the organization is a school, or a Notification file if the organization is a guaranty agency, lender, or lender servicer. Dates are displayed up to one year into the future or past.
- **Type**—The type of file that the NSLDS will send the organization. Valid values are:
  - *Regular*—A regularly scheduled file. When the NSLDS sends an organization a regular file, it automatically schedules another such file for one year in the future.
  - *Ad Hoc*—A file generated for some special reason and not as part of the organization's regular schedule. When the NSLDS sends an organization an ad hoc file, it does not automatically schedule another such file for one year in the future.
- **Created By (Date)**—Who created or updated the schedule to cause the generation of a particular schedule item and, in parentheses, the date they did it. Valid values are:
  - *Original Schedule*—Schedule items created when the organization originally signed-up with the NSLDS.
  - *User Name*—Schedule items created by an online user using the Enrollment Reporting Create or Enrollment Reporting Modify page.

Last updated: November 26, 2001



- If Navigation is clicked, see Section 1.2.1.1.

### 1.3.9 Enrollment Reporting Schedule Create

## Enrollment Reporting Schedule Create

### Purpose of this page

The Enrollment Reporting Schedule Create page allows you to create a new schedule for your organization to receive enrollment status files from the NSLDS. When you use this page to create a new schedule, the NSLDS invalidates your organization's current schedule and creates an entirely new schedule.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to create a New Schedule

To create a new schedule:

1. In the **Start Date** box, type a valid date greater than or equal to the current date and less than or equal to the current date plus one year.
2. In the **Frequency** box, click a selection.
3. In the **Default Sort Order** box, click a selection.
4. Click **Submit**.
5. If you entered a valid start date and frequency, the Enrollment Reporting Schedule Create Confirm page displays the new schedule and asks you to confirm it.

#### Notes:

- If you entered an invalid start date or frequency, the Enrollment Reporting Schedule Create page redisplay with the appropriate error message.
- The start date can be any valid date greater than or equal to the current date and less than or equal to the current date plus one year, but files will only be generated on weekdays. This means that a file scheduled for generation on a Saturday will be generated on the following Monday. However, the NSLDS will not generate more than one file for the same organization at the same time. This means that if an organization has files scheduled for generation on Saturday, Sunday, and Monday, a single file will be generated on Monday, not three separate files.
- Valid frequencies for schools are as follows:
  - Every Week
  - Every Two Weeks
  - Every Month

- Every Two Months
- Every Three Months
- Every Four Months
- Every Six Months
- Valid frequencies for guaranty agencies, lenders, and lender servicers are as follows:
  - Every Day
  - Every Week
- Default frequencies are every two months for schools and weekly for all other organizations. The following permutations are possible:
  - If a school does not type a start date and selects the default frequency, rosters are scheduled for the first day of every other month, and the months are odd or even depending on the school's type.
  - If a school types a start date and selects the default frequency, rosters are scheduled every other month starting on the date selected by the school.
  - If a non-school organization does not type a start date and selects the default frequency, Notification files are scheduled for Monday every week.
  - If a non-school organization types a start date and selects the default frequency, rosters are scheduled weekly starting on the date selected by the non-school organization.

#### How to confirm a new schedule

To confirm a new schedule:

1. Verify the schedule displayed on the Enrollment Reporting Schedule Create Confirm page to make sure it is the schedule you want to create.
2. Click **Confirm**.
3. The Enrollment Reporting Schedule page redisplay with your new schedule as the Current Schedule.

#### How to cancel a new schedule

To cancel a new schedule:

1. Click **Cancel**.
2. The Enrollment Reporting Schedule Create page redisplay.

#### How to interpret the Current Schedule

The Current Schedule displays the following information:

- **Date**—The date when the NSLDS will send an organization a Student Status Confirmation Report (SSCR) if it is a school, or a Notification file if it is a guaranty agency, lender, or lender servicer. Dates are displayed up to one year into the future or past.
- **Type**—The type of file that the NSLDS will send the organization. Valid values are:
  - *Regular*—A regularly scheduled file. When the NSLDS sends an organization a regular file, it automatically schedules another such file for one year in the future.
  - *Ad Hoc*—A file generated for some special reason and not as part of the organization's regular schedule. When the NSLDS sends an organization an ad hoc file, it does not automatically schedule another such file for one year in the future.
- **Created By (Date)**—Who created or updated the schedule to cause the generation of a particular schedule item and, in parentheses, the date they did it. Valid values are:
  - *Original Schedule*—Schedule items created when the organization originally signed-up with the NSLDS.
  - *User Name*—Schedule items created by an online user using the Enrollment Reporting Create or Enrollment Reporting Modify page.

Last updated: November 26, 2001

- If Navigation is clicked, see Section 1.2.1.1.

### 1.3.10 Enrollment Reporting Schedule Create Confirm

The Help Screen for this section is the same as the Help Screen for the above section, Enrollment Reporting Schedule Create.

- If Navigation is clicked, see Section 1.2.1.1.

### 1.3.11 Enrollment Reporting Schedule Modify

**Enrollment Reporting Schedule Modify**

**Purpose of this page**

The Enrollment Reporting Schedule Modify page allows you to modify your organization's current schedule for receiving enrollment status files from the NSLDS.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to modify a User Profile

To modify the Default Sort Order for Roster files received by a school that does not have a servicer:

1. Click a different **Default Sort Order**.
2. Click **Submit** under the Modify Schedule form.
3. The Enrollment Reporting Schedule Create Confirm page displays the sort order and asks you to confirm it.

**Note:** For all other options or users, call the Customer Service Center and ask the representative to make the changes you want.

### How to modify a Schedule

To modify an existing schedule:

1. To cancel existing schedule items:
  - a. Click the **Cancel** button for that item.
2. To modify existing schedule items:
  - a. Type a valid date greater than or equal to the current date and less than or equal to the current date plus one year in the **Date** box or select a different **Type** from the list.
3. To add new items to the schedule:
  - a. Click **Add Blank Line** to add another row to the Modify Schedule form.
  - b. In the **Date** box, type a valid date greater than or equal to the current date and less than or equal to the current date plus one year.
  - c. In the **Type** list, click **Regular** or **Ad Hoc**.
4. Click **Submit**.
5. If your modifications create a valid schedule, the Enrollment Reporting Schedule Modify Confirm page displays the new schedule and asks you to confirm it.

**Notes:**

- Type refers to the type of file that the NSLDS will send your organization. Valid values are:
  - *Regular*—A regularly scheduled file. When the NSLDS sends an organization a regular file, it will automatically schedule another such file for one year in the future.
  - *Ad Hoc*—A file generated for some special reason and not as part of the organization's regular schedule. When the NSLDS sends an organization an ad hoc file, it will not automatically schedule another such file for one year in the future.
- If the modifications you made produce a schedule that does not pass the edits applied by the

NSLDS, Enrollment Reporting Schedule Modify redisplay with the appropriate error message. It also places error icons in front of specific schedule items that failed edits. Place your cursor over an icon to display the error message for that item as a ToolTip.

### Schedule Validation Rules

In order to pass the edits applied by the NSLDS, schedules must conform to the following rules:

- For schools, a gap of more than six months cannot elapse between Regular rosters. This includes the gap between the last roster generated for your school and the first roster listed on your schedule.
- For guaranty agencies, lenders, and lender servicers, a gap of more than one week cannot elapse between Notification files.

### How to confirm schedule modifications

To confirm schedule modifications:

1. Verify the schedule displayed on the Enrollment Reporting Schedule Modify Confirm page to make sure it reflects your modifications.
2. Click **Confirm**.
3. The Enrollment Reporting Schedule page redisplay with a Current Schedule that reflects your modifications.

### How to cancel schedule modifications

To cancel schedule modifications:

1. Click **Cancel**.
2. The Enrollment Reporting Schedule Modify page redisplay.

### How to interpret the User Profile

The User Profile box displays different user options depending upon the type of organization and the particular values the organization has selected. The user options are defined as follows:

- **Distribution Medium**—How enrollment information is sent to the organization. Valid values are:
  - Student Aid Internet Gateway (SAIG)
  - Tape
- **Distribution SAIG User ID**—For organizations that receive enrollment information by the Student Aid Internet Gateway, the address of the mailbox to which that information is sent.
- **Servicer Name (Schools Only)**—For schools that use a third-party servicer to send enrollment information to the NSLDS, the name of the servicer.
- **Split Files Indicator (Schools Only)**—For schools that use a third-party servicer, a Yes or No option indicating whether the servicer submits enrollment information for all the schools it services as a single file (No) or as a series of separate files (Yes).

- **Record Format (Non-Schools Only)**—The format in which a guaranty agency, lender, or lender servicer receives enrollment information. Valid values are:
  - SSCR Standard
  - Common Account Maintenance (CAM)
- **Records Received (Non-School Users)**—What records a guaranty agency, lender, or lender servicer receives. Valid values are:
  - *All Records*—All current enrollment records regardless of whether they contain any changes since the last Notification file
  - *Changes Only*—Only records that contain a change to a value other than Certification Date since the last Notification file

Last updated: November 26, 2001

- If Navigation is clicked, see Section 1.2.1.1.

### 1.3.12 Enrollment Reporting Schedule Modify Confirm

The Help Screen for this section is the same as for the above section, Enrollment Reporting Schedule Modify.

- If Navigation is clicked, see Section 1.2.1.1.

### 1.3.13 SSCR School Waiver List

The Help Screen for this section will be added at a later date.

### 1.3.14 SSCR School Waiver Display

The Help Screen for this section will be added at a later date.

### 1.3.15 SSCR School Waiver Add

The Help Screen for this section will be added at a later date.

### 1.3.16 SSCR School Waiver Update

The Help Screen for this section will be added at a later date.

### 1.3.17 SSCR School Waiver Delete

The Help Screen for this section will be added at a later date.

### 1.3.18 Past Enrollment Report

The Help Screen for this section will be added at a later date.

### 1.3.19 Past Enrollment Report Confirm

The Help Screen for this section will be added at a later date.

## 1.4 Organization

### 1.4.1 Organization Contact List

### Organization Contact List

**Purpose of this page**

The Organization Contact List page displays contact information for an organization. The contact's function, first name/last name, phone/ext., and e-mail are listed on this page.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**Organization Description**

Below the navigation bar, the school's **Name**, **OPEID code**, **Status** and **Address**, appear as reported by the Postsecondary Education Participants System (PEPS). The Status contains one of the following:

- **Open** - School is an open institution.
- **Closed** - School has been reported as closed.
- **Merged** - School has merged with another institution. This will also display the OPEID number

of the institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution.

#### How to search for an organization

The Organization Search Bar is located directly below the Navigation Bar. The Type, Code, and Name boxes appear here. When an organization is retrieved or selected, the organization identifier information will appear at the top of each of the organization pages.

To search for an organization:

1. Select the **Type** of organization you want to search for by clicking the down-arrow.
2. Type the **Code** or **Name** of the organization.
3. Click **Retrieve**.

#### Notes:

- The search results will match or closely match the information you selected or typed in the boxes. Click the numbered bullet next to the Name to view more information.
- The Code or Name can be typed partially in the respective text boxes in order to retrieve search results (i.e., you can type 'J', rather than 'John Doe University' in the Name box).
- If the organization you are searching for does not appear on the list, alter the punctuation and spelling. You must type the name exactly as it appears in NSLDS. For example, if you are searching for California State University in Sacramento, it must be typed 'California State University-Sacramento'. If you type 'California State University, Sacramento', it will not appear on the list.

#### How to navigate on this page

- Under **Function**, click the numbered bullet to view more information about this contact.
- Under **Email**, click the envelope icon to send e-mail to this contact. It will use your computer's default e-mail package.
- If you are authorized to add a new contact for this organization, click **Add New Contact**.
- If you are authorized to update or delete a contact for this organization, click the number of the contact to access the Organization Contact Detail page.

**Note:** No list will be displayed when no contacts have been entered on the NSLDS.

Last updated: July 1, 2001

- If Navigation is clicked, see Section 1.2.1.1.

### 1.4.2 Organization Contact Detail

#### Organization Contact Detail

### Purpose of this page

The Organization Contact Detail page displays contact information for one of the organization's contacts.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### Organization Description

Below the navigation bar, the school's **Name**, **OPEID code**, **Status** and **Address**, appear as reported by the Postsecondary Education Participants System (PEPS). The Status contains one of the following:

- **Open** - School is an open institution.
- **Closed** - School has been reported as closed.
- **Merged** - School has merged with another institution. This will also display the OPEID number of the institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution.

### How to update contact detail

To update organization contact:

1. Click **Update**.
2. Type the contact information in the **Organization Contact Update** fields.
3. Click **Submit**.

After you submit the form, the page displays the updated information.

### How to delete an Organization contact

To delete an organization contact:

1. Click **Delete**.
2. Review the contact information in the **Organization Contact Delete Confirm** page.
3. Click **Confirm**.

After you submit the form, the page displays the updated information.

Last updated: May 14, 2001



- If Navigation is clicked, see Section 1.2.1.1.

## 1.4.3 Organization Contact Update

## Organization Contact Update

### Purpose of this page

The Organization Contact Update page allows users to update organization contact information that appears on the Organization Contact Detail page.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### Organization Description

Below the navigation bar, the school's **Name**, **OPEID code**, **Status** and **Address**, appear as reported by the Postsecondary Education Participants System (PEPS). The Status contains one of the following:

- **Open** - School is an open institution.
- **Closed** - School has been reported as closed.
- **Merged** - School has merged with another institution. This will also display the OPEID number of the institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution.

### Updating Organization Contact Information

The Organization Contact Detail page displays organization contact information that can be updated by clicking **Update** above the displayed contact information. The Organization Contact Update page displays the contact information boxes, where the information can be updated.

To update contact information:

1. Type updated information in the text boxes.
2. Click **Submit**.

#### Notes:

- Under **Functions**, you may select multiple functions by holding down the SHIFT key or CTRL key and clicking your selections.
- One person in an organization can be assigned multiple functions, but a function can only be assigned to one person in an organization.
- The name of the person who last updated the organization contact information and the date will be displayed on the Organization Contact Detail page.

Last updated: July 1, 2001

- If Navigation is clicked, see Section 1.2.1.1.

#### 1.4.4 Organization Contact Delete

### Organization Contact Delete

**Purpose of this page**

The Organization Contact Delete Confirmation page allows you to delete a Contact on the Organization Contact List.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**Organization Description**

Below the navigation bar, the school's **Name**, **OPEID code**, **Status** and **Address**, appear as reported by the Postsecondary Education Participants System (PEPS). The Status contains one of the following:

- **Open** - School is an open institution.
- **Closed** - School has been reported as closed.
- **Merged** - School has merged with another institution. This will also display the OPEID number of the institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution.

**How to delete a Contact**

1. Read the Confirmation statement.
2. Review the Contact information displayed below the Confirmation statement.
3. To delete the Contact, click **Confirm**.

Last updated: July 1, 2001

- If Navigation is clicked, see Section 1.2.1.1.

#### 1.4.5 Organization Contact Add

### Organization Contact Add

**Purpose of this page**

The Organization Contact Add page allows you to add the organization contact information.

**[Navigation](#)**

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to add the organization contact information**

To add the organization contact information:

1. In the **Available Functions** box, click a selection. (See Function Descriptions table below.)
2. In the **First Name** box, type the first name of the organization contact.
3. In the **Last Name** box, type the last name of the organization contact.
4. In the **Title** box, type the title of the organization contact.
5. In the **Phone** box, type the phone number of the organization contact.
6. In the **Ext** box, type the phone number extension of the organization contact.
7. In the **Fax** box, type the Fax number of the organization contact.
8. In the **E-Mail** box, type the e-mail address of the organization contact.
9. In the **URL** box, type the URL (Web site address, for example: <http://www.stateuniversity.edu>) of the organization contact.
10. In the **Address** box, type the address of the organization contact.
11. In the **City** box, type the city of the organization contact.
12. In the **State** box, click a selection.
13. In the **Zip Code** box, type the Zip code of the organization contact.
14. Click **Submit**.

When adding the organization contact information, keep in mind the following:

- In the Available Functions box, you may select multiple functions by holding down the SHIFT key or CTRL key and clicking your selections.
- One person in an organization can be assigned multiple functions, but a function can only be assigned to one person in an organization.

<b>Function Descriptions</b>	
<b>Function</b>	<b>Description</b>
Primary Contact	For schools, the person responsible for overall NSLDS compliance, including Perkins submissions, Enrollment Reporting, and overpayment reporting. For guaranty agencies, the person responsible for compliance

	with monthly data feeds to the NSLDS. This person may <i>not</i> be able to answer questions on individual loans or students.
SSN/ID Issues	The person who can answer inquiries from schools and other data providers about student identifier conflicts. In most cases, the contact should be familiar with the monthly data provider feeds to the NSLDS, either Perkins or FFEL.
IS (Information Systems) Technical Issues	The person who can answer questions about the technical specifications of a school's or guaranty agency's computing environment.
Enrollment Reporting Issues	For schools, the person responsible for supplying enrollment information directly to the NSLDS or to the school's servicer. For guaranty agencies, the person responsible for updating loan records with enrollment data.
FAT/SAR/ISIR Issues	For schools, this person should be able to address a variety of financial aid issues, including Perkins, FFEL, Direct Loan, Aid Overpayment, and Pell Grant issues. For guaranty agencies, this person should be able to address the most recent information submitted to the NSLDS on a particular student.
Default Issues	For schools and guaranty agencies, the person involved in loan servicing who can respond to inquiries about an individual loan's repayment status.
Overpayment Issues	The school contact responsible for inputting and updating overpayment information.
Federal Perkins Issues	The school contact who can monitor cumulative amounts and discuss Perkins eligibility for individual students.
FFEL Issues	The school contact who can monitor cumulative amounts and discuss FFEL eligibility. For guaranty agencies, the person who can answer school inquiries on eligibility.
Direct Loan Issues	The school contact who can monitor cumulative amounts and discuss Direct Loan eligibility.
Pell Grant Issues	The school contact who can respond to Pell disbursement inquiries from other schools.
Cohort Default Rate Issues	For schools, the person who monitors the school's default rates or manages the school's default prevention program. For guaranty agencies, the person who can respond to school inquiries about default rates.
Perkins Data Provider Contact	The school or school servicer contact for monthly Perkins submissions. This person should be able to answer questions about the individual data elements that are reported to the NSLDS.
Guaranty Agency Contact	For guaranty agencies, this person should be the same as the primary contact.
Lender NSLDS Contact	Guaranty agencies should supply the contact person at specific lenders.
Customer Service	Borrowers main point of contact.

### How to interpret the organization description

The organization description appears at the top of the page and displays the following information:

- **Name**—The name of the organization or school as reported by the Postsecondary Education Participants System (PEPS).
- **Code**—The school's OPEID code as reported by PEPS.
- **Type**—The type of organization.
- **Status**—The school's status as reported by PEPS. The status is one of the following:
  - *Open*—The school is an open institution.
  - *Closed*—The school is a closed institution.
  - *Merged*—The school has merged with another institution. This also displays the OPEID code of the institution that this school merged with. The OPEID code links to the Organization Contact List page for the remaining/merged institution.
- **Address**—The address of the organization or school as reported by PEPS.

Last updated: March 27, 2002

- If Navigation is clicked, see Section 1.2.1.1.

## 1.4.6 Organization Search

### Organization Search

#### Purpose of this page

The Organization Search page allows you to search for an organization and view information about the organization. An organization can be an FDLP servicer, a Department of Education (ED) region, a guaranty agency, state agency, a lender, a lender branch servicer, or a school.

#### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

#### How to search for an organization

The Organization Search Bar is located directly below the Navigation Bar. The Type, Code, and Name boxes appear here. Below this, the Optional filter criteria appears, where the search results can be filtered by typing and selecting information in the City and State boxes. When an organization is retrieved or selected, the organization identifier information will appear at the top of each of the

organization pages.

To search for an organization:

1. Select the **Type** of organization you want to search for by clicking the down-arrow.
2. Type the **Code** or **Name** of the organization.
3. Click **Retrieve**.

**Notes:**

- The search results will match or closely match the information you selected or typed in the boxes. Click the numbered bullet next to the Name to view more information.
- The Code or Name can be typed partially in the respective text boxes in order to retrieve search results (i.e., you can type 'J', rather than 'John Doe University' in the Name box).
- If the organization you are searching for does not appear on the list, alter the punctuation and spelling. You must type the name exactly as it appears in NSLDS. For example, if you are searching for California State University in Sacramento, it must be typed 'California State University-Sacramento'. If you type 'California State University, Sacramento', it will not appear on the list.

To filter the search results:

1. In the **City** box, type in a city.
2. In the **State** box, select a state by clicking the down-arrow.
3. Click **Retrieve**.
4. Click **Clear** to clear the City and State boxes.

**Note:** The filtered search results appear according to the information you selected or typed in the boxes. Click the numbered bullet next to the Name to view more information.

The state codes are defined as follows:

STATE LOCATION CODE	NSLDS STATE OR AREA
AA	MILITARY LOCATION CODE
AE	MILITARY LOCATION CODE
AK	ALASKA
AL	ALABAMA
AP	MILITARY LOCATION CODE
AR	ARKANSAS
AS	AMERICAN SAMOA
AZ	ARIZONA
CA	CALIFORNIA
CM	NORTHERN MARIANAS ISLANDS
CN	CANADA
CO	COLORADO
CT	CONNECTICUT

CT	CONNECTICUT
CZ	CANAL ZONE
DC	DISTRICT OF COLUMBIA
DE	DELAWARE
FC	FOREIGN COUNTRY
FL	FLORIDA
FM	MICRONESIA
GA	GEORGIA
GU	GUAM
HI	HAWAII
IA	IOWA
ID	IDAHO
IL	ILLINOIS
IN	INDIANA
IQ	OTHER UNITED STATES TERRITORY OR POSSESSION
KS	KANSAS
KY	KENTUCKY
LA	LOUISIANA
MA	MASSACHUSETTS
MD	MARYLAND
ME	MAINE
MH	MARSHALL ISLANDS
MI	MICHIGAN
MN	MINNESOTA
MO	MISSOURI
MP	MARIANAS ISLANDS
MS	MISSISSIPPI
MT	MONTANA
MX	MEXICO
NC	NORTH CAROLINA
ND	NORTH DAKOTA
NE	NEBRASKA
NH	NEW HAMPSHIRE
NJ	NEW JERSEY
NM	NFW MFXICQ

NR	NON-RESIDENT, STATE UNKNOWN
NV	NEVADA
NY	NEW YORK
OH	OHIO
OK	OKLAHOMA
OR	OREGON
PA	PENNSYLVANIA
PC	PANAMA CANAL ZONE
PR	PUERTO RICO
PW	REPUBLIC OF PALAU
RI	RHODE ISLAND
SC	SOUTH CAROLINA
SD	SOUTH DAKOTA
TN	TENNESSEE
TT	TRUST TERRITORIES OF THE PACIFIC
TX	TEXAS
UT	UTAH
VA	VIRGINIA
VI	VIRGIN ISLANDS
VT	VERMONT
WA	WASHINGTON
WI	WISCONSIN
WK	WAKE ISLAND
WV	WEST VIRGINIA
WY	WYOMING

Last updated: August 21, 2001



- If Navigation is clicked, see Section 1.2.1.1.

### 1.4.7 Data Provider Schedule

**Data Provider Schedule**

### Purpose of this page

The Data Provider Schedule displays a history of current, past, and future scheduled data provider submittals. The table is populated with information based on your logon ID and cannot be updated from this page.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### Organization Description

Below the navigation bar, the school's **Name**, **OPEID code**, **Status** and **Address**, appear as reported by the Postsecondary Education Participants System (PEPS). The Status contains one of the following:

- **Open** - School is an open institution.
- **Closed** - School has been reported as closed.
- **Merged** - School has merged with another institution. This will also display the OPEID number of the institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution.

### How to interpret the Data Provider Schedule

The Data Provider Schedule displays a list of up to 50 submittals. Data providers who have more than 50 submittals will see future submittals with the balance consisting of the most recent submittals. The records are sorted in descending order by the Scheduled Submittal Date and by the Received Date. Data providers who do not have a schedule set up with the NSLDS will see a message indicating this. The Data Provider Schedule table displays the following information:

- **Scheduled Submittal Date**—The date NSLDS expects to process the submittal.
- **Received Date**—The date NSLDS received the incoming submittal.
- **Processed Date**—The date on which NSLDS completely processed the submittal.
- **Loan Records Extracted**—The total number of detail records extracted from the data provider database for this submission. This number may include records that were in error and did not update the NSLDS database.
- **Loans with Errors**—The total number of detail records extracted from the data provider database that included errors and did not update the NSLDS database.
- **Submittal Pass Rate (%)**—The percentage of detail records extracted from the data provider database that contained no errors and updated the NSLDS database.

#### Notes:

- The **Loans with Errors** and **Submittal Pass Rate (%)** columns will not appear for Guaranty Agency users, or for users viewing an organization other than their own.
- NSLDS no longer provides an Earliest Extract Date. Data Providers are expected to provide their information in a timely manner in accordance with the schedule. Submittals are not expected to be made more than one week prior to or after the scheduled submittal date.

Submittals made too early will error out. Submittals made too late will not process, and the Data Provider will receive a "missed submittal" message.

Last updated: May 14, 2001

- If Navigation is clicked, see Section 1.2.1.1.

## 1.4.8 Repayment Information

### Repayment Information

**Purpose of this page**

The Repayment Information page displays the current repayment status of certain borrowers in FFEL and Direct Loan (DL) Programs who attended a school during a specific period. This information has no relationship to the calculation of a draft or final cohort default for a school and will not be used in that process. This data is provided solely for informational purposes and may not be used in any administrative procedure. The information reported is based on information provided by the guaranty agency that guaranteed the loan or by the Direct Loan servicer.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**Organization Description**

Below the navigation bar, the school's **Name**, **OPEID code**, **Status** and **Address**, appear as reported by the Postsecondary Education Participants System (PEPS). The Status contains one of the following:

- **Open** - School is an open institution.
- **Closed** - School has been reported as closed.
- **Merged** - School has merged with another institution. This will also display the OPEID number of the institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution.

**How to Interpret the Repayment Information table**

- **Numerator Date Range**—Identifies the 24-month period used to determine whether any borrowers have defaulted or met other specified conditions on FFEL and/or DL Program loans that entered repayment in the first 12 months of the identified 24-month period.
- **Denominator Date Range**—Identifies the 12-month period used to determine the borrowers that have entered into repayment on FFEL and/or DL Program loans.
- **FFEL Num**—The total number of borrowers that entered repayment on FFEL Program loans

during a specified 12-month period and have defaulted on those loans during the same 12-month period or the next 12-month period.

- **FFEL Denom**—The total number of borrowers that entered repayment on FFEL Program loans during a specified 12-month period.
- **%**—FFEL student repayment history rate.
- **DL Num**—The total number of borrowers that entered repayment on DL Program loans during a specified 12-month period and have defaulted on those loans during the same 12-month period or the next 12-month period.
- **DL Denom**—The total number of borrowers that entered repayment on DL Program loans during a specified 12-month period.
- **%**—Direct Loan student repayment history rate.
- **Dual Num**—The total number of borrowers that entered repayment on FFEL and/or DL Program loans during a specified 12-month period and have defaulted on those loans during the same 12-month period or the next 12-month period.
- **Dual Denom**—The total number of borrowers that entered repayment on FFEL and/or DL Program loans during a specified 12-month period.
- **%**—Dual student repayment history rate.
- **Date Processed**—Identifies the date the Student Repayment History Report was processed.

Last updated: May 14, 2001

- If Navigation is clicked, see Section 1.2.1.1.

#### 1.4.9 Cohort Default Rate History List

### Cohort Default Rate History List

**Purpose of this page**

The Cohort Default Rate History List page allows you to view a history of the default rates for the selected organization.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to interpret the Cohort Default Rate History table**

- **Fiscal Year**—The NSLDS financial year for which a default request was made.
- **Originating/Current**—An indicator of lender status as it relates to loans for the selected organization. The lender statuses are defined as follows:
  - **OL**—Originating.
  - **CL**—Current.
- **Rate Type**—The status of an organization's defaulted borrower calculation. The Rate Types are defined as follows:
  - **Official**—A default rate authorized for viewing by all organizations.
  - **Official Susp'd**—A default rate that has been appealed by the school.
  - **Draft**—A default rate that is available for viewing only by the rated organization and the Default Management Division of the Department of Education.
- **Rate Sub Type**—Within each rate type there are five possible sub types that can be in effect for a default rate history occurrence. The Rate Sub Types are defined as follows:
  - **ACTUAL**—The "raw" rate calculated using the actual list of borrowers of a school prior to any adjustments.
  - **AVERAGE**—The rate used for a school with 20 or fewer borrowers entering repayment during a fiscal year that had a cohort default rate calculated for the two previous fiscal years.
  - **COMBINED**—The rate is calculated from the defaulted borrowers of schools that have been grouped together.
  - **MERGED**—The rate is calculated from the defaulted borrowers of schools that have been merged.
  - **LEAD SCH COMBO**—The rate is taken from a lead school in a group of schools.
  - **SUBSTITUTED**—The calculated rate was replaced by a rate that was derived through other means.
- **Program Type**—The Title IV loan programs for which loans were issued by an organization. The Program Types are defined as follows:
  - **Dual**—An organization that provides both FFEL and Direct loan types.
  - **FFEL**—An organization that provides loans within the Federal Family Education Loan program.
  - **Direct**—An organization that provides loans within the William D. Ford Direct Loan program.
- **Numerator**—The total number of borrowers that entered repayment on a loan program during the cohort year and have defaulted on those loans during the same cohort year or the next cohort year.

- **Denominator**—The total number of borrowers that entered repayment on a loan program during a cohort year.
- **Rate**—The default rate for the organization, which is calculated as a percentage of the Numerator to Denominator and truncated to one decimal place.
- **Process Date**—Identifies the date that the rate was calculated.

**Notes:**

- The Rate Type column is only applicable: when viewing cohort default rate history where the users are viewing their own rates; when viewing schools where the users belong to ED's Default Management Division; or when viewing GAs or Lenders where the users belong to ED's Financial Partners, Partner Service.
- The Rate Sub Type column is only applicable when viewing cohort default rate history for schools where the users belong to ED's Default Management Division.
- The Program Type column is only applicable when viewing cohort default rate history for schools where the users are viewing their own rates or when the users belong to ED. ED users belonging to the Default Management Division will view columns for Numerator, Denominator and Rate broken out by Program Type when viewing a school's cohort default rate history. Cohort default rate history for Lenders and GAs only display values for the FFEL program.
- The Originating/Current column is only applicable when viewing cohort default rate history for Lenders.

Last updated: April 30, 2001



- If Navigation is clicked, see Section 1.2.1.1.

#### 1.4.10 Cohort Default Rate History Detail

The Help Screen for this section will be added at a later date.

#### 1.4.11 View Date Control

**CDR View Date Control Detail**

**Purpose of this page**

The CDR View Date Control Detail page allows you to view a list of Default Rate Calculation Requests and to update the viewable date for the most recent request

**Navigation Tabs and Navigation Bar**

The Navigation Tabs are located across the top of every page. Each tab provides a link to the main page of a corresponding section.

- Click **Menu** to access the Main Menu.
- Click **Aid** to access the Loan History page.
- Click **Org** to access the Organization Contact List page.
- Click **Report** to access the Report List page.

The Navigation Bar is directly below the Navigation Tabs, and includes links to the other pages within that section. Your name and your institution's name display below the specified links.

#### Maintaining the View Date

The Fiscal Year, Rate Type, Run Date, and Date Viewable are shown.  
To update the Date Viewable:

- Click **Submit**.

Last updated: April 10, 2001

- If Navigation is clicked, see Section 1.2.1.1.

### 1.4.12 View Date Control Update

#### View Date Control

#### Purpose of this page

The CDR View Date Control page allows you to set the viewable date for the latest Default Rate Calculation Request.

#### Navigation Tabs and Navigation Bar

The Navigation Tabs are located across the top of every page. Each tab provides a link to the main page of a corresponding section.

- Click **Menu** to access the Main Menu.
- Click **Aid** to access the Loan History page.
- Click **Org** to access the Organization Contact List page.
- Click **Report** to access the Report List page.

The Navigation Bar is directly below the Navigation Tabs, and includes links to the other pages within

that section. Your name and your institution's name display below the specified links.

#### How to set the View Date

The Fiscal Year, Rate Type, Run Date, and Date Viewable boxes appear. The Date Viewable is the only one that can be set.

To set the Date Viewable:

1. Type a Valid Date.
2. Click **Submit**.

Last updated: April 10, 2001

- If Navigation is clicked, see Section 1.2.1.1.

### 1.4.13 School Profile

### School Profile Page

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#### Purpose of this page

The School Profile page allows you to view Title IV grant and loan programs, as well as the school's academic and program schedule information.

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#### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

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#### Organization Description

Below the navigation bar, the school's **Name**, **OPEID code**, **Status** and **Address**, appear as reported by the Postsecondary Education Participants System (PEPS). The Status contains one of the following:

- **Open** - School is an open institution.
- **Closed** - School has been reported as closed.
- **Merged** - School has merged with another institution. This will also display the OPEID number of the institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution.

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#### How to interpret the School Profile

The school's profile information displays the following:

1. **Program Length** - Length of the longest program offered by the institution.

2. **School Type** - Identifies the ownership control type of the institution.
3. **Ethnic Code** - Ethnic affiliation of the institution
4. **Certification Type** - Certification status of the institution
5. **Academic Calendar** - Academic calendar of the institution
6. **Congressional District** - Congressional district(s) of the main institution
7. **Eligibility Status** - Indicates whether the institution is eligible to participate in Title IV programs
  1. **Y** - Eligible to participate
  2. **N** - Not eligible to participate
8. **Change Affiliation Code** - Code designating Change of Affiliation
9. **Region Code** - Main institution's ED region code
10. **Location Reason** - Main/location reason for loss of Title IV eligibility
11. **Approval Indicator** - Indicates whether the location is approved for eligibility or certification
12. **Initial Approval Date** - Date the main/location was approved for Title IV eligibility
13. **Disapproval Date** - Date the main/location was disapproved for Title IV eligibility
14. **System Funded Office Indicator** - Indicates whether the school is a System Office.
15. **Branch Indicator** - Indicates whether the location is a branch of, or the main location of the institution
16. **Change of Affiliation Effective Date** - Date the school changed affiliation.
17. **FDSLPL End Reason** - Indicates the reason the school ended participation with the Federal Direct Student Loan Program
18. **FDSLPL Origination Level** - Indicates the current origination level for Direct Loans held by the school.
19. **FDSLPL Origination End Reason** - Reason the school stopped being authorized to originate Direct Loans at a particular origination level.

#### How to interpret Program Status

The Program Status information displays the following:

1. **Pell Start Date** - Current start date for Federal Pell Grant certification, as reported by the Institutional Participation and Oversight Service (IPOS).
2. **Pell End Date** - Current end date for Federal Pell Grant certification, as reported by IPOS

3. **FFEL Start Date** - Current start date for Federal Family Education Loan (FFEL) program certification, as reported by IPOS. The programs covered by this would be specified as Stafford or Stafford Unsubsidized.
4. **FFEL End Date** - Current end date for FFEL program certification, as reported by IPOS. The programs covered by this would be specified as Stafford or Stafford Unsubsidized.
5. **FFEL PLUS Begin Date** - Current begin date for FFEL PLUS program certification, as reported by IPOS.
6. **FFEL PLUS End Date** - Current end date for FFEL PLUS program certification, as reported by IPOS.
7. **FFEL SLS Start Date** - Current start date for FFEL Supplemental Loan S (SLS) program certification, as reported by IPOS.
8. **FFEL SLS End Date** - Current end date for FFEL SLS program certification, as reported by IPOS.
9. **FDSL P Stafford Start Date** - Current start date for Federal Direct Student Loan Program (FDSL P) certification, as reported by IPOS. The programs covered by this would be specified as Subsidized or Unsubsidized.
10. **FDSL P Stafford End Date** - Current end date for FDSL P certification, as reported by IPOS. The programs covered by this would be specified as Subsidized or Unsubsidized.
11. **FDSL P PLUS Start Date** - Current start date for FDSL P PLUS certification, as reported by IPOS.
12. **FDSL P PLUS End Date** - Current end date for FDSL P PLUS certification, as reported by IPOS.
13. **Perkins Start Date** - Current start date for Federal Perkins Certification, as reported by IPOS.
14. **Perkins End Date** - Current end date for Federal Perkins Certification, as reported by IPOS.
15. **SEOG Start Date** - Current start date for Federal SEOG Certification, as reported by IPOS.
16. **SEOG End Date** - Current end date for Federal SEOG Certification, as reported by IPOS.

#### How to interpret the School Status

The School Status information displays the following:

1. **Action Code** - Overall Eligibility action code for the Main Institution and any underlying locations.
2. **Action Reason Code** - Overall Eligibility reason code for the Main Institution and any underlying locations.
3. **Effective Date of Combination** - Overall Eligibility action date for the Main Institution and any underlying locations.

**Note:** For all date fields if actual date is not available, a plug date of 01/01/1500 will be used.

### How to display a school's profile

To display a school's profile:

1. Enter **Code** and/or **Name** of the school you want displayed
2. Click **Retrieve**.

Last updated: May 8, 2001

- If Navigation is clicked, see Section 1.2.1.1.

## 1.4.14 Loan Unlock Maintenance

### Loan Unlock Maintenance

#### Purpose of this page

The Loan Unlock Maintenance page allows you to view and unlock loans for a Guaranty Agency (GA) organization.

#### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

#### How to use the Primary Search Options

The Primary Search Options at the top of the page allow you to retrieve a list of the locked loans to view based on your search criteria.

To use the Primary Search Options:

1. In the **GA Organization** field, the GA organization number displays automatically.
2. In the **From SSN** box, type the Social Security Number (SSN) where the search begins.
3. In the **From Last Name** box, type the last name where the search begins.
4. In the **From Locked Date** box, type the locked date (MMDDCCYY) where the search begins.
5. In the **Retrieve/Sort by** box, click a selection indicating how you want the list sorted.
6. In the **To SSN** box, type the SSN where the search ends.
7. In the **To Last Name** box, type the last name where the search ends.
8. In the **To Locked Date**, type the locked date (MMDDCCYY) where the search ends.

9. Click **Retrieve**.

10. The list of locked loans displays.

As a default setting, the list displays in descending order by locked date.

#### How to unlock locked loans

To unlock locked loans:

1. Click the check boxes in the **Unlock Loan** column corresponding to the locked loans that you wish to unlock. To unlock all the locked loans on the list, click the **All** check box.
2. Click **Submit**.
3. The locked loans that you selected are unlocked.
4. Click **Cancel** if you do not wish to unlock the locked loans.

#### How to interpret the list of locked loans

The information on the list of locked loans is defined as follows:

- **Name**—The name of the student or PLUS borrower.
- **SSN**—The Social Security Number (SSN) of the student or PLUS borrower.
- **DOB**—The date of birth (DOB) of the student or PLUS borrower.
- **Loan Date**—The date when the loan was taken by the student or PLUS borrower.
- **Loan Type**—The type of Title IV award made with a formal agreement for repayment with interest. The loan types are defined as follows:

Loan Type	Definition
CL	FFEL Consolidation Loan
PL	FFEL PLUS Loan
RF	FFEL Refinanced Loan
SF	FFEL Stafford Subsidized Loan
SL	Supplemental Loan
SU	FFEL Stafford Unsubsidized Loan

- **Loan Amt**—The amount of the loan.
- **School Code**—The OPEID code of the school.
- **Ind Sep Loan**—An indicator used to differentiate among multiple loans of the same loan date for the same borrower or student attending the same school. This field is used mostly by GAs.

- **Date Locked**—The date when the loan was locked.

When using the Loan Unlock Maintenance page, keep in mind the following:

- The Loan Unlock Maintenance page allows GAs to unlock their locked loans, which enables those loans to be updated by the monthly batch feed data.
- A GA can only unlock its own loans.
- Once a loan is locked by an organization, the loan remains locked until that organization unlocks that loan or by reporting an exact match through the batch load process.
- Users cannot lock a loan from the Loan Unlock Maintenance page.

Last updated: June 27, 2002



- If Navigation is clicked, see Section 1.2.1.1.

## 1.5 Exception Reports

### 1.5.1 School Repayment Loan Detail Report Parameter (ED)

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

### 1.5.2 School Repayment Loan Detail Report Parameter (Schools)

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

### 1.5.3 Cohort Default Rate History Report Parameter

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

### 1.5.4 DMD Cohort Default Rate History Report Parameter

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

### 1.5.5 FPPS Cohort Default Rate History Report Parameter

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

#### 1.5.6 School Cohort Default Rate History Report Parameter

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

#### 1.5.7 GA Cohort Default Rate History Report Parameter

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

#### 1.5.8 Lender Cohort Default Rate History Report Parameter

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

#### 1.5.9 Financial Aid History Report Parameter

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

#### 1.5.10 Reasonability Quarterly Form 2000 Report Parameter

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

#### 1.5.11 Accounts Maintenance Fee Extract Report Parameter

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

#### 1.5.12 Loan Processing and Issuance Fee Report Parameter

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

#### 1.5.13 Reasonability Quarterly Backup F2000 Report Parameter

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

#### 1.5.14 Reasonability Yearly Form 2000 Report Parameter

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

#### 1.5.15 Reasonability Annual Backup F2000 Parameter

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

#### 1.5.16 Federal Receivables Extract Report Parameter

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

#### 1.5.17 Organization Search

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

#### 1.5.18 Successful Parameter Submission

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

#### 1.5.19 Report History List

The Help for this screen will be provided by the MicroStrategy Reporting Tool.

### **1.6 Transfer Student Monitoring**

#### 1.6.1 School Transfer Profile Add

<b>School Transfer Profile Add</b>	<input type="checkbox"/>
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### Purpose of this page

The School Transfer Profile Add page allows you to add School Transfer Profile information. You must complete this page before initiating the Transfer Monitor process.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to add a School Transfer Profile

To add a School Transfer Profile:

1. In the **First Name** box, type the first name of the school's contact.
2. In the **Last Name** box, type the last name of the school's contact.
3. In the **Title** box, type the title of the school's contact.
4. In the **Phone** and **Ext** boxes, type the phone number and extension of the school's contact.
5. In the **E-Mail** box, type the e-mail address designated to receive Alert notification messages, which could be set up at the school as a group e-mail.
6. In the **Inform** box, type the TG number for the **Designated Batch SAIG Mailbox for School, Servicer, or Central Administration Office (Optional)**. You may leave this blank if you are not using the batch interface (via the SAIG mailbox) and only wish to use the Web.
7. In the **Inform** (Is this your Servicer for Transfer Monitoring?) check box, click to indicate **Yes** or **No**.
8. In the **Alert** check box, click how you want your school's Alert information to be sent (**Web Only** or **Web and Batch File**). If you click Web and Batch File, type the TG number in the **SAIG Mailbox for School, Servicer, or Central Administration Office** box.
9. In the **Alert** (Is this your Servicer for Transfer Monitoring?) check box, click to indicate **Yes** or **No**.
10. In the **Batch Alert Method** check box, click an Alert format: **Extract** or **Report**. Extract indicates that you want Alerts as a data file; Report indicates you want the Alerts in a report format. If you clicked Web Only as the Alert, leave the Extract and Report check boxes blank.
11. Click **Submit**.

When adding a School Transfer Profile, keep in mind the following:

- After the School Transfer Profile has been added, your name and the date appear on the School Transfer Profile page in Last Update By.
- If you attempt to add a student to your school's Transfer Monitoring List via batch file before completing this page, NSLDS sends back an error file. If you attempt to add a student to your school's Transfer Monitoring List via this Web site before completing this page, you are re-directed to this page.

- This page only displays once. After this page is completed, use the School Transfer Profile Update page to make any updates.

Last updated: March 15, 2002

- If Navigation is clicked, see Section 1.2.1.1.

## 1.6.2 School Transfer Profile

### School Transfer Profile

**Purpose of this page**

The **School Transfer Profile** page displays information about the school contact for the Transfer Monitoring process. This page shows how your school is set up to submit Inform files and receive Alert notifications. This information is provided and updated by school users, and must be completed prior to submitting your school's first Inform.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to update the School Transfer Profile**

To update the School Transfer Profile information:

1. Click **Update** at the top of the page.
2. The School Transfer Profile Update page appears.

**How to interpret the School Transfer Profile**

The **School Transfer Profile** information is defined as follows:

- **First Name** —The first name of the school's contact.
- **Last Name** —The last name of the school's contact.
- **Title** —The title of the school's contact.
- **Phone** —The phone number of the school's contact.
- **E-Mail** —The e-mail address provided by the school to receive Alert notification messages, which could be set up at the school as a group e-mail.
- **Inform** —The designated batch SAIG mailbox for the School, Servicer, or Central Administration

Office. This may appear blank if the user is not using a batch interface (via the SAIG mailbox) and only wishes to use the Web. For example, many smaller schools do not have a batch interface and only use the Web.

- **Transfer Monitoring Servicer** —The servicer that is responsible for receiving and/or sending the Transfer Monitoring information for a school. This indicates whether the school uses ('Yes') or does not use ('No') a Transfer Monitoring Servicer.
- **Alert** —Indicates how the school requested its Alert to be sent (Web Only or Web and Batch).
- **SAIG Mailbox** —The designated SAIG mailbox for Alerts. A TG number displays, which indicates that the school has designated Web and Batch as its output option for Alerts. This appears blank if the school designated Web Only.
- **Batch Alert Method** —If the school requested Web and Batch Alerts, in addition to providing a SAIG mailbox number, the school must select an Alert format. Extract indicates that the school requested the Alerts as a data file; Report indicates that the school requested the Alerts be in a Report format. If this field is not present, the school designated Web Only.
- **Last Update By** —The name of the user who last updated the school's Transfer Profile, and the date of that update.

Last updated: March 15, 2002

- If Navigation is clicked, see Section 1.2.1.1.

### 1.6.3 School Transfer Profile Update

## School Transfer Profile Update

**Purpose of this page**

The School Transfer Profile Update page allows you to update the School Transfer Profile information.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to update the School Transfer Profile**

To update the School Transfer Profile:

1. In the **First Name** box, type the first name of the school's contact.
2. In the **Last Name** box, type the last name of the school's contact.

3. In the **Title** box, type the title of the school's contact.
4. In the **Phone** and **Ext** boxes, type the phone number and extension of the school's contact.
5. In the **E-Mail** box, type the e-mail address designated to receive Alert notification messages, which could be set up at the school as a group e-mail.
6. In the **Inform** box, type the TG number for the **Designated Batch SAIG Mailbox for School, Servicer, or Central Administration Office (Optional)**. You may leave this blank if you are not using the batch interface (via the SAIG mailbox) and only wish to use the Web.
7. In the **Inform** (Is this your Servicer for Transfer Monitoring?) check box, click to indicate **Yes** or **No**.
8. In the **Alert** check box, click how you want your school's Alert information to be sent (**Web Only** or **Web and Batch File**). If you click Web and Batch File, type the TG number in the **SAIG Mailbox for School, Servicer, or Central Administration Office** box.
9. In the **Alert** (Is this your Servicer for Transfer Monitoring?) check box, click to indicate **Yes** or **No**.
10. In the **Batch Alert Method** check box, click an Alert format: **Extract** or **Report**. Extract indicates that you want Alerts as a data file; Report indicates you want the Alerts in a report format. If you clicked Web Only as the Alert, leave the Extract and Report check boxes blank.
11. Click **Submit**.

In Last Update By, the name of the user who last updated the School Transfer Profile and the date of the last School Transfer Profile update appear.

Last updated: March 15, 2002

- If Navigation is clicked, see Section 1.2.1.1.

#### 1.6.4 Student Monitoring Add

**Student Monitoring Add**

**Purpose of this page**

The Student Monitoring Add page allows you to add a student to the Transfer Monitoring List. If the user is adding a student to the Transfer Monitoring List who is not in the NSLDS database, the student will only be added to the Transfer Monitoring List and will not display on any other pages in the NSLDS FAP site.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

#### How to add a student to the Transfer Monitoring List

1. In the **SSN** box, type the student's Social Security Number. (The SSN appears automatically if you linked from the Loan or Pell Grant History pages.)
2. In the **First Name** box, type the student's first name. (The First Name appears automatically if you linked from the Loan or Pell Grant History pages.)
3. In the **Last Name** box, type the student's last name. (The Last Name appears automatically if you linked from the Loan or Pell Grant History pages.)
4. In the **Date Of Birth** box, type the student's date of birth. (The Date of Birth appears automatically if you linked from the Loan or Pell Grant History pages.)
5. In the **Enrollment Begin Date** box, type the date on which the student is expected to, or did begin classes at the school.
6. In the **Monitor Begin Date** box, type the date on which you want NSLDS to begin monitoring the student. The current date will appear by default, although the date can be changed.
7. Click **Submit**.

Last updated: July 1, 2001

- If Navigation is clicked, see Section 1.2.1.1.

### 1.6.5 Transfer Monitoring List

### Transfer Monitoring List

**Purpose of this page**

The Student Monitoring Detail page displays detailed transfer monitoring student information that can be updated or deleted.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to interpret the Transfer Monitoring List**

The Transfer Monitoring List information is defined as follows:

- **SSN**—The student's Social Security Number. (The blue numbered icon next to the SSN will change with sorting. If you click the icon, it will take you to the Transfer Monitoring Detail page for that student. If a student has had an Alert sent from the NSLDS, there will be an Alert icon displayed next to the SSN.)
- **Name**—The student's name. (The Transfer Monitoring List by default is displayed in alphabetical order by last name, but you can change how the list is sorted.)
- **Enrollment Begin Date**—The date on which the student is expected to, or did begin classes at the school.
- **Monitor Begin Date**—The date on which NSLDS began monitoring the student.
- **Last Changed By**—The name of the user who last changed the student's record, or the name of the user who added the student to the list.

#### How to retrieve a sorted/filtered Transfer Monitoring List

To sort/filter and retrieve a Transfer Monitoring List:

1. In the **Sort By** list, click the sort criteria.
2. In the **Display Only** boxes, type in the display criteria that you wish to view.
3. Click **Retrieve** to view the sorted/filtered list.

#### Notes:

- The Add Student to Monitor List button at the top of the page will take you to the Student Monitoring Add page when you click it.
- If a student was added/updated via a batch file, the Last Changed By will read Batch.

Last updated: July 1, 2001

- If Navigation is clicked, see Section 1.2.1.1.

## 1.6.6 Student Monitoring Detail

### Student Monitoring Detail

**Purpose of this page**

The Student Monitoring Detail page displays detailed transfer monitoring student information that can be updated or deleted.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

#### How to interpret the Student Monitoring Detail

- **SSN**—The student's Social Security Number.
- **Name**—The student's current name in the NSLDS. If the student was added to the Transfer Monitoring List, but is not in the NSLDS, the name will display as provided by the school user.
- **DOB**—The student's date of birth. If the student was added to the Transfer Monitoring List, but is not in the NSLDS, the DOB will display as provided by the school user.
- **Enrollment Begin Date**—The date on which the student was reported to begin classes at the school.
- **Monitor Begin Date**—The date on which the NSLDS began monitoring the student.
- **Last Changed By**—The name of the user who added or last changed the student information.

#### How to update or delete the Student Monitoring Detail

- To update or delete the Student Monitoring Detail information, click **Update** or **Delete**.

**Note:** If a student was added/updated via a batch file, the Last Changed By will read Batch.

Last updated: July 1, 2001

- If Navigation is clicked, see Section 1.2.1.1.

### 1.6.7 Student Monitoring Update

#### Student Monitoring Update

#### Purpose of this page

The Student Monitoring Update page allows you to update the Enrollment Begin Date and/or the Monitoring Begin Date for student's Transfer Monitoring Detail information.

#### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

#### How to update Student Monitoring Detail

1. Type the new **Enrollment Begin Date** and/or the new **Monitoring Begin Date** in the respective box(es).
2. Click **Submit**.

**Notes:**

- If you are updating the Monitoring Begin Date to a date in the future, it cannot be later than the Enrollment Begin Date.
- After clicking Submit, your name will appear in Last Changed By until the record on the Transfer Monitoring List is changed again.

Last updated: July 1, 2001

- If Navigation is clicked, see Section 1.2.1.1.

### 1.6.8 Student Monitoring Delete

#### Student Monitoring Delete

##### Purpose of this page

The **Student Monitoring Delete Confirmation** page allows you to delete the student from the **Transfer Monitoring List** page. Student Monitoring records should only be deleted if the student will not be attending your school, or the student was added to your school's list in error. Do not delete a student simply to stop monitoring him or her. Once the delete has been confirmed, the student's information will be removed from the Monitoring and, if applicable, Alert lists. It does not delete him or her from the NSLDS database.

##### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

##### How to delete the student from the Transfer Monitoring List

To delete the student from the Transfer Monitoring List, read the Delete Confirmation statement, then click **Confirm**.

**Note:** If a student was added/updated via a batch file, the **Last Changed By** field will read **Batch**.

Last updated: July 1, 2001

- If Navigation is clicked, see Section 1.2.1.1.

## 1.6.9 Monitoring Alert Review

### Monitoring Alert Review

**Purpose of this page**

The Monitoring Alert Review page lists all transfer students on a school's Transfer Monitoring List to which changes have been reported.

[Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

**How to interpret the Monitoring Alert Review**

- **Monitoring Results as of**—The date on which the Transfer Monitoring Process last ran.
- **SSN**—The student's Social Security Number.
- **Name**—The first and last name of the student.
- **DOB**—The student's date of birth.
- **Change**—The type of change reported on the student's record. If new information was reported on a student's loan, **Loan** will appear in the text box. **Loan** is a link to the Loan Detail page of the loan that had a change reported. If new information was reported on a student's Pell Grant, **Pell** will appear in the text box. **Pell** is a link to the Pell Grant History page for this student.
- **Reviewed**—Indicates to other users at your school that this information was reviewed. Clicking the check box and then clicking **Submit** indicates that you have reviewed the Change immediately to the left of the box. The check boxes determine whether the change information is listed in the top section of the list or the section following.
- **Date Alerted**—The date on which the NSLDS alerted the school of the change to the student's record.
- **Enrollment Begin Date**—The date on which the school reported that the student is expected to, or did begin classes at the school.
- **Monitor Begin Date**—The date on which the NSLDS began monitoring the student.

**How to a retrieve a sorted/filtered Monitoring Alert Review List**

To use **Sort By** and **Display Only** at the top of the page:

1. In the **Sort By** list, click how the list should be sorted. The default sort is Non-reviewed records in alphabetical order by last name, then Reviewed records in alphabetical order by last name. Options include: SSN, Date Alerted, Enrollment Begin Date, and Monitor Begin Date.
2. In the **Display Only** boxes, type the information that you wish to view.
3. Click **Loans Only** or **Pell Only**, if you wish to view only one type of Alert information.
4. Click **Retrieve** to view the sorted/filtered list.

To re-order the list by **Reviewed** check boxes selected, click **Submit**.

**Notes:**

- Clicking the link in the Change box will not automatically place a check mark in the Reviewed box. To place a check mark in the Reviewed box when reviewing online, you must manually click it and then submit.
- If the school designated that Alerts be sent via Web and Batch, those records sent in the batch Alert file will automatically have check marks in the Reviewed boxes.
- The Monitoring Alert Review page can be viewed without accessing the student's record to view the change reported. The Batch Alert file cannot be viewed without reviewing the change information because it is the batch file.

Last updated: July 1, 2001

- If Navigation is clicked, see Section 1.2.1.1.

## 1.7 Admin/Support

### 1.7.1 Messages List

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.2 Message Detail Maintenance Display

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.3 Message Detail Maintenance – Add

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.4 Message Detail Maintenance - Update

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.5 Message Detail Maintenance - Delete

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.6 Guaranty Agency List

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.7 Guaranty Agency Display

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.8 Guaranty Agency Maintenance - Add

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.9 Guaranty Agency Maintenance - Update

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.10 Validation Translation Maintenance List

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.11 Validation Translation Maintenance - Display

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.12 Validation Translation Maintenance - Add

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.13 Validation Translation Maintenance - Update

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.14 Loan Type Maintenance List

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.15 Loan Type Maintenance - Display

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.16 Loan Type Maintenance - Add

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.17 Loan Type Maintenance - Update

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.18 Loan Type Maintenance - Delete

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.19 Submittal Control Detail Maintenance List

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.20 Submittal Control Detail Maintenance – Update

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.21 Submittal Schedule Maintenance List

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.22 Submittal Schedule Maintenance Add

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.23 Submittal Schedule Maintenance Insert

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.24 Submittal Schedule Maintenance Delete

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.25 Location Group Maintenance List

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.26 Location Group Detail

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.27 Location Group Maintenance - Add

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.28 Location Group Maintenance - Update

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.29 Location Group Maintenance - Delete

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.30 Function Group Maintenance List

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.31 Function Group Detail

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.32 Function Group Maintenance - Add

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.33 Function Group Maintenance - Update

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.34 Function Group Maintenance - Delete

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.35 Function Group to Web Page Assignment Page

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.36 Web Group Maintenance List

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.37 Web Group Detail

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.38 Web Group Maintenance – Add

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.39 Web Group Maintenance - Update

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.40 Web Group to Web Page Assignment

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.41 Web Group Maintenance – Delete

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.42 Super Search

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.43 User Detail

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.44 Add User

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.45 Update User

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.46 Delete User

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.47 User to Function Group Assignment

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.48 Function Group to User Assignment

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.49 External Contact List

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.50 External Contact Detail

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

#### 1.7.51 External Contact Add

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.52 External Contact Update

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.

### 1.7.53 External Contact Delete

This screen is not supported by the legacy NSLDS website. The Help Screen for this section will be added at a later date.