



F E D E R A L
S T U D E N T A I D
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FSA Modernization Partner

NSLDS II Reengineering
Screens Detail Design:
Organization

Version 2.1

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Document Control

Version Number	Description	Release Date	Author
1.0	Initial Issue	09/30/2002	Dawn Will
2.0	Documented additional business logic and error validation.	11/08/2002	Dawn Will
2.1	Incorporated changes from client reviews.	11/26/2002	

1 General Information

1.1 Background

The National Student Loan Data System (NSLDS) was established as part of the Higher Education Act of 1965, as amended, to provide a comprehensive repository of information about Title IV aid recipients and their loans, grants, lenders, guaranty agencies, servicers, and schools.

Given these challenges, a project to modernize the system – NSLDS Reengineering – has been undertaken to improve financial and data integrity, reduce operational costs, and improve customer satisfaction. At the heart of the design for a reengineered NSLDS solution are five “big ideas” for radically changing the underlying processes, data structures, and technical platforms supporting the existing system:

- Data Warehousing
- Internal FSA (Federal Student Aid) Direct Access
- Outsourced Enrollment Tracking
- Financial Partner Data Feed Reengineering
- Common Record Extension

The first phase of the NSLDS Reengineering effort is called NSLDS II. NSLDS II Release 1 will focus on the Data Warehousing and Internal FSA Direct Access opportunities, as well as assessing ways to support existing requirements through NSLDS II or other modernized systems. Later releases of work will focus on the remaining three ideas and enhancements.

1.2 NSLDS Points of Entry Overview

There are three main applications in the legacy NSLDS technical architecture that serve as the gateway for accessing and modifying Title IV data online. The applications include the Financial Aid Professional (FAP) website, Student Access Financial Aid Review (SAFAR) website, and the Customer Information Control System (CICS). As part of the NSLDS II replatforming initiative, CICS will be retired and its functionality will be transferred to the FAP website. The User Interface Inventory Matrix (**Reference Appendix B**) documents a comprehensive list of screens for the FAP and Student Access websites and the NSLDS functional area(s) they support.

The FAP website, which can be found at <http://www.nslsdfap.ed.gov>, will be the main user access point for NSLDS II data by Department of Education (ED) personnel, guaranty agencies (GAs), lenders, and schools. It provides support for users by tracking the financial aid and enrollment history for Title IV aid recipients, organizational information for Title IV aid financial partners, access to predefined reports, for some users, the ability to execute ad hoc

queries, and the monitoring of student transfers. A lender or school may also allow a servicer to access the website and provide online updates on their behalf. Each user must be registered with the website and can only log on with a valid User ID and Password.

The two major areas of enhancement for the FAP website will consist of the following:

1. Reengineering the existing reporting architecture
2. Retiring CICS

Reengineering the Reporting Architecture

Reports are currently accessed through the Main Menu, which allows users to execute predefined reports and receive the results either in their SAIG mailbox or download them directly (depending on the users permission level). If a user requires data that is not supported by a predefined report, they are limited to either developing their own query or contacting the support center to develop a query for them. In order to create a query, a user must be familiar with Structured Query Language (SQL), which is the code used to develop a query, the NSLDS data model, whose data elements are used within the SQL, and the Query Management Facility (QMF) tool, which is the application used to execute the query. In order to empower users and improve the customer experience for executing ad hoc queries, the MicroStrategy reporting tool will be implemented. The MicroStrategy reporting tool is a commercial off-the-shelf (COTS) package that has the capability to filter and analyze massive volumes of data to the transaction level. In addition, the MicroStrategy application server has a full range of query optimization algorithms designed to ensure that data is extracted from a database in the most efficient and least resource demanding way.

The new ad hoc reporting functionality will continue to be accessible through the Main Menu and Report screens in the FAP website. The detailed design regarding the report screen changes can be found in the Report Detail Design document.

Retiring CICS

CICS is IBM software that allows ED personnel to connect to the NSLDS mainframe and perform online transactions. Users have the ability to update or access data online from ED Headquarters or Regional offices. The majority of the CICS functionality has already been transitioned to the FAP website in response to user demand for a more user-friendly and flexible tool. The remaining functionality, which includes screens from the System Administration, Default Rate, and Student Status Confirmation menus will be transferred to the FAP website as part of the NSLDS II reengineering initiative. (This will complete the functionality transition to the FAP website, therefore, clearing the path for retiring CICS.) Once CICS has been retired, the FAP website will serve as the default application for ED personnel to access NSLDS II data.

The Student Access website, which can be accessed at <http://www.nsls.ed.gov>, allows borrowers to securely view and track their financial aid history. They have the ability to view their Title IV loans at a summary or at a detailed loan level. The summary loan level data allows a borrower to view all Title IV loans they are responsible for in a concise format. The

detailed loan level data tracks the history of each loan throughout its lifecycle. Each student must be registered with the website and must have a valid User ID and Password to logon. This is a read only website and does not have any update capabilities associated with it.

The following diagram displays the CICS application being retired due to functionality being transitioned to the FAP website during the NSLDS replatforming initiative.

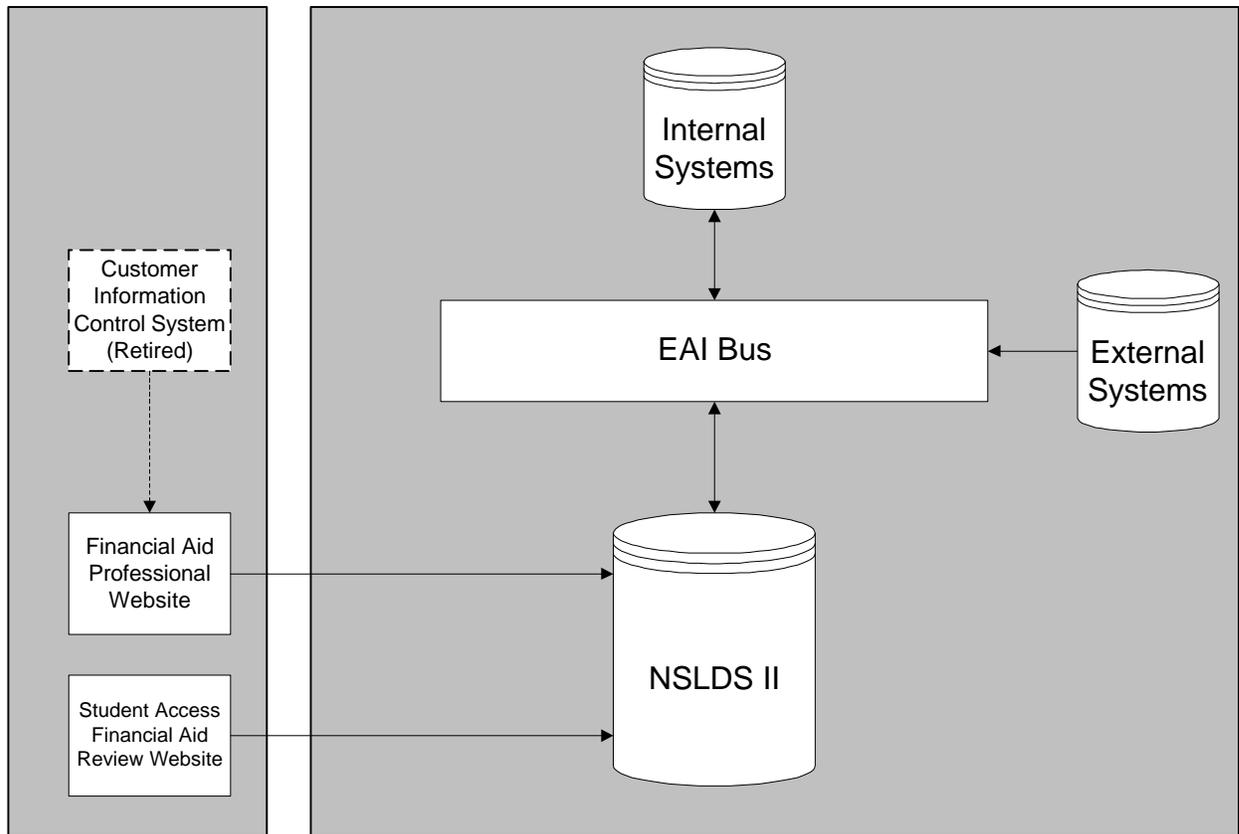


Figure 1, NSLDS II User Interface Diagram

1.3 Screens Detail Design Document Layout

The screens detail design document provides a blueprint for developing each screen that will support the FAP and Student Access websites. The screens detail design document is separated into the following modules:

Financial Aid Professional website

- Login-Menu – Contains the detail design for the Login-Menu screens.
- Financial Aid– Contains the detail design for the Financial Aid screens.

- Enrollment – Contains the detail design for the Enrollment screens.
- Organization – Contains the detail design for the Organization screens.
- Reports – Contains the detail design for the Reports screens.
- Transfer Student Monitoring – Contains the detail design for the Transfer Student Monitoring screens.
- Admin/Support – Contains the detail design for the Admin/Support screens.
- Appendix A – Global Attributes for FAP Website– Lists common icons that may be displayed in the Login-Menu, Financial Aid, Enrollment, Organization, Transfer Student Monitoring, and Admin/Support modules.
- Appendix B - Provides a comprehensive list of all the screens in the FAP and Student Access websites and their associated function groups.

Student Access Financial Aid Review website

- Student Access– Contains the detail design for the Student Access screens.

This detail design document will contain the following information for each screen:

1.4 Name of the Screen

Description	Defines the purpose of the screen.
New or Existing	New – Indicates the screen is new to the website. Existing- Indicates the screen previously existed on the website.
User Group (Screen Level)	Identifies which function group currently has access to the screen.
Requirements Traceability	Maps the detail design for the screen to the detailed requirements.
Reference(s)	Lists reference documentation that provides additional detail for each screen.
Business Object	Lists the Business Object the screen will utilize for development purposes.

1.4.1 Software Unit Logic

NSLDS I File Name:	Lists the file name for each screen that was used for NSLDS I (if the screen previously existed).
NSLDS II File Name:	Lists the file name for each screen that will be used for NSLDS II.
Pre-Status:	Lists the screen names and their links that will allow a user to access a specific screen.
Post-Status:	Lists the screen names that are accessible from a specific screen (and the links that will allow a user to navigate to that screen). When the

	user navigates to another screen, the screen will appear in the same window unless otherwise specified.
Gif Name:	List of Gif, or image, files used in the screen.
Tab Order:	Lists in numeric order of the tab order for each screen.

Note:

Section 3.1 (Class Diagram) of the Application Architecture Detail Design document identifies the ASP pages and the corresponding COOL:Gen Action Blocks (i.e., procedures). This will be used to further define the business logic, error validations and security in a later release.

1.4.2 Design Details

The following screenshot highlights the functionality of the screen:

Provides a design layout of the screen.

Note:

The screenshots depicted in this document were taken from the legacy website. The existing text, links, and data elements will be included in the NSLDS II website as described in this document. However, the actual look of the screens may be modified for the NSLDS II Release. Also, certain text, links, and data elements may be excluded from view based on the user's security access.

1.4.3 Screen Functionality

The following section lists and describes the functionality of each object on the screen.

Name of the Data Element on the screen	
Element	Type of data element (e.g., label, pushbutton, checkbox, textbox).
Definition/Business Rules	Description of the data element and any business rules associated with it.
Actions to be performed	Describes any action associated with the data element.
Business Object (Attribute)	Lists the Business Object(s) and Attribute(s) the data element will utilize for development purposes.
Validation	<ul style="list-style-type: none"> <i>Condition:</i> Describes the validation that will be performed. <i>Message:</i> Describes the message that will appear to the user. <i>Location:</i> Describes where the validation will

Name of the Data Element on the screen	
	<p>occur (i.e., Client or Server) <i>Additional Information:</i> Describes any additional information related to the validation (e.g., gif files appearing with error messages).</p> <p>Note:</p> <p>The validations occur one at a time and are not listed in any particular order. However, validations will occur from top to bottom and left to right on any given screen unless otherwise specified.</p>

Note:

Section 508 of the Rehabilitation Act of 1998 mandates a website accessibility review. Section 508 requires that electronic and information technology developed, procured, maintained, or used by Federal government agencies must be accessible to persons with disabilities. The system must allow a person with a disability to have comparable access to and use of information as a person without a disability.

The Assistive Technology Group within the FSA Technology Center is responsible for performing Section 508 reviews. During the Build phase, the NSLDS II Modernization Partner team will work with the Assistive Technology Group to verify that the design of the online screens meets Section 508 requirements. The FAP and Student Access websites are currently not Section 508 compliant. The formal accessibility review for NSLDS II will be conducted during the Test phase.

2 Screen Workflow

2.1 Master List of Screens

The following table provides a list screens for the Organization module of the FAP website for NSLDS II. The table includes the section the screen is explained, screen name, whether the screen is new or existing and a description of the screen.

Section	Screen Name	New/ Existing	Description
3.1	Organization Contact List	Existing	Displays the organization and summary contact information for the NSLDS functions.
3.2	Organization Contact Detail	Existing	Displays contact information for one of the organization's contacts. A user can also update and delete organization contact information from this screen.
3.3	Organization Contact Update	Existing	Allows a user to update contact information for their organization.
3.4	Organization Contact Delete	Existing	Allows a user to delete a contact on the Organization Contact List.
3.5	Organization Contact Add	Existing	Allows a user to add new contact information for their organization to NSLDS.
3.6	Organization Search	Existing	Allows a user to find an organization stored in NSLDS.
3.7	Data Provider Schedule	Existing	Displays a history of current, past, and future scheduled data provider submittals.
3.8	Repayment Information	Existing	Displays the current repayment status of certain borrowers in Federal Family Education Loan (FFEL) and Direct Loan (DL) programs who attended a school during a specific period.
3.9	Cohort Default Rate History List	Existing	Allows a user to view a history of the default rates for the selected organization and request Loan Details.
3.10	Cohort Default Rate History Detail	New	Allows Default Management to detailed numbers of the default rates for the selected organization and request Loan Details.
3.11	View Data Control	Existing	Allows authorized users to display the dates when default rate calculations are

Section	Screen Name	New/ Existing	Description
			viewable. Web pages that display default rates will check these dates. Rates will not display if dates are blank or if dates are in the future.
3.12	View Data Control Update	Existing	Allows the user to change the Date Viewable attribute of the most recent Default Rate Calculation Request.
3.13	School Profile	Existing	Allows a user to view Title IV grant and loan programs, as well as the school's academic and program schedule information.
3.14	Loan Unlock Maintenance	Existing	Allows users to unlock batch locked loan(s) that are owned by a Guaranty Agency (GA).

2.2 Update/Inquiry Diagram

The following diagram displays screens that contain update functionality to the Enterprise Data Warehouse (EDW), as well as, screens that contain inquiry capabilities from the EDW:

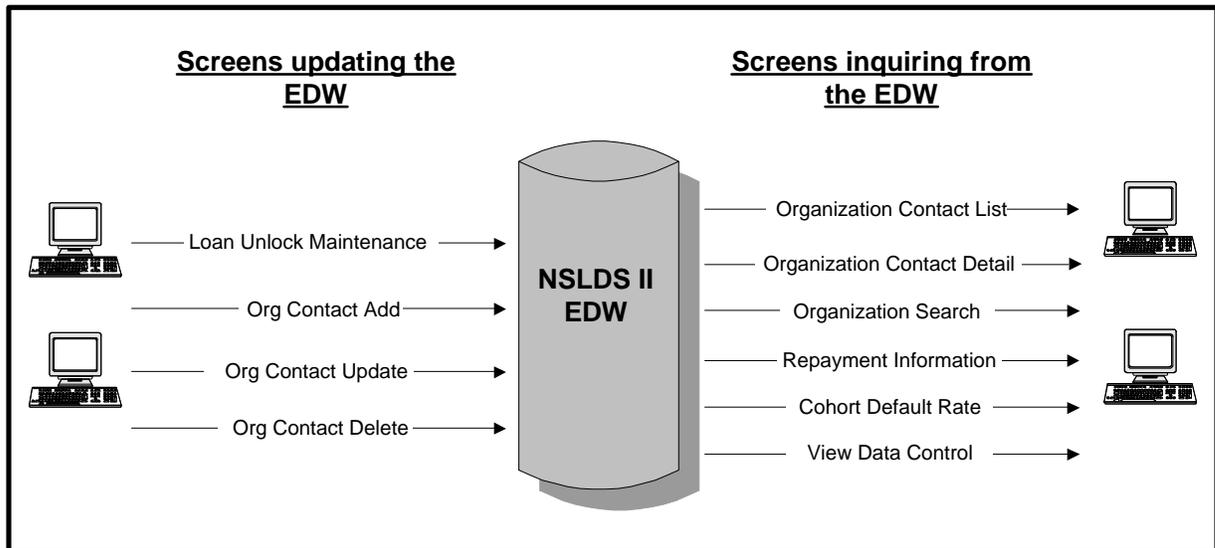


Figure 2, NSLDS II Organization Update/Inquiry Diagram

3 Screen Details

3.1 Organization Contact List

Description	Displays the organization and summary contact information for the NSLDS functions.
New or Existing	Existing
User Group (Screen Level)	NSLDS
Requirements Traceability	1.042
Reference(s)	NSLDS User Documentation, WB16 Organization Contact List Server, 01_Organization Contact List Page_WP258149
Object Name	School, GA, Lender, Servicer, State Agency, ED

3.1.1 Software Unit Logic

NSLDS I File Name:	orgclst.asp
NSLDS II File Name:	Orgclst.jsp
Pre-Status:	<p>This screen is accessible from all screens on the Financial Aid Professionals website except from the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • System Log On • Privacy Act • Help • Change Password • System Requirements • Contact Us • Frequently Asked Questions • Download Help • Security
Post-Status:	<p>This screen allows a user to navigate to any of the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Search (Link: Org Search) • Data Provider Schedule (Link: Data Provider Schedule) • Repayment Information (Link: Repayment Information) • Cohort Default Rate History List (Link: Cohort Default Rate) • View Date Control (Link: View Date Control)

	<ul style="list-style-type: none"> • Loan Unlock Maintenance (Link: Loan Unlock Maintenance) • School Profile (Link: School Profile) • Organization Contact Detail (Link: 1) • Organization Contact Add (Pushbutton: Add New Contact) • Menu (Link: Menu Tab) • Loan History List (Link: Aid Tab) • Enrollment Summary (Link: Enroll Tab) • Report (Link: Report Tab) • Transfer Monitoring List (Link: Tran Tab) • External Contact List (Link: Support Tab) • Contact Us (Link: Contact Us Icon) • System Log On (Link: System Logoff Icon)
Gif Name:	<p>The following graphical objects may appear on this screen:</p> <ul style="list-style-type: none"> • Email.gif • Error.gif • Info.gif
Tab Order	<ol style="list-style-type: none"> 1. URL Navigation Bar 2. Menu Tab 3. Aid Tab 4. Enroll Tab 5. Report Tab 6. Tran Tab 7. Support Tab 8. Contact Us Icon 9. Help Icon 10. Logoff Icon 11. Org Search 12. Data Provider Schedule 13. Repayment Information 14. Cohort Default Rate 15. Cohort Default Rate DM 16. Cohort Default Rate FFPS 17. View Date Control 18. Loan Unlock Maintenance 19. School Profile 20. Department of Education Region 0 (Example)

3.1.2 Design Details

The following screenshot highlights the functionality of Organization Contact List screen.

Function	First Name / Last Name	Phone / Ext.	Email
1 PRIMARY CONTACT	DEBT COLLECT SERVICE	(800)621-3115	
2 SSN/ID ISSUES	-		
3 IS TECHNICAL ISSUES	TBD		
4 DEFAULT ISSUES	TBD		
5 OVERPAYMENT ISSUES	TBD		
6 PERKINS ISSUES	DEBBIE HUTSON	(304)782-5280	
7 FFEL ISSUES	TBD		
8 COHORT DEFLT RATE ISSUES	DEFAULT MANAGEMENT	(202)377-4258	
9 CUSTOMER SVC(BORROWERS)	TBD		

Figure 3, Organization Contact List

3.1.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Org Contact List	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen. This link is deactivated when the user is in the Organization Contact List screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	When clicked, the Organization Search screen appears.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.
Actions to be performed	When clicked, the Cohort Default Rate screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.

Cohort Default Rate DM	
	Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link

School Profile	
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Business Object (Attribute)	None.
Actions to be performed	When clicked, the School Profile screen appears.

Type	
Element	Dropdown Box
Definition/Business Rules	<p>Allows a user to select a type of organization you want to search for.</p> <p>The options in the Dropdown Box are (displayed in this order):</p> <ul style="list-style-type: none"> • -- Select - (Default) • FDLP Servicer • ED Region • Guaranty Agency • Lender • Lender Branch Servicer • School • State Agency
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear.
Business Object (Attribute)	Lender (orgType), Servicer (orgType), School (orgType), GA (orgType), ED (orgType), State Agency (orgType)
Validation	None.

Code	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter the code of an organization.</p> <p>Different Types of organizations have different code lengths. The lengths for the codes are:</p> <ul style="list-style-type: none"> • FDLP Servicer - 3 characters long • ED Region - 2 characters long • Guaranty Agency - 3 characters long • Lender - 8 characters long • Lender Branch Servicer - 6 characters long • School - 8 characters long • State Agency - 4 characters long <p>The code can be typed partially in order to</p>

Code	
	retrieve search results (i.e. You can type '12', rather than '12345678' which will display the Org Search screen with all organizations that begin with '12'). <i>Min Characters - 0</i> <i>Max Characters - 8</i>
Actions to be performed	As the user enters the code, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	Lender (orgCode), Servicer (orgCode), School (orgCode), GA (orgCode), ED (orgCode), State Agency (orgCode)
Validation	None.

Name	
Element	Textbox
Definition/Business Rules	Allows a user to enter the name of an organization. The name can be typed partially in order to retrieve search results (i.e. You can type 'S', rather than 'State University' which will display the Org Search Screen with all organization that begin with 'S'). <i>Min Characters - 0</i> <i>Max Characters - 45</i>
Actions to be performed	As the user enters the name, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	Lender (orgName), Servicer (orgName), School (orgName), GA (orgName), ED (orgName), State Agency (orgName)
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve organization contact

Retrieve	
	information.
Actions to be performed	By clicking on the pushbutton the organization that satisfies the criteria entered will be listed Organization Search screen.
Business Object (Attribute)	None.
Validation	<ul style="list-style-type: none"> • <i>Condition:</i> If the user selects the type for an organization and then clicks the Retrieve pushbutton, the organization that satisfies the criteria entered will be listed in the Organization Search screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the user selects the type and enters the code for an organization and then clicks the Retrieve pushbutton, the organization that satisfies the criteria entered will be listed on the screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type and name for an organization and then clicks the Retrieve pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type, code, and name for an organization and then clicks the Retrieve pushbutton, the Enrollment Reporting Schedule is displayed with a list of organizations that match the Type of organization and have a common code and name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.

Retrieve	
	<p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> <p>• <i>Condition:</i> User clicks the Retrieve button without selecting a Type or inputting a Code and Name. <i>Message:</i> Please select an Organization Type. <i>Location:</i> Client <i>Additional Information:</i> Type label turns red. Display Error.gif.</p> <p>• <i>Condition:</i> User selects FDLP SERVICER Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 5 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif.</p> <p>• <i>Condition:</i> User selects ED REGION Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 2 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif.</p> <p>• <i>Condition:</i> User selects GUARANTY AGENCY Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 3 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif.</p> <p>• <i>Condition:</i> User selects LENDER BRANCH SERVICER Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 6 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif.</p>

Retrieve	
	<ul style="list-style-type: none"> <i>Condition:</i> User selects STATE AGENCY Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 4 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. <i>Condition:</i> User selects a Type and enters a non-numeric Code (i.e. abcd) <i>Message:</i> Please enter a numeric Organizational Code. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. <p>An information message appears at the top of the screen for the following condition:</p> <ul style="list-style-type: none"> <i>Condition:</i> Organization contact information is not found based on criteria entered. <i>Message:</i> No record found for the selected criteria. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.

Name	
Element	Label
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgName), Servicer (orgName), School (orgName), GA (orgName), ED (orgName), State Agency (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgCode), Servicer (orgCode), School (orgCode), GA (orgCode), ED (orgCode), State Agency (orgCode)

Code	
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgType), Servicer (orgType), School (orgType), GA (orgType), ED (orgType), State Agency (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization. The three types of statuses are:</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This Status column will not appear if there is no data in NSLDS II.</p>
Actions to be performed	None.
Business Object (Attribute)	GA (status), School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgStreet, orgCity, orgState, orgZip), Servicer (orgStreet, orgCity, orgState, orgZip), School (orgStreet, orgCity, orgState, orgZip), GA

Address	
	(orgStreet, orgCity, orgState, orgZip), ED (orgStreet, orgCity, orgState, orgZip), State Agency (orgStreet, orgCity, orgState, orgZip)
Validation	None.

Add New Contact	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the Organization Contact Add screen.
Actions to be performed	By clicking on the pushbutton the Organization Contact Add screen is displayed.
Business Object (Attribute)	None.
Validation	None.

<u>1</u> (Example)	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact Detail screen.
Actions to be performed	When clicked, the Organization Contact Detail appears.
Business Object (Attribute)	None.
Validation	None.

Function	
Element	Label
Definition/Business Rules	Displays the function of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactFunction), Servicer (contactFunction), GA (contactFunction), School (contactFunction), ED (contactFunction), State Agency (contactFunction)
Validation	None.

First Name / Last Name	
Element	Label
Definition/Business Rules	Displays the first and last name of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactFirstName, contactLastName), Servicer (contactFirstName, contactLastName), GA (contactFirstName, contactLastName), School

First Name / Last Name	
	(contactFirstName, contactLastName), ED (contactFirstName, contactLastName), State Agency (contactFirstName, contactLastName)
Validation	None.

Phone / Ext.	
Element	Label
Definition/Business Rules	Displays the phone number and extension of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactPhone, contactExtension), Servicer (contactPhone, contactExtension), GA (contactPhone, contactExtension), School (contactPhone, contactExtension), ED (contactPhone, contactExtension), State Agency (contactPhone, contactExtension)
Validation	None.

Email	
Element	Link
Definition/Business Rules	Allows a user to send an email to the contact person listed. The email icon is: 
Actions to be performed	When clicked, the user's default email package will display with the appropriate email address.
Business Object (Attribute)	Lender (contactEmail), Servicer (contactEmail), GA (contactEmail), School (contactEmail), ED (contactEmail State Agency (contactEmail)
Validation	None.

3.2 Organization Contact Detail

Description	Displays contact information for one of the organization's contacts. A user can also update and delete organization contact information from this screen.
New or Existing	Existing
User Group (Screen Level)	NSLDS
Requirements	1.043

Traceability	
Reference(s)	NSLDS User Documentation, WB17 Org Contact Detail Server_T48, 011_Organization Contact Detail Page_TO48
Object Name	School, GA, Lender, Servicer, State Agency, ED

3.2.1 Software Unit Logic

NSLDS I File Name:	orgcdis.asp
NSLDS II File Name:	Orgcdis.jsp
Pre-Status:	<p>This screen is accessible from the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: Back Icon)
Post-Status:	<p>This screen allows a user to navigate to any of the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: Org Contact List) • Organization Search (Link: Org Search) • Data Provider Schedule (Link: Data Provider Schedule) • Repayment Information (Link: Repayment Information) • Cohort Default Rate History List (Link: Cohort Default Rate) • View Date Control (Link: View Date Control) • Loan Unlock Maintenance (Link: Loan Unlock Maintenance) • School Profile (Link: School Profile) • Organization Contact Update (Pushbutton: Update) • Organization Contact Delete (Pushbutton: Delete) • Menu (Link: Menu Tab) • Loan History List (Link: Aid Tab) • Enrollment Summary (Link: Enroll Tab) • Report (Link: Report Tab) • Transfer Monitoring List (Link: Tran Tab) • External Contact List (Link: Support Tab) • Contact Us (Link: Contact Us Icon) • System Log On (Link: System Logoff Icon)
Gif Name:	<p>The following graphical objects may appear on this screen:</p> <ul style="list-style-type: none"> • Back.gif
Tab Order	<ol style="list-style-type: none"> 1. Return to Org Contact List 2. Update 3. Delete 4. Email

	<ol style="list-style-type: none">5. URL6. URL Navigation Bar7. Menu Tab8. Aid Tab9. Enroll Tab10. Report Tab11. Tran Tab12. Support Tab13. Contact Us Icon14. Help Icon15. Logoff Icon16. Org Contact List17. Org Search18. Data Provider Schedule19. Repayment Information20. Cohort Default Rate21. Cohort Default Rate DM22. Cohort Default Rate FFPS23. View Date Control24. Loan Unlock Maintenance25. School Profile26. Department of Education Region 0 (Example)
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3.2.2 Design Details

The following screenshot highlights the functionality of Organization Contact Detail screen.

NSLDS Menu Aid Enroll Org Report

Org Contact List | Org Search | Data Provider Schedule | Repayment Information | Cohort Default Rate | Cohort Default Rate DM | View Date Control | Loan Unlock Maintenance | School Profile

Logged on as: DAWN WILL from Department of Education Region 0

Return To Organization Contact List

Name: HEADQUARTERS
Code: 0 **Type:** Dept of Ed Region
Address: 7TH & D STREETS, S.W., ROB 3, ROOM 4520
WASHINGTON, DC 20202

Organization Contact Detail

Update Delete

Function: PRIMARY CONTACT
First Name: DEBT COLLECT
Last Name: SERVICE
Title: QA MANAGER
Phone: (800)621-3115 **Ext:**
Fax:
E-Mail: MFILLINIC@FALLSCHURCH.ESYS.COM
URL: [OrgContact.htm](#)
Address: ST LOUIS ST
City: ST. LOUIS
State: WI
Zip Code: 22042 - 2900
Last Update By: DAWN WILL
Update Date: 09/05/2002

Figure 4, Organization Contact Detail

3.2.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	When clicked, the Organization Search screen appears.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.
Actions to be performed	When clicked, the Cohort Default Rate History List screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.

Cohort Default Rate DM	
	Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link

School Profile	
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Return to Organization Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Name	
Element	Label
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgName), Servicer (orgName), GA (orgName), School (orgName), ED (orgName), State Agency (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgCode), Servicer (orgCode), GA (orgCode), School (orgCode), ED (orgCode), State Agency (orgCode)
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgType), Servicer (orgType), GA (orgType), School (orgType), ED (orgType), State Agency (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization.</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This Status column will not appear if there is no data in NSLDS II.</p>
Actions to be performed	None.
Business Object (Attribute)	GA (status), School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgStreet, orgCity, orgState, orgZip), Servicer (orgStreet, orgCity, orgState, orgZip), School (orgStreet, orgCity, orgState, orgZip), GA (orgStreet, orgCity, orgState, orgZip), ED (orgStreet, orgCity, orgState, orgZip), State Agency (orgStreet, orgCity, orgState, orgZip)
Validation	None.

Update	
Element	Label
Definition/Business Rules	Allows a user to update organization contact details.
Actions to be performed	By clicking on the pushbutton, User is directed to the Organization Contact Update screen, which is pre-populated with the Contact's information.

Update	
Business Object (Attribute)	None.
Validation	None.

Delete	
Element	Pushbutton
Definition/Business Rules	Allows a user to delete organization contact details.
Actions to be performed	By clicking on the pushbutton, User is directed to the Organization Contact Delete screen, where the User can confirm the deletion of the Contact.
Business Object (Attribute)	None.
Validation	None.

Function	
Element	Label
Definition/Business Rules	Displays the function of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactFunction), Servicer (contactFunction), GA (contactFunction), School (contactFunction), ED (contactFunction), State Agency (contactFunction)
Validation	None.

First Name	
Element	Label
Definition/Business Rules	Displays the first name of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactFirstName), Servicer (contactFirstName), GA (contactFirstName), School (contactFirstName), ED (contactFirstName), State Agency (contactFirstName)
Validation	None.

Last Name	
Element	Label
Definition/Business Rules	Displays the last name of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactLastName), Servicer

Last Name	
	(contactLastName), GA (contactLastName), School (contactLastName), ED (contactLastName), State Agency (contactLastName)
Validation	None.

Title	
Element	Label
Definition/Business Rules	Displays the title of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactTitle), Servicer (contactTitle), GA (contactTitle), School (contactTitle), ED (contactTitle), State Agency (contactTitle)
Validation	None.

Phone	
Element	Label
Definition/Business Rules	Displays the phone number of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactPhone), Servicer (contactPhone), GA (contactPhone), School (contactPhone), ED (contactPhone), State Agency (contactPhone)
Validation	None.

Ext	
Element	Label
Definition/Business Rules	Displays the extension of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactExtension), Servicer (contactExtension), GA (contactExtension), School (contactExtension), ED (contactExtension), State Agency (contactExtension)
Validation	None.

Fax	
Element	Label
Definition/Business Rules	Displays the fax number of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactFax), Servicer (contactFax), GA

Fax	
	(contactFax), School (contactFax), ED (contactFax), State Agency (contactExtension)
Validation	None.

E-Mail	
Element	Link
Definition/Business Rules	Allows a user to send an email to the contact person listed. Mask – The email address should be displayed with an '@', '.', and last 3 characters must be letters.
Actions to be performed	When clicked, the user's default email package will display with the appropriate email address.
Business Object (Attribute)	Lender (contactEmail), Servicer (contactEmail), GA (contactEmail), School (contactEmail), ED (contactEmail), State Agency (contactEmail)
Validation	None.

URL	
Element	Link
Definition/Business Rules	Displays the URL for the contact person displayed.
Actions to be performed	When clicked the screen is displayed of the URL address.
Business Object (Attribute)	Lender (contactURL), Servicer (contactURL), GA (contactURL), School (contactURL), ED (contactURL), State Agency (contactURL)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactAddress1, contact Address2), Servicer (contactAddress1, contact Address2), GA (contactAddress1, contact Address2), School (contactAddress1, contact Address2), ED (contactAddress1, contact Address2), State Agency (contactAddress1, contact Address2)
Validation	None.

City	
Element	Label
Definition/Business Rules	Displays the city for the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactCity), Servicer (contactCity), GA (contactCity), School (contactCity), ED (contactCity), State Agency (contactCity)
Validation	None.

State	
Element	Label
Definition/Business Rules	Displays the state for the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactState), Servicer (contactState), GA (contactState), School (contactState), ED (contactState), State Agency (contactState)
Validation	None.

Zip Code	
Element	Label
Definition/Business Rules	Displays the zip code for the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactZip), Servicer (contactZip), GA (contactZip), School (contactZip), ED (contactZip), State Agency (contactZip)
Validation	None.

Last Updated By:	
Element	Label
Definition/Business Rules	Displays the name of the person who last updated the contact information displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactLastUpdatedBy), Servicer (contactLastUpdatedBy), GA (contactLastUpdatedBy), School (contactLastUpdatedBy), ED (contactLastUpdatedBy), State Agency (contactLastUpdatedBy)
Validation	None.

Update Date	
Element	Label
Definition/Business Rules	Displays the date the contact information was updated. <i>Mask</i> - The date should be displayed in "MM/DD/CCYY" format.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactLastUpdatedDt), Servicer (contactLastUpdatedDt), GA (contactLastUpdatedDt), School (contactLastUpdatedDt), ED (contactLastUpdatedDt), State Agency (contactLastUpdatedDt)
Validation	None.

3.3 Organization Contact Update

Description	Allows a user to update contact information for their organization
New or Existing	Existing
User Group (Screen Level)	NSLDS
Requirements Traceability	1.044, 1.048
Reference(s)	NSLDS User Documentation, WB1F_Org Contact Update Server, O13_Organization Contact Update Server
Object Name	School, GA, Lender, Servicer, State Agency, ED

3.3.1 Software Unit Logic

NSLDS I File Name:	ORGCUPD.asp
NSLDS II File Name:	Orgcupd.jsp
Pre-Status:	This screen is accessible from the following screens (depending on user access privileges): <ul style="list-style-type: none"> • Organization Contact Detail (Pushbutton: Update)
Post-Status:	This screen allows a user to navigate to any of the following screens

	<p>(depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact History List (Link: Org Contact List) • Organization Search (Link: Org Search) • Data Provider Schedule (Link: Data Provider Schedule) • Repayment Information (Link: Repayment Information) • Cohort Default Rate History List (Link: Cohort Default Rate) • View Date Control (Link: View Date Control) • Loan Unlock Maintenance (Link: Loan Unlock Maintenance) • School Profile (Link: School Profile) • Organization Contact Detail (Back Icon) • Menu (Link: Menu Tab) • Loan History List (Link: Aid Tab) • Enrollment Summary (Link: Enroll Tab) • Report (Link: Report Tab) • Transfer Monitoring List (Link: Tran Tab) • External Contact List (Link: Support Tab) • Contact Us (Link: Contact Us Icon) • System Log On (Link: System Logoff Icon)
<p>Gif Name:</p>	<p>The following graphical objects may appear on this screen:</p> <ul style="list-style-type: none"> • Back.gif • Error.gif
<p>Tab Order</p>	<ol style="list-style-type: none"> 1. Return to Org Contact List 2. Available Functions 3. First Name 4. Last Name 5. Title 6. Phone 7. Ext 8. Fax 9. Email 10. URL 11. Address 1 12. Address 2 13. City 14. State 15. Zip Code 16. Submit 17. URL Navigation Bar 18. Menu Tab 19. Aid Tab 20. Enroll Tab 21. Report Tab

	<ul style="list-style-type: none">22. Tran Tab23. Support Tab24. Contact Us Icon25. Help Icon26. Logoff Icon27. Org Contact List28. Org Search29. Data Provider Schedule30. Repayment Information31. Cohort Default Rate32. Cohort Default Rate DM33. Cohort Default Rate FFPS34. View Date Control35. Loan Unlock Maintenance36. School Profile37. Department of Education Region 0 (Example)
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3.3.2 Design Details

The following screenshot highlights the functionality of Organization Contact Update screen.



Menu
Aid
Enroll
Org
Report





[Org Contact List](#) | [Org Search](#) | [Data Provider Schedule](#) | [Repayment Information](#) | [Cohort Default Rate](#) | [Cohort Default Rate DM](#) | [View Date Control](#) | [School Profile](#)

Logged on as: DAWN M WILL from [Department of Education Region 0](#)



Return To
Organization Contact
List

Name: COLLEGE OF NOTRE DAME OF MARYLAND
Code: 00206500 **Type:** School
Status: OPEN
Address: 4701 NORTH CHARLES STREET
 BALTIMORE, MD 212102476

Organization Contact Update

Selected Function: Primary Contact

Available Functions:

SSN/ID Issues
 IS Technical Issues
 Enrollment Reporting
 FAT/SAR/ISIR Issues
 Default Issues

First Name:

Last Name:

Title:

Phone: **Ext:**

Fax:

E-Mail:

URL:

Address:

City:

State:

Zip Code:

Last Update By: TERESA DRZEWIECKI
Update Date: 05/21/2001

Figure 5, Organization Contact Update

3.3.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	When clicked, the Organization Search screen appears.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.
Actions to be performed	When clicked, the Cohort Default Rate screen appears.

Cohort Default Rate	
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD

Loan Unlock Maintenance	
	user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Return to Organization Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Name	
Element	Label
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgName), Servicer (orgName), GA (orgName), School (orgName), ED (orgName), State Agency (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgCode), Servicer (orgCode), GA (orgCode), School (orgCode), ED (orgCode), State Agency (orgCode)
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgType), Servicer (orgType), GA (orgType), School (orgType), ED (orgType), State Agency (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization.</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This Status column will not appear if there is no data in NSLDS II.</p>
Actions to be performed	None.
Business Object (Attribute)	GA (status), School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgStreet, orgCity, orgState, orgZip), Servicer (orgStreet, orgCity, orgState, orgZip), School (orgStreet, orgCity, orgState, orgZip), GA (orgStreet, orgCity, orgState, orgZip), ED (orgStreet, orgCity, orgState, orgZip), State Agency (orgStreet, orgCity, orgState, orgZip)
Validation	None.

Selected Function	
Element	Label
Definition/Business Rules	Displays the selected function for the contact person.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactFunction), Servicer (contactFunction), GA (contactFunction), School (contactFunction), ED (contactFunction), State Agency (contactFunction)
Validation	None.

Available Function	
Element	Listbox
Definition/Business Rules	<p>Allows a user to select function(s) for the contact person.</p> <p>The user may select multiple functions by holding down the SHIFT key or CTRL key and clicking your selections.</p> <p>One person in an organization can be assigned multiple functions, but a function can only be assigned to one person in an organization. The functions displayed in the Listbox are:</p> <ul style="list-style-type: none"> • Primary Contact – For schools, the person responsible for overall NSLDS compliance, including Perkins submissions, SSCR, 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 Technical Issues – The person who can answer questions about the technical specifications of a school's or guaranty

Available Function	
	<p>agencies computing environment.</p> <ul style="list-style-type: none"> • SSCR 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 that can monitor cumulative amounts and discuss Perkins eligibility for individual students. • FFEL Issues – The school contact that 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 that can monitor cumulative amounts and discuss Direct Loan eligibility. • Pell Grant Issues – The school contact that 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

Available Function	
	<p>school inquiries about default rates.</p> <ul style="list-style-type: none"> • 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. • Transfer Monitoring – The school contact that submits Inform and/or receives Alert information on transfer students.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactFunction), Servicer (contactFunction), GA (contactFunction), School (contactFunction), ED (contactFunction), State Agency (contactFunction)
Validation	None.

First Name	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter first name for the contact person.</p> <p><i>Min Characters – 0</i> <i>Max Characters – 12</i></p>
Actions to be performed	<p>As the user enters the first name, it is displayed in the textbox in editable format.</p> <p>On Enter Submit pushbutton is enacted.</p>
Business Object (Attribute)	Lender (contactFirstName), Servicer (contactFirstName), GA (contactFirstName), School (contactFirstName), ED (contactFirstName.), State Agency (contactFirstName)
Validation	None.

Last Name	
Element	Textbox
Definition/Business Rules	Allows a user to enter last name for the contact person. <i>Min Characters – 0</i> <i>Max Characters – 35</i>
Actions to be performed	As the user enters the last name, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactLastName), Servicer (contactLastName), GA (contactLastName), School (contactLastName), ED (contactLastName), State Agency (contactLastName)
Validation	None.

Title	
Element	Textbox
Definition/Business Rules	Allows a user to enter the title for the contact person. <i>Min Characters – 0</i> <i>Max Characters – 30</i>
Actions to be performed	As the user enters the SSN, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactTitle), Servicer (contactTitle), GA (contactTitle), School (contactTitle), ED (contactTitle), State Agency (contactTitle)
Validation	None.

Phone	
Element	Textbox
Definition/Business Rules	Allows a user to enter the phone number for the contact person. <i>Min Characters – 0</i> <i>Max Characters – 13</i>

Phone	
Actions to be performed	As the user enters the phone number, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactPhone), Servicer (contactPhone), GA (contactPhone), School (contactPhone), ED (contactPhone), State Agency (contactPhone)
Validation	None.

Ext	
Element	Textbox
Definition/Business Rules	Allows a user to enter the extension for the contact person. <i>Min Characters – 0</i> <i>Max Characters – 5</i>
Actions to be performed	As the user enters the extension, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactExtension), Servicer (contactExtension), GA (contactExtension), School (contactExtension), ED (contactExtension), State Agency (contactExtension)
Validation	None.

Fax	
Element	Textbox
Definition/Business Rules	Allows a user to enter the fax number for the contact person. <i>Min Characters – 0</i> <i>Max Characters – 13</i>
Actions to be performed	As the user enters the fax number, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactFax), Servicer (contactFax), GA (contactFax), School (contactFax), ED (contactFax), State Agency (contactExtension)

Fax	
Validation	None.

E-Mail	
Element	Textbox
Definition/Business Rules	Allows a user to enter the email address for the contact person. <i>Masks</i> – E-mail must have a '@', '.', and last 3 characters must be letters.
Actions to be performed	As the user enters the email address, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactEmail), Servicer (contactEmail), GA (contactEmail), School (contactEmail), ED (contactEmail), State Agency (contactEmail)
Validation	None.

URL	
Element	Textbox
Definition/Business Rules	Allows a user to enter the URL to contact the contact person <i>Min Characters</i> – 0 <i>Max Characters</i> – 45
Actions to be performed	As the user enters the URL, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactURL), Servicer (contactURL), GA (contactURL), School (contactURL), ED (contactURL), State Agency (contactURL)
Validation	None.

Address	
Element	Textbox
Definition/Business Rules	Allows a user to enter their street address. <i>Min Characters</i> – 0 <i>Max Characters</i> – 50

Address	
Actions to be performed	As the user enters their address, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactAddress1, contact Address2), Servicer (contactAddress1, contact Address2), GA (contactAddress1, contact Address2), School (contactAddress1, contact Address2), ED (contactAddress1, contact Address2), State Agency (contactAddress1, contact Address2)
Validation	None.

City	
Element	Textbox
Definition/Business Rules	Allows a user to enter the city for the contact person. <i>Min Characters – 0</i> <i>Max Characters – 20</i>
Actions to be performed	As the user enters the city, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactCity), Servicer (contactCity), GA (contactCity), School (contactCity), ED (contactCity), State Agency (contactCity)
Validation	None.

State	
Element	Dropdown Box
Definition/Business Rules	Allows a user to enter the state for the contact person. All states are included in the dropdown box in abbreviated format (i.e. Virginia is displayed 'VA').
Actions to be performed	When the user clicks on the State Dropdown Box, all the options appear.
Business Object (Attribute)	Lender (contactState), Servicer (contactState), GA (contactState), School (contactState), ED (contactState), State Agency (contactState)

State	
Validation	None.

Zip Code	
Element	Textbox
Definition/Business Rules	Allows a user to enter the zip code for the contact person. <i>Min Characters - 0</i> <i>Max Characters - 10</i>
Actions to be performed	As the user enters the zip code, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactZip), Servicer (contactZip), GA (contactZip), School (contactZip), ED (contactZip), State Agency (contactZip)
Validation	None.

Last Updated By:	
Element	Label
Definition/Business Rules	Displays the name of the person who last updated the contact information displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactLastUpdatedBy), Servicer (contactLastUpdatedBy), GA (contactLastUpdatedBy), School (contactLastUpdatedBy), ED (contactLastUpdatedBy), State Agency (contactLastUpdatedBy)
Validation	None.

Update Date	
Element	Label
Definition/Business Rules	Displays the date the contact information was updated. <i>Mask - The date should be displayed in "MM/DD/CCYY" format.</i>
Actions to be performed	None.
Business Object (Attribute)	Lender (contactLastUpdatedDt), Servicer (contactLastUpdatedDt), GA

Update Date	
	(contactLastUpdatedDt), School (contactLastUpdatedDt), ED (contactLastUpdatedDt), State Agency (contactLastUpdatedDt)
Validation	None.

Submit	
Element	Pushbutton
Definition/Business Rules	Allows a user to submit the changes for the Organization Contact person.
Actions to be performed	User clicks the pushbutton after having made the necessary modifications to the Organization Contact information. Validation is performed.
Business Object (Attribute)	None.
Validation	<p>An information message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> • <i>Condition:</i> Upon successful validation, the User is directed to the Organization Contact List screen. <i>Message:</i> Organization Contact has been successfully updated. <i>Location:</i> Server <i>Additional Information:</i> This message displays on the Organization Contact List screen. Display info.gif. <p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> • <i>Condition:</i> User leaves the First and Last Name fields blank. <i>Message:</i> Please enter the name. <i>Location:</i> Client <i>Additional Information:</i> First Name label turns red. Display Error.gif. • <i>Condition:</i> User enters a non-numeric number in the Phone field (i.e. abcd). <i>Message:</i> Invalid phone number. Please enter in 999-XXX-XXXX format. Display Error.gif. <i>Location:</i> Client

Submit	
	<p><i>Additional Information:</i> Phone label turns red.</p> <ul style="list-style-type: none"> • <i>Condition:</i> User enters an invalid area code number in the Phone field (i.e. a12-345-6789). <i>Message:</i> Area code must be numeric. Please enter in 999-XXX-XXXX format. <i>Location:</i> Client <i>Additional Information:</i> Phone label turns red. Display Error.gif. • <i>Condition:</i> User enters an invalid number in the Phone field (i.e. 1234). <i>Message:</i> Invalid phone number. Please enter in 999-XXX-XXXX format. <i>Location:</i> Client <i>Additional Information:</i> Phone label turns red. Display Error.gif. • <i>Condition:</i> User enters a non-numeric number in the Ext field (i.e. abcd). <i>Message:</i> Please enter a numeric Phone Ext. <i>Location:</i> Client <i>Additional Information:</i> Ext label turns red. Display Error.gif. • <i>Condition:</i> User enters an invalid number in the Phone field (i.e. 123-456-7-89). <i>Message:</i> Phone number must be alphanumeric. Please enter in 999-XXX-XXXX format. <i>Location:</i> Client <i>Additional Information:</i> Phone label turns red. Display Error.gif. • <i>Condition:</i> User enters a non-numeric number in the Fax field (i.e. abcd). <i>Message:</i> Invalid fax number. Please enter in 999-XXX-XXXX format. <i>Location:</i> Client <i>Additional Information:</i> Fax label turns red. Display Error.gif. • <i>Condition:</i> User enters an invalid area code number in the Fax field (i.e. a12-345-6789).

Submit	
	<p><i>Message:</i> Area code must be numeric. Please enter in 999-XXX-XXXX format. <i>Location:</i> Client <i>Additional Information:</i> Fax label turns red. Display Error.gif.</p> <ul style="list-style-type: none"> • <i>Condition:</i> User enters an invalid number in the Fax field (i.e. 1234). <i>Message:</i> Invalid Fax number. Please enter in 999-XXX-XXXX format. <i>Location:</i> Client <i>Additional Information:</i> Fax label turns red. Display Error.gif. • <i>Condition:</i> User enters an invalid number in the Fax field (i.e. 123-456-7-89). <i>Message:</i> Fax number must be alphanumeric. Please enter in 999-XXX-XXXX format. <i>Location:</i> Client <i>Additional Information:</i> Fax label turns red. Display Error.gif. • <i>Condition:</i> User enters non-numeric value in the Zip Code field (i.e. abcd). <i>Message:</i> Zip code must be numeric. Please enter in 99999-9999 format. <i>Location:</i> Client <i>Additional Information:</i> Zip Code label turns red. Display Error.gif. • <i>Condition:</i> User enters an invalid value in the Zip Code field (i.e. 123). <i>Message:</i> Invalid Zip Code. Please enter in 99999-9999 format. <i>Location:</i> Client <i>Additional Information:</i> Zip Code label turns red. Display Error.gif. • <i>Condition:</i> User enters an invalid value in the Zip Code field (i.e. 12345-6). <i>Message:</i> Invalid Zip Code. Please enter in 99999-9999 format. <i>Location:</i> Client <i>Additional Information:</i> Zip Code label turns

Submit	
	<p>red. Display Error.gif.</p> <ul style="list-style-type: none"> • <i>Condition:</i> Zip code is not entered in alphanumeric format (i.e. 9898D). <i>Message:</i> Please enter Zip Code in alphanumeric format. <i>Location:</i> Client <i>Additional Information:</i> Zip Code label turns red. Display Error.gif. • <i>Condition:</i> TBD <i>Message:</i> Organization already exists. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Organization Contact not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Organization Contact permitted value violation. Invalid command. Record has been updated by another user, please return to display page. <i>Location:</i> Server <i>Additional Information:</i> TBD

3.4 Organization Contact Delete

Description	Allows a user to delete a contact on the Organization Contact List.
New or Existing	Existing
User Group (Screen Level)	NSLDS
Requirements Traceability	1.045
Reference(s)	NSLDS User Documentation, O14_Organization Contact Delete Confirmation Page, WB1G_Org Contact Delete Server
Object Name	School, GA, Lender, Servicer, State Agency, ED

3.4.1 Software Unit Logic

NSLDS I File Name:	orgcdel.asp
NSLDS II File Name:	Orgcdel.jsp
Pre-Status:	<p>This screen is accessible from the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact Detail (Pushbutton: Delete)
Post-Status:	<p>This screen allows a user to navigate to any of the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact History List (Link: Org Contact List) • Organization Search (Link: Org Search) • Data Provider Schedule (Link: Data Provider Schedule) • Repayment Information (Link: Repayment Information) • Cohort Default Rate History List (Link: Cohort Default Rate) • View Date Control (Link: View Date Control) • Loan Unlock Maintenance (Link: Loan Unlock Maintenance) • School Profile (Link: School Profile) • Organization Contact Detail (Back Icon) • Menu (Link: Menu Tab) • Loan History List (Link: Aid Tab) • Enrollment Summary (Link: Enroll Tab) • Report (Link: Report Tab) • Transfer Monitoring List (Link: Tran Tab) • External Contact List (Link: Support Tab) • Contact Us (Link: Contact Us Icon) • System Log On (Link: System Logoff Icon)
Gif Name:	<p>The following graphical objects may appear on this screen:</p> <ul style="list-style-type: none"> • Back.gif
Tab Order	<ol style="list-style-type: none"> 1. Return to Org Contact List 2. Email 3. URL 4. Confirm 5. URL Navigation Bar 6. Menu Tab 7. Aid Tab 8. Enroll Tab 9. Report Tab 10. Tran Tab 11. Support Tab

	<ol style="list-style-type: none">12. Contact Us Icon13. Help Icon14. Logoff Icon15. Org Contact List16. Org Search17. Data Provider Schedule18. Repayment Information19. Cohort Default Rate20. Cohort Default Rate DM21. Cohort Default Rate FFPS22. View Date Control23. Loan Unlock Maintenance24. School Profile25. Department of Education Region 0 (Example)
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3.4.2 Design Details

The following screenshot highlights the functionality of Organization Contact Delete screen.

Figure 6, Organization Contact Delete

3.4.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	When clicked, the Organization Search screen appears.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.

View Date Control	
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Return to Organization Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Name	
Element	Label
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgName), Servicer (orgName), GA (orgName), School (orgName), ED (orgName), State Agency (orgName)

Name	
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgCode), Servicer (orgCode), GA (orgCode), School (orgCode), ED (orgCode), State Agency (orgCode)
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgType), Servicer (orgType), GA (orgType), School (orgType), ED (orgType), State Agency (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization.</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This Status column will not appear if there is no data in NSLDS II.</p>
Actions to be performed	None.
Business Object (Attribute)	GA (status), School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgStreet, orgCity, orgState, orgZip), Servicer (orgStreet, orgCity, orgState, orgZip), School (orgStreet, orgCity, orgState, orgZip), GA (orgStreet, orgCity, orgState, orgZip), ED (orgStreet, orgCity, orgState, orgZip), State Agency (orgStreet, orgCity, orgState, orgZip)
Validation	None.

Instructions	
Element	Label
Definition/Business Rules	Displays the instructions for a user. The instructions should read: "You have requested the following Organization Contact be deleted from the system. Click CONFIRM to complete the delete."
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Function	
Element	Label
Definition/Business Rules	Displays the function of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactFunction), Servicer (contactFunction), GA (contactFunction), School (contactFunction), ED (contactFunction), State Agency (contactFunction)
Validation	None.

First Name	
Element	Label
Definition/Business Rules	Displays the first name of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactFirstName), Servicer (contactFirstName), GA (contactFirstName),

First Name	
	School (contactFirstName), ED (contactFirstName.), State Agency (contactFirstName)
Validation	None.

Last Name	
Element	Label
Definition/Business Rules	Displays the last name of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactLastName), Servicer (contactLastName), GA (contactLastName), School (contactLastName), ED (contactLastName), State Agency (contactLastName)
Validation	None.

Title	
Element	Label
Definition/Business Rules	Displays the title of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactTitle), Servicer (contactTitle), GA (contactTitle), School (contactTitle), ED (contactTitle), State Agency (contactTitle)
Validation	None.

Phone	
Element	Label
Definition/Business Rules	Displays the phone number of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactPhone), Servicer (contactPhone), GA (contactPhone), School (contactPhone), ED (contactPhone), State Agency (contactPhone)
Validation	None.

Ext	
Element	Label
Definition/Business Rules	Displays the extension of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactExtension), Servicer

Ext	
	(contactExtension), GA (contactExtension), School (contactExtension), ED (contactExtension), State Agency (contactExtension)
Validation	None.

Fax	
Element	Label
Definition/Business Rules	Displays the fax number of the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactFax), Servicer (contactFax), GA (contactFax), School (contactFax), ED (contactFax), State Agency (contactExtension)
Validation	None.

E-Mail	
Element	Link
Definition/Business Rules	Allows a user to send an email to the contact person listed.
Actions to be performed	When clicked, the user's default email package will display with the appropriate email address.
Business Object (Attribute)	Lender (contactEmail), Servicer (contactEmail), GA (contactEmail), School (contactEmail), ED (contactEmail), State Agency (contactEmail)
Validation	None.

URL	
Element	Link
Definition/Business Rules	Allows a user to send a URL to the contact person listed.
Actions to be performed	When clicked, the page that the URL address points to will display.
Business Object (Attribute)	Lender (contactURL), Servicer (contactURL), GA (contactURL), School (contactURL), ED (contactURL), State Agency (contactURL)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the contact person displayed.
Actions to be performed	None.

Address	
Business Object (Attribute)	Lender (contactAddress1, contact Address2), Servicer (contactAddress1, contact Address2), GA (contactAddress1, contact Address2), School (contactAddress1, contact Address2), ED (contactAddress1, contact Address2), State Agency (contactAddress1, contact Address2)
Validation	None.

City	
Element	Label
Definition/Business Rules	Displays the city for the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactCity), Servicer (contactCity), GA (contactCity), School (contactCity), ED (contactCity), State Agency (contactCity)
Validation	None.

State	
Element	Label
Definition/Business Rules	Displays the state for the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactState), Servicer (contactState), GA (contactState), School (contactState), ED (contactState), State Agency (contactState)
Validation	None.

Zip Code	
Element	Label
Definition/Business Rules	Displays the zip code for the contact person displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactZip), Servicer (contactZip), GA (contactZip), School (contactZip), ED (contactZip), State Agency (contactZip)
Validation	None.

Last Updated By:	
Element	Label
Definition/Business Rules	Displays the name of the person who last updated the contact information displayed.
Actions to be performed	None.

Last Updated By:	
Business Object (Attribute)	Lender (contactLastUpdatedBy), Servicer (contactLastUpdatedBy), GA (contactLastUpdatedBy), School (contactLastUpdatedBy), ED (contactLastUpdatedBy), State Agency (contactLastUpdatedBy)
Validation	None.

Update Date	
Element	Label
Definition/Business Rules	Displays the date the contact information was updated. <i>Mask</i> - The date should be displayed in "MM/DD/CCYY" format.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactLastUpdatedDt), Servicer (contactLastUpdatedDt), GA (contactLastUpdatedDt), School (contactLastUpdatedDt), ED (contactLastUpdatedDt), State Agency (contactLastUpdatedDt)
Validation	None.

Confirm	
Element	Pushbutton
Definition/Business Rules	Allows a user to delete the changes for the Organization Contact person.
Actions to be performed	By clicking on the pushbutton, the Organization Contact will be deleted from the database.
Business Object (Attribute)	None.
Validation	An information message appears at the top of the screen for the following condition: <ul style="list-style-type: none"> <i>Condition:</i> TBD <i>Message:</i> No records were found in the database. <i>Location:</i> Server <i>Additional Information:</i> TBD <i>Condition:</i> Contact is successfully deleted. This message appears in the Organization Contact List screen.

Confirm	
	<p><i>Message:</i> Contact successfully deleted. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.</p>

3.5 Organization Contact Add

Description	Allows a user to add new contact information for their organization to NSLDS II.
New or Existing	Existing
User Group (Screen Level)	NSLDS
Requirements Traceability	1.047, 1.048
Reference(s)	NSLDS User Documentation, WB1E_Organization Contact Add Server, O12_Organization Contact Add Page
Object Name	School, GA, Lender, Servicer, State Agency, ED

3.5.1 Software Unit Logic

NSLDS I File Name:	ORGCADD.asp
NSLDS II File Name:	Orgcadd.jsp
Pre-Status:	<p>This screen is accessible from the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Pushbutton: Add Contact)
Post-Status:	<p>This screen allows a user to navigate to any of the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact History List (Link: Org Contact List) • Organization Search (Link: Org Search) • Data Provider Schedule (Link: Data Provider Schedule) • Repayment Information (Link: Repayment Information) • Cohort Default Rate History List (Link: Cohort Default Rate) • View Date Control (Link: View Date Control) • Loan Unlock Maintenance (Link: Loan Unlock Maintenance) • School Profile (Link: School Profile) • Menu (Link: Menu Tab) • Loan History List (Link: Aid Tab) • Enrollment Summary (Link: Enroll Tab)

	<ul style="list-style-type: none"> • Report (Link: Report Tab) • Transfer Monitoring List (Link: Tran Tab) • External Contact List (Link: Support Tab) • Contact Us (Link: Contact Us Icon) • System Log On (Link: System Logoff Icon)
Gif Name:	<p>The following graphical objects may appear on this screen:</p> <ul style="list-style-type: none"> • Back.gif • Error.gif • Info.gif
Tab Order	<ol style="list-style-type: none"> 1. Return to Org Contact List 2. Available Functions 3. First Name 4. Last Name 5. Title 6. Phone 7. Ext 8. Fax 9. Email 10. URL 11. Address 1 12. Address 2 13. City 14. State 15. Zip Code 16. Submit 17. URL Navigation Bar 18. Menu Tab 19. Aid Tab 20. Enroll Tab 21. Report Tab 22. Tran Tab 23. Support Tab 24. Contact Us Icon 25. Help Icon 26. Logoff Icon 27. Org Contact List 28. Org Search 29. Data Provider Schedule 30. Repayment Information 31. Cohort Default Rate 32. Cohort Default Rate DM 33. Cohort Default Rate FFPS 34. View Date Control 35. Loan Unlock Maintenance

	<p>36. School Profile 37. Department of Education Region 0 (Example)</p>
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3.5.2 Design Details

The following screenshot highlights the functionality of Organization Contact Add screen.

Figure 7, Organization Contact Add

3.5.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	When clicked, the Organization Search screen appears.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.
Actions to be performed	When clicked, the Cohort Default Rate History

Cohort Default Rate	
	List screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen.

Loan Unlock Maintenance	
	Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Return to Organization Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Name	
Element	Label
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgName), Servicer (orgName), GA (orgName), School (orgName), ED (orgName), State Agency (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgCode), Servicer (orgCode), GA (orgCode), School (orgCode), ED (orgCode), State Agency (orgCode)

Code	
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgType), Servicer (orgType), GA (orgType), School (orgType), ED (orgType), State Agency (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization.</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This Status column will not appear if there is no data in NSLDS II.</p>
Actions to be performed	None.
Business Object (Attribute)	GA (status), School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgStreet, orgCity, orgState, orgZip), Servicer (orgStreet, orgCity, orgState, orgZip), School (orgStreet, orgCity, orgState, orgZip), GA (orgStreet, orgCity, orgState, orgZip), ED

Address	
	(orgStreet, orgCity, orgState, orgZip), State Agency (orgStreet, orgCity, orgState, orgZip)
Validation	None.

Available Function	
Element	Listbox
Definition/Business Rules	<p>Allows a user to select function(s) for the contact person.</p> <p>The user may select multiple functions by holding down the SHIFT key or CTRL key and clicking your selections.</p> <p>One person in an organization can be assigned multiple functions, but a function can only be assigned to one person in an organization The functions displayed in the Listbox are:</p> <ul style="list-style-type: none"> • Primary Contact – For schools, the person responsible for overall NSLDS compliance, including Perkins submissions, SSCR, 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 Technical Issues – The person who can answer questions about the technical specifications of a school’s or guaranty agencies computing environment. • SSCR 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

Available Function	
	<p>data.</p> <ul style="list-style-type: none"> • 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 that can monitor cumulative amounts and discuss Perkins eligibility for individual students. • FFEL Issues – The school contact that 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 that can monitor cumulative amounts and discuss Direct Loan eligibility. • Pell Grant Issues – The school contact that 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.

Available Function	
	<ul style="list-style-type: none"> • 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. • Transfer Monitoring – The school contact that submits Inform and/or receives Alert information on transfer students.
Business Object (Attribute)	Lender (contactFunction), Servicer (contactFunction), GA (contactFunction), School (contactFunction), ED (contactFunction), State Agency (contactFunction)
Actions to be performed	None.
Validation	None.

First Name	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter first name for the contact person.</p> <p><i>Min Characters – 0</i> <i>Max Characters – 12</i></p>
Actions to be performed	<p>As the user enters the first name, it is displayed in the textbox in editable format.</p> <p>On Enter Submit pushbutton is enacted.</p>
Business Object (Attribute)	Lender (contactFirstName), Servicer (contactFirstName), GA (contactFirstName), School (contactFirstName), ED (contactFirstName), State Agency (contactFirstName)
Validation	None.

Last Name	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter last name for the contact person.</p> <p><i>Min Characters – 0</i></p>

Last Name	
	<i>Max Characters – 35</i>
Actions to be performed	As the user enters the last name, it is displayed in the textbox in editable format.
Business Object (Attribute)	Lender (contactLastName), Servicer (contactLastName), GA (contactLastName), School (contactLastName), ED (contactLastName), State Agency (contactLastName)
Validation	None.

Title	
Element	Textbox
Definition/Business Rules	Allows a user to enter the title for the contact person. <i>Min Characters – 0</i> <i>Max Characters – 30</i>
Actions to be performed	As the user enters the SSN, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactTitle), Servicer (contactTitle), GA (contactTitle), School (contactTitle), ED (contactTitle), State Agency (contactTitle)
Validation	None.

Phone	
Element	Textbox
Definition/Business Rules	Allows a user to enter the phone number for the contact person. <i>Min Characters – 0</i> <i>Max Characters – 13</i> Masks - Phone number must be entered in the "999-999-9999" or "9999999999" format.
Actions to be performed	As the user enters the phone number, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactPhone), Servicer (contactPhone),

Phone	
	GA (contactPhone), School (contactPhone), ED (contactPhone), State Agency (contactPhone)
Validation	None.

Ext	
Element	Textbox
Definition/Business Rules	Allows a user to enter the extension for the contact person. <i>Min Characters</i> – 0 <i>Max Characters</i> – 5
Actions to be performed	As the user enters the extension, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactExtension), Servicer (contactExtension), GA (contactExtension), School (contactExtension), ED (contactExtension), State Agency (contactExtension)
Validation	None.

Fax	
Element	Textbox
Definition/Business Rules	Allows a user to enter the fax number for the contact person. <i>Min Characters</i> – 0 <i>Max Characters</i> – 13 Masks - Fax number must be entered in the "999-999-9999" or "9999999999" format.
Actions to be performed	As the user enters the fax number, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactFax), Servicer (contactFax), GA (contactFax), School (contactFax), ED (contactFax), State Agency (contactExtension)
Validation	None.

E-Mail	
Element	Textbox
Definition/Business Rules	Allows a user to enter the email address for the contact person. <i>Min Characters – 0</i> <i>Max Characters – 45</i> <i>Masks – E-mail must have a '@', '.', and last 3 characters must be letters.</i>
Actions to be performed	As the user enters the email address, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactEmail), Servicer (contactEmail), GA (contactEmail), School (contactEmail), ED (contactEmail), State Agency (contactEmail)
Validation	None.

URL	
Element	Textbox
Definition/Business Rules	Allows a user to enter the URL address for the contact person. <i>Min Characters – 0</i> <i>Max Characters – 45</i>
Actions to be performed	As the user enters the URL, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactURL), Servicer (contactURL), GA (contactURL), School (contactURL), ED (contactURL), State Agency (contactURL)
Validation	None.

Address	
Element	Textbox
Definition/Business Rules	Allows a user to enter the address for the contact person. <i>Min Characters – 0</i> <i>Max Characters – 50</i>
Actions to be performed	As the user enters their SSN, it is displayed in the

Address	
	textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactAddress1, contact Address2), Servicer (contactAddress1, contact Address2), GA (contactAddress1, contact Address2), School (contactAddress1, contact Address2), ED (contactAddress1, contact Address2), State Agency (contactAddress1, contact Address2)
Validation	None.

City	
Element	Textbox
Definition/Business Rules	Allows a user to enter the city for the contact person. <i>Min Characters - 0</i> <i>Max Characters - 20</i>
Actions to be performed	As the user enters the city, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactCity), Servicer (contactCity), GA (contactCity), School (contactCity), ED (contactCity), State Agency (contactCity)
Validation	None.

State	
Element	Dropdown Box
Definition/Business Rules	Allows a user to enter the state for the contact person. All states are included in the dropdown box in abbreviated format (i.e. Virginia is displayed 'VA').
Actions to be performed	When the user clicks on the State Dropdown Box, all the options appear.
Business Object (Attribute)	Lender (contactState), Servicer (contactState), GA (contactState), School (contactState), ED (contactState), State Agency (contactState)
Validation	None.

Zip Code	
Element	Textbox
Definition/Business Rules	Allows a user to enter the zip code for the contact person. <i>Min Characters – 0</i> <i>Max Characters – 10</i> Masks - ZIP Code must be entered in a "123456789" or "12345-6789" format.
Actions to be performed	As the user enters the zip code, it is displayed in the textbox in editable format. On Enter Submit pushbutton is enacted.
Business Object (Attribute)	Lender (contactZip), Servicer (contactZip), GA (contactZip), School (contactZip), ED (contactZip), State Agency (contactZip)
Validation	None.

Last Updated By:	
Element	Label
Definition/Business Rules	Displays the name of the person who last updated the contact information displayed.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactLastUpdatedBy), Servicer (contactLastUpdatedBy), GA (contactLastUpdatedBy), School (contactLastUpdatedBy), ED (contactLastUpdatedBy), State Agency (contactLastUpdatedBy)
Validation	None.

Update Date	
Element	Label
Definition/Business Rules	Displays the date the contact information was updated. The date should be displayed in "MM/DD/CCYY" format.
Actions to be performed	None.
Business Object (Attribute)	Lender (contactLastUpdatedDt), Servicer (contactLastUpdatedDt), GA

Update Date	
	(contactLastUpdatedDt), School (contactLastUpdatedDt), ED (contactLastUpdatedDt), State Agency (contactLastUpdatedDt)
Validation	None.

Submit	
Element	Pushbutton
Definition/Business Rules	Allows a user to submit the new Organization Contact person.
Actions to be performed	By clicking on the pushbutton, validation is performed. If there are no errors the user is directed to the Organization Contact List screen with a message that the Add has been performed successfully. If there are errors, the appropriate error message is displayed.
Business Object (Attribute)	None.
Validation	<p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> • <i>Condition:</i> User leaves the First and Last Name fields blank. <i>Message:</i> Please enter the name. <i>Location:</i> Client <i>Additional Information:</i> First Name label turns red. Display Error.gif. • <i>Condition:</i> User enters a non-numeric number in the Phone field (i.e. abcd). <i>Message:</i> Invalid phone number. Please enter in 999-XXX-XXXX format. <i>Location:</i> Client <i>Additional Information:</i> Phone label turns red. Display Error.gif. • <i>Condition:</i> User enters an invalid area code number in the Phone field (i.e. a12-345-6789). <i>Message:</i> Area code must be numeric. Please enter in 999-XXX-XXXX format. <i>Location:</i> Client <i>Additional Information:</i> Phone label turns red. Display Error.gif.

Submit	
	<ul style="list-style-type: none"> • <i>Condition:</i> User enters an invalid number in the Phone field (i.e. 1234). <i>Message:</i> Invalid phone number. Please enter in 999-XXX-XXXX format. <i>Location:</i> Client <i>Additional Information:</i> Phone label turns red. Display Error.gif. • <i>Condition:</i> User enters a non-numeric number in the Ext field (i.e. abcd). <i>Message:</i> Please enter a numeric Phone Ext. <i>Location:</i> Client <i>Additional Information:</i> Ext label turns red. Display Error.gif. • <i>Condition:</i> User enters an invalid number in the Phone field (i.e. 123-456-7-89). <i>Message:</i> Phone number must be alphanumeric. Please enter in 999-XXX-XXXX format. <i>Location:</i> Server <i>Additional Information:</i> Phone label turns red. Display Error.gif. • <i>Condition:</i> User enters a non-numeric number in the Fax field (i.e. abcd). <i>Message:</i> Invalid fax number. Please enter in 999-XXX-XXXX format. <i>Location:</i> Client <i>Additional Information:</i> Fax label turns red. Display Error.gif. • <i>Condition:</i> User enters an invalid area code number in the Fax field (i.e. a12-345-6789). <i>Message:</i> Area code must be numeric. Please enter in 999-XXX-XXXX format. <i>Location:</i> Client <i>Additional Information:</i> Fax label turns red. Display Error.gif. • <i>Condition:</i> User enters an invalid number in the Fax field (i.e. 1234). <i>Message:</i> Invalid Fax number. Please enter in 999-XXX-XXXX format.

Submit	
	<p><i>Location:</i> Client <i>Additional Information:</i> Fax label turns red. Display Error.gif.</p> <ul style="list-style-type: none"> • <i>Condition:</i> User enters an invalid number in the Fax field (i.e. 123-456-7-89). <i>Message:</i> Fax number must be alphanumeric. Please enter in 999-XXX-XXXX format. <i>Location:</i> Client <i>Additional Information:</i> Fax label turns red. Display Error.gif. • <i>Condition:</i> User enters non-numeric value in the Zip Code field (i.e. abcd). <i>Message:</i> Invalid Zip Code. Please enter in 99999-9999 format. <i>Location:</i> Client <i>Additional Information:</i> Zip Code label turns red. Display Error.gif. • <i>Condition:</i> User enters an invalid value in the Zip Code field (i.e. 123). <i>Message:</i> Invalid Zip Code. Please enter in 99999-9999 format. <i>Location:</i> Client <i>Additional Information:</i> Zip Code label turns red. Display Error.gif. • <i>Condition:</i> User enters an invalid value in the Zip Code field (i.e. 12345-6). <i>Message:</i> Invalid Zip Code. Please enter in 99999-9999 format. <i>Location:</i> Client <i>Additional Information:</i> Zip Code label turns red. Display Error.gif. • <i>Condition:</i> User enters non-numeric value in the Zip Code field (i.e. abcd). <i>Message:</i> Zip code must be numeric. Please enter in 99999-9999 format. <i>Location:</i> Client <i>Additional Information:</i> Zip Code label turns red. Display Error.gif.

Submit	
	<ul style="list-style-type: none"> • <i>Condition:</i> User did not select a function for the contact. <i>Message:</i> Please select the function(s) for this contact. <i>Location:</i> Client <i>Additional Information:</i> Available Function label turns red. Display Error.gif. • <i>Condition:</i> TBD <i>Message:</i> Organization Type or Code is invalid. <i>Location:</i> Client <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Activity function not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> The organization contact already exists. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> The Organization Contact permitted value violation. Invalid command. No unused activity function found. <i>Location:</i> Server <i>Additional Information:</i> TBD <p>An information message appears at the top of the screen for the following condition:</p> <ul style="list-style-type: none"> • <i>Condition:</i> Contact is successfully added. This message appears in the Organization Contact List screen. <i>Message:</i> Contact successfully added. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.

3.6 Organization Search

Description	Allows a user to find an organization stored in NSLDS II.
New or Existing	Existing
User Group (Screen Level)	NSLDS
Requirements Traceability	1.046
Reference(s)	NSLDS User Documentation, O3_Org Search Page ORGSRCH.ASP, WB85_ORG_SEARCH_SVR, WB47_STATE_LIST_SVR
Object Name	School, GA, Lender, Servicer, State Agency, ED

3.6.1 Software Unit Logic

NSLDS I File Name:	orgsrch.asp
NSLDS II File Name:	Orgsrch.jsp
Pre-Status:	<p>This screen is accessible from the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: Org Search) • Organization Contact Detail (Link: Org Search) • Organization Contact Update (Link: Org Search) • Organization Contact Delete Confirmation (Link: Org Search) • Organization Contact Add (Link: Org Search) • Data Provider Schedule (Link: Org Search) • Repayment Information (Link: Org Search) • Cohort Default Rate History List (Link: Org Search) • View Date Control (Link: Org Search) • School Profile (Link: Org Search) • Loan Unlock Maintenance (Link: Org Search)
Post-Status:	<p>This screen allows a user to navigate to any of the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: Org Contact List) • Data Provider Schedule (Link: Data Provider Schedule) • Repayment Information (Link: Repayment Information) • Cohort Default Rate History List (Link: Cohort Default Rate) • View Date Control (Link: View Date Control) • Loan Unlock Maintenance (Link: Loan Unlock Maintenance) • School Profile (Link: School Profile)

	<ul style="list-style-type: none"> • Menu (Link: Menu Tab) • Loan History List (Link: Aid Tab) • Enrollment Summary (Link: Enroll Tab) • Report (Link: Report Tab) • Transfer Monitoring List (Link: Tran Tab) • External Contact List (Link: Support Tab) • Contact Us (Link: Contact Us Icon) • System Log On (Link: System Logoff Icon)
Gif Name:	<p>The following graphical objects may appear on this screen:</p> <ul style="list-style-type: none"> • Error.gif • Info.gif
Tab Order	<ol style="list-style-type: none"> 1. Type 2. Code 3. Name 4. Retrieve 5. Department of Education Region 0 (Example) 6. City 7. State 8. Retrieve 9. Clear 10. <u>1</u> (Example) 11. URL Navigation Bar 12. Menu Tab 13. Aid Tab 14. Enroll Tab 15. Report Tab 16. Tran Tab 17. Support Tab 18. Contact Us Icon 19. Help Icon 20. Logoff Icon 21. Org Contact List 22. Data Provider Schedule 23. Repayment Information 24. Cohort Default Rate 25. Cohort Default Rate DM 26. Cohort Default Rate FFPS 27. View Date Control 28. Loan Unlock Maintenance 29. School Profile

3.6.2 Design Details

The following screenshot highlights the functionality of Organization Search screen.

The screenshot shows the NSLDS web application interface. At the top, there is a navigation menu with 'Menu', 'Aid', 'Enroll', 'Org', and 'Report'. Below the menu, there are search filters for 'Type' (set to SCHOOL), 'Code', and 'Name', along with a 'Retrieve' button. The user is logged in as 'DAWN M WILL' from the 'Department of Education Region 9'. An 'Optional filter criteria' box shows 'City: BALTIMORE' and 'State: MD - MARYLAND'. Below this, a message states 'Search results : Schools filtered for City: 'BALTIMORE' filtered for State: 'MD''. A table lists 25 schools with their names and codes. At the bottom, it says '- MORE MATCHES FOUND -'.

Name	Code
1 STRAYER UNIVERSITY - WHITE MARSH	00145924
2 BALTIMORE, MD	
BALTIMORE COLLEGE OF COMMERCE	00205900
BALTIMORE, MD	
BALTIMORE HEBREW UNIVERSITY	00206000
BALTIMORE, MD	
BALTIMORE CITY COMMUNITY COLLEGE	00206100
BALTIMORE, MD	
BALTIMORE CITY COMMUNITY COLLEGE - HARBOR CAM	00206101
BALTIMORE, MD	
COMMUNITY COLLEGE OF BALTIMORE COUNTY	00206300
BALTIMORE, MD	
COMMUNITY COLLEGE OF BALTIMORE COUNTY - OCCUP	00206304
BALTIMORE, MD	
COMMUNITY COLLEGE OF BALTIMORE COUNTY - ESSEX	00206308
BALTIMORE, MD	
COMMUNITY COLLEGE OF BALTIMORE COUNTY - POINT	00206309
BALTIMORE, MD	
COMMUNITY COLLEGE OF BALTIMORE COUNTY - SCOTT	00206310
BALTIMORE, MD	
COLLEGE OF NOTRE DAME OF MARYLAND	00206500
BALTIMORE, MD	
COPPIN STATE COLLEGE	00206800
BALTIMORE, MD	
EASTERN COLLEGE	00206900
BALTIMORE, MD	
ESSEX COMMUNITY COLLEGE	00207000
BALTIMORE, MD	
GOUCHER COLLEGE	00207300
BALTIMORE, MD	
JOHNS HOPKINS UNIVERSITY - HOMEWOOD CAMPUS -	00207700
BALTIMORE, MD	
JOHNS HOPKINS UNIVERSITY - SCHOOL OF ARTS/SCI	00207702
BALTIMORE, MD	
JOHNS HOPKINS UNIVERSITY - SCHOOL OF ENGINEER	00207704
BALTIMORE, MD	
JOHNS HOPKINS UNIVERSITY - SCHOOL OF PUBLIC H	00207705
BALTIMORE, MD	
JOHNS HOPKINS UNIVERSITY - SCHOOL OF MEDICINE	00207706
BALTIMORE, MD	
JOHNS HOPKINS UNIVERSITY - SCHOOL OF NURSNG	00207707
BALTIMORE, MD	
JOHNS HOPKINS UNIVERSITY - PEABODY CONSERVATO	00207708
BALTIMORE, MD	
JOHNS HOPKINS UNIVERSITY - SCHOOL OF RAD TECH	00207709
BALTIMORE, MD	
JOHNS HOPKINS UNIVERSITY - EAST BALTIMORE(MED	00207710
BALTIMORE, MD	
JOHNS HOPKINS UNIVERSITY - DOWNTOWN CENTER -	00207713
BALTIMORE, MD	

Figure 8, Organization Search

3.6.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen. This link is deactivated when the user is in the Organization Search screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.
Actions to be performed	When clicked, the Cohort Default Rate History List screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Type	
Element	Link
Definition/Business Rules	Allows a user to select a type of organization you want to search for. The options in the Dropdown Box are (displayed in this order): <ul style="list-style-type: none"> • -- Select -- • FDLP Servicer • ED Region • Guaranty Agency • Lender • Lender Branch Servicer • School • State Agency
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear.
Business Object (Attribute)	Lender (orgType), Servicer (orgType), School (orgType), GA (orgType), ED (orgType), State Agency (orgType)
Validation	None.

Code	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter the code of an organization.</p> <p>Different Types of organizations have different code lengths. The lengths for the codes are:</p> <ul style="list-style-type: none"> • FDLP Servicer – 3 characters long • ED Region - 2 characters long • Guaranty Agency – 3 characters long • Lender – 8 characters long • Lender Branch Servicer – 6 characters long • School – 8 characters long • State Agency - 4 characters long <p>The code can be typed partially in order to retrieve search results (i.e. You can type '12', rather than '12345678' which will display the Org Search screen with all organizations that begin with '12').</p> <p><i>Max Characters – 0</i> <i>Max Characters - 8</i></p>
Actions to be performed	<p>As the user enters the code, it is displayed in the textbox in editable format.</p> <p>On Enter Retrieve pushbutton is enacted.</p>
Business Object (Attribute)	Lender (orgCode), Servicer (orgCode), School (orgCode), GA (orgCode), ED (orgCode), State Agency (orgCode)
Validation	None.

Name	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter the name of an organization.</p> <p>The name can be typed partially in order to retrieve search results (i.e. You can type 'S', rather than 'State University' which will display the Org Search Screen with all organization that begin with 'S').</p> <p><i>Min Characters – 0</i></p>

Name	
	<i>Max Characters – 45</i>
Actions to be performed	As the user enters the name, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	Lender (orgName), Servicer (orgName), School (orgName), GA (orgName), ED (orgName), State Agency (orgName)
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve organization contact information.
Actions to be performed	By clicking on the pushbutton the organization that satisfies the criteria entered will be listed Organization Search screen.
Business Object (Attribute)	None.
Validation	<ul style="list-style-type: none"> • <i>Condition:</i> If the user selects the type for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed in the Organization Search screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the user selects the type and enters the code for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed on the screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type and name for an organization and then clicks the Retrieve pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common name associated with it.

Retrieve	
	<p><i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <ul style="list-style-type: none"> <p><i>Condition:</i> If the User selects the type, code, and name for an organization and then clicks the pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common code and name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> <p><i>Condition:</i> User clicks the Retrieve button without selecting a Type or inputting a Code and Name. <i>Message:</i> Please select an Organization Type. <i>Location:</i> Client <i>Additional Information:</i> Type label turns red. Display Error.gif.</p> <p><i>Condition:</i> User selects FDLP SERVICER Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 5 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif.</p> <p><i>Condition:</i> User selects ED REGION Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 2 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif.</p> <p><i>Condition:</i> User selects GUARANTY AGENCY Type and enters an invalid Code (i.e. 00000000).</p>

Retrieve	
	<p><i>Message:</i> Please enter an Organization Code length of 3 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif.</p> <ul style="list-style-type: none"> • <i>Condition:</i> User selects LENDER BRANCH SERVICER Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 6 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects STATE AGENCY Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 4 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> TBD <i>Message:</i> Please enter an Organization Code length of 8 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> TBD <i>Message:</i> Please enter an Organization Code length of 10 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects a Type and enters a non-numeric Code (i.e. abcd). <i>Message:</i> Please enter a numeric Organizational Code. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif.

Retrieve	
	<ul style="list-style-type: none"> • <i>Condition:</i> TBD. <i>Message:</i> The school Branch was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD. <i>Message:</i> The school Branch Servicer was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD. <i>Message:</i> Invalid Command. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD. <i>Message:</i> Selected Organization Type was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD. <i>Message:</i> Organization Type was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD <p>An information message appears at the top of the screen for the following condition:</p> <ul style="list-style-type: none"> • <i>Condition:</i> Organization contact information is not found based on criteria entered. <i>Message:</i> No record found for the selected criteria. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.

City	
Element	Textbox
Definition/Business Rules	Allows a user to enter the name of a city. <i>Min Characters</i> – 0

City	
	<i>Max Characters – 20</i>
Actions to be performed	As the user enters the city, it is displayed in the textbox in editable format.
Business Object (Attribute)	Lender (contactCity), Servicer (contactCity), GA (contactCity), School (contactCity), ED (contactCity), State Agency (contactCity)
Validation	None.

State	
Element	Dropdown Box
Definition/Business Rules	<p>Allows a user to select a state.</p> <p>All of the states will be listed and formatted with Abbreviation – State Name (i.e. VA – Virginia).</p> <p>In addition to all the states being listed, the following will also be included the following will be choices in the dropdown (in alphabetical order):</p> <ul style="list-style-type: none"> • AA – Military Location Code • AE – Military Location Code • AP – Military Location Code • AS – American Somoa • CM – Northern Marianas Islands • FC – Foreign Country • FM – Micronesia • GU – Guam • IQ – Other United States Territory Possession • MH - Marshall Islands • MP – Marianas Islands • MX – Mexico • NM – New Mexico • NR – Non-Resident, State Unknown • PC – Panama Canal Zone • PR – Puerto Rico • PW – Republic of Palau • TT – Trust Territories of the Pacific • VI – Virgin Islands • WK – Wake Island
Actions to be performed	When the user clicks on the state Dropdown Box, all the options appear.

State	
Business Object (Attribute)	Lender (contactState), Servicer (contactState), GA (contactState), School (contactState), ED (contactState), State Agency (contactState)
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve organization contact information.
Actions to be performed	When the pushbutton is clicked, the group that meets the criteria being searched for displays on the screen.
Business Object (Attribute)	None.
Validation	<ul style="list-style-type: none"> • <i>Condition:</i> If the user selects the type for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed in the Organization Search screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the user selects the type and state for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed in the Organization Search screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the user selects the type, state, and city for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed in the Organization Search screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the user selects the type and enters the code for an organization and then clicks the pushbutton, the organization that

Retrieve	
	<p>satisfies the criteria entered will be listed on the screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <ul style="list-style-type: none"> • <i>Condition:</i> If the User selects the type and name for an organization and then clicks the Retrieve pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type, state, and name for an organization, and then clicks the Retrieve pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type, code, and name for an organization and then clicks the pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common code and name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. <p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> • <i>Condition:</i> User clicks the Retrieve button without selecting a Type. <i>Message:</i> Please select an Organization Type. <i>Location:</i> Client

Retrieve	
	<p><i>Additional Information:</i> Type label turns red. Display Error.gif.</p> <ul style="list-style-type: none"> • <i>Condition:</i> User enters a City, but does not select a State <i>Message:</i> Please select a state or country when searching by city. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> User selects FDLP SERVICER Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 5 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects ED REGION Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 2 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects GUARANTY AGENCY Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 3 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects LENDER BRANCH SERVICER Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 6 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif.

Retrieve	
	<ul style="list-style-type: none"> • <i>Condition:</i> User selects STATE AGENCY Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 4 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> TBD <i>Message:</i> Please enter an Organization Code length of 8 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> TBD <i>Message:</i> Please enter an Organization Code length of 10 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects a Type and enters a non-numeric Code (i.e. abcd). <i>Message:</i> Please enter a numeric Organizational Code. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> TBD. <i>Message:</i> The school Branch was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD. <i>Message:</i> The school Branch Servicer was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD. <i>Message:</i> Invalid Command. <i>Location:</i> Server

Retrieve	
	<p><i>Additional Information:</i> TBD</p> <ul style="list-style-type: none"> • <i>Condition:</i> TBD. <i>Message:</i> Selected Organization Type was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD. <i>Message:</i> Organization Type was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD <p>An information message appears at the top of the screen for the following condition:</p> <ul style="list-style-type: none"> • <i>Condition:</i> Organization contact information is not found based on criteria entered. <i>Message:</i> No record found for the selected criteria. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.

Clear	
Element	Pushbutton
Definition/Business Rules	Allows a user to clear the selections that have been made.
Actions to be performed	When the pushbutton is clicked, the screen refreshes and initialized to be blank.
Business Object (Attribute)	None.
Validation	None.

Organization Table	
Element	Table
Definition/Business Rules	Displays the Organization Name and Code. <i>Sort Order</i> – Code, Name
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

1 (Example)	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Name	
Element	Label
Definition/Business Rules	<p>Displays the name of the Organization.</p> <p>The city and state are listed below the name for each organization.</p> <p>Fifty Organizations will display on the screen at a time. To navigate to the next set of Organizations, click the down arrow.</p> <p>The down arrow is:</p> 
Actions to be performed	None.
Business Object (Attribute)	Lender (orgName, orgCity, orgState), Servicer (orgName, orgCity, orgState), School (orgName, orgCity, orgState), GA (orgName, orgCity, orgState), ED (orgName, orgCity, orgState), State Agency (orgName, orgCity, orgState)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code number of the Organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgCode), Servicer (orgCode), School (orgCode), GA (orgCode), ED (orgCode), State Agency (orgCode)
Validation	None.

3.7 Data Provider Schedule

Description	Allows a user to view a history of current, past, and future scheduled data provider submittals.
New or Existing	Existing
User Group (Screen Level)	NSLDPG, SCHFAT, SCHDPC, GAINQ, GADPC
Requirements Traceability	1.049
Reference(s)	NSLDS User Documentation, Data Provider Schedule Page DATAPROV.ASP, WB93_DATA_PROVIDER_SCHEDULE_SVR
Object Name	School, GA

3.7.1 Software Unit Logic

NSLDS I File Name:	dataprov.asp
NSLDS II File Name:	DataProv.asp
Pre-Status:	<p>This screen is accessible from the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: Data Provider Schedule) • Organization Contact Detail (Link: Data Provider Schedule) • Organization Contact Update (Link: Data Provider Schedule) • Organization Contact Delete Confirmation (Link: Data Provider Schedule) • Organization Contact Add (Link: Data Provider Schedule) • Organization Search (Link: Data Provider Schedule) • Repayment Information (Link: Data Provider Schedule) • Cohort Default Rate History List (Link: Data Provider Schedule) • View Date Control (Link: Data Provider Schedule) • School Profile (Link: Data Provider Schedule) • Loan Unlock Maintenance (Link: Data Provider Schedule)
Post-Status:	<p>This screen allows a user to navigate to any of the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: Org Contact List) • Repayment Information (Link: Repayment Information) • Cohort Default Rate History List (Link: Cohort Default Rate) • View Date Control (Link: View Date Control)

	<ul style="list-style-type: none"> • Loan Unlock Maintenance (Link: Loan Unlock Maintenance) • School Profile (Link: School Profile) • Menu (Link: Menu Tab) • Loan History List (Link: Aid Tab) • Enrollment Summary (Link: Enroll Tab) • Report (Link: Report Tab) • Transfer Monitoring List (Link: Tran Tab) • External Contact List (Link: Support Tab) • Contact Us (Link: Contact Us Icon) • System Log On (Link: System Logoff Icon)
Gif Name:	<p>The following graphical objects may appear on this screen:</p> <ul style="list-style-type: none"> • Error.gif • Info.gif
Tab Order	<ol style="list-style-type: none"> 1. Type 2. Code 3. Name 4. Retrieve 5. Department of Education Region 0 (Example) 6. URL Navigation Bar 7. Menu Tab 8. Aid Tab 9. Enroll Tab 10. Report Tab 11. Tran Tab 12. Support Tab 13. Contact Us Icon 14. Help Icon 15. Logoff Icon 16. Org Contact List 17. Org Search 18. Repayment Information 19. Cohort Default Rate 20. Cohort Default Rate DM 21. Cohort Default Rate FFPS 22. View Date Control 23. Loan Unlock Maintenance 24. School Profile

3.7.2 Design Details

The following screenshot highlights the functionality of Data Provider Schedule screen.

 Menu Aid Enroll Org Report						
Org Contact List Org Search Data Provider Schedule Repayment Information Cohort Default Rate Cohort Default Rate DM View Data Control School Profile						
Type: <input type="text" value="-- Select --"/>	Code: <input type="text"/>	Name: <input type="text"/>	Retrieve			
Logged on as: DAWN M WILL from Department of Education Region 9						
Name: GOUCHER COLLEGE Code: 00207300 Type: School Status: OPEN Address: 1021 DULANEY VALLEY ROAD BALTIMORE, MD 212042794						
Data Provider Schedule						
Scheduled Submittal Date	Received Date	Processed Date	Loan Records Extracted	Loans with Errors	Submittal Pass Rate(%)	
12/03/2002	N/A	N/A	N/A	N/A	N/A	N/A
11/06/2002	N/A	N/A	N/A	N/A	N/A	N/A
10/06/2002	N/A	N/A	N/A	N/A	N/A	N/A
09/03/2002	N/A	N/A	N/A	N/A	N/A	N/A
08/06/2002	08/02/2002	08/06/2002	692	43	94.00	
07/09/2002	07/01/2002	07/09/2002	695	32	96.00	
06/04/2002	06/03/2002	06/04/2002	699	32	96.00	
05/07/2002	05/06/2002	05/08/2002	703	31	96.00	
04/09/2002	04/02/2002	04/09/2002	713	42	95.00	
03/06/2002	03/08/2002	03/09/2002	723	43	96.00	
02/06/2002	02/06/2002	02/05/2002	724	321	56.00	
01/08/2002	01/09/2002	01/11/2002	731	337	54.00	
12/04/2001	12/04/2001	12/04/2001	787	364	54.00	
11/06/2001	N/A	N/A	N/A	N/A	N/A	N/A
10/19/2001	N/A	N/A	N/A	N/A	N/A	N/A
10/09/2001	10/02/2001	10/09/2001	1,329	445	67.00	
09/04/2001	N/A	N/A	N/A	N/A	N/A	N/A
08/07/2001	N/A	N/A	N/A	N/A	N/A	N/A
07/10/2001	N/A	N/A	N/A	N/A	N/A	N/A
06/06/2001	N/A	N/A	N/A	N/A	N/A	N/A
05/08/2001	N/A	N/A	N/A	N/A	N/A	N/A
04/10/2001	N/A	N/A	N/A	N/A	N/A	N/A
03/06/2001	N/A	N/A	N/A	N/A	N/A	N/A
02/06/2001	N/A	N/A	N/A	N/A	N/A	N/A
01/09/2001	N/A	N/A	N/A	N/A	N/A	N/A
12/06/2000	N/A	N/A	N/A	N/A	N/A	N/A
11/07/2000	N/A	N/A	N/A	N/A	N/A	N/A
10/10/2000	N/A	N/A	N/A	N/A	N/A	N/A
09/06/2000	N/A	N/A	N/A	N/A	N/A	N/A
08/08/2000	N/A	N/A	N/A	N/A	N/A	N/A
07/11/2000	N/A	N/A	N/A	N/A	N/A	N/A
06/06/2000	N/A	N/A	N/A	N/A	N/A	N/A
05/09/2000	N/A	N/A	N/A	N/A	N/A	N/A
04/11/2000	N/A	N/A	N/A	N/A	N/A	N/A
03/07/2000	N/A	N/A	N/A	N/A	N/A	N/A
02/08/2000	N/A	N/A	N/A	N/A	N/A	N/A
01/11/2000	N/A	N/A	N/A	N/A	N/A	N/A
12/07/1999	N/A	N/A	N/A	N/A	N/A	N/A
11/09/1999	N/A	N/A	N/A	N/A	N/A	N/A
10/12/1999	N/A	N/A	N/A	N/A	N/A	N/A
09/07/1999	N/A	N/A	N/A	N/A	N/A	N/A
08/10/1999	N/A	N/A	N/A	N/A	N/A	N/A
07/13/1999	N/A	N/A	N/A	N/A	N/A	N/A
06/08/1999	N/A	N/A	N/A	N/A	N/A	N/A
05/11/1999	N/A	N/A	N/A	N/A	N/A	N/A
04/13/1999	N/A	N/A	N/A	N/A	N/A	N/A
03/09/1999	N/A	N/A	N/A	N/A	N/A	N/A
02/09/1999	N/A	N/A	N/A	N/A	N/A	N/A
01/12/1999	N/A	N/A	N/A	N/A	N/A	N/A
12/08/1998	N/A	N/A	N/A	N/A	N/A	N/A

Figure 9, Data Provider Schedule

3.7.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	When clicked, the Organization Search screen appears.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen. This link is deactivated when the user is in the Data Provider Schedule screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.
Actions to be performed	When clicked, the Cohort Default Rate History List screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Type	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select a type of organization you want to search for. The options in the Dropdown Box are (displayed in this order): <ul style="list-style-type: none"> • -- Select -- • School • Guaranty Agency
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear.
Business Object (Attribute)	School (orgType), GA (orgType)
Validation	None.

Code	
Element	Textbox
Definition/Business Rules	Allows a user to enter the code of an organization. Different Types of organizations have different code lengths. The lengths for the codes are: <ul style="list-style-type: none"> • School – 8 characters long • Guaranty Agency – 3 characters long

Code	
	<p>The code can be typed partially in order to retrieve search results (i.e. You can type '12', rather than '12345678' which will display the Org Search screen with all organizations that begin with '12').</p> <p><i>Min Characters - 0</i> <i>Max Characters - 8</i></p>
Actions to be performed	<p>As the user enters the code, it is displayed in the textbox in editable format.</p> <p>On Enter Retrieve pushbutton is enacted.</p>
Business Object (Attribute)	School (orgCode), GA (orgCode)
Validation	None.

Name	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter the name of an organization.</p> <p>The name can be typed partially in order to retrieve search results (i.e. You can type 'S', rather than 'State University' which will display the Org Search Screen with all organization that begin with 'S').</p> <p><i>Min Characters - 0</i> <i>Max Characters - 45</i></p>
Actions to be performed	<p>As the user enters the name, it is displayed in the textbox in editable format.</p> <p>On Enter Retrieve pushbutton is enacted.</p>
Business Object (Attribute)	School (orgName), GA (orgName)
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve organization contact information.
Actions to be performed	By clicking on the pushbutton the organization

Retrieve	
	that satisfies the criteria entered will be listed in the Organization Search screen.
Business Object (Attribute)	None.
Validation	<ul style="list-style-type: none"> • <i>Condition:</i> If the user selects the type for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed in the Organization Search screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the user selects the type and enters the code for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed on the screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type and name for an organization and then clicks the Retrieve pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type, code, and name for an organization and then clicks the pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common code and name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. <p>An error message appears at the top of the screen for the following conditions:</p>

Retrieve	
	<ul style="list-style-type: none"> • <i>Condition:</i> User clicks the Retrieve button without selecting a Type or inputting a Code and Name. <i>Message:</i> Please select an Organization Type. <i>Location:</i> Client <i>Additional Information:</i> Type label turns red. Display Error.gif. • <i>Condition:</i> User selects GUARANTY AGENCY Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 3 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects a Type and enters a non-numeric Code (i.e. abcd). <i>Message:</i> Please enter a numeric Organizational Code. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. <p>An information message appears at the top of the screen for the following condition:</p> <ul style="list-style-type: none"> • <i>Condition:</i> Organization contact information is not found based on criteria entered. <i>Message:</i> No record found for the selected criteria. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.

Name	
Element	Label
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgName), GA (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgCode), GA (orgCode)
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgType), GA (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization.</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This Status column will not appear if there is no data in NSLDS II.</p>
Actions to be performed	None.
Business Object (Attribute)	GA (status), School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgStreet, orgCity, orgState, orgZip), GA (orgStreet, orgCity, orgState, orgZip)

Address	
Validation	None.

Scheduled Submittal Date	
Element	Label
Definition/Business Rules	Displays the date NSLDS II expects to process the submittal.
Actions to be performed	None.
Business Object (Attribute)	School (scheduledSubmitDt), GA (scheduledSubmitDt)
Validation	None.

Received Date	
Element	Label
Definition/Business Rules	Displays the date NSLDS II received the incoming submittal. N/A will appear if the date is in the future.
Actions to be performed	None.
Business Object (Attribute)	School (receivedDt), GA (receivedDt)
Validation	None.

Processed Date	
Element	Label
Definition/Business Rules	Displays the date NSLDS II completely processed the submittal. N/A will appear if the date is in the future.
Actions to be performed	None.
Business Object (Attribute)	School (processedDt), GA (processedDt)
Validation	None.

Loan Records Extracted	
Element	Label
Definition/Business Rules	Displays 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 II database. N/A will appear if the date is in the future.
Actions to be performed	None.
Business Object (Attribute)	School (loanRecordsExtracted), GA

Loan Records Extracted	
	(loanRecordsExtracted)
Validation	None.

Loans with Errors	
Element	Label
Definition/Business Rules	<p>Displays the total number of detail records extracted from the data provider database that included errors and did not update the NSLDS II database.</p> <p>This column will not appear for Guaranty Agency users or for users viewing an organization other than their own.</p> <p>N/A will appear if the date is in the future.</p>
Actions to be performed	None.
Business Object (Attribute)	School (loansWithErrors), GA (loansWithErrors)
Validation	None.

Submittal Pass Rate (%)	
Element	Label
Definition/Business Rules	<p>Displays the percentage of detail records extracted from the data provider database that contained no errors and updated the NSLDS II database.</p> <p>The calculation will be performed by subtracting Loans with Errors from Loan Records Extracted to get the Loans without Errors. Then divide Loans without Errors by Loan Records Extracted.</p> <p>This column will not appear for Guaranty Agency users or for users viewing an organization other than their own.</p> <p>N/A will appear if the date is in the future.</p>
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

3.8 Repayment Information

Description	Displays the current repayment status (Notional Default Rate) of certain borrowers in Federal Family Education Loan (FFEL) and Direct Loan (DL) programs who attended a school during a specific period.
New or Existing	Existing
User Group (Screen Level)	SCHFAT, SCHFAT, SCHSCR, ED, EDDEF, GADPC, EDDMD, SCHDPC, GAINQ
Requirements Traceability	1.050
Reference(s)	NSLDS User Documentation, Repayment Information Page REPAYINF.ASP
Object Name	School, GA

3.8.1 Software Unit Logic

NSLDS I File Name:	repayinf.asp
NSLDS II File Name:	RepayInfo.jsp
Pre-Status:	<p>This screen is accessible from the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: Repayment Information) • Organization Contact Detail (Link: Repayment Information) • Organization Contact Update (Link: Repayment Information) • Organization Contact Delete Confirmation (Link: Repayment Information) • Organization Contact Add (Link: Repayment Information) • Organization Search (Link: Repayment Information) • Data Provider Schedule (Link: Repayment Information) • Cohort Default Rate History List (Link: Repayment Information) • View Date Control (Link: Repayment Information) • School Profile (Link: Repayment Information) • Loan Unlock Maintenance (Link: Repayment Information)
Post-Status:	<p>This screen allows a user to navigate to any of the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: Org Contact List) • Organization Search (Link: Org Search) • Data Provider Schedule (Link: Data Provider Schedule) • Cohort Default Rate History List (Link: Cohort Default

	<p>Rate)</p> <ul style="list-style-type: none"> • View Date Control (Link: View Date Control) • Loan Unlock Maintenance (Link: Loan Unlock Maintenance) • School Profile (Link: School Profile) • Menu (Link: Menu Tab) • Loan History List (Link: Aid Tab) • Enrollment Summary (Link: Enroll Tab) • Report (Link: Report Tab) • Transfer Monitoring List (Link: Tran Tab) • External Contact List (Link: Support Tab) • Contact Us (Link: Contact Us Icon) • System Log On (Link: System Logoff Icon)
Gif Name:	<p>The following graphical objects may appear on this screen:</p> <ul style="list-style-type: none"> • Error.gif • Info.gif
Tab Order	<ol style="list-style-type: none"> 1. Type 2. Code 3. Name 4. Retrieve 5. Department of Education Region 0 6. Request Loan Detail for Latest Month 7. URL Navigation Bar 8. Menu Tab 9. Aid Tab 10. Enroll Tab 11. Report Tab 12. Tran Tab 13. Support Tab 14. Contact Us Icon 15. Help Icon 16. Logoff Icon 17. Org Contact List 18. Org Search 19. Data Provider Schedule 20. Cohort Default Rate 21. Cohort Default Rate DM 22. Cohort Default Rate FFPS 23. View Date Control 24. Loan Unlock Maintenance 25. School Profile

3.8.2 Design Details

The following screenshot highlights the functionality of Repayment Information screen.



Menu
Aid
Enroll
Org
Report





[Org Contact List](#) | [Org Search](#) | [Data Provider Schedule](#) | [Repayment Information](#) | [Cohort Default Rate](#) | [Cohort Default Rate DM](#) | [View Date Control](#) | [School Profile](#)

Type: SCHOOL Code: Name: Retrieve

Logged on as: DAWN M WILL from [Department of Education Region 0](#)

Name: GOUCHER COLLEGE
Code: 00207300 **Type:** School
Status: OPEN
Address: 1021 DULANEY VALLEY ROAD
 BALTIMORE, MD 212042794

Repayment Information

Request Loan Detail for latest month

The following information reflects the current repayment status of certain borrowers in FFEL and Direct loan programs who attended a school during a specific period. This information has no relationship to the calculation of draft or official cohort default rates 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.

	Numerator Date Range	Denominator Date Range	FFEL Num	FFEL Denom	%	DL Num	DL Denom	%	Dual Num	Dual Denom	%	Date Processed
1	07/2000-06/2002	07/2000-06/2001	3	266	1.1	0	0	0.0	0	0	0.0	07/27/2002
2	06/2000-05/2002	06/2000-05/2001	4	275	1.4	0	0	0.0	0	0	0.0	06/23/2002
3	05/2000-04/2002	05/2000-04/2001	4	277	1.4	0	0	0.0	0	0	0.0	05/25/2002
4	04/2000-03/2002	04/2000-03/2001	4	281	1.4	0	0	0.0	0	0	0.0	04/27/2002
5	03/2000-02/2002	03/2000-02/2001	3	273	1.0	0	0	0.0	0	0	0.0	03/23/2002
6	02/2000-01/2002	02/2000-01/2001	3	277	1.0	0	0	0.0	0	0	0.0	02/23/2002
7	01/2000-12/2001	01/2000-12/2000	3	278	1.0	0	0	0.0	0	0	0.0	01/26/2002
8	12/1999-11/2001	12/1999-11/2000	4	276	1.4	0	0	0.0	0	0	0.0	12/22/2001
9	11/1999-10/2001	11/1999-10/2000	7	378	1.8	0	0	0.0	0	0	0.0	11/24/2001
10	10/1999-09/2001	10/1999-09/2000	7	271	2.5	0	0	0.0	0	0	0.0	10/27/2001
11	09/1999-08/2001	09/1999-08/2000	6	271	2.2	0	0	0.0	0	0	0.0	09/29/2001
12	08/1999-07/2001	08/1999-07/2000	4	275	1.4	0	0	0.0	0	0	0.0	08/25/2001
13	07/1999-06/2001	07/1999-06/2000	4	273	1.4	0	0	0.0	0	0	0.0	07/28/2001
14	06/1999-05/2001	06/1999-05/2000	5	262	1.9	0	0	0.0	0	0	0.0	06/23/2001
15	05/1999-04/2001	05/1999-04/2000	5	258	1.9	0	0	0.0	0	0	0.0	05/26/2001
16	04/1999-03/2001	04/1999-03/2000	5	254	1.9	0	0	0.0	0	0	0.0	04/28/2001
17	03/1999-02/2001	03/1999-02/2000	5	252	1.9	0	0	0.0	0	0	0.0	03/24/2001
18	02/1999-01/2001	02/1999-01/2000	5	253	1.9	0	0	0.0	0	0	0.0	02/24/2001
19	01/1999-12/2000	01/1999-12/1999	5	253	1.9	0	0	0.0	0	0	0.0	01/27/2001
20	12/1998-11/2000	12/1998-11/1999	3	277	1.0	0	0	0.0	0	0	0.0	12/23/2000
21	11/1998-10/2000	11/1998-10/1999	4	257	1.5	0	0	0.0	0	0	0.0	11/25/2000
22	10/1998-09/2000	10/1998-09/1999	5	253	1.9	0	0	0.0	0	0	0.0	10/28/2000
23	09/1998-08/2000	09/1998-08/1999	6	252	2.3	0	0	0.0	0	0	0.0	09/23/2000
24	08/1998-07/2000	08/1998-07/1999	5	248	2.0	0	0	0.0	0	0	0.0	08/26/2000
25	07/1998-06/2000	07/1998-06/1999	5	249	2.0	0	0	0.0	0	0	0.0	07/29/2000
26	06/1998-05/2000	06/1998-05/1999	5	235	2.1	0	0	0.0	0	0	0.0	06/24/2000
27	05/1998-04/2000	05/1998-04/1999	3	238	1.2	0	0	0.0	0	0	0.0	05/27/2000
28	04/1998-03/2000	04/1998-03/1999	3	238	1.2	0	0	0.0	0	0	0.0	04/29/2000
29	03/1998-02/2000	03/1998-02/1999	3	241	1.2	0	0	0.0	0	0	0.0	03/25/2000
30	02/1998-01/2000	02/1998-01/1999	3	243	1.2	0	0	0.0	0	0	0.0	02/26/2000
31	01/1998-12/1999	01/1998-12/1998	4	248	1.6	0	0	0.0	0	0	0.0	01/29/2000
32	12/1997-11/1999	12/1997-11/1998	4	234	1.7	0	0	0.0	0	0	0.0	01/25/2000

Figure 10, Repayment Information

3.8.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen. This link is deactivated when the user is in the Repayment Information screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link

Cohort Default Rate	
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.
Actions to be performed	When clicked, the Cohort Default Rate History List screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Type	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select a type of organization you want to search for. The options in the Dropdown Box are (displayed in this order): <ul style="list-style-type: none"> • School
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear.
Business Object (Attribute)	School (orgType)
Validation	None.

Code	
Element	Textbox
Definition/Business Rules	Allows a user to enter the code of an organization. Different Types of organizations have different code lengths. The lengths for the codes are: <ul style="list-style-type: none"> • School – 8 characters long The code can be typed partially in order to retrieve search results (i.e. You can type '12',

Code	
	rather than '12345678' which will display the Org Search screen with all organizations that begin with '12'). <i>Min Characters - 0</i> <i>Max Characters - 8</i>
Actions to be performed	As the user enters the code, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	School (orgCode)
Validation	None.

Name	
Element	Textbox
Definition/Business Rules	Allows a user to enter the name of an organization. The name can be typed partially in order to retrieve search results (i.e. You can type 'S', rather than 'State University' which will display the Org Search Screen with all organization that begin with 'S'). <i>Min Characters - 0</i> <i>Max Characters - 45</i>
Actions to be performed	As the user enters the name, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	School (orgName)
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve organization contact information.
Actions to be performed	By clicking on the pushbutton the organization that satisfies the criteria entered will be listed Organization Search screen.
Business Object (Attribute)	None.

Retrieve	
Validation	<ul style="list-style-type: none"> • <i>Condition:</i> If the user selects the type for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed in the Organization Search screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the user selects the type and enters the code for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed on the screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type and name for an organization and then clicks the Retrieve pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type, code, and name for an organization and then clicks the pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common code and name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. <p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> • <i>Condition:</i> User selects a Type and enters a non-numeric Code (i.e. abcd). <i>Message:</i> Please enter a numeric

Retrieve	
	<p>Organizational Code. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif.</p> <ul style="list-style-type: none"> • <i>Condition:</i> TBD <i>Message:</i> Invalid Action <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Invalid function key. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> The record has been successfully added. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> System Error. Notify support. Command not set. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter required fields. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Claim Reason Code was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Guaranty Agency was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Lender Branch was not found.

Retrieve	
	<p><i>Location:</i> Server <i>Additional Information:</i> TBD</p> <ul style="list-style-type: none"> • <i>Condition:</i> TBD <i>Message:</i> Lender Branch Servicer was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Lender was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> The Loan Status was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> The Loan Type was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Parameter Validation not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Output Medium must be selected before Submittal. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Extracts can't be submitted to printer or RMDS output. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> User not authorized for WAN mailbox.

Retrieve	
	<p><i>Location:</i> Server <i>Additional Information:</i> TBD</p> <ul style="list-style-type: none"> • <i>Condition:</i> TBD <i>Message:</i> Must enter a valid sort selection. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Must enter a valid report type. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please confirm request to submit (Y-Yes or N-No) ==> <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Field not numeric. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Field length too long. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Year must be numeric. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Month must be numeric. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Day must be numeric <i>Location:</i> Server <i>Additional Information:</i> TBD

Retrieve	
	<ul style="list-style-type: none"> • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid day. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid year. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid month. (01 through 12). <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a date in a MMDDCCYY format.. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> All parameters are validated, Submit when ready. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Only "*" is valid as wild card. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Highlighted fields must be equal to each other. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> 1st highlighted field must be > or = to 2nd highlighted field. <i>Location:</i> Server <i>Additional Information:</i> TBD

Retrieve	
	<ul style="list-style-type: none"> • <i>Condition:</i> TBD <i>Message:</i> Invalid Quarter. Valid Quarters are 1 through 4. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Invalid Year. Year cannot be GT Current year + 1 or LT '1965'. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Lender or Lender Servicer is required. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Invalid Quarter Year combination. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> 1st highlighted field must be > 2nd highlighted field. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> 1st highlighted field must be < or = to 2nd highlighted field. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> 1st highlighted field must be < 2nd highlighted field. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Invalid date. Date must be at least

Retrieve	
	<p>01/01/0001. <i>Location:</i> Server <i>Additional Information:</i> TBD</p> <ul style="list-style-type: none"> • <i>Condition:</i> TBD <i>Message:</i> Parameters are validated. Submit when ready. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Report was not Submitted <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Enter a value in one of the highlighted fields <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Only one highlighted field may contain data <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Parameters are validated. Submit when ready. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a unique Report Parameter.. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a unique Report Parameter Attribute. <i>Location:</i> Server <i>Additional Information:</i> TBD

Retrieve	
	<ul style="list-style-type: none"> • <i>Condition:</i> TBD <i>Message:</i> Report Parameter Attribute permitted value violation. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Report Parameter permitted value violation. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> The School Branch was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> The School Branch Servicer was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> The School was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter required data. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please select a sort for this report. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> The School Branch was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD

Retrieve	
	<ul style="list-style-type: none"> • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid School Code. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> The School Branch was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter required data. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please select a sort for this report. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid School Code. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid School Branch Code. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid School Branch Servicer Code. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid Lender Code. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid Lender Branch

Retrieve	
	<p>Code. <i>Location:</i> Server <i>Additional Information:</i> TBD</p> <ul style="list-style-type: none"> • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid Lender Branch Servicer Code. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid Loan Type Code. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid Loan Status Code. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid Claim Reason Code. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid Guaranty Agency Code. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please select an Output Medium. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please select a Report Type. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD

Retrieve	
	<p><i>Message:</i> Please enter a numeric value for this field. <i>Location:</i> Server <i>Additional Information:</i> TBD</p> <ul style="list-style-type: none"> • <i>Condition:</i> TBD <i>Message:</i> Please enter a numeric value for the year. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a numeric value for the month. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a numeric value for the day. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid day. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid year. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid month. (01 through 12).. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a "*" for a wildcard value.. <i>Location:</i> Server <i>Additional Information:</i> TBD

Retrieve	
	<ul style="list-style-type: none"> • <i>Condition:</i> TBD <i>Message:</i> Highlighted fields must be equal to each other. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> 1st highlighted field must be > or = to 2nd highlighted field. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a Lender or Lender Servicer Code. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> 1st highlighted field must be > 2nd highlighted field. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Plea1st highlighted field must be < or = to 2nd highlighted field. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> 1st highlighted field must be < 2nd highlighted field. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a value in one of the highlighted fields. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD

Retrieve	
	<p><i>Message:</i> Please enter a valid Quarter/Year Combination. <i>Location:</i> Server <i>Additional Information:</i> TBD</p> <ul style="list-style-type: none"> • <i>Condition:</i> TBD <i>Message:</i> Only one highlighted field may contain data. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> You are not authorized to run this report. Please contact the Customer Service Center. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid Quarter. (1-4). <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please enter a valid Fiscal Year. (Current year + 1 or > 1965). <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> The report profile was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> The Destination ID was not found. <i>Location:</i> Server <i>Additional Information:</i> TBD <p>An information message appears at the top of the screen for the following condition:</p> <ul style="list-style-type: none"> • <i>Condition:</i> User clicks on the Retrieve

Retrieve	
	<p>pushbutton without entering a Code. <i>Message:</i> Please select an organization of this type – School. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.</p> <ul style="list-style-type: none"> <p><i>Condition:</i> TBD <i>Message:</i> No message was found for this Report. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.</p> <p><i>Condition:</i> TBD <i>Message:</i> No record was found for this school. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.</p>

Name	
Element	Label
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgCode)
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	Displays the status of the organization.

Status	
	<ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This Status column will not appear if there is no data in NSLDS II.</p>
Actions to be performed	None.
Business Object (Attribute)	GA (status), School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgStreet, orgCity, orgState, orgZip), GA (orgStreet, orgCity, orgState, orgZip)
Validation	None.

Request Loan Detail for latest month	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the report parameters screen.
Actions to be performed	By clicking on the pushbutton, the user is linked to the Selection and Sort reporting page passing the Report ID 'DRC010' for ED and GA user and Report ID 'DRC015' for School user.
Business Object (Attribute)	None.
Validation	None.

Disclosure statement	
Element	Label
Definition/Business Rules	Displays a disclosure statement that should read: "The following information reflects the current

Disclosure statement	
	repayment status of certain borrowers in FFEL and Direct loan programs who attended a school during a specific period. This information has no relationship to the calculation of draft or official cohort default rates 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.”
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Numerator Date Range	
Element	Label
Definition/Business Rules	Identifies the 24-month period used to determine whether any borrowers have defaulted or met other specified conditions on FFEL and DL program loans that entered repayment in the first 12 months of the identified 24-month period. Schools and GAs may only view a maximum of 17 months of history. ED may view the maximum of 36 months of history.
Actions to be performed	None.
Business Object (Attribute)	School (numDtRange)
Validation	None.

Denominator Date Range	
Element	Label
Definition/Business Rules	Identifies 12-month period used to determine the borrowers that have entered into repayment on FFEL and DL program loans. Schools and GAs may only view a maximum of 17 months of history. ED may view the maximum of 36 months of history.
Actions to be performed	None.
Business Object (Attribute)	School (denomDtRange)
Validation	None.

FFEL Num	
Element	Label
Definition/Business Rules	Displays 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.
Actions to be performed	None.
Business Object (Attribute)	School (FFELNum)
Validation	None.

FFEL Denom	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on FFLE program loans during a specified 12-month period.
Actions to be performed	None.
Business Object (Attribute)	School (FFELDenom)
Validation	None.

%	
Element	Label
Definition/Business Rules	Displays the FFEL student repayment history rate. FFEL Numerator divided by FFEL Denominator.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

DL Num	
Element	Label
Definition/Business Rules	Displays 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.
Actions to be performed	None.
Business Object (Attribute)	School (DLNum)
Validation	None.

DL Denom	
Element	Label

DL Denom	
Definition/Business Rules	The total number of borrowers that entered repayment on DL program loans during a specified 12-month period.
Actions to be performed	None.
Business Object (Attribute)	School (DLDenom)
Validation	None.

%	
Element	Label
Definition/Business Rules	Displays the direct loan student repayment history rate. Direct Loan Numerator divided by Direct Loan Denominator.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Dual Num	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on FFEL and 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.
Actions to be performed	None.
Business Object (Attribute)	School (DualNum)
Validation	None.

Dual Denom	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on FFEL and DL program loans during a specified 12-month period.
Actions to be performed	None.
Business Object (Attribute)	School (DualDenom)
Validation	None.

%	
Element	Label

%	
Definition/Business Rules	Displays the dual student repayment history rate. Dual Numerator divided by Dual Denominator.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Date Processed	
Element	Label
Definition/Business Rules	Identifies the date the Student Repayment History List was processed. This is the date when the actual notional calculation was performed.
Actions to be performed	None.
Business Object (Attribute)	School (ProcessedDt)
Validation	None.

Denominator Date Range	
Element	Label
Definition/Business Rules	Identifies 12-month period used to determine the borrowers that have entered into repayment on FFEL and DL program loans.
Actions to be performed	None.
Business Object (Attribute)	School (denomDtRange)
Validation	None.

3.9 Cohort Default Rate History List

Description	Allows a user to view a history of the default rates for the selected organization and request Loan Details.
New or Existing	Existing
User Group (Screen Level)	ED, EDDMD, EDDEF, GADPC, GAINQ, LENDER, SCHFAT, SCHSCR
Requirements Traceability	1.051, 1.052
Reference(s)	NSLDS User Documentation, Cohort Default Rate History List (ED) CHRED.ASP, Cohort Default Rate History List (DMD) CHRDM.D.ASP, Cohort Default Rate History List (SCH) CHRSC.H.ASP, Cohort Default Rate History List (Lender)

	CHRLen.ASP, Cohort Default Rate History List (GA) CHRGA.ASP, Cohort Default Rate History List (FPPS) CHRFPFS.ASP
Object Name	School, GA, Lender, Servicer

3.9.1 Software Unit Logic

NSLDS I File Name:	CHRDED.asp (ED), CHREDDMD.asp (DMD), CHRSCH.asp (School), CHRGA.asp (GA), CHRLen.asp (Lender), CHRFPFS.asp (FPPS)
NSLDS II File Name:	ChrdED.jsp (ED), ChrEDDMMD.jsp (DMD), ChrSch.jsp (School), ChrGA.jsp (GA), ChrLen.jsp (Lender), ChrFPFS.jsp (FPPS)
Pre-Status:	<p>This screen is accessible from the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: Cohort Default Rate) • Organization Contact Detail (Link: Cohort Default Rate) • Organization Contact Update (Link: Cohort Default Rate) • Organization Contact Delete Confirmation (Link: Cohort Default Rate) • Organization Contact Add (Link: Cohort Default Rate) • Organization Search (Link: Cohort Default Rate) • Data Provider Schedule (Link: Cohort Default Rate) • Repayment Information (Link: Cohort Default Rate) • View Date Control (Link: Cohort Default Rate) • School Profile (Link: Cohort Default Rate) • Loan Unlock Maintenance (Link: Cohort Default Rate)
Post-Status:	<p>This screen allows a user to navigate to any of the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: Org Contact List) • Organization Search (Link: Org Search) • Data Provider Schedule (Link: Data Provider Schedule) • Repayment Information (Link: Repayment Information) • View Date Control (Link: View Date Control) • Loan Unlock Maintenance (Link: Loan Unlock Maintenance) • School Profile (Link: School Profile) • Menu (Link: Menu Tab) • Loan History List (Link: Aid Tab) • Enrollment Summary (Link: Enroll Tab) • Report (Link: Report Tab) • Transfer Monitoring List (Link: Tran Tab) • External Contact List (Link: Support Tab) • Contact Us (Link: Contact Us Icon)

	<ul style="list-style-type: none"> • System Log On (Link: System Logoff Icon)
Gif Name:	<p>The following graphical objects may appear on this screen:</p> <ul style="list-style-type: none"> • Error.gif • Info.gif
Tab Order	<ol style="list-style-type: none"> 1. Type 2. Code 3. Name 4. Retrieve 5. Department of Education Region 0 6. Request Loan Details 7. URL Navigation Bar 8. Menu Tab 9. Aid Tab 10. Enroll Tab 11. Report Tab 12. Tran Tab 13. Support Tab 14. Contact Us Icon 15. Help Icon 16. Logoff Icon 17. Org Contact List 18. Org Search 19. Data Provider Schedule 20. Repayment Information 21. Cohort Default Rate DM 22. Cohort Default Rate FFPS 23. View Date Control 24. Loan Unlock Maintenance 25. School Profile

3.9.2 Design Details

The following screenshot highlights the functionality of Cohort Default Rate History screen.

See Sections 3.9.3.1 – 3.9.3.6 for the Cohort Default Rate prototypes.

3.9.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

3.9.3.1 Cohort Default Rate – ED View

NSLDS Menu Aid Enroll Org Report Tran Support

Org Contact List | Org Search | Data Provider Schedule | Repayment Information | **Cohort Default Rate** | View Date Control |
Loan Unlock Maintenance | School Profile

Type: --- Select --- Code: [] Name: [] Retrieve

Logged on as: DAWN WILL from Department of Education Region 0

Name: JOHNS HOPKINS UNIVERSITY - HOMEWOOD CAMPUS -
Code: 00207700 **Type:** School
Status: OPEN
Address: 242 GARLAND HALL
BALTIMORE, MD 212182693

Cohort Default Rate History List

Request Loan Details

Fiscal Year	Rate Type	Program Type	Numerator	Denominator	Rate	Process Date
1999	OFFICIAL	Dual	0	139	0	07/12/2001
1998	OFFICIAL	Dual	0	143	0	07/12/2001
1997	OFFICIAL	Dual	3	206	1.4	07/12/2001
1996	OFFICIAL	Dual	9	204	4.4	07/12/2001
1995	OFFICIAL	FFEL	5	186	2.6	07/11/2001
1994	OFFICIAL	FFEL	7	109	6.4	07/11/2001
1993	OFFICIAL	FFEL	2	83	2.4	07/11/2001

The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes.

Figure 11, Cohort Default Rate – ED View (Schools)

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.

Org Search	
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. This link is deactivated when the user is in the Cohort Default Rate History List screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen

Cohort Default Rate DM	
	appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link

School Profile	
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Type	
Element	Dropdown Box
Definition/Business Rules	<p>Allows a user to select a type of organization you want to search for.</p> <p>The options in the Dropdown Box are (displayed in this order):</p> <ul style="list-style-type: none"> • -- Select -- • Guaranty Agency • Lender • School
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear.
Business Object (Attribute)	Lender (orgType), GA (orgType), School (orgType)
Validation	None.

Code	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter the code of an organization.</p> <p>Different Types of organizations have different code lengths. The lengths for the codes are:</p> <ul style="list-style-type: none"> • Guaranty Agency – 3 characters long • Lender – 8 characters long • School – 8 characters long <p>The code can be typed partially in order to retrieve search results (i.e. You can type '12', rather than '12345678' which will display the Org Search screen with all organizations that begin with '12').</p> <p><i>Min Characters – 0</i> <i>Max Characters – 8</i></p>
Actions to be performed	As the user enters the code, it is displayed in the

Code	
	textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	Lender (orgCode), GA (orgCode), School (orgCode)
Validation	None.

Name	
Element	Textbox
Definition/Business Rules	Allows a user to enter the name of an organization. The name can be typed partially in order to retrieve search results (i.e. You can type 'S', rather than 'State University' which will display the Org Search Screen with all organization that begin with 'S'). <i>Min Characters - 0</i> <i>Max Characters - 45</i>
Actions to be performed	As the user enters the name, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	Lender (orgName), GA (orgName), School (orgName)
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve organization contact information.
Actions to be performed	By clicking on the pushbutton the organization that satisfies the criteria entered will be listed Organization Search screen.
Business Object (Attribute)	None.
Validation	<ul style="list-style-type: none"> <i>Condition:</i> If the user selects the type for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed in the Organization

Retrieve	
	<p>Search screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <ul style="list-style-type: none"> • <i>Condition:</i> If the user selects the type and enters the code for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed on the screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type and name for an organization and then clicks the Retrieve pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type, code, and name for an organization and then clicks the pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common code and name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. <p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> • <i>Condition:</i> User clicks the Retrieve button without selecting a Type or inputting a Code and Name. <i>Message:</i> Please select an Organization Type. <i>Location:</i> Client <i>Additional Information:</i> Type label turns red. Display Error.gif.

Retrieve	
	<ul style="list-style-type: none"> • <i>Condition:</i> User selects FDLP SERVICER Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 5 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects ED REGION Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 2 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects GUARANTY AGENCY Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 3 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects LENDER BRANCH SERVICER Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 6 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects STATE AGENCY Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 4 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects a Type and enters a

Retrieve	
	<p>non-numeric Code (i.e. abcd) <i>Message:</i> Please enter a numeric Organizational Code. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif.</p> <p>An information message appears at the top of the screen for the following condition:</p> <ul style="list-style-type: none"> • <i>Condition:</i> Organization contact information is not found based on criteria entered. <i>Message:</i> No record found for the selected criteria. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.

Name	
Element	Label
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgName), GA (orgName), School (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgCode), GA (orgCode), School (orgCode)
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgType), GA (orgType), School (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization.</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This Status column will not appear if there is no data in NSLDS II.</p>
Actions to be performed	None.
Business Object (Attribute)	GA (status), School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgStreet, orgCity, orgState, orgZip), School (orgStreet, orgCity, orgState, orgZip), GA (orgStreet, orgCity, orgState, orgZip)
Validation	None.

Request Loan Detail	
Element	Label
Definition/Business Rules	Allows a user to navigate to the report screen.
Actions to be performed	By clicking on the pushbutton, the Report screen (Report DC029) is displayed.
Business Object (Attribute)	None.
Validation	None.

Fiscal Year	
Element	Label
Definition/Business Rules	Displays the fiscal year for CDR. October through

Fiscal Year	
	following September 30 during which a default request was calculated. Allows user to navigate to the Cohort Default Rate History Display screen.
Actions to be performed	When clicked the Cohort Default Rate History Display screen displays.
Business Object (Attribute)	Lender (fiscalYear), GA (fiscalYear), School (fiscalYear)
Validation	None.

Originating/Current	
Element	Label
Definition/Business Rules	Displays an indicator of lender status as it relates to loans for the selected organization. The lender statuses are: <ul style="list-style-type: none"> • OL—Originating • CL—Current <p>This column is only applicable when viewing CDR history for Lenders.</p>
Actions to be performed	None.
Business Object (Attribute)	Lender (status)
Validation	None.

Rate Type	
Element	Label
Definition/Business Rules	Displays the status of an organization's defaulted borrower calculation. ED only sees the Official Rate.
Actions to be performed	None.
Business Object (Attribute)	School (rateType), GA (rateType), Lender (rateType)
Validation	None.

Program Type	
Element	Label
Definition/Business Rules	Displays the Title IV loan programs for which loans were issued by an organization. The Program Types are: <ul style="list-style-type: none"> • Dual—An organization that provides

Program Type	
	<p>both FFEL and Direct loan types.</p> <ul style="list-style-type: none"> • 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. <p>This 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 and DMD. 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 display. Cohort default rate history for Lenders and GAs only display values for the FFEL program.</p>
Actions to be performed	None.
Business Object (Attribute)	School (programType)
Validation	None.

Numerator	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a loan program during the cohort year and has defaulted on those loans during the same cohort year or the next cohort year.
Actions to be performed	None.
Business Object (Attribute)	School (Num), GA (Num), Lender (Num)
Validation	None.

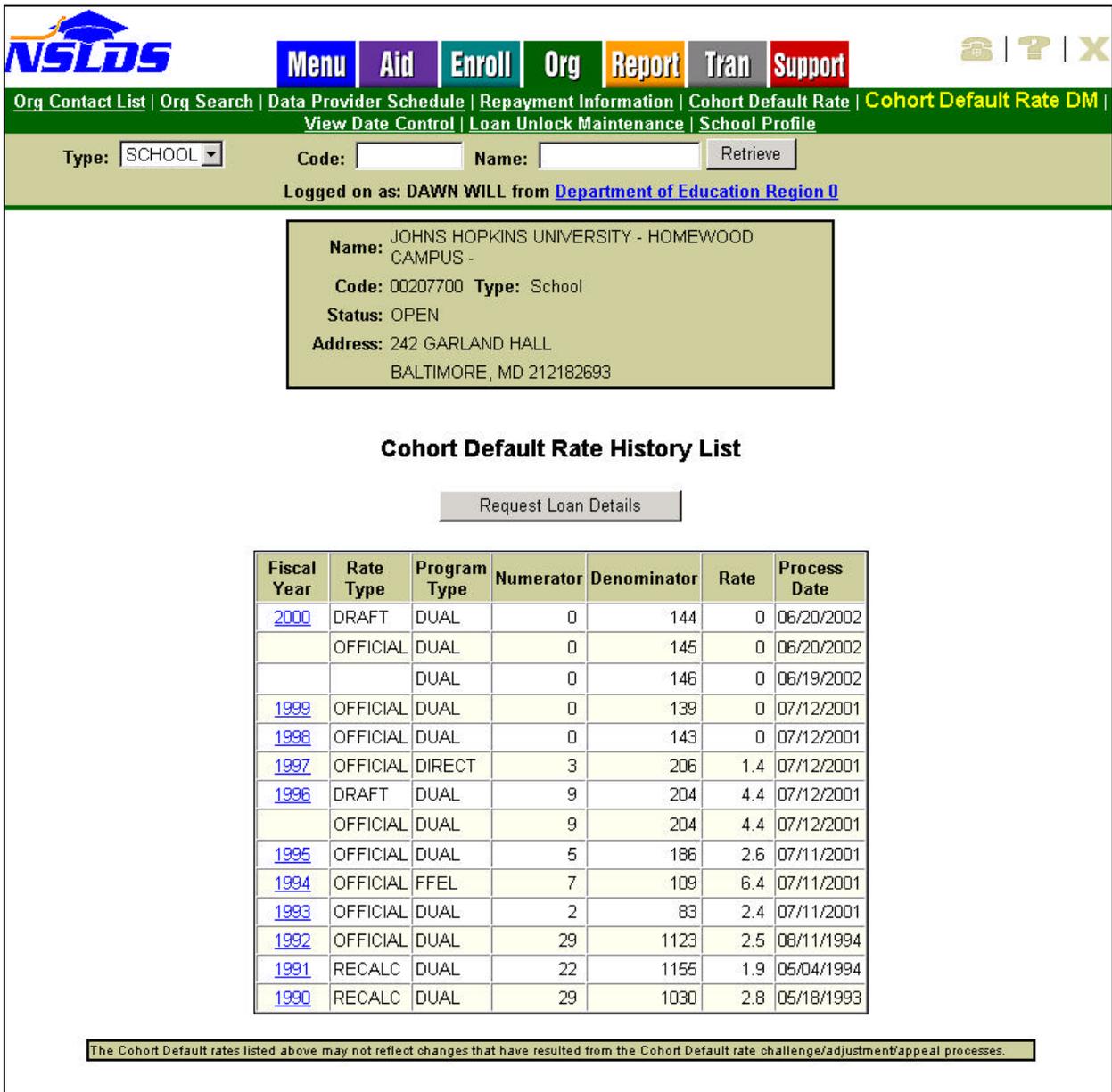
Denominator	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a loan program during the cohort year.
Actions to be performed	None.
Business Object (Attribute)	School (Denom), GA (Denom), Lender (Denom)
Validation	None.

Rate	
Element	Label
Definition/Business Rules	Displays the default rate for the organization, which is calculated as a percentage of the Numerator to Denominator and truncated to one decimal place.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Process Date	
Element	Label
Definition/Business Rules	Displays the date that the rates were calculated.
Actions to be performed	None.
Business Object (Attribute)	School (CDRProcessDt), GA (CDRProcessDt), Lender (CDRProcessDt)
Validation	None.

Disclosure statement	
Element	Label
Definition/Business Rules	Displays the disclosure statement that reads: "The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes."
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

3.9.3.2 Cohort Default Rate – Default Management View



NSLDS Menu Aid Enroll Org Report Tran Support

Org Contact List | Org Search | Data Provider Schedule | Repayment Information | Cohort Default Rate | **Cohort Default Rate DM** | View Date Control | Loan Unlock Maintenance | School Profile

Type: SCHOOL Code: Name: Retrieve

Logged on as: DAWN WILL from Department of Education Region 0

Name: JOHNS HOPKINS UNIVERSITY - HOMEWOOD CAMPUS -
Code: 00207700 **Type:** School
Status: OPEN
Address: 242 GARLAND HALL
BALTIMORE, MD 212182693

Cohort Default Rate History List

Request Loan Details

Fiscal Year	Rate Type	Program Type	Numerator	Denominator	Rate	Process Date
2000	DRAFT	DUAL	0	144	0	06/20/2002
	OFFICIAL	DUAL	0	145	0	06/20/2002
		DUAL	0	146	0	06/19/2002
1999	OFFICIAL	DUAL	0	139	0	07/12/2001
1998	OFFICIAL	DUAL	0	143	0	07/12/2001
1997	OFFICIAL	DIRECT	3	206	1.4	07/12/2001
1996	DRAFT	DUAL	9	204	4.4	07/12/2001
	OFFICIAL	DUAL	9	204	4.4	07/12/2001
1995	OFFICIAL	DUAL	5	186	2.6	07/11/2001
1994	OFFICIAL	FFEL	7	109	6.4	07/11/2001
1993	OFFICIAL	DUAL	2	83	2.4	07/11/2001
1992	OFFICIAL	DUAL	29	1123	2.5	08/11/1994
1991	RECALC	DUAL	22	1155	1.9	05/04/1994
1990	RECALC	DUAL	29	1030	2.8	05/18/1993

The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes.

Figure 12, Cohort Default Rate - DM View (Schools)

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. This link is deactivated when the user is in the Cohort Default Rate History List screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.

Cohort Default Rate DM	
	Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Type	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select a type of organization you want to search for. Default Management only views the School's Cohort Default Rates.
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear.
Business Object (Attribute)	School (orgType)
Validation	None.

Code	
Element	Textbox
Definition/Business Rules	Allows a user to enter the code of an organization. The code can be typed partially in order to retrieve search results (i.e. You can type '12', rather than '12345678' which will display the Org Search screen with all organizations that begin with '12'). <i>Min Characters – 0</i> <i>Max Characters – 8</i>
Actions to be performed	As the user enters the code, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	School (orgCode)
Validation	None.

Name	
Element	Textbox
Definition/Business Rules	Allows a user to enter the name of an

Name	
	<p>organization.</p> <p>The name can be typed partially in order to retrieve search results (i.e. You can type 'S', rather than 'State University' which will display the Org Search Screen with all organization that begin with 'S').</p> <p><i>Min Characters</i> – 0 <i>Max Characters</i> – 45</p>
Actions to be performed	<p>As the user enters the name, it is displayed in the textbox in editable format.</p> <p>On Enter Retrieve pushbutton is enacted.</p>
Business Object (Attribute)	School (orgName)
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve organization contact information.
Actions to be performed	By clicking on the pushbutton the organization that satisfies the criteria entered will be listed Organization Search screen.
Business Object (Attribute)	None.
Validation	<ul style="list-style-type: none"> • <i>Condition:</i> If the user selects the type for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed in the Organization Search screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the user selects the type and enters the code for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed on the screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.

Retrieve	
	<ul style="list-style-type: none"> • <i>Condition:</i> If the User selects the type and name for an organization and then clicks the Retrieve pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type, code, and name for an organization and then clicks the pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common code and name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. <p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> • <i>Condition:</i> User clicks the Retrieve button without selecting a Type or inputting a Code and Name. <i>Message:</i> Please select an Organization Type. <i>Location:</i> Client <i>Additional Information:</i> Type label turns red. Display Error.gif. • <i>Condition:</i> TBD <i>Message:</i> Please enter an Organization Code length of 8 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> TBD <i>Message:</i> Please enter an Organization Code length of 10 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red.

Retrieve	
	<p>Display Error.gif.</p> <ul style="list-style-type: none"> <i>Condition:</i> User selects a Type and enters a non-numeric Code (i.e. abcd). <i>Message:</i> Please enter a numeric Organizational Code. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. <p>An information message appears at the top of the screen for the following condition:</p> <ul style="list-style-type: none"> <i>Condition:</i> Organization contact information is not found based on criteria entered. <i>Message:</i> No record found for the selected criteria. <i>Location:</i> Client <i>Additional Information:</i> Display Info.gif. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.

Name	
Element	Label
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgCode)
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization.</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This Status column will not appear if there is no data in NSLDS II.</p>
Actions to be performed	None.
Business Object (Attribute)	School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgStreet, orgCity, orgState, orgZip)
Validation	None.

Request Loan Detail	
Element	Label
Definition/Business Rules	Allows a user to navigate to the report screen.
Actions to be performed	By clicking on the pushbutton, the Report screen (Report DC030) is displayed.
Business Object (Attribute)	None.
Validation	None.

Fiscal Year	
Element	Label
Definition/Business Rules	Displays the fiscal year for CDR. October through following September 30 during which a default

Fiscal Year	
	request was calculated. Default Management can view CDR information as soon as the rates are calculated. ED, School's and GA's must wait until the Default Rates are mailed to view.
Actions to be performed	None.
Business Object (Attribute)	School (fiscalYear)
Validation	None.

Rate Type	
Element	Label
Definition/Business Rules	<p>Displays the status of an organization's defaulted borrower calculation. The Rate Types are:</p> <ul style="list-style-type: none"> • 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. <p>This 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.</p>
Actions to be performed	None.
Business Object (Attribute)	School (rateType)
Validation	None.

Rate Sub Type	
Element	Label
Definition/Business Rules	<p>Displays the rate type for a default rate history. Within each rate type there are six possible sub types that can be in effect for a default rate history occurrence. The Rate Sub Types are:</p> <ul style="list-style-type: none"> • Actual—The "raw" rate calculated using the actual list of borrowers of a school prior to any adjustments.

Rate Sub Type	
	<ul style="list-style-type: none"> • 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. <p>This column is only applicable when viewing cohort default rate history for schools where the users belong to ED's Default Management Division.</p>
Actions to be performed	None.
Business Object (Attribute)	School (rateSubType)
Validation	None.

Program Type	
Element	Label
Definition/Business Rules	<p>Displays the Title IV loan programs for which loans were issued by an organization. The Program Types are:</p> <ul style="list-style-type: none"> • 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. <p>This 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 and DMD. Cohort default rate</p>

Program Type	
	history for Lenders and GAs only display values for the FFEL program.
Actions to be performed	None.
Business Object (Attribute)	School (programType)
Validation	None.

Numerator	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a loan program during the cohort year and has defaulted on those loans during the same cohort year or the next cohort year.
Actions to be performed	None.
Business Object (Attribute)	School (DualNum)
Validation	None.

Denominator	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a loan program during the cohort year.
Actions to be performed	None.
Business Object (Attribute)	School (DualDenom)
Validation	None.

Rate	
Element	Label
Definition/Business Rules	Displays the default rate for the organization, which is calculated as a percentage of the Numerator to Denominator and truncated to one decimal place.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Process Date	
Element	Label
Definition/Business Rules	Displays the date that the rates were calculated.
Actions to be performed	None.
Business Object (Attribute)	School (CDRProcessDt)

Process Date	
Validation	None.

Disclosure statement	
Element	Label
Definition/Business Rules	Displays the disclosure statement that reads: “The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes.”
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

3.9.3.3 Cohort Default Rate – School View

The screenshot shows the NSLDS web interface. At the top left is the NSLDS logo. A navigation bar contains buttons for Menu, Aid, Enroll, Org, Report, Tran, and Support. Below this is a green bar with links: Org Contact List, Org Search, Data Provider Schedule, Repayment Information, Cohort Default Rate (highlighted), View Date Control, Loan Unlock Maintenance, and School Profile. A search area includes a dropdown for Type (set to SCHOOL), input fields for Code and Name, and a Retrieve button. Below the search area, it says 'Logged on as: DAWN WILL from Department of Education Region 0'. A box displays school details for Johns Hopkins University - Homewood Campus, including code 00207700, status OPEN, and address 242 Garland Hall, Baltimore, MD 212182693. The main section is titled 'Cohort Default Rate History List' and contains a 'Request Loan Details' button. Below the button is a table with 7 columns: Fiscal Year, Rate Type, Program Type, Numerator, Denominator, Rate, and Process Date. The table lists data from 1990 to 2000. A note at the bottom states: 'The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes.'

Fiscal Year	Rate Type	Program Type	Numerator	Denominator	Rate	Process Date
2000	DRAFT	DUAL	0	144	0	06/20/2002
	OFFICIAL	DUAL	0	145	0	06/20/2002
		DUAL	0	146	0	06/19/2002
1999	OFFICIAL	DUAL	0	139	0	07/12/2001
1998	OFFICIAL	DUAL	0	143	0	07/12/2001
1997	OFFICIAL	DIRECT	3	206	1.4	07/12/2001
1996	DRAFT	DUAL	9	204	4.4	07/12/2001
	OFFICIAL	DUAL	9	204	4.4	07/12/2001
1995	OFFICIAL	DUAL	5	186	2.6	07/11/2001
1994	OFFICIAL	FFEL	7	109	6.4	07/11/2001
1993	OFFICIAL	DUAL	2	83	2.4	07/11/2001
1992	OFFICIAL	DUAL	29	1123	2.5	08/11/1994
1991	RECALC	DUAL	22	1155	1.9	05/04/1994
1990	RECALC	DUAL	29	1030	2.8	05/18/1993

Figure 13, Cohort Default Rate – School View (Schools)

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. This link is deactivated when the user is in the Cohort Default Rate History List screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.

Cohort Default Rate DM	
	Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link

School Profile	
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Type	
Element	Dropdown Box
Definition/Business Rules	<p>Allows a user to select a type of organization you want to search for.</p> <p>The options in the Dropdown Box are (displayed in this order):</p> <ul style="list-style-type: none"> • -- Select -- • Guaranty Agency • Lender • School
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear.
Business Object (Attribute)	GA (orgType), Lender (orgType), School (orgType)
Validation	None.

Code	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter the code of an organization.</p> <p>Different Types of organizations have different code lengths. The lengths for the codes are:</p> <ul style="list-style-type: none"> • Guaranty Agency – 3 characters long • Lender – 8 characters long • School – 8 characters long <p>The code can be typed partially in order to retrieve search results (i.e. You can type '12', rather than '12345678' which will display the Org Search screen with all organizations that begin with '12').</p> <p><i>Min Characters – 0</i> <i>Max Characters – 8</i></p>
Actions to be performed	As the user enters the code, it is displayed in the

Code	
	textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	GA (orgCode), Lender (orgCode), School (orgCode)
Validation	None.

Name	
Element	Textbox
Definition/Business Rules	Allows a user to enter the name of an organization. The name can be typed partially in order to retrieve search results (i.e. You can type 'S', rather than 'State University' which will display the Org Search Screen with all organization that begin with 'S'). <i>Min Characters - 0</i> <i>Max Characters - 45</i>
Actions to be performed	As the user enters the name, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	GA (orgName), Lender (orgName), School (orgName)
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve organization contact information.
Actions to be performed	By clicking on the pushbutton the organization that satisfies the criteria entered will be listed Organization Search screen.
Business Object (Attribute)	None.
Validation	<ul style="list-style-type: none"> <i>Condition:</i> If the user selects the type for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed in the Organization Search screen.

Retrieve	
	<p><i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <ul style="list-style-type: none"> <p><i>Condition:</i> If the user selects the type and enters the code for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed on the screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <p><i>Condition:</i> If the User selects the type and name for an organization and then clicks the Retrieve pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <p><i>Condition:</i> If the User selects the type, code, and name for an organization and then clicks the pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common code and name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> <p><i>Condition:</i> User clicks the Retrieve button without selecting a Type or inputting a Code and Name. <i>Message:</i> Please select an Organization Type. <i>Location:</i> Client <i>Additional Information:</i> Type label turns red. Display Error.gif.</p>

Retrieve	
	<ul style="list-style-type: none"> • <i>Condition:</i> User selects GUARANTY AGENCY Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 3 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects a Type and enters a non-numeric Code (i.e. abcd). <i>Message:</i> Please enter a numeric Organizational Code. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. <p>An information message appears at the top of the screen for the following condition:</p> <ul style="list-style-type: none"> • <i>Condition:</i> Organization contact information is not found based on criteria entered. <i>Message:</i> No record found for the selected criteria. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif. • <i>Condition:</i> Default information message that appears in the screen. <i>Message:</i> Please select an organization of this type – Lender, school, Guaranty Agency. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.

Name	
Element	Label
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	GA (orgName), Lender (orgName), School (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	GA (orgCode), Lender (orgCode), School (orgCode)
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	GA (orgType), Lender (orgType), School (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization.</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This Status column will not appear if there is no data in NSLDS II.</p>
Actions to be performed	None.
Business Object (Attribute)	GA (status), School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.

Address	
Business Object (Attribute)	GA (orgStreet, orgCity, orgState, orgZip), Lender (orgStreet, orgCity, orgState, orgZip), School (orgStreet, orgCity, orgState, orgZip)
Validation	None.

Request Loan Detail	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the report screen.
Actions to be performed	By clicking on the pushbutton, the Report screen (Report DC035) is displayed.
Business Object (Attribute)	None.
Validation	None.

Fiscal Year	
Element	Label
Definition/Business Rules	Displays the fiscal year for CDR. October through following September 30 during which a default request was calculated.
Actions to be performed	None.
Business Object (Attribute)	GA (fiscalYear), Lender (fiscalYear), School (fiscalYear)
Validation	None.

Originating/Current	
Element	Label
Definition/Business Rules	Displays an indicator of lender status as it relates to loans for the selected organization. The lender statuses are: <ul style="list-style-type: none"> • OL—Originating • CL—Current <p>This column is only applicable when viewing CDR history for Lenders.</p>
Actions to be performed	None.
Business Object (Attribute)	Lender (status)
Validation	None.

Rate Type	
Element	Label
Definition/Business Rules	Displays the status of an organization's defaulted borrower calculation. The Rate Types are: <ul style="list-style-type: none"> • Official – A default rate authorized for

Rate Type	
	<p>viewing by all organizations.</p> <ul style="list-style-type: none"> • 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. <p>This column is only applicable: when viewing cohort default rate history where the users are viewing their own rates.</p> <p>The Official Susp'd row appears, but the program type, numerator, denominator, rate and process date columns are blank.</p>
Actions to be performed	None.
Business Object (Attribute)	School (rateType), GA (rateType), Lender (rateType)
Validation	None.

Program Type	
Element	Label
Definition/Business Rules	<p>Displays the Title IV loan programs for which loans were issued by an organization. The Program Types are:</p> <ul style="list-style-type: none"> • 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. <p>This 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</p>

Program Type	
	FFEL program.
Actions to be performed	None.
Business Object (Attribute)	School (programType)
Validation	None.

Numerator	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a loan program during the cohort year and has defaulted on those loans during the same cohort year or the next cohort year.
Actions to be performed	None.
Business Object (Attribute)	School (Num), GA (Num), Lender (Num)
Validation	None.

Denominator	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a loan program during the cohort year.
Actions to be performed	None.
Business Object (Attribute)	School (Denom), GA (Denom), Lender (Denom)
Validation	None.

Rate	
Element	Label
Definition/Business Rules	Displays the default rate for the organization, which is calculated as a percentage of the Numerator to Denominator and truncated to one decimal place.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Process Date	
Element	Label
Definition/Business Rules	Displays the date that the rates were calculated.
Actions to be performed	None.
Business Object (Attribute)	School (CDRProcessDt), GA (CDRProcessDt), Lender (CDRProcessDt)

Process Date	
Validation	None.

Disclosure statement	
Element	Label
Definition/Business Rules	Displays the disclosure statement that reads: “The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes.”
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

3.9.3.4 Cohort Default Rate – GA View

The screenshot shows the NSLDS web application interface. At the top left is the NSLDS logo. A navigation menu includes links for Menu, Aid, Enroll, Org, Report, Tran, and Support. Below the menu is a green header bar with links for Org Contact List, Org Search, Data Provider Schedule, Repayment Information, Cohort Default Rate, View Date Control, Loan Unlock Maintenance, and School Profile. A search area contains a 'Type' dropdown menu, 'Code' and 'Name' input fields, and a 'Retrieve' button. A status bar indicates the user is logged on as 'DAWN WILL' from 'Department of Education Region 0'. The main content area displays the details for 'MARYLAND HIGHER EDUCATION LOAN CORP.' with a code of 724 and a status of 'CLOSED'. Below this is the 'Cohort Default Rate History List' with a 'Request Loan Details' button. The table lists data from 1993 to 2000, showing 'Rate Type', 'Numerator', 'Denominator', 'Rate', and 'Process Date'. A disclaimer at the bottom states that the listed rates may not reflect changes from challenge/adjustment/appeal processes.

Name: MARYLAND HIGHER EDUCATION LOAN CORP.
Code: 724 **Type:** Guaranty Agency
Status: CLOSED
Address: 2100 GUILFORD AVE., ROOM 305
BALTIMORE, MD 212180000

Cohort Default Rate History List

Request Loan Details

Fiscal Year	Rate Type	Numerator	Denominator	Rate	Process Date
2000	DRAFT	0	0	0	01/20/2002
	OFFICIAL	0	0	0	08/20/2002
		0	0	0	08/19/2002
1999	OFFICIAL	0	1	0	08/12/2001
1998	OFFICIAL	0	0	0	08/12/2000
1997	OFFICIAL	0	0	0	08/12/1999
1996	DRAFT	0	0	0	01/12/1998
	OFFICIAL	0	0	0	08/12/1998
1995	OFFICIAL	0	0	0	08/11/1997
1994	OFFICIAL	0	0	0	08/11/1996
1993	OFFICIAL	0	0	0	08/11/1995

The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes.

Figure 14, Cohort Default Rate - GA View (GA)

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. This link is deactivated when the user is in the Cohort Default Rate History List screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.

Cohort Default Rate DM	
	Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link

School Profile	
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Type	
Element	Dropdown Box
Definition/Business Rules	<p>Allows a user to select a type of organization you want to search for.</p> <p>The options in the Dropdown Box are (displayed in this order):</p> <ul style="list-style-type: none"> • -- Select -- • Guaranty Agency • Lender • School
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear.
Business Object (Attribute)	Lender (orgType), GA (orgType), School (orgType)
Validation	None.

Code	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter the code of an organization.</p> <p>Different Types of organizations have different code lengths. The lengths for the codes are:</p> <ul style="list-style-type: none"> • Guaranty Agency – 3 characters long • Lender – 8 characters long • School – 8 characters long <p>The code can be typed partially in order to retrieve search results (i.e. You can type '12', rather than '12345678' which will display the Org Search screen with all organizations that begin with '12').</p> <p><i>Min Characters – 0</i> <i>Max Characters – 8</i></p>
Actions to be performed	As the user enters the code, it is displayed in the

Code	
	textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	Lender (orgCode), GA (orgCode), School (orgCode)
Validation	None.

Name	
Element	Textbox
Definition/Business Rules	Allows a user to enter the name of an organization. The name can be typed partially in order to retrieve search results (i.e. You can type 'S', rather than 'State University' which will display the Org Search Screen with all organization that begin with 'S'). <i>Min Characters - 0</i> <i>Max Characters - 45</i>
Actions to be performed	As the user enters the name, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	Lender (orgName), GA (orgName), School (orgName)
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve organization contact information.
Actions to be performed	By clicking on the pushbutton the organization that satisfies the criteria entered will be listed Organization Search screen.
Business Object (Attribute)	None.
Validation	<ul style="list-style-type: none"> <i>Condition:</i> If the user selects the type for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed in the Organization

Retrieve	
	<p>Search screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <ul style="list-style-type: none"> • <i>Condition:</i> If the user selects the type and enters the code for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed on the screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type and name for an organization and then clicks the Retrieve pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type, code, and name for an organization and then clicks the pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common code and name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. <p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> • <i>Condition:</i> User clicks the Retrieve button without selecting a Type or inputting a Code and Name. <i>Message:</i> Please select an Organization Type. <i>Location:</i> Client <i>Additional Information:</i> Type label turns red. Display Error.gif.

Retrieve	
	<ul style="list-style-type: none"> • <i>Condition:</i> User selects GUARANTY AGENCY Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 3 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects a Type and enters a non-numeric Code (i.e. abcd). <i>Message:</i> Please enter a numeric Organizational Code. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. <p>An information message appears at the top of the screen for the following condition:</p> <ul style="list-style-type: none"> • <i>Condition:</i> Organization contact information is not found based on criteria entered. <i>Message:</i> No record found for the selected criteria. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif. • <i>Condition:</i> Default information message that appears in the screen. <i>Message:</i> Please select an organization of this type – Lender, school, Guaranty Agency. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.

Name	
Element	Label
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgName), GA (orgName), School (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgCode), GA (orgCode), School (orgCode)
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgType), GA (orgType), School (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization.</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This Status column will not appear if there is no data in NSLDS II.</p>
Actions to be performed	None.
Business Object (Attribute)	GA (status), School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.

Address	
Business Object (Attribute)	Lender (orgStreet, orgCity, orgState, orgZip), School (orgStreet, orgCity, orgState, orgZip), GA (orgStreet, orgCity, orgState, orgZip)
Validation	None.

Request Loan Detail	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the report screen.
Actions to be performed	By clicking on the pushbutton, the Report screen (Report DC040) is displayed.
Business Object (Attribute)	None.
Validation	None.

Fiscal Year	
Element	Label
Definition/Business Rules	Displays the fiscal year for CDR. October through following September 30 during which a default request was calculated.
Actions to be performed	None.
Business Object (Attribute)	Lender (fiscalYear), GA (fiscalYear), School (fiscalYear)
Validation	None.

Originating/Current	
Element	Label
Definition/Business Rules	Displays an indicator of lender status as it relates to loans for the selected organization. The lender statuses are: <ul style="list-style-type: none"> • OL—Originating • CL—Current <p>This column is only applicable when viewing CDR history for Lenders.</p>
Actions to be performed	None.
Business Object (Attribute)	Lender (status)
Validation	None.

Rate Type	
Element	Label
Definition/Business Rules	Displays the status of an organization's defaulted borrower calculation. The Rate Types are: <ul style="list-style-type: none"> • Official – A default rate authorized for

Rate Type	
	<p>viewing by all organizations.</p> <ul style="list-style-type: none"> • 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. <p>This 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.</p> <p>The Official Susp'd row appears, but the program type, numerator, denominator, rate and process date columns are blank.</p>
Actions to be performed	None.
Business Object (Attribute)	School (rateType), GA (rateType), Lender (rateType)
Validation	None.

Numerator	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a loan program during the cohort year and has defaulted on those loans during the same cohort year or the next cohort year.
Actions to be performed	None.
Business Object (Attribute)	School (Num), GA (Num), Lender (Num)
Validation	None.

Denominator	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a loan program during the cohort year.
Actions to be performed	None.
Business Object (Attribute)	School (Denom), GA (Denom), Lender (Denom)

Denominator	
Validation	None.

Rate	
Element	Label
Definition/Business Rules	Displays the default rate for the organization, which is calculated as a percentage of the Numerator to Denominator and truncated to one decimal place.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Process Date	
Element	Label
Definition/Business Rules	Displays the date that the rates were calculated.
Actions to be performed	None.
Business Object (Attribute)	School (CDRProcessDt), GA (CDRProcessDt), Lender (CDRProcessDt)
Validation	None.

Disclosure statement	
Element	Label
Definition/Business Rules	Displays the disclosure statement that reads: "The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes."
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

3.9.3.5 Cohort Default Rate – Lender View

NSLDS Menu Aid Enroll Org Report Tran Support

Org Contact List | Org Search | Data Provider Schedule | Repayment Information | **Cohort Default Rate** | View Date Control | Loan Unlock Maintenance | School Profile

Type: --- Select --- Code: Name: Retrieve

Logged on as: DAWN WILL from [Baltimore Fed Savings & Loan Assn](#)

Name: BALTIMORE FED SAVINGS & LOAN ASSN
Code: 805386 Type: Lender

Cohort Default Rate History List

Request Loan Details

Fiscal Year	Rate Type	Originating/Current	Numerator	Denominator	Rate	Process Date
1999	OFFICIAL	CL	0	40	0	07/12/2001
		OL	0	36	0	07/12/2001
1998	OFFICIAL	CL	0	39	0	07/12/2001
		OL	0	31	0	07/12/2001
1997	OFFICIAL	CL	1	42	2.3	07/12/2001
		OL	0	44	0	07/12/2001
1996	OFFICIAL	CL	0	30	0	07/12/2001
		OL	1	29	3.4	07/12/2001
1995	OFFICIAL	CL	5	35	14.2	07/11/2001
		OL	4	26	15.3	07/11/2001
1994	OFFICIAL	CL	0	23	0	07/11/2001
		OL	0	21	0	07/11/2001
1993	OFFICIAL	CL	1	19	5.2	07/11/2001
		OL	2	18	11.1	07/11/2001

The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes.

Figure 15, Cohort Default Rate – Lender View (Lender)

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. This link is deactivated when the user is in the Cohort Default Rate History List screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.

Cohort Default Rate DM	
	Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link

School Profile	
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Type	
Element	Dropdown Box
Definition/Business Rules	<p>Allows a user to select a type of organization you want to search for.</p> <p>The options in the Dropdown Box are (displayed in this order):</p> <ul style="list-style-type: none"> • -- Select -- • Guaranty Agency • Lender • School
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear.
Business Object (Attribute)	Lender (orgType), Servicer (orgType), School (orgType), GA (orgType)
Validation	None.

Code	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter the code of an organization.</p> <p>Different Types of organizations have different code lengths. The lengths for the codes are:</p> <ul style="list-style-type: none"> • Guaranty Agency – 3 characters long • Lender – 8 characters long • School – 8 characters long <p>The code can be typed partially in order to retrieve search results (i.e. You can type '12', rather than '12345678' which will display the Org Search screen with all organizations that begin with '12').</p> <p><i>Min Characters – 0</i> <i>Max Characters – 8</i></p>
Actions to be performed	As the user enters the code, it is displayed in the

Code	
	textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	Lender (orgCode), Servicer (orgCode), School (orgCode), GA (orgCode)
Validation	None.

Name	
Element	Textbox
Definition/Business Rules	Allows a user to enter the name of an organization. The name can be typed partially in order to retrieve search results (i.e. You can type 'S', rather than 'State University' which will display the Org Search Screen with all organization that begin with 'S'). <i>Min Characters - 0</i> <i>Max Characters - 45</i>
Actions to be performed	As the user enters the name, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	Lender (orgName), Servicer (orgName), School (orgName), GA (orgName)
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve organization contact information.
Actions to be performed	By clicking on the pushbutton the organization that satisfies the criteria entered will be listed Organization Search screen.
Business Object (Attribute)	None.
Validation	<ul style="list-style-type: none"> <i>Condition:</i> If the user selects the type for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed in the Organization Search screen.

Retrieve	
	<p><i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <ul style="list-style-type: none"> <p><i>Condition:</i> If the user selects the type and enters the code for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed on the screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <p><i>Condition:</i> If the User selects the type and name for an organization and then clicks the Retrieve pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <p><i>Condition:</i> If the User selects the type, code, and name for an organization and then clicks the pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common code and name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> <p><i>Condition:</i> User clicks the Retrieve button without selecting a Type or inputting a Code and Name. <i>Message:</i> Please select an Organization Type. <i>Location:</i> Client <i>Additional Information:</i> Type label turns red. Display Error.gif.</p>

Retrieve	
	<ul style="list-style-type: none"> • <i>Condition:</i> User selects GUARANTY AGENCY Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 3 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects a Type and enters a non-numeric Code (i.e. abcd). <i>Message:</i> Please enter a numeric Organizational Code. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. <p>An information message appears at the top of the screen for the following condition:</p> <ul style="list-style-type: none"> • <i>Condition:</i> Organization contact information is not found based on criteria entered. <i>Message:</i> No record found for the selected criteria. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif. • <i>Condition:</i> Default information message that appears in the screen. <i>Message:</i> Please select an organization of this type – Lender, school, Guaranty Agency. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.

Name	
Element	Label
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgName), GA (orgName), School (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgCode), GA (orgCode), School (orgCode)
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgType), GA (orgType), School (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization.</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This Status column will not appear if there is no data in NSLDS II.</p>
Actions to be performed	None.
Business Object (Attribute)	GA (status), School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.

Address	
Business Object (Attribute)	Lender (orgStreet, orgCity, orgState, orgZip), School (orgStreet, orgCity, orgState, orgZip), GA (orgStreet, orgCity, orgState, orgZip)
Validation	None.

Request Loan Detail	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the report screen.
Actions to be performed	By clicking on the pushbutton, the Report screen (Report DC045) is displayed.
Business Object (Attribute)	None.
Validation	TBD

Fiscal Year	
Element	Label
Definition/Business Rules	Displays the fiscal year for CDR. October through following September 30 during which a default request was calculated.
Actions to be performed	None.
Business Object (Attribute)	Lender (fiscalYear), GA (fiscalYear), School (fiscalYear)
Validation	None.

Originating/Current	
Element	Label
Definition/Business Rules	Displays an indicator of lender status as it relates to loans for the selected organization. The lender statuses are: <ul style="list-style-type: none"> • OL—Originating • CL—Current <p>This column is only applicable when viewing CDR history for Lenders.</p>
Actions to be performed	None.
Business Object (Attribute)	Lender (status)
Validation	None.

Rate Type	
Element	Label
Definition/Business Rules	Displays the status of an organization's defaulted borrower calculation. The Rate Types are: <ul style="list-style-type: none"> • Official – A default rate authorized for

Rate Type	
	<p>viewing by all organizations.</p> <ul style="list-style-type: none"> • 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. <p>This 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.</p> <p>The Official Susp'd row appears, but the program type, numerator, denominator, rate and process date columns are blank.</p>
Actions to be performed	None.
Business Object (Attribute)	School (rateType), GA (rateType), Lender (rateType)
Validation	None.

Program Type	
Element	Label
Definition/Business Rules	<p>Displays the Title IV loan programs for which loans were issued by an organization. The Program Types are:</p> <ul style="list-style-type: none"> • 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. <p>This 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. Cohort default rate history for Lenders and GAs only display values for the</p>

Program Type	
	FFEL program.
Actions to be performed	None.
Business Object (Attribute)	School (programType)
Validation	None.

Numerator	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a loan program during the cohort year and has defaulted on those loans during the same cohort year or the next cohort year.
Actions to be performed	None.
Business Object (Attribute)	School (Num), GA (Num), Lender (Num)
Validation	None.

Denominator	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a loan program during the cohort year.
Actions to be performed	None.
Business Object (Attribute)	School (Denom), GA (Denom), Lender (Denom)
Validation	None.

Rate	
Element	Label
Definition/Business Rules	Displays the default rate for the organization, which is calculated as a percentage of the Numerator to Denominator and truncated to one decimal place.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Process Date	
Element	Label
Definition/Business Rules	Displays the date that the rates were calculated.
Actions to be performed	None.
Business Object (Attribute)	School (CDRProcessDt), GA (CDRProcessDt), Lender (CDRProcessDt)

Process Date	
Validation	None.

Disclosure statement	
Element	Label
Definition/Business Rules	Displays the disclosure statement that reads: “The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes.”
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

3.9.3.6 Cohort Default Rate – FFPS View

The screenshot shows the NSLDS web interface. At the top, there is a navigation menu with buttons for Menu, Aid, Enroll, Org, Report, Tran, and Support. Below the menu is a green header bar with links for Org Contact List, Org Search, Data Provider Schedule, Repayment Information, Cohort Default Rate, Cohort Default Rate FFPS, View Date Control, Loan Unlock Maintenance, and School Profile. A search area includes a dropdown for Type (set to '— Select —'), input fields for Code and Name, and a Retrieve button. A status bar indicates the user is logged on as DAWN WILL from the Department of Education Region 0.

The main content area displays the following information:

Name: BALTIMORE FED SAVINGS & LOAN ASSN
Code: 805386 **Type:** Lender

Cohort Default Rate History List

Request Loan Details

Fiscal Year	Rate Type	Originating/Current	Numerator	Denominator	Rate	Process Date
2000	DRAFT	CL	0	0	0	06/20/2002
		OL	0	0	0	06/20/2002
	OFFICIAL	CL	0	0	0	06/20/2002
		OL	0	0	0	06/20/2002
		CL	0	0	0	06/19/2002
		OL	0	0	0	06/19/2002
1999	OFFICIAL	CL	0	0	0	07/12/2001
		OL	0	0	0	07/12/2001
1998	OFFICIAL	CL	0	0	0	07/12/2001
		OL	0	0	0	07/12/2001
1997	OFFICIAL	CL	0	0	0	07/12/2001
		OL	0	0	0	07/12/2001
1996	DRAFT	CL	0	0	0	07/12/2001
		OL	0	0	0	07/12/2001
	OFFICIAL	CL	0	0	0	07/12/2001
		OL	0	0	0	07/12/2001
1995	OFFICIAL	CL	0	0	0	07/11/2001
		OL	0	0	0	07/11/2001
1994	OFFICIAL	CL	0	0	0	07/11/2001
		OL	0	0	0	07/11/2001
1993	OFFICIAL	CL	0	0	0	07/11/2001
		OL	0	0	0	07/11/2001

The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes.

Figure 16, Cohort Default Rate – FFPS View (Lender)

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List

Org Contact List	
	screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. This link is deactivated when the user is in the Cohort Default Rate History List screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.

Loan Unlock Maintenance	
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Type	
Element	Dropdown Box
Definition/Business Rules	<p>Allows a user to select a type of organization you want to search for.</p> <p>The options in the Dropdown Box are (displayed in this order):</p> <ul style="list-style-type: none"> • -- Select -- • Guaranty Agency • Lender
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear.
Business Object (Attribute)	Lender (orgType), GA (orgType)
Validation	None.

Code	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter the code of an organization.</p> <p>Different Types of organizations have different code lengths. The lengths for the codes are:</p> <ul style="list-style-type: none"> • Guaranty Agency – 3 characters long • Lender – 6 characters long <p>The code can be typed partially in order to retrieve search results (i.e. You can type '12', rather than '12345678' which will display the Org Search screen with all organizations that begin with '12').</p> <p><i>Min Characters – 0</i></p>

Code	
	<i>Max Characters – 8</i>
Actions to be performed	As the user enters the code, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	Lender (orgCode), GA (orgCode)
Validation	None.

Name	
Element	Textbox
Definition/Business Rules	Allows a user to enter the name of an organization. The name can be typed partially in order to retrieve search results (i.e. You can type 'S', rather than 'State University' which will display the Org Search Screen with all organization that begin with 'S'). <i>Min Characters – 0</i> <i>Max Characters – 45</i>
Actions to be performed	As the user enters the name, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	Lender (orgName), GA (orgName)
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve organization contact information.
Actions to be performed	By clicking on the pushbutton the organization that satisfies the criteria entered will be listed Organization Search screen.
Business Object (Attribute)	None.
Validation	<ul style="list-style-type: none"> <i>Condition:</i> If the user selects the type for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed in the Organization

Retrieve	
	<p>Search screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <ul style="list-style-type: none"> • <i>Condition:</i> If the user selects the type and enters the code for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed on the screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type and name for an organization and then clicks the Retrieve pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type, code, and name for an organization and then clicks the pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common code and name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. <p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> • <i>Condition:</i> User clicks the Retrieve button without selecting a Type or inputting a Code and Name. <i>Message:</i> Please select an Organization Type. <i>Location:</i> Client <i>Additional Information:</i> Type label turns red. Display Error.gif.

Retrieve	
	<ul style="list-style-type: none"> • <i>Condition:</i> User selects GUARANTY AGENCY Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 3 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects a Type and enters a non-numeric Code (i.e. abcd). <i>Message:</i> Please enter a numeric Organizational Code. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. <p>An information message appears at the top of the screen for the following condition:</p> <ul style="list-style-type: none"> • <i>Condition:</i> Organization contact information is not found based on criteria entered. <i>Message:</i> No record found for the selected criteria. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif. • <i>Condition:</i> Default information message that appears in the screen. <i>Message:</i> Please select an organization of this type – Lender, Guaranty Agency. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.

Name	
Element	Label
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgName), GA (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgCode), GA (orgCode)
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgType), GA (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization.</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This Status column will not appear if there is no data in NSLDS II.</p>
Actions to be performed	None.
Business Object (Attribute)	GA (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgStreet, orgCity, orgState, orgZip), GA

Address	
	(orgStreet, orgCity, orgState, orgZip)
Validation	None.

Request Loan Detail	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the report screen.
Actions to be performed	By clicking on the pushbutton, the Report screen (Report DC029) is displayed.
Business Object (Attribute)	None.
Validation	None.

Fiscal Year	
Element	Label
Definition/Business Rules	Displays the fiscal year for CDR. October through following September 30 during which a default request was calculated. FFPS can view CDR information as soon as the rates are calculated. ED, School's and GA's must wait until the Default Rates are mailed to view.
Actions to be performed	None.
Business Object (Attribute)	GA (fiscalYear), Lender (fiscalYear)
Validation	None.

Originating/Current	
Element	Label
Definition/Business Rules	Displays an indicator of lender status as it relates to loans for the selected organization. The lender statuses are: <ul style="list-style-type: none"> • OL—Originating • CL—Current <p>This column is only applicable when viewing CDR history for Lenders.</p>
Actions to be performed	None.
Business Object (Attribute)	Lender (status)
Validation	None.

Rate Type	
Element	Label
Definition/Business Rules	Displays the status of an organization's defaulted borrower calculation. The Rate Types are:

Rate Type	
	<ul style="list-style-type: none"> • 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. <p>This 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.</p>
Actions to be performed	None.
Business Object (Attribute)	GA (rateType)
Validation	None.

Numerator	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a loan program during the cohort year and has defaulted on those loans during the same cohort year or the next cohort year.
Actions to be performed	None.
Business Object (Attribute)	GA (DualNum), Lender (DualNum)
Validation	None.

Denominator	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a loan program during the cohort year.
Actions to be performed	None.
Business Object (Attribute)	GA (DualDenom), Lender (DualDenom)
Validation	None.

Rate	
Element	Label

Rate	
Definition/Business Rules	Displays the default rate for the organization, which is calculated as a percentage of the Numerator to Denominator and truncated to one decimal place.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Process Date	
Element	Label
Definition/Business Rules	Displays the date that the rates were calculated.
Actions to be performed	None.
Business Object (Attribute)	GA (CDRProcessDt), Lender (CDRProcessDt)
Validation	None.

Disclosure statement	
Element	Label
Definition/Business Rules	Displays the disclosure statement that reads: "The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes."
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

3.10 Cohort Default Rate History Display

Description	Allows a user to view a history of the default rates for the selected organization and request Loan Details.
New or Existing	Existing
User Group (Screen Level)	EDDMD
Requirements Traceability	1.051, 1.052
Reference(s)	NSLDS User Documentation, Cohort Default Rate History List (DMD) CHRDM.D.ASP
Object Name	School, GA, Lender

3.10.1 Software Unit Logic

NSLDS I File Name:	There is not an ASP file associated with this screen.
NSLDSII File Name:	CDRHistDisp.jsp
Pre-Status:	This screen is accessible from the following screens (depending on user access privileges): <ul style="list-style-type: none"> • Cohort Default History List (Link: 1)
Post-Status:	This screen allows a user to navigate to any of the following screens (depending on user access privileges): <ul style="list-style-type: none"> • Organization Contact List (Link: Org Contact List) • Organization Search (Link: Org Search) • Data Provider Schedule (Link: Data Provider Schedule) • Repayment Information (Link: Repayment Information) • Cohort Default Rate History List (Link: Cohort Default Rate, Back Icon) • View Date Control (Link: View Date Control) • Loan Unlock Maintenance (Link: Loan Unlock Maintenance) • School Profile (Link: School Profile) • Menu (Link: Menu Tab) • Loan History List (Link: Aid Tab) • Enrollment Summary (Link: Enroll Tab) • Report (Link: Report Tab) • Transfer Monitoring List (Link: Tran Tab) • External Contact List (Link: Support Tab) • Contact Us (Link: Contact Us Icon) • System Log On (Link: System Logoff Icon)
Gif Name:	The following graphical objects may appear on this screen: <ul style="list-style-type: none"> • Back.gif
Tab Order	<ol style="list-style-type: none"> 1. Type 2. Code 3. Name 4. Retrieve 5. Department of Education Region 0 (Example) 6. Request Loan Details 7. URL Navigation Bar 8. Menu Tab 9. Aid Tab 10. Enroll Tab 11. Report Tab

	<ul style="list-style-type: none"> 12. Tran Tab 13. Support Tab 14. Contact Us Icon 15. Help Icon 16. Logoff Icon 17. Org Contact List 18. Org Search 19. Data Provider Schedule 20. Repayment Information 21. Cohort Default Rate 22. Cohort Default Rate DM 23. Cohort Default Rate FFPS 24. View Date Control 25. Loan Unlock Maintenance 26. School Profile
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3.10.2 Design Details

The following screenshot highlights the functionality of Cohort Default Rate History Display screen.

NSLDS Menu Aid Enroll Org Report Tran Support

Org Contact List | Org Search | Data Provider Schedule | Repayment Information | Cohort Default Rate | **Cohort Default Rate DM** | Cohort Default Rate DM | View Date Control | Loan Unlock Maintenance | School Profile

Logged on as: DAWN WILL from Department of Education Region 0

Name: JOHNS HOPKINS UNIVERSITY - HOMEWOOD CAMPUS -
Code: 00207700 **Type:** School
Status: OPEN
Address: 242 GARLAND HALL
 BALTIMORE, MD 212182693

Cohort Default Rate History Display

Request Loan Details

Fiscal Year	Rate Type	Rate Sub Type	Num	Denom	Rate	FFEL Num	FFEL Denom	FFEL Rate	DL Num	DL Denom	DL Rate	Dual Num	Dual Denom	Dual Rate	Process Date
2000	DRAFT	ACTUAL	0	144	0	0	98	0	0	46	0	0	144	0	06/20/2002
	OFFICIAL	ACTUAL	0	145	0	0	99	0	0	46	0	0	145	0	06/20/2002
		ACTUAL	0	146	0	0	99	0	0	47	0	0	146	0	06/19/2002

The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes.

Figure 17, Cohort Default Rate History Display

3.10.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link

Cohort Default Rate	
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.
Actions to be performed	When clicked, the Cohort Default Rate History List screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Name	
Element	Label
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	GA (orgName), Lender (orgName), School (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	GA (orgCode), Lender (orgCode), School (orgCode)
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	GA (orgType), Lender (orgType), School (orgType)

Type	
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization.</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This Status column will not appear if there is no data in NSLDS II.</p>
Actions to be performed	None.
Business Object (Attribute)	GA (status), School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.
Business Object (Attribute)	GA (orgStreet, orgCity, orgState, orgZip), Lender (orgStreet, orgCity, orgState, orgZip), School (orgStreet, orgCity, orgState, orgZip)
Validation	None.

Request Loan Detail	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the report screen.
Actions to be performed	By clicking on the pushbutton, the Report screen is displayed.
Business Object (Attribute)	None.
Validation	TBD

Fiscal Year	
Element	Label
Definition/Business Rules	Displays the fiscal year for CDR. October through following September 30 during which a default request was calculated.
Actions to be performed	None.
Business Object (Attribute)	GA (fiscalYear), Lender (fiscalYear), School (fiscalYear)
Validation	None.

Rate Type	
Element	Label
Definition/Business Rules	<p>Displays the status of an organization's defaulted borrower calculation. The Rate Types are:</p> <ul style="list-style-type: none"> • 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. <p>This 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.</p>
Actions to be performed	None.
Business Object (Attribute)	School (rateType), GA (rateType), Lender (rateType)
Validation	None.

Rate Sub Type	
Element	Label
Definition/Business Rules	<p>Displays the rate type for a default rate history. Within each rate type there are six possible sub types that can be in effect for a default rate history occurrence. The Rate Sub Types are:</p> <ul style="list-style-type: none"> • Actual—The "raw" rate calculated using the actual list of borrowers of a school

Rate Sub Type	
	<p>prior to any adjustments.</p> <ul style="list-style-type: none"> • 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. <p>This column is only applicable when viewing cohort default rate history for schools where the users belong to ED's Default Management Division.</p>
Actions to be performed	None.
Business Object (Attribute)	School (rateSubType)
Validation	None.

FFEL Num	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a FFEL loan program during the cohort year and has defaulted on those loans during the same cohort year or the next cohort year.
Actions to be performed	None.
Business Object (Attribute)	School (FFELNum)
Validation	None.

FFEL Denom	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a FFEL loan program during the cohort year.

FFEL Denom	
Actions to be performed	None.
Business Object (Attribute)	School (FFELDenom)
Validation	None.

Rate	
Element	Label
Definition/Business Rules	Displays the FFEL default rate for the organization, which is calculated as a percentage of the Numerator to Denominator and truncated to one decimal place.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

DL Num	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a DL loan program during the cohort year and has defaulted on those loans during the same cohort year or the next cohort year.
Actions to be performed	None.
Business Object (Attribute)	School (DLNum)
Validation	None.

DL Denom	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a DL loan program during the cohort year.
Actions to be performed	None.
Business Object (Attribute)	School (DLDenom)
Validation	None.

Rate	
Element	Label
Definition/Business Rules	Displays the DL default rate for the organization, which is calculated as a percentage of the Numerator to Denominator and truncated to one decimal place.
Actions to be performed	None.

Rate	
Business Object (Attribute)	None.
Validation	None.

Dual Numerator	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a Dual loan program during the cohort year and has defaulted on those loans during the same cohort year or the next cohort year.
Actions to be performed	None.
Business Object (Attribute)	School (DualNum)
Validation	None.

Dual Denominator	
Element	Label
Definition/Business Rules	Displays the total number of borrowers that entered repayment on a Dual loan program during the cohort year.
Actions to be performed	None.
Business Object (Attribute)	School (DualDenom)
Validation	None.

Rate	
Element	Label
Definition/Business Rules	Displays the Dual default rate for the organization, which is calculated as a percentage of the Numerator to Denominator and truncated to one decimal place.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Process Date	
Element	Label
Definition/Business Rules	Displays the date that the rates were calculated.
Actions to be performed	None.
Business Object (Attribute)	School (CDRProcessDt), GA (CDRProcessDt), Lender (CDRProcessDt)
Validation	None.

Disclosure statement	
Element	Label
Definition/Business Rules	Displays the disclosure statement that reads: “The Cohort Default rates listed above may not reflect changes that have resulted from the Cohort Default rate challenge/adjustment/appeal processes.”
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

3.11 View Data Control

Description	Allows authorized users to display the dates when default rate calculations are viewable. Web pages that display default rates will check these dates. Rates will not display if dates are blank or if dates are in the future.
New or Existing	Existing
User Group (Screen Level)	EDDEF, EDDMD
Requirements Traceability	1.099
Reference(s)	CDR View Date Control
Object Name	School, GA, Lender, Servicer, State Agency, ED, View Date Control

3.11.1 Software Unit Logic

NSLDS I File Name:	VWDTCNTL.asp
NSLDS I File Name:	VwDtCntrl.jsp
Pre-Status:	<p>This screen is accessible from the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: View Date Control) • Organization Contact Detail (Link: View Date Control) • Organization Contact Update (Link: View Date Control) • Organization Contact Delete Confirmation (Link: View Date Control) • Organization Contact Add (Link: View Date Control) • Organization Search (Link: View Date Control) • Data Provider Schedule (Link: View Date Control)

	<ul style="list-style-type: none"> • Repayment Information (Link: View Date Control) • Cohort Default Rate History List (Link: View Date Control) • School Profile (Link: View Date Control) • Loan Unlock Maintenance (Link: View Date Control)
Post-Status:	<p>This screen allows a user to navigate to any of the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: Org Contact List) • Organization Search (Link: Org Search) • Data Provider Schedule (Link: Data Provider Schedule) • Repayment Information (Link: Repayment Information) • Cohort Default Rate History List (Link: Cohort Default Rate) • Loan Unlock Maintenance (Link: Loan Unlock Maintenance) • School Profile (Link: School Profile) • Menu (Link: Menu Tab) • Loan History List (Link: Aid Tab) • Enrollment Summary (Link: Enroll Tab) • Report (Link: Report Tab) • Transfer Monitoring List (Link: Tran Tab) • External Contact List (Link: Support Tab) • Contact Us (Link: Contact Us Icon) • System Log On (Link: System Logoff Icon)
Gif Name:	<p>The following graphical objects may appear on this screen:</p> <ul style="list-style-type: none"> • Error.gif • Info.gif
Tab Order	<ol style="list-style-type: none"> 1. Type 2. Code 3. Name 4. Retrieve 5. Department of Education Region 0 (Example) 6. Update 7. URL Navigation Bar 8. Menu Tab 9. Aid Tab 10. Enroll Tab 11. Report Tab 12. Tran Tab 13. Support Tab 14. Contact Us Icon 15. Help Icon 16. Logoff Icon 17. Org Contact List 18. Org Search

	<ul style="list-style-type: none"> 19. Data Provider Schedule 20. Repayment Information 21. Cohort Default Rate 22. Cohort Default Rate DM 23. Cohort Default Rate FFPS 24. Loan Unlock Maintenance 25. School Profile
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3.11.2 Design Details

The following screenshot highlights the functionality of View Data Control screen.

Name: HEADQUARTERS
Code: 0 **Type:** Dept of Ed Region
Address: 7TH & D STREETS, S.W., ROB 3, ROOM 4520
WASHINGTON, DC 20202

View Date Control Detail

Update

Fiscal Year	Rate Type	Run Date	Date Viewable
2000	Draft	06/20/2002	
	Official	06/20/2002	
	Official	06/19/2002	
1999	Official	07/12/2001	06/01/2002
1998	Official	07/12/2001	06/01/2001
1997	Official	07/12/2001	06/01/2001
	Draft	07/12/2001	06/01/2001
1996	Official	07/12/2001	06/01/2001
	Official	07/11/2001	06/01/2001
1995	Official	07/11/2001	06/01/2001
1994	Official	07/11/2001	06/01/2001
1993	Official	07/11/2001	06/01/2001
1992	Official	08/24/1995	06/01/2001
1991	Official	08/24/1995	06/01/2001
1990	Official	08/24/1995	06/01/2001

Figure 18, View Date Control

3.11.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	When clicked, the Organization Search screen appears.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.
Actions to be performed	When clicked, the Cohort Default Rate screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. This link is deactivated when the user is in the View Date Control screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Type	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select a type of organization you want to search for. The options in the Dropdown Box are (displayed in this order): <ul style="list-style-type: none"> • -- Select -- • FDLP Servicer • ED Region • Guaranty Agency • Lender • Lender Branch Servicer • School • State Agency
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear.
Business Object (Attribute)	Lender (orgType), Servicer (orgType), School (orgType), GA (orgType), ED (orgType), State Agency (orgType)
Validation	None.

Code	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter the code of an organization.</p> <p>Different Types of organizations have different code lengths. The lengths for the codes are:</p> <ul style="list-style-type: none"> • FDLP Servicer – 3 characters long • ED Region - 2 characters long • Guaranty Agency – 3 characters long • Lender – 8 characters long • Lender Branch Servicer – 6 characters long • School – 8 characters long • State Agency - 4 characters long <p>The code can be typed partially in order to retrieve search results (i.e. You can type '12', rather than '12345678' which will display the Org Search screen with all organizations that begin with '12').</p> <p><i>Max Characters – 0</i> <i>Max Characters - 8</i></p>
Actions to be performed	<p>As the user enters the code, it is displayed in the textbox in editable format.</p> <p>On Enter Retrieve pushbutton is enacted.</p>
Business Object (Attribute)	Lender (orgCode), Servicer (orgCode), School (orgCode), GA (orgCode), ED (orgCode), State Agency (orgCode)
Validation	None.

Name	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter the name of an organization.</p> <p>The name can be typed partially in order to retrieve search results (i.e. You can type 'S', rather than 'State University' which will display the Org Search Screen with all organization that begin with 'S').</p> <p><i>Min Characters – 0</i></p>

Name	
	<i>Max Characters – 45</i>
Actions to be performed	As the user enters the name, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	Lender (orgName), Servicer (orgName), School (orgName), GA (orgName), ED (orgName), State Agency (orgName)
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve organization contact information.
Actions to be performed	By clicking on the pushbutton the organization that satisfies the criteria entered will be listed Organization Search screen.
Business Object (Attribute)	None.
Validation	<ul style="list-style-type: none"> • <i>Condition:</i> If the user selects the type for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed in the Organization Search screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the user selects the type and enters the code for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed on the screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type and name for an organization and then clicks the Retrieve pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common name associated with it.

Retrieve	
	<p><i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <ul style="list-style-type: none"> <p><i>Condition:</i> If the User selects the type, code, and name for an organization and then clicks the pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common code and name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> <p><i>Condition:</i> User clicks the Retrieve button without selecting a Type or inputting a Code and Name. <i>Message:</i> Please select an Organization Type. <i>Location:</i> Client <i>Additional Information:</i> Type label turns red. Display Error.gif.</p> <p><i>Condition:</i> User selects FDLP SERVICER Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 5 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif.</p> <p><i>Condition:</i> User selects ED REGION Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 2 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif.</p> <p><i>Condition:</i> User selects GUARANTY AGENCY Type and enters an invalid Code (i.e. 00000000).</p>

Retrieve	
	<p><i>Message:</i> Please enter an Organization Code length of 3 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif.</p> <ul style="list-style-type: none"> • <i>Condition:</i> User selects LENDER BRANCH SERVICER Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 6 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects STATE AGENCY Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 4 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects a Type and enters a non-numeric Code (i.e. abcd) <i>Message:</i> Please enter a numeric Organizational Code. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. <p>An information message appears at the top of the screen for the following condition:</p> <ul style="list-style-type: none"> • <i>Condition:</i> Organization contact information is not found based on criteria entered. <i>Message:</i> No record found for the selected criteria. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.

Name	
Element	Label

Name	
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgName), Servicer (orgName), School (orgName), GA (orgName), ED (orgName), State Agency (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgCode), Servicer (orgCode), School (orgCode), GA (orgCode), ED (orgCode), State Agency (orgCode)
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgType), Servicer (orgType), School (orgType), GA (orgType), ED (orgType), State Agency (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization.</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This</p>

Status	
	Status column will not appear if there is no data in NSLDS II.
Actions to be performed	None.
Business Object (Attribute)	GA (status), School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgStreet, orgCity, orgState, orgZip), Servicer (orgStreet, orgCity, orgState, orgZip), School (orgStreet, orgCity, orgState, orgZip), GA (orgStreet, orgCity, orgState, orgZip), ED (orgStreet, orgCity, orgState, orgZip), State Agency (orgStreet, orgCity, orgState, orgZip)
Validation	None.

Update	
Element	Pushbutton
Definition/Business Rules	Allows a user to navigate to the View Data Control Update screen.
Actions to be performed	When clicked, the View Data Control Update screen appears.
Business Object (Attribute)	None.
Validation	None.

Fiscal Year	
Element	Label
Definition/Business Rules	Displays the Fiscal Year of the calculated Default Rate.
Actions to be performed	None.
Business Object (Attribute)	ViewDateControl (fiscalYear)
Validation	None.

Rate Type	
Element	Label
Definition/Business Rules	Displays the Rate Type of the calculated Default Rate.
Actions to be performed	None.
Business Object (Attribute)	ViewDateControl (rateType)

Rate Type	
Validation	None.

Run Date	
Element	Label
Definition/Business Rules	Displays the date the Default Rate was calculated. The date viewable must be viewable in "MM/DD/CCYY" format.
Actions to be performed	None.
Business Object (Attribute)	ViewDateControl (runDate)
Validation	None.

Date Viewable	
Element	Label
Definition/Business Rules	Displays the date the Default Rate will be viewable. <i>Mask</i> - The date viewable must be viewable in "MM/DD/CCYY" format.
Actions to be performed	None.
Business Object (Attribute)	ViewDateControl (viewAvailDate)
Validation	None.

3.12 View Data Control Update

Description	Allows authorized administrative users to update the viewable date for the most recent Default Rate Calculation request.
New or Existing	Existing
User Group (Screen Level)	EDDEF, EDDMD
Requirements Traceability	1.100
Reference(s)	CDR View Date Control
Object Name	School, GA, Lender, Servicer, State Agency, ED, View Date Control

3.12.1 Software Unit Logic

NSLDS I File Name:	None.
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NSLDS II File Name:	VwDtCntrlUp.jsp
Pre-Status:	<p>This screen is accessible from the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • View Date Control (Pushbutton: Update)
Post-Status:	<p>This screen allows a user to navigate to any of the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: Org Contact List) • Organization Search (Link: Org Search) • Data Provider Schedule (Link: Data Provider Schedule) • Repayment Information (Link: Repayment Information) • Cohort Default Rate History List (Link: Cohort Default Rate) • View Date Control (Link: View Date Control) • Loan Unlock Maintenance (Link: Loan Unlock Maintenance) • School Profile (Link: School Profile) • Menu (Link: Menu Tab) • Loan History List (Link: Aid Tab) • Enrollment Summary (Link: Enroll Tab) • Report (Link: Report Tab) • Transfer Monitoring List (Link: Tran Tab) • External Contact List (Link: Support Tab) • Contact Us (Link: Contact Us Icon) • System Log On (Link: System Logoff Icon)
Gif Name:	<p>The following graphical objects may appear on this screen:</p> <ul style="list-style-type: none"> • Error.gif • Info.gif
Tab Order	<ol style="list-style-type: none"> 1. Date Viewable 2. Submit 3. URL Navigation Bar 4. Menu Tab 5. Aid Tab 6. Enroll Tab 7. Report Tab 8. Tran Tab 9. Support Tab 10. Contact Us Icon 11. Help Icon 12. Logoff Icon 13. Org Contact List 14. Org Search 15. Data Provider Schedule

	<ul style="list-style-type: none"> 16. Repayment Information 17. Cohort Default Rate 18. Cohort Default Rate DM 19. Cohort Default Rate FFPS 20. View Date Control 21. Loan Unlock Maintenance 22. School Profile 23. Department of Education Region 0 (Example)
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3.12.2 Design Details

The following screenshot highlights the functionality of View Data Control screen.

Name: HEADQUARTERS
Code: 0 **Type:** Dept of Ed Region
Address: 7TH & D STREETS, S.W., ROB 3, ROOM 4520
WASHINGTON, DC 20202

View Date Control Update

Fiscal Year	Rate Type	Run Date	Date Viewable
2000	Draft	06/20/2002	<input type="text"/> MMDDCCYY
	Official	06/20/2002	
	Official	06/19/2002	
1999	Official	07/12/2001	06/01/2002
1998	Official	07/12/2001	06/01/2001
1997	Official	07/12/2001	06/01/2001
1996	Draft	07/12/2001	06/01/2001
	Official	07/12/2001	06/01/2001
1995	Official	07/11/2001	06/01/2001
1994	Official	07/11/2001	06/01/2001
1993	Official	07/11/2001	06/01/2001
1992	Official	08/24/1995	06/01/2001
1991	Official	08/24/1995	06/01/2001
1990	Official	08/24/1995	06/01/2001

Figure 19, View Date Control Update

3.12.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	When clicked, the Organization Search screen appears.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen.
Actions to be performed	When clicked, the Cohort Default Rate screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. This link is deactivated when the user is in the View Date Control screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

Type	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select a type of organization you want to search for. The options in the Dropdown Box are (displayed in this order): <ul style="list-style-type: none"> • -- Select -- • FDLP Servicer • ED Region • Guaranty Agency • Lender • Lender Branch Servicer • School • State Agency
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear.
Business Object (Attribute)	Lender (orgType), Servicer (orgType), School (orgType), GA (orgType), ED (orgType), State Agency (orgType)
Validation	None.

Code	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter the code of an organization.</p> <p>Different Types of organizations have different code lengths. The lengths for the codes are:</p> <ul style="list-style-type: none"> • FDLP Servicer – 3 characters long • ED Region - 2 characters long • Guaranty Agency – 3 characters long • Lender – 8 characters long • Lender Branch Servicer – 6 characters long • School – 8 characters long • State Agency - 4 characters long <p>The code can be typed partially in order to retrieve search results (i.e. You can type '12', rather than '12345678' which will display the Org Search screen with all organizations that begin with '12').</p> <p><i>Max Characters – 0</i> <i>Max Characters - 8</i></p>
Actions to be performed	<p>As the user enters the code, it is displayed in the textbox in editable format.</p> <p>On Enter Retrieve pushbutton is enacted.</p>
Business Object (Attribute)	Lender (orgCode), Servicer (orgCode), School (orgCode), GA (orgCode), ED (orgCode), State Agency (orgCode)
Validation	None.

Name	
Element	Textbox
Definition/Business Rules	<p>Allows a user to enter the name of an organization.</p> <p>The name can be typed partially in order to retrieve search results (i.e. You can type 'S', rather than 'State University' which will display the Org Search Screen with all organization that begin with 'S').</p> <p><i>Min Characters – 0</i></p>

Name	
	<i>Max Characters – 45</i>
Actions to be performed	As the user enters the name, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	Lender (orgName), Servicer (orgName), School (orgName), GA (orgName), ED (orgName), State Agency (orgName)
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve organization contact information.
Actions to be performed	By clicking on the pushbutton the organization that satisfies the criteria entered will be listed Organization Search screen.
Business Object (Attribute)	None.
Validation	<ul style="list-style-type: none"> Condition: If the user selects the type for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed in the Organization Search screen. Message: None. Location: Server Additional Information: None. Condition: If the user selects the type and enters the code for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed on the screen. Message: None. Location: Server Additional Information: None. Condition: If the User selects the type and name for an organization and then clicks the Retrieve pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common name associated with it.

Retrieve	
	<p><i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None.</p> <ul style="list-style-type: none"> • <i>Condition:</i> If the User selects the type, code, and name for an organization and then clicks the pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common code and name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. <p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> • <i>Condition:</i> User clicks the Retrieve button without selecting a Type or inputting a Code and Name. <i>Message:</i> Please select an Organization Type. <i>Location:</i> Client <i>Additional Information:</i> Type label turns red. Display Error.gif. • <i>Condition:</i> User selects FDLP SERVICER Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 5 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects ED REGION Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 2 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects GUARANTY AGENCY Type and enters an invalid Code (i.e. 00000000).

Retrieve	
	<p><i>Message:</i> Please enter an Organization Code length of 3 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif.</p> <ul style="list-style-type: none"> • <i>Condition:</i> User selects LENDER BRANCH SERVICER Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 6 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects STATE AGENCY Type and enters an invalid Code (i.e. 00000000). <i>Message:</i> Please enter an Organization Code length of 4 or less. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. • <i>Condition:</i> User selects a Type and enters a non-numeric Code (i.e. abcd) <i>Message:</i> Please enter a numeric Organizational Code. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. <p>An information message appears at the top of the screen for the following condition:</p> <ul style="list-style-type: none"> • <i>Condition:</i> Organization contact information is not found based on criteria entered. <i>Message:</i> No record found for the selected criteria. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.

Name	
Element	Label

Name	
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgName), Servicer (orgName), School (orgName), GA (orgName), ED (orgName), State Agency (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgCode), Servicer (orgCode), School (orgCode), GA (orgCode), ED (orgCode), State Agency (orgCode)
Validation	None.

Type	
Element	Label
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgType), Servicer (orgType), School (orgType), GA (orgType), ED (orgType), State Agency (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization.</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This</p>

Status	
	Status column will not appear if there is no data in NSLDS II.
Actions to be performed	None.
Business Object (Attribute)	GA (status), School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.
Business Object (Attribute)	Lender (orgStreet, orgCity, orgState, orgZip), Servicer (orgStreet, orgCity, orgState, orgZip), School (orgStreet, orgCity, orgState, orgZip), GA (orgStreet, orgCity, orgState, orgZip), ED (orgStreet, orgCity, orgState, orgZip), State Agency (orgStreet, orgCity, orgState, orgZip)
Validation	None.

Fiscal Year	
Element	Label
Definition/Business Rules	Displays the Fiscal Year of the calculated Default Rate.
Actions to be performed	None.
Business Object (Attribute)	ViewDateControl (fiscalYear)
Validation	None.

Rate Type	
Element	Label
Definition/Business Rules	Displays the Rate Type of the calculated Default Rate.
Actions to be performed	None.
Validation	None.

Run Date	
Element	Label
Definition/Business Rules	Displays the date the Default Rate was calculated. <i>Mask</i> - The date viewable must be viewable in "MM/DD/CCYY" format.
Actions to be performed	None.
Business Object (Attribute)	ViewDateControl (rateType)

Run Date	
Business Object (Attribute)	ViewDateControl (runDate)
Validation	None.

Date Viewable	
Element	Label / Textbox
Definition/Business Rules	<p>Displays the date the Default Rate will be viewable.</p> <p>If the date viewable is the most recent calculation Allows user to modify the date the Default Rate is viewable.</p> <p><i>Mask</i> - The date viewable must be entered in "MM/DD/CCYY" format.</p>
Actions to be performed	When the date is entered, the text appears in editable format.
Business Object (Attribute)	ViewDateControl (viewAvailDate)
Validation	None.

Submit	
Element	Pushbutton
Definition/Business Rules	Allows user to submit change to the date the Default Rate will be viewable.
Actions to be performed	User clicks on the pushbutton after having modified the date. Validation is performed.
Business Object (Attribute)	None.
Validation	<ul style="list-style-type: none"> <i>Condition:</i> Upon successful validation, the user is directed to the View Date Control screen. <i>Message:</i> Update to Date Viewable has been performed successfully. <i>Location:</i> Server <i>Additional Information:</i> This message displays on the View Date Control Screen. <p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> <i>Condition:</i> The user does not input any value in the Date Viewable field and clicks Submit. <i>Message:</i> "No Changes were made." <i>Location:</i> Server

Submit	
	<p><i>Additional Information:</i> None.</p> <ul style="list-style-type: none"> • <i>Condition:</i> User enters an invalid Date in the Date Viewable field (i.e. 13/32/2002). <i>Message:</i> "Please enter a valid date." <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> User enters the same date that is already in the Date Viewable field. <i>Message:</i> "No Changes were made." <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> User enters the same date that is already in the Date Viewable field. <i>Message:</i> Please enter a valid Date. <i>Location:</i> Server <i>Additional Information:</i> None.

3.13 School Profile

Description	Allows a user to view Title IV grant and loan programs, as well as the schools academic and program schedule information.
New or Existing	Existing
User Group (Screen Level)	ED
Requirements Traceability	1.053
Reference(s)	NSLDS User Documentation, School Profile Detail Page ORGSCHPR.ASP
Object Name	School, GA

3.13.1 Software Unit Logic

NSLDS I File Name:	ORGschPr.asp
NSLDS II File Name:	OrgSchPr.jsp
Pre-Status:	This screen is accessible from the following screens (depending on

	<p>user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: School Profile) • Organization Contact Detail (Link: School Profile) • Organization Contact Update (Link: School Profile) • Organization Contact Delete Confirmation (Link: School Profile) • Organization Contact Add (Link: School Profile) • Organization Search (Link: School Profile) • Data Provider Schedule (Link: School Profile) • Repayment Information (Link: School Profile) • Cohort Default Rate History List (Link: School Profile) • View Date Control (Link: School Profile) • Loan Unlock Maintenance (Link: School Profile)
<p>Post-Status:</p>	<p>This screen allows a user to navigate to any of the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: Org Contact List) • Organization Search (Link: Org Search) • Data Provider Schedule (Link: Data Provider Schedule) • Repayment Information (Link: Repayment Information) • Cohort Default Rate History List (Link: Cohort Default Rate) • View Date Control (Link: View Date Control) • Loan Unlock Maintenance (Link: Loan Unlock Maintenance) • Menu (Link: Menu Tab) • Loan History List (Link: Aid Tab) • Enrollment Summary (Link: Enroll Tab) • Report (Link: Report Tab) • Transfer Monitoring List (Link: Tran Tab) • External Contact List (Link: Support Tab) • Contact Us (Link: Contact Us Icon) • System Log On (Link: System Logoff Icon)
<p>Gif Name:</p>	<p>The following graphical objects may appear on this screen:</p> <ul style="list-style-type: none"> • Error.gif • Info.gif
<p>Tab Order</p>	<ol style="list-style-type: none"> 1. Type 2. Code 3. Name 4. Retrieve 5. Department of Education Region 0 6. URL Navigation Bar

	<ol style="list-style-type: none">7. Menu Tab8. Aid Tab9. Enroll Tab10. Report Tab11. Tran Tab12. Support Tab13. Contact Us Icon14. Help Icon15. Logoff Icon16. Org Contact List17. Org Search18. Data Provider Schedule19. Repayment Information20. Cohort Default Rate21. Cohort Default Rate DM22. Cohort Default Rate FFPS23. View Date Control24. Loan Unlock Maintenance25. School Profile
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3.13.2 Design Details

The following screenshot highlights the functionality of School Profile screen.



Menu
Aid
Enroll
Org
Report
Tran
Support





[Org Contact List](#) | [Org Search](#) | [Data Provider Schedule](#) | [Repayment Information](#) | [Coherent Default Rate](#) | [View Date Control](#) | [Loan Unlock Maintenance](#) | [School Profile](#)

Type: SCHOOL Code: Name: Retrieve

Logged on as: DAWN WILL from [Department of Education Region 0](#)

Name: JOHNS HOPKINS UNIVERSITY - HOMEWOOD CAMPUS -
Code: 00207700 **Type:** School
Status: OPEN
Address: 242 GARLAND HALL
 BALTIMORE, MD 212182693

?

School Profile

Program Length: 8 - MASTER'S DEGREE OR DOCTOR'S DEGREE
School Type: 2 - PRIVATE, NONPROFIT
Ethnic Code: 6 - ETHNICITY NOT REPORTED
Certification Type: 0 - CERTIFIED
Academic Calendar: 5H - SEMESTER HOURS
Congressional District: 07
Eligibility Status: Y
Change of Affiliation Code:
Change of Affiliation Effective Date:
Region Code: 03 - PHILADELPHIA, PA
Location Reason:
Approval Indicator: Y
Initial Approval Date: 12/01/1985
Disapproval Date:
System Funded Office: N
Branch Indicator: N
FDSLPS Origination Level: 1 - OPTION 2 (SCHOOL ORIGINATES, HANDLES PNOTES, DRAWS \$)
FDSLPS Origination End Reason:
FDSLPS End Reason:

?

Program Status

Pell Start Date: 12/01/1985
Pell End Date: 12/31/9999
FFEL Stafford Start Date: 12/01/1985
FFEL Stafford End Date: 12/31/9999
FFEL Stafford Unsubsidized Start Date: 12/01/1985
FFEL Stafford Unsubsidized End Date: 12/31/9999
FFEL PLUS Start Date: 12/01/1985
FFEL PLUS End Date: 12/31/9999
FDSLPS Stafford Start Date: 04/01/1985
FDSLPS Stafford End Date: 12/31/9999
FDSLPS Stafford Unsubsidized Start Date: 04/01/1985
FDSLPS Stafford Unsubsidized End Date: 12/31/9999
FDSLPS PLUS Start Date: 04/01/1985
FDSLPS PLUS End Date: 12/31/9999
Perkins Start Date: 12/01/1985
Perkins End Date: 12/31/9999
SEOG Start Date: 12/01/1985
SEOG End Date: 12/31/9999

?

School Status

Action Code: 05 - REAPPROVE ELIG/FULL CERT
Action Reason Code: 12 - MEETS REQUIREMENTS
Effective Date of Combination: 05/15/2001

Figure 20, School Profile

3.13.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	When clicked, the Organization Search screen appears.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate screen.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Loan Unlock Maintenance screen. Only appears if user is OLNUPD or SUPUPD user.
Actions to be performed	When clicked, the Loan Unlock Maintenance screen appears.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the School Profile screen. This link is deactivated when the user is in the School Profile screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

Type	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select a type of organization you want to search for. The options in the Dropdown Box are (displayed in this order): <ul style="list-style-type: none"> • School
Actions to be performed	When the user clicks on the Type Dropdown Box, all the options appear.
Business Object (Attribute)	School (orgType)
Validation	None.

Code	
Element	Textbox
Definition/Business Rules	Allows a user to enter the code of an organization. Different Types of organizations have different code lengths. The lengths for the codes are: <ul style="list-style-type: none"> • School – 8 characters long The code can be typed partially in order to

Code	
	retrieve search results (i.e. You can type '12', rather than '12345678' which will display the Org Search screen with all organizations that begin with '12'). <i>Min Characters - 0</i> <i>Max Characters - 8</i>
Actions to be performed	As the user enters the code, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	School (orgCode)
Validation	None.

Name	
Element	Textbox
Definition/Business Rules	Allows a user to enter the name of an organization. The name can be typed partially in order to retrieve search results (i.e. You can type 'S', rather than 'State University' which will display the Org Search Screen with all organization that begin with 'S'). <i>Min Characters - 0</i> <i>Max Characters - 45</i>
Actions to be performed	As the user enters the name, it is displayed in the textbox in editable format. On Enter Retrieve pushbutton is enacted.
Business Object (Attribute)	School (orgName)
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to retrieve organization contact information.
Actions to be performed	By clicking on the pushbutton the organization that satisfies the criteria entered will be listed Organization Search screen.

Retrieve	
Business Object (Attribute)	None.
Validation	<ul style="list-style-type: none"> • <i>Condition:</i> If the user selects the type for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed in the Organization Search screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the user selects the type and enters the code for an organization and then clicks the pushbutton, the organization that satisfies the criteria entered will be listed on the screen. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type and name for an organization and then clicks the Retrieve pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. • <i>Condition:</i> If the User selects the type, code, and name for an organization and then clicks the pushbutton, the Organization Search screen is displayed with a list of organizations that match the Type of organization and have a common code and name associated with it. <i>Message:</i> None. <i>Location:</i> Server <i>Additional Information:</i> None. <p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> • <i>Condition:</i> User clicks the Retrieve button without selecting a Type or inputting a Code

Retrieve	
	<p>and Name. <i>Message:</i> Please select an Organization Type. <i>Location:</i> Client <i>Additional Information:</i> Type label turns red. Display Error.gif.</p> <ul style="list-style-type: none"> <i>Condition:</i> User selects a Type and enters a non-numeric Code (i.e. abcd). <i>Message:</i> Please enter a numeric Organizational Code. <i>Location:</i> Client <i>Additional Information:</i> Code label turns red. Display Error.gif. <p>An information message appears at the top of the screen for the following condition:</p> <ul style="list-style-type: none"> <i>Condition:</i> Organization contact information is not found based on criteria entered. <i>Message:</i> No record found for the selected criteria. <i>Location:</i> Client <i>Additional Information:</i> Display Info.gif. <i>Location:</i> Server <i>Additional Information:</i> Display Info.gif.

Name	
Element	Label
Definition/Business Rules	Displays the name of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgName)
Validation	None.

Code	
Element	Label
Definition/Business Rules	Displays the code of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgCode)
Validation	None.

Type	
Element	Label

Type	
Definition/Business Rules	Displays the type of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgType)
Validation	None.

Status	
Element	Label
Definition/Business Rules	<p>Displays the status of the organization.</p> <ul style="list-style-type: none"> • 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 this institution this school merged with. The OPEID number will link to the Organization Contact page for the remaining/merged institution. <p>This only shows if a school or GA is displaying. There are also about 10% of schools and GA's that do not have this information documented. This Status column will not appear if there is no data in NSLDS II.</p>
Actions to be performed	None.
Business Object (Attribute)	GA (status), School (status)
Validation	None.

Address	
Element	Label
Definition/Business Rules	Displays the address of the organization.
Actions to be performed	None.
Business Object (Attribute)	School (orgStreet, orgCity, orgState, orgZip), GA (orgStreet, orgCity, orgState, orgZip)
Validation	None.

Program Length	
Element	Label
Definition/Business Rules	Displays the school's program length.
Actions to be performed	None.
Business Object (Attribute)	School (programLength)
Validation	None.

School Code	
Element	Label
Definition/Business Rules	Displays the school's school code.
Actions to be performed	None.
Business Object (Attribute)	School (orgCode)
Validation	None.

Ethnic Code	
Element	Label
Definition/Business Rules	Displays the school's ethnic code.
Actions to be performed	None.
Business Object (Attribute)	School (ethnicCode)
Validation	None.

Certification Type	
Element	Label
Definition/Business Rules	Displays the school's certification type.
Actions to be performed	None.
Business Object (Attribute)	School (certificationType)
Validation	None.

Academic Calendar	
Element	Label
Definition/Business Rules	Displays the school's academic calendar.
Actions to be performed	None.
Business Object (Attribute)	School (academicCalendar)
Validation	None.

Congressional District	
Element	Label
Definition/Business Rules	Displays the school's congressional district.
Actions to be performed	None.
Business Object (Attribute)	School (congressionalDistrict)
Validation	None.

Eligibility Status	
Element	Label
Definition/Business Rules	Displays the school's eligibility status.
Actions to be performed	None.
Business Object (Attribute)	School (eligibilityStatus)

Eligibility Status	
Validation	None.

Change of Affiliation Code	
Element	Label
Definition/Business Rules	Displays the school's change of affiliation code.
Actions to be performed	None.
Business Object (Attribute)	School (COACode)
Validation	None.

Change of Affiliation Effective Date	
Element	Label
Definition/Business Rules	Displays the school's change of affiliation effective date.
Actions to be performed	None.
Business Object (Attribute)	COA(EffectiveDt)
Validation	None.

Region Code	
Element	Label
Definition/Business Rules	Displays the school's region code.
Actions to be performed	None.
Business Object (Attribute)	School (regionCode)
Validation	None.

Location Reason	
Element	Label
Definition/Business Rules	Displays the school's location region.
Actions to be performed	None.
Business Object (Attribute)	School (locationReason)
Validation	None.

Approval Indicator	
Element	Label
Definition/Business Rules	Displays the school's approval indicator.
Actions to be performed	None.
Business Object (Attribute)	School (approvalIndicator)
Validation	None.

Initial Approval Date	
Element	Label
Definition/Business Rules	Displays the school's initial approval date.

Initial Approval Date	
Actions to be performed	None.
Business Object (Attribute)	School (initialApprovalDt)
Validation	None.

Disapproval Date	
Element	Label
Definition/Business Rules	Displays the school's disapproval date.
Actions to be performed	None.
Business Object (Attribute)	School (disapprovalDt)
Validation	None.

System Funded Office	
Element	Label
Definition/Business Rules	Displays the school's system funded office.
Actions to be performed	None.
Business Object (Attribute)	School (systemFundedOffice)
Validation	None.

Branch Indicator	
Element	Label
Definition/Business Rules	Displays the school's branch indicator.
Actions to be performed	None.
Business Object (Attribute)	School (branchIndicator)
Validation	None.

FDSLPOrigin Level	
Element	Label
Definition/Business Rules	Displays the school's FDSLPOrigin level.
Actions to be performed	None.
Business Object (Attribute)	School (FDSLPOriginatioNlvl)
Validation	None.

FDSLPOrigin End Reason	
Element	Label
Definition/Business Rules	Displays the school's FDSLPOrigin End Reason.
Actions to be performed	None.
Business Object (Attribute)	School (FDSLPOriginatioNendReason)
Validation	None.

FDSLPEndReason	
Element	Label
Definition/Business Rules	Displays the school's FDSLPEndReason.
Actions to be performed	None.
Business Object (Attribute)	School (FDSLPEndReason)
Validation	None.

PellStartDt	
Element	Label
Definition/Business Rules	Displays the program's Pell start date.
Actions to be performed	None.
Business Object (Attribute)	School (PellStartDt)
Validation	None.

PellEndDt	
Element	Label
Definition/Business Rules	Displays the program's Pell end date.
Actions to be performed	None.
Business Object (Attribute)	School (PellEndDt)
Validation	None.

FFELStaffordStartDate	
Element	Label
Definition/Business Rules	Displays the program's FFEL Stafford start date.
Actions to be performed	None.
Business Object (Attribute)	School (FDSLPPFELStaffordStartDate)
Validation	None.

FFELStaffordEndDate	
Element	Label
Definition/Business Rules	Displays the program's FFEL Stafford end date.
Actions to be performed	None.
Business Object (Attribute)	School (FFELStaffordEndDate)
Validation	None.

FFELStaffordUnsubsidizedStartDate	
Element	Label
Definition/Business Rules	Displays the program's FFEL Stafford Unsubsidized start date.
Actions to be performed	None.
Business Object (Attribute)	School (FFELStaffordUnsubsidizedStartDate)
Validation	None.

FFEL Stafford Unsubsidized End Date	
Element	Label
Definition/Business Rules	Displays the program's FFEL Stafford Unsubsidized end date.
Actions to be performed	None.
Business Object (Attribute)	School (FFELStaffordUnsubsidizedEndDate)
Validation	None.

FFEL PLUS Start Date	
Element	Label
Definition/Business Rules	Displays the program's FFEL PLUS start date.
Actions to be performed	None.
Business Object (Attribute)	School (FFELPlusStartDate)
Validation	None.

FFEL PLUS End Date	
Element	Label
Definition/Business Rules	Displays the program's FFEL PLUS end date.
Actions to be performed	None.
Business Object (Attribute)	School (FFELPlusEndDate)
Validation	None.

FDSLPS Stafford Start Date	
Element	Label
Definition/Business Rules	Displays the program's FDSLPS Stafford start date.
Actions to be performed	None.
Business Object (Attribute)	School (FDSLPSStaffordStartDate)
Validation	None.

FDSLPS Stafford End Date	
Element	Label
Definition/Business Rules	Displays the program's FDSLPS Stafford end date.
Actions to be performed	None.
Business Object (Attribute)	School (FDSLPSFFELStaffordEndDate)
Validation	None.

FDSLPS Stafford Unsubsidized Start Date	
Element	Label
Definition/Business Rules	Displays the program's FDSLPS Stafford Unsubsidized start date.
Actions to be performed	None.

FDSLSP Stafford Unsubsidized Start Date	
Business Object (Attribute)	School (FDSLSPStaffordUnsubsidizedStartDate)
Validation	None.

FDSLSP Stafford Unsubsidized End Date	
Element	Label
Definition/Business Rules	Displays the program's FDSLSP Stafford Unsubsidized end date.
Actions to be performed	None.
Business Object (Attribute)	School (FDSLSPStaffordUnsubsidizedEndDate)
Validation	None.

FDSLSP PLUS Start Date	
Element	Label
Definition/Business Rules	Displays the program's FDSLSP PLUS start date.
Actions to be performed	None.
Business Object (Attribute)	School (FDSLPlusStartDate)
Validation	None.

FDSLSP PLUS End Date	
Element	Label
Definition/Business Rules	Displays the program's FDSLSP PLUS end date.
Actions to be performed	None.
Business Object (Attribute)	School (FDSLPlusEndDate)
Validation	None.

Perkins Start Date	
Element	Label
Definition/Business Rules	Displays the program's Perkins start date.
Actions to be performed	None.
Business Object (Attribute)	School (PerkinsStartDt)
Validation	None.

Perkins End Date	
Element	Label
Definition/Business Rules	Displays the program's Perkins end date.
Actions to be performed	None.
Business Object (Attribute)	School (PerkinsEndDt)
Validation	None.

SEOG Start Date	
Element	Label

SEOG Start Date	
Definition/Business Rules	Displays the program's SEOG start date.
Actions to be performed	None.
Business Object (Attribute)	School (SEOGStartDt)
Validation	None.

SEOG End Date	
Element	Label
Definition/Business Rules	Displays the program's SEOG end date.
Actions to be performed	None.
Business Object (Attribute)	School (SEOGEndDt)
Validation	None.

Action Code	
Element	Label
Definition/Business Rules	Displays the school's action code.
Actions to be performed	None.
Business Object (Attribute)	School (actionCode)
Validation	None.

Action Reason Code	
Element	Label
Definition/Business Rules	Displays the school's action reason code.
Actions to be performed	None.
Business Object (Attribute)	School (actionReasonCode)
Validation	None.

Effective Date of Combination	
Element	Label
Definition/Business Rules	Displays the school's effective date of combination.
Actions to be performed	None.
Business Object (Attribute)	School (effectiveDtOfCombination)
Validation	None.

3.14 Loan Unlock Maintenance

Description	Allows users to unlock batch locked loan(s) that are owned by a Guaranty Agency (GA).
New or Existing	Existing
User Group	OLNUPD, SUPUPD

(Screen Level)	
Requirements Traceability	1.101
Reference(s)	Loan Unlock Maintenance LNUNLOCK.ASP, WS08 Loan Unlock Maintenance Server
Object Name	Borrower, School, GA, Loan

3.14.1 Software Unit Logic

NSLDS I File Name:	LNUNLOCK.asp
NSLDS II File Name:	LnUnlck.jsp
Pre-Status:	<p>This screen is accessible from the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: Loan Unlock Maintenance) • Organization Contact Detail (Link: Loan Unlock Maintenance) • Organization Contact Update (Link: Loan Unlock Maintenance) • Organization Contact Delete Confirmation (Link: Loan Unlock Maintenance) • Organization Contact Add (Link: Loan Unlock Maintenance) • Organization Search (Link: Loan Unlock Maintenance) • Data Provider Schedule (Link: Loan Unlock Maintenance) • Repayment Information (Link: Loan Unlock Maintenance) • Cohort Default Rate History List (Link: Loan Unlock Maintenance) • View Date Control (Link: Loan Unlock Maintenance) • School Profile (Link: Loan Unlock Maintenance)
Post-Status:	<p>This screen allows a user to navigate to any of the following screens (depending on user access privileges):</p> <ul style="list-style-type: none"> • Organization Contact List (Link: Org Contact List) • Organization Search (Link: Org Search) • Data Provider Schedule (Link: Data Provider Schedule) • Repayment Information (Link: Repayment Information) • Cohort Default Rate History List (Link: Cohort Default Rate) • View Date Control (Link: View Date Control) • School Profile (Link: School Profile) • Menu (Link: Menu Tab) • Loan History List (Link: Aid Tab)

	<ul style="list-style-type: none"> • Enrollment Summary (Link: Enroll Tab) • Report (Link: Report Tab) • Transfer Monitoring List (Link: Tran Tab) • External Contact List (Link: Support Tab) • Contact Us (Link: Contact Us Icon) • System Log On (Link: System Logoff Icon)
Gif Name:	<p>The following graphical objects may appear on this screen:</p> <ul style="list-style-type: none"> • NextGroup.gif • PrevGroup.gif • Error.gif • Info.gif
Tab Order	<ol style="list-style-type: none"> 1. GA Organization 2. Org Search 3. From SSN 4. From Last Name 5. From Locked Date 6. Retrieve/Sort by 7. To SSN 8. To Last Name 9. To Locked Date 10. Retrieve 11. All 12. Checkbox(s) 13. Submit 14. Cancel 15. Privacy Act of 1974 (As Amended) 16. URL Navigation Bar 17. Menu Tab 18. Aid Tab 19. Enroll Tab 20. Report Tab 21. Tran Tab 22. Support Tab 23. Contact Us Icon 24. Help Icon 25. Logoff Icon 26. Org Contact List 27. Org Search 28. Data Provider Schedule 29. Repayment Information 30. Cohort Default Rate 31. Cohort Default Rate DM 32. Cohort Default Rate FFPS 33. View Date Control

	<p>34. Loan Unlock Maintenance</p> <p>35. School Profile</p> <p>36. Department of Education Region 0 (Example)</p>
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3.14.2 Design Details

The following screenshot highlights the functionality of Loan Unlock Maintenance screen.

The screenshot displays the 'Loan Unlock Maintenance' interface. At the top, there is a navigation bar with the NSLDS logo and menu items: Menu, Aid, Enroll, Org, Report, Tran, Support. Below this is a secondary navigation bar with links: Org Contact List, Org Search, Data Provider Schedule, Repayment Information, Cohort Default Rate, Cohort Default Rate DM, View Date Control, Loan Unlock Maintenance (highlighted), and School Profile. A status bar indicates the user is logged on as 'DAWN WILL' from 'Department of Education Region 0'.

The main content area features a 'Search Options' form with the following fields:

- GA Organization: 733 (with an 'Org Search' button)
- Retrieve/Sort by: Locked Date(Default) (dropdown menu)
- From SSN: [text input]
- To SSN: [text input]
- From Last Name: [text input]
- To Last Name: [text input]
- From Locked Date: [text input] (MMDDCCYY)
- To Locked Date: [text input] (MMDDCCYY)

A 'Retrieve' button is located below the search options.

Below the search form is a table titled 'Unlock Loan' with the following data:

<input type="checkbox"/>	Name	SSN	DOB	Loan Date	Loan Type	Loan Amt	School Code	Ind Sep Loan	Date Locked
<input type="checkbox"/>	Heagy, Mandy	123456789	10/19/1975	09/01/1993	SF	2500	00234503	A	09/28/2002
<input type="checkbox"/>	Myers, Jason	234567890	11/27/1957	07/13/1975	SF	1000	00467605	A	09/28/2002
<input type="checkbox"/>	Wolf, Kristen	345678901	12/19/1977	09/01/1995	SF	4000	00357547	A	09/28/2002
<input type="checkbox"/>	Augustyn, Catherine	456789012	10/19/1968	09/01/1986	SF	2000	00779305	A	09/28/2002

At the bottom of the table area are 'Submit' and 'Cancel' buttons.

The footer of the page contains a home icon and the text 'PRIVACY ACT OF 1974 (AS AMENDED)'.

Figure 21, Loan Unlock Maintenance

3.14.3 Screen Functionality

The following section describes each object on the screen and the functionality behind the object.

Org Contact List	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Contact List screen.
Actions to be performed	When clicked, the Organization Contact List screen appears.
Business Object (Attribute)	None.
Validation	None.

Org Search	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Organization Search screen.
Actions to be performed	When clicked, the Organization Search screen appears.
Business Object (Attribute)	None.
Validation	None.

Data Provider Schedule	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Data Provider Schedule screen.
Actions to be performed	When clicked, the Data Provider Schedule screen appears.
Business Object (Attribute)	None.
Validation	None.

Repayment Information	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Repayment Information screen.
Actions to be performed	When clicked, the Repayment Information screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default

Cohort Default Rate	
	Rate screen.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate DM	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the Cohort Default Rate DM screen appears.
Business Object (Attribute)	None.
Validation	None.

Cohort Default Rate FFPS	
Element	Link
Definition/Business Rules	Allows a user to navigate to the Cohort Default Rate History List screen. Only appears if user is FFPS user.
Actions to be performed	When clicked, the Cohort Default Rate FFPS screen appears.
Business Object (Attribute)	None.
Validation	None.

View Date Control	
Element	Link
Definition/Business Rules	Allows a user to navigate to the View Date Control screen. Only appears if user is DMD user.
Actions to be performed	When clicked, the View Date Control screen appears.
Business Object (Attribute)	None.
Validation	None.

Loan Unlock Maintenance	
Element	Link (Deactivated)
Definition/Business Rules	Allows a user to navigate to the Loan Unlock

Loan Unlock Maintenance	
	Maintenance screen. This link is deactivated when the user is in the Loan Unlock Maintenance screen.
Actions to be performed	None.
Business Object (Attribute)	None.
Validation	None.

School Profile	
Element	Link
Definition/Business Rules	Allows a user to navigate to the School Profile screen.
Actions to be performed	When clicked, the School Profile screen appears.
Business Object (Attribute)	None.
Validation	None.

GA Organization	
Element	Textbox/Label
Definition/Business Rules	<p>If user is a Superuser Allows a user to enter the code for a GA's Organization.</p> <p><i>Min Characters – 0</i> <i>Max Characters – 3</i></p> <p>If user is an authorized and trained GA The current GA code is displayed in a non-editable format.</p>
Actions to be performed	<p>If user is a Superuser When entered, the text will display in editable format.</p> <p>If user is an authorized and trained GA No actions will be performed.</p>
Business Object (Attribute)	GA (orgCode)
Validation	None.

Org Search	
Element	Pushbutton
Definition/Business Rules	<p>Allows a user to search and select a School OPEID.</p> <p>The pushbutton only displays if the user is a</p>

Org Search	
	Superuser.
Actions to be performed	By clicking on the pushbutton, the Organization Search screen appears.
Business Object (Attribute)	None.
Business Object (Attribute)	None.
Validation	None.

Retrieve/Sort by	
Element	Dropdown Box
Definition/Business Rules	Allows a user to select the order the list of locked loans are displayed. The three different options are: <ul style="list-style-type: none"> • Locked Date (Default) • Last Name • SSN
Actions to be performed	When the user clicks on the Retrieve/Sort by Dropdown Box, all the options appear.
Business Object (Attribute)	Borrower (lastName), Borrower (SSN), Loan (lockedDt)
Validation	None.

From SSN	
Element	Textbox
Definition/Business Rules	Allows a user to enter the beginning value specified for a desired SSN range of output. <i>Min Characters - 0</i> <i>Max Characters - 11</i> Masks - SSN must be entered in a "123456789" or "123-45-6789" format.
Actions to be performed	When entered, the text will display in editable format.
Business Object (Attribute)	Borrower (SSN)
Validation	None.

To SSN	
Element	Textbox
Definition/Business Rules	Allows a user to enter the ending value specified for a desired SSN range of output. <i>Min Characters - 0</i>

To SSN	
	<i>Max Characters</i> – 11 Masks - SSN must be entered in a "123456789" or "123-45-6789" format.
Actions to be performed	When entered, the text will display in editable format.
Business Object (Attribute)	Borrower (SSN)
Validation	None.

From Last Name	
Element	Textbox
Definition/Business Rules	Allows a user to enter the beginning value specified for a desired range of Last Name output. <i>Min Characters</i> – 0 <i>Max Characters</i> – 30
Actions to be performed	When entered, the text will display in editable format.
Business Object (Attribute)	Borrower (lastname)
Validation	None.

To Last Name	
Element	Textbox
Definition/Business Rules	Allows a user to enter the ending value specified for a desired range of Last Name output. <i>Min Characters</i> – 0 <i>Max Characters</i> – 30
Actions to be performed	When entered, the text will display in editable format.
Business Object (Attribute)	Borrower (lastname)
Validation	None.

From Locked Date	
Element	Textbox
Definition/Business Rules	Allows a user to enter the beginning value specified for a desired range of Locked Date output. <i>Mask</i> - Date must be with a "MMDDCCYY", "MM/DD/CCYY" or "MM-DD-CCYY" format.
Actions to be performed	When entered, the text will display in editable

From Locked Date	
	format.
Business Object (Attribute)	Loan (lockedDt)
Validation	None.

To Locked Date	
Element	Textbox
Definition/Business Rules	Allows a user to enter the ending value specified for a desired range of Locked Date output. <i>Mask</i> - Date must be entered with a "MMDDCCYY", "MM/DD/CCYY" or "MM-DD-CCYY" format.
Actions to be performed	When entered, the text will display in editable format.
Business Object (Attribute)	Loan (lockedDt)
Validation	None.

Retrieve	
Element	Pushbutton
Definition/Business Rules	Allows a user to search for locked loans.
Actions to be performed	By clicking on the pushbutton, the locked loans are pulled back that meet the search criteria. When loans are retrieved for the specified GA, only 30 loans will display on the screen. If there are more than 30 loans locked for the GA, the up and down arrows will be displayed.
Business Object (Attribute)	None.
Validation	<ul style="list-style-type: none"> <i>Condition:</i> Upon successful validation, the loans are retrieved for the specified GA and displayed on the screen <i>Message:</i> None. <i>Location:</i> Server. <i>Additional Information:</i> None. <p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> <i>Condition:</i> User does not enter a GA code. <i>Message:</i> Please enter a GA code. <i>Location:</i> Client <i>Additional Information:</i> GA Organization label turns red.

Retrieve	
	<ul style="list-style-type: none"> <p>• <i>Condition:</i> User enters a non-numeric GA code (i.e. abc) <i>Message:</i> Please enter a numeric Organization Code. <i>Location:</i> Client <i>Additional Information:</i> GA Organization label turns red.</p> <p>• <i>Condition:</i> User enters an invalid GA code (i.e. 000) <i>Message:</i> Please specify a valid GA code. <i>Location:</i> Server <i>Additional Information:</i> GA Organization label turns red.</p> <p>• <i>Condition:</i> User enters a To SSN that is less than the From SSN. <i>Message:</i> Please enter a To SSN that is greater than the From SSN. <i>Location:</i> Client <i>Additional Information:</i> To SSN and From SSN labels turn red.</p> <p>• <i>Condition:</i> User enters a To SSN or From SSN that is not in the correct format (not in the correct format, either 999999999 or 999-99-9999). <i>Message:</i> Please enter SSN in the format 999-99-9999. <i>Location:</i> Client <i>Additional Information:</i> To SSN and From SSN labels turn red.</p> <p>• <i>Condition:</i> User enters a To Last Name that is less than the From Last Name. <i>Message:</i> Please enter a To Last Name that is greater than the From Last Name. <i>Location:</i> Client <i>Additional Information:</i> To Last Name and From Last Name labels turn red.</p> <p>• <i>Condition:</i> User enters an invalid From Locked Date (i.e. 13/32/2002)</p>

Retrieve	
	<p><i>Message:</i> Please enter a valid From Locked Date in MMDDCCYY format. <i>Location:</i> Client <i>Additional Information:</i> From Locked Date label turns red.</p> <ul style="list-style-type: none"> • <i>Condition:</i> User enters an invalid To Locked Date (i.e. 13/32/2002) <i>Message:</i> Please enter a valid To Locked Date in MMDDCCYY format. <i>Location:</i> Client <i>Additional Information:</i> To Locked Date label turns red. • <i>Condition:</i> User enters a To Locked Date that is less than the From Locked Date. <i>Message:</i> Please enter a To Locked Date that is greater than the From Locked Date. <i>Location:</i> Client <i>Additional Information:</i> From Locked Date and To Locked Date labels turn red. <p>An information message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> • <i>Condition:</i> TBD <i>Message:</i> Please click the retrieve button to display locked loans based on Search Options. <i>Location:</i> TBD <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Please check at least one loan to be unlocked prior to clicking the “Submit” button. <i>Location:</i> TBD <i>Additional Information:</i> TBD • <i>Condition:</i> TBD <i>Message:</i> Selected loans have been successfully unlocked. No more locked loans exist meeting specified search options. <i>Location:</i> Server <i>Additional Information:</i> TBD

Retrieve	
	<ul style="list-style-type: none"> <i>Condition:</i> TBD <i>Message:</i> Selected loans have been successfully unlocked. Locked loans list refreshed. <i>Location:</i> Server <i>Additional Information:</i> TBD <i>Condition:</i> TBD <i>Message:</i> No locked loans were found meeting current Search Options. <i>Location:</i> Server <i>Additional Information:</i> TBD

Unlock Loan	
Element	Checkbox
Definition/Business Rules	Allows a user to select a loan to unlock.
Actions to be performed	A check will be displayed if the user clicks on the box.
Business Object (Attribute)	None.
Validation	None.

Up arrow	
Element	Link/Gif
Definition/Business Rules	Allows a user to navigate to the previous set of locked loans.
Actions to be performed	When clicked, the previous set of 30 locked loans will be displayed.
Business Object (Attribute)	None.
Validation	None.

Down arrow	
Element	Link/Gif
Definition/Business Rules	Allows a user to navigate to the next set of locked loans.
Actions to be performed	When clicked, the next set of 30 locked loans will be displayed.
Business Object (Attribute)	None.
Validation	None.

All	
Element	Pushbutton

All	
Definition/Business Rules	Allows a user to quickly check all checkboxes to unlock every loan.
Actions to be performed	By clicking on the pushbutton, a check will display in every checkbox
Business Object (Attribute)	None.
Validation	None.

Name	
Element	Label
Definition/Business Rules	Displays the Last Name, First Name and Middle Initial of the borrower.
Actions to be performed	None.
Business Object (Attribute)	Borrower (lastName, fistName, middleInitial)
Validation	None.

SSN	
Element	Label
Definition/Business Rules	Displays the SSN of the borrower.
Actions to be performed	None.
Business Object (Attribute)	Borrower (SSN)
Validation	None.

DOB	
Element	Label
Definition/Business Rules	Displays the Date of Birth of the borrower.
Actions to be performed	None.
Business Object (Attribute)	Borrower (DOB)
Validation	None.

Loan Date	
Element	Label
Definition/Business Rules	Displays the Loan Date of the borrower's Loan.
Actions to be performed	None.
Business Object (Attribute)	Loan (originationDt)
Validation	None.

Loan Amount	
Element	Label
Definition/Business Rules	Displays the Loan Amount of the borrower's Loan.
Actions to be performed	None.

Loan Amount	
Business Object (Attribute)	Loan (originationAmt)
Validation	None.

School Code	
Element	Label
Definition/Business Rules	Displays the School Code and School Branch code that the borrower attended.
Actions to be performed	None.
Business Object (Attribute)	School (orgCode)
Validation	None.

Ind Sep Loan	
Element	Label
Definition/Business Rules	Displays the Indicator Separate Loan (FFEL's Dup ID) of the borrower.
Actions to be performed	None.
Business Object (Attribute)	Loan (splitFileIndicator)
Validation	None.

Date Locked	
Element	Label
Definition/Business Rules	Displays the Batch Lock Start Date of the borrower's Loan.
Actions to be performed	None.
Business Object (Attribute)	Loan (lockedDt)
Validation	None.

Up arrow	
Element	Link/Gif
Definition/Business Rules	Allows a user to navigate to the previous set of locked loans.
Actions to be performed	When clicked, the previous set of 30 locked loans will be displayed.
Business Object (Attribute)	None.
Validation	None.

Down arrow	
Element	Link/Gif
Definition/Business Rules	Allows a user to navigate to the next set of locked loans.

Down arrow	
	The picture for the down arrow appears: 
Actions to be performed	When clicked, the next set of 30 locked loans will be displayed.
Business Object (Attribute)	None.
Validation	None.

Submit	
Element	Pushbutton
Definition/Business Rules	Allows a user to submit the loan data that have check marks to be unlocked.
Actions to be performed	By clicking on the pushbutton, validation is performed. If there are no errors the loans checked will be unlocked and the Loan Unlock Maintenance screen refreshes with a message that the loans have been unlocked successfully. If there are errors, the appropriate error message is displayed.
Business Object (Attribute)	None.
Validation	<p>An error message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> <p><i>Condition:</i> User does not check a loan to unlock. <i>Message:</i> "Please check at least one loan to be unlocked prior to clicking the 'Submit' button." <i>Location:</i> Server <i>Additional Information:</i> Display error.gif.</p> <p>An information message appears at the top of the screen for the following conditions:</p> <ul style="list-style-type: none"> <p><i>Condition:</i> The selected locked loans were successfully unlocked and no more locked loans exist. <i>Message:</i> "Selected loans have been successfully unlocked. No more locked loans exist meeting specified search options." <i>Location:</i> Server <i>Additional Information:</i> Display info.gif.</p>

Submit	
	<ul style="list-style-type: none"> • <i>Condition:</i> The selected locked loans were successfully unlocked and more locked loans exist. <i>Message:</i> Selected loans have been successfully unlocked. Locked Loans list refreshed. <i>Location:</i> Server <i>Additional Information:</i> Display info.gif.

Cancel	
Element	Pushbutton
Definition/Business Rules	Allows a user to redisplay the current page.
Actions to be performed	By clicking on the pushbutton, the loans current page will display in either the original format it was displayed in, or since the last time it was submitted, depending on which occurred most recently.
Business Object (Attribute)	None.
Validation	None.

4 Appendix A – Screens Global Attributes

5 Appendix B – User Interface Inventory Matrix

6 Appendix C – Website Help