

DOCUMENT RESUME

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ABSTRACT

This guide provides the materials necessary for a two-day 10-session workshop on the National Student Loan Data System (NSLDS) and is intended for appropriate personnel at institutions of higher education. Main objectives for participants in the workshop include being able to, first, explain how NSLDS works; second, navigate through the NSLDS function screens effectively; and, third, use NSLDS to comply with Title IV student financial aid requirements. The 10 sessions cover the following topics: (1) overview of NSLDS and its functions, (2) timelines, (3) problem resolution, (4) connecting to NSLDS, (5) school and third-party servicer responsibilities, (6) software setup, (7) student eligibility, (8) borrower tracking, (9) student status confirmation reports, and (10) wrap-up. Provided for each session are: a list of session objectives, a list of session contents, and the session material, displayed in half pages to allow space for note-taking during the presentation. (DB)

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National Student Loan Data System Participant's Guide

HE 031 408

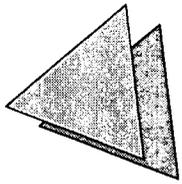


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Introductory Session

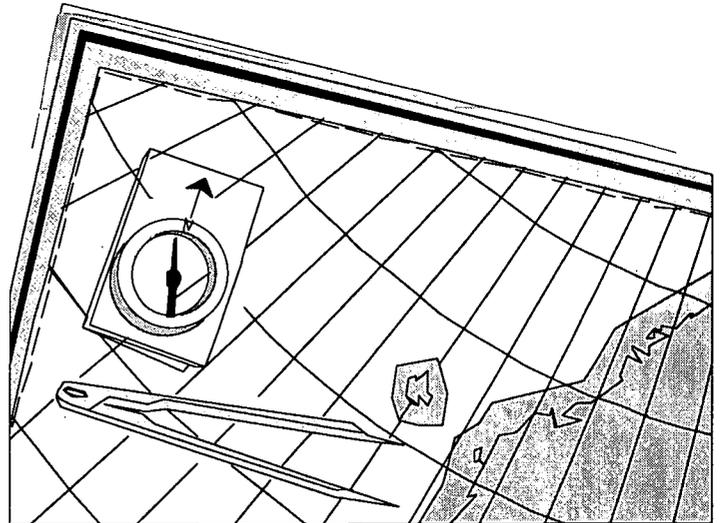
Objectives

After completing the workshop, you will be able to:

- ◆ explain how NSLDS works,
- ◆ navigate through the NSLDS function screens effectively, and
- ◆ use NSLDS to comply with Title IV student financial aid requirements.

Contents

- ◆ Overview of the Workshop
- ◆ Main Workshop Objectives
- ◆ Workshop Agenda
- ◆ Workshop Materials
- ◆ Recommendations



WORKSHOP AGENDA

Day 1

Introductory Session

Session 1: Overview of NSLDS and its Functions

Session 2: Timelines

Session 3: Problem Resolution

Session 4: Connecting to NSLDS

Session 5: School and Third-Party Servicer Responsibilities

Day 2

Session 6: Software Setup

Session 7: Student Eligibility

Session 8: Borrower Tracking

Session 9: Student Status Confirmation Reports

Session 10: Wrap Up

WORKSHOP MATERIALS

- ◆ Participant's Guide.
- ◆ NSLDS *Quick Reference Guide*.

Notes:



RECOMMENDATIONS

- ◆ Provide written feedback on NSLDS.
 - See recommendations sheet on next two pages.
 - Fill this out as we go along.

NSLDS RECOMMENDATIONS SHEET

Help ED improve NSLDS. Please use this sheet to write down your ideas and suggestions as you think of them.

Here are the suggestions that occurred to me during:

Session 1

Session 2

Session 3

Session 4

NSLDS RECOMMENDATIONS SHEET (CONT'D)

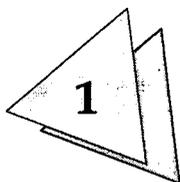
Session 5

Session 6

Session 7

Session 8

Session 9



Overview of NSLDS and its Functions

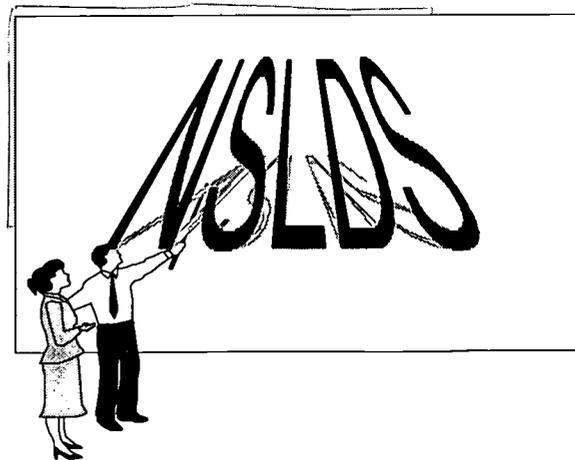
Objectives

After completing this session, you will be able to:

- ◆ describe the online functions of the National Student Loan Data System (NSLDS),
- ◆ explain how the eligibility of Title IV applicants is determined using the prescreening/postscreening process,
- ◆ describe Financial Aid Transcripts in NSLDS,
- ◆ explain how the borrower's enrollment status is monitored using Student Status Confirmation Reports,
- ◆ describe how defaulted borrowers are tracked, and
- ◆ explain how NSLDS searches for data.

Contents

- ◆ Introduction
- ◆ Data Providers
- ◆ Determining Eligibility
- ◆ Enrollment Tracking
- ◆ Borrower Tracking



DETERMINING ELIGIBILITY

Prescreening

Prescreening provides schools with data on students who are previous financial aid recipients.

Notes:



Prescreening

- Prescreening identifies individuals who have:
 - defaults on Title IV loans
 - overpayments on Pell Grants, FSEOGs, and Perkins Loans
 - approached loan eligibility for a single year

Postscreening

Postscreening identifies students whose status has changed.

Postscreening

NSLDS will scan its database to find cases where a student's status changes because of:

- defaulted loans
- satisfactory loan repayment arrangements
- overpayments

Financial Aid Transcripts

NSLDS's online Financial Aid Transcript (FAT) function provides another way to obtain the historical information needed to determine a student's eligibility prior to disbursing financial aid.

Notes:



```

RC05  _  FAT Summary Part 2(P2)  Loan Detail(LD)  Aggregate Detail(AD)
          Overpayment Summary(OS)  Name Hist(NH)  Attendance Hist(AH)
-----
                               NSLDS                               03-02-1998
                               Financial Aid Transcript Summary Part 1  12:15:50

SSN..001285951  First Name..IDA_____  DOB..10-02-1937  Schl Yr..1998
Curr SSN: 001285951  Last Name: BENNINGTON  Name Hist: Y
For Overpayment Summary Info make a selection (S) and press ENTER
Sel  Overpayment  Contact  Defaulted Loans....: Y  Discharged.....: Y
     Pell.....: N  N/A      Loan Sat.  Repayment: N  Active Bankruptcy: N
     FSEOG....: N  N/A
     _  Perkins.: Y  05      Perkins Cumulative Loan Amount...: $2,500
-----
For Aggregate Detail make a selection (S) and press ENTER
Aggregate Amount for FFELP/Direct Loans
_  Subsidized Loans
   Outstanding Prin. Bal.: $ 5,000  Pending Disb: $  N/A  Total: $ 5,000
_  Unsubsidized Loans
   Outstanding Prin. Bal.: $ 3,000  Pending Disb: $  N/A  Total: $ 3,000
_  Consolidated Loans
   Outstanding Prin. Bal.: $ 8,000  Total: $ 8,000

                               PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT
    
```

RC05 Financial Aid Transcript Summary Part 1

```

RC5A  _  Loan Detail(LD)  Name History(NH)  Attendance History(AH)
-----
                                NSLDS                                03-02-1998
                                Financial Aid Transcript Summary Part 2      12:15:52

SSN.....: 001285951  First Name: IDA  DOB: 10-02-1937  Schl Yr...: 1998
Curr SSN: 043906703  Last Name.: BENNINGTON  Name Hist: Y
Perkins Loans
Cumulative Loan Amount.....: $2,500  Current Year Loan Amount: $  N/A
First Disb. Prior to 10-01-1992: N  Expanded Lending Option.: N
-----
1994-95 Pell Payment Data  MORE:  +
School Code: 00156200  School Name: DEKALB COLG
Tran.....: 01  Sch. Amt....: $ 1,200  Disb. Amt.: $ 600
Rem. Amt.:  % Sch. Used: 100.00  As of.....: 10-10-1996

School Code: 00256900  School Name: UNIV OF NEVADA LAS VEGAS
Tran.....: 01  Sch. Amt....: $ 1,200  Disb. Amt.: $ 600
Rem. Amt.: $  % Sch. Used: 100.00  As of.....: 10-10-1996

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD
    
```

RC5A Financial Aid Transcript Summary Part 2

```

RC06  _  GA/School Information (GS)
-----
                                NSLDS                                03-02-1998
                                Loan Detail By Loan Begin Date, Outstanding Bal. (Descending)      12:15:54

SSN.....: 043906703  First Name: TARA MARIE  DOB: 02-16-1975  Name Hist: Y
Curr SSN: 043906703  Last Name.: NUNEZ  MORE:  +

Loan Detail  Loan Amount  Loan Begin  Loan End  GA Code  School Code  --Contact--- Code  Type
-----
_ FFEL STAFFORD SUB  $5,500  09-03-1996  05-22-1997  733  0258900  700204  LNS
  Status Cd ID as of 09-03-1996  Outst Bal. $2,750 as of 08-13-1996  Acad Lvl: 3

_ FFEL STAFFORD SUB  $5,500  08-29-1995  05-16-1996  733  0258900  827288  LEN
  Status Cd ID as of 08-29-1995  Outst Bal. $5,500 as of 09-30-1995  Acad Lvl: 3

_ FFEL STAFFORD SUB  $1,750  01-18-1995  05-18-1995  733  00258900  700043  LNS
  Status Cd ID as of 01-18-1995  Outst Bal. $1,750 as of 06-30-1996  Acad Lvl: 2

_ FFEL STAFFORD SUB  $1,750  09-05-1994  05-13-1995  733  00257200  700043  LNS
  Status Cd ID as of 09-05-1994  Outst Bal. $1,750 as of 06-30-1996  Acad Lvl: 2

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F9=STATUS CODE LIST  F10=SELECT SORT ORDER
    
```

RC06 Loan Detail 14

ENROLLMENT TRACKING

Notes:



Student Status Confirmation Report

Student Status Confirmation Report (SSCR) information is used by FFEL lenders, guaranty agencies, and the Direct Loan servicer to verify a borrower's enrollment status. Accurate enrollment information is necessary to determine when a borrower is ready to enter repayment.

```

RC71  U_  Display Student(D)  Update sscr(U)  List Address(LA)
      Past enrollment Status change(PS)
-----
                        NSLDS                        03-18-1998
                        SSCR Online Update           09:04:20

School/Branch Code... 00104600 TALLADEGA COLLEGE
SSN..043882658  First Name..COREY_____  DOB..12-06-1974 (MM-DD-YYYY)
Last Name: REED                               Curr SSN.: 043882658
----- Current School Status Change (Mandatory) -----
Anticipated Completion Date..05-24-1998 (MM-DD-YYYY)
Enrollment Code..F  Enrollment Code Effect Date....09-05-1997 (MM-DD-YYYY)
                        Certification Date.....09-15-1997 (MM-DD-YYYY)
Student Designator..741293_____ (Optional)
----- Student Information Change (Optional) -----
SSN....._____  First Name.._____  Middle Initial.._
Last Name.._____  DOB...-_-_____ (MM-DD-YYYY)
----- Permanent Address Information (Optional)-----
Address Line 1..2030 F ST. NW _____
Address Line 2.._____
City.....Minneapolis_____  State..MN  Zip Code..22563____
Country..US_____  Effective Date..09-05-1997 (MM-DD-YYYY)

                        PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT
    
```

RC71 SSCR Online Update

```

RC7C
-----
                        NSLDS                               11-21-1995
                        Student Address List                 12:37:48

First name: CHRIS           Last name: LAMBART           SSN: 037000002
Sel      Please make a selection(S) and press ENTER      MORE: +
- Address line 1: 1234 HICKERY STREET ONE
  Address line 2: ROSEMONT PLAZA
  City.....: ROSEMONT           State: PA  Zip: 22051-0001
  Country.....: UNITED STATES OF AMERICA  Effective Date: 11-01-1995
- Address line 1: 1910 CHERRY LANE
  Address line 2: CAVALIER COURT
  City.....: CHANTILLY           State: VA  Zip: 22031-1961
  Country.....: U.S.A.           Effective Date: 01-01-1993
- Address line 1: 423 WILSON BOULEVARD
  Address line 2: PROVIDENCE HALL
  City.....: DALE CITY           State: VA  Zip: 32861-1995
  Country.....: U.S.A.           Effective Date: 11-24-1992
- Address line 1: 1906 GALLOWS ROAD
  Address line 2: MERRYFIELD HOUSING
  City.....: MERRYFIELD           State: VA  Zip: 16411-1000
  Country.....: U.S.A.           Effective Date: 02-13-1991

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC7C Student Address List

```

RC7D  __  Add(A)  Change(C)  Delete(DE)
-----
                        NSLDS                               03-13-1998
                        Past Enrollment Status Change       08:05:00

Sch/Br Code.: 00104800  TROY STATE UNIVERSITY @ DOTHAN
Student Name: COREY           REED                       SSN: 043882658
Anticipated Compl Date: 12-15-1998  (MM-DD-YYYY)      (MM-DD-YYYY)
Enrollment Code.._  Effective Date.._ _ _ _ _          Cert Date.._ _ _ _ _
----- Current Status -----
Enroll Code: H  Effec Date: 01-01-1998  Cert Date: 01-05-1998  Source: SSCR
Make a selection (S) and press ENTER for UPDATE or DELETE
  Enroll
Sel Code  Description           Effect Date  Certi Date
-   A     APPROVED LEAVE OF ABSENCE  10-01-1997  10-15-1997
-   L     LESS THAN HALF TIME       01-01-1994  02-15-1994

                        PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC7D Past Enrollment Status Change


```

RC86  _  Aid profile 1(A1)  Lender History(LH)  Guaranty agency History(GH)
        School servicer History(SH)  L0an history(LO)
-----
                                NSLDS                                04-24-1997
                                Loan Detail                            09:22:15

Student Name: TOMMY           T AYALA                               SSN: 122001669
PLUS Name....:                                                       SSN:
Loan Type: SF  Amount:  5000      Certification/Guaranty Date: 07-17-1994
Period Begin Date....: 08-01-1994  Period End Date.....: 05-31-1995

Outstanding Principal Bal:  3000  Outstanding Principal Bal Date: 04-15-1997
Outstanding Interest Bal.:  150  Outstanding Interest Bal Date.: 04-15-1997
                                MORE:
-- Disbursement --  -- Cancellation --  ---- Refund ----  ---- Status ----
Date      Amount   Date      Amount   Date      Amount   Date      Code
09-30-1994  2500
01-31-1995  2500

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC86 Loan Detail

```

RC93  _  Organization Contact (OC)
-----
                                NSLDS                                04-24-1997
                                Current Data Provider Information      09:10:12

Student/Borrower Name: TOMMY           T AYALA                               SSN: 122001669
                                MORE
_ GA Code.....: 740      Name: OKLAHOMA GUARANTEED STUDENT LOAN PROGRAM
Street Address.....: P.O. BOX 3000
City.....: OKLAHOMA CITY           State: OK  Zip Code: 731010000
Resp Begin Date....: 08-30-1992

                                Name:
Street Address.....:
City.....:           State:      Zip Code:

                                Name:
Street Address.....:
City.....:           State:      Zip Code:

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC93 Current Data Provider Information

How Does NSLDS Search for Data Online?

Notes:



Locating Borrowers and Analyzing Loans

- NSLDS follows these steps to locate borrowers and to analyze their loans:
 - Step One: Searches for borrower records based on specific data elements.
 - Step Two: Retrieves the borrower record from the database.
 - Step Three: Displays the result of the search, online.

In using NSLDS's functions, the first step is often to **populate the data screen** by entering information that will identify the student. Generally, this means the Social Security number, first name, and date of birth. When these three data items are entered, NSLDS will provide access to its information on the specified borrower. However, the Borrower Tracking and Aid Overpayment functions will permit school users to search the database with **just a Social Security number**.

- ◆ For example, this can help you identify borrowers who do not get prescreened due to comment code 138. This code appears on the SAR/ISIR when the SSN on the FAFSA is found in NSLDS, but the name on the FAFSA does not match the name in NSLDS.
- ◆ Limit your use of the SSN-only search to solving problems like this, since ED tracks users to safeguard against unwarranted "browsing" of records and to protect the privacy of borrowers in the database.



Timelines

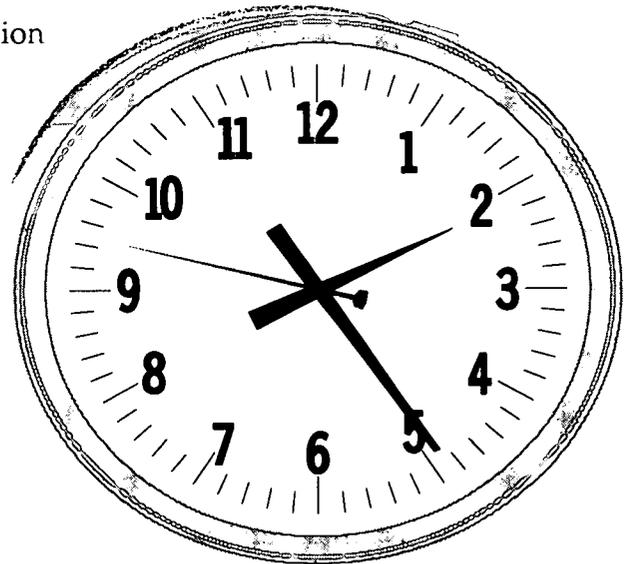
Objective

After completing this session, you will be able to:

- ◆ understand the dates and reporting requirements necessary to ensure compliance with ED's NSLDS functions.

Contents

- ◆ Student Status Confirmation Reports
- ◆ Reporting Federal Perkins Loan Information
- ◆ Reporting Overpayment Information



STUDENT STATUS CONFIRMATION REPORTS

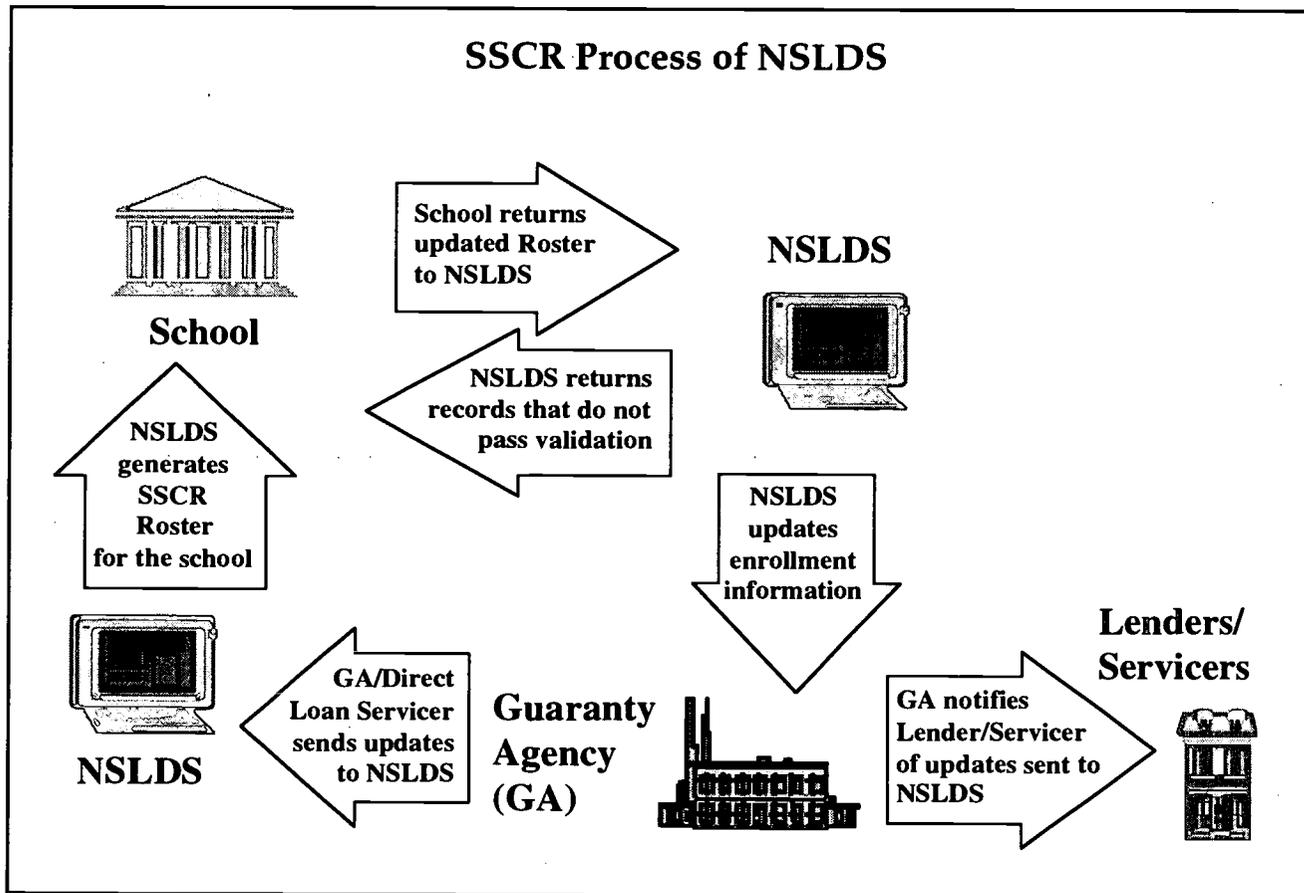
Notes:



NSLDS generates the SSCR Roster File and transmits it to the school via the Title IV Wide Area Network (Title IV WAN).

- ◆ Schools receive the SSCR Roster File in their Title IV WAN mailboxes.

Schools return the updated roster file, called the SSCR Submittal File, to NSLDS. NSLDS then forwards new and changed data to each affected guaranty agency and/or the Direct Loan servicer.



Examples of SSCR Cycle Dates		
Semester Schools	Quarter Schools	Other Schools
September	October	October
November	December	December
January	February	February
March	April	April
May or June	June	June
		August

SSCR Submittal Files

According to 34 CFR 682.610(c) and 34 CFR 685.309(b), schools must return SSCR Submittal Files within 30 days.

- ◆ If schools do not comply, they are subject to fines or other ED administrative sanctions.

SSCR Error Notification Files

NSLDS generates an error report on receiving the school's roster file. The error report is called an SSCR Error Notification File.

The SSCR Error Notification File:

- ◆ is generated even if no errors appear in school's SSCR Submittal File
- ◆ documents school's compliance with SSCR requirements

- ◆ if there are errors, school must correct errors within ten days of date Error Notification File was generated
- ◆ all unresolved errors appear in next SSCR cycle
- ◆ if there are no errors, school need not respond
- ◆ school can correct errors online

Notes:



REPORTING FEDERAL PERKINS LOAN INFORMATION

Schools (or their third-party servicers) must report monthly on:

- ◆ new loans
- ◆ loans for which NSLDS required data

Schools must report information such as:

- ◆ changes in status
- ◆ name changes

When there are no changes on an active loan, schools may report quarterly.

Problem Resolution

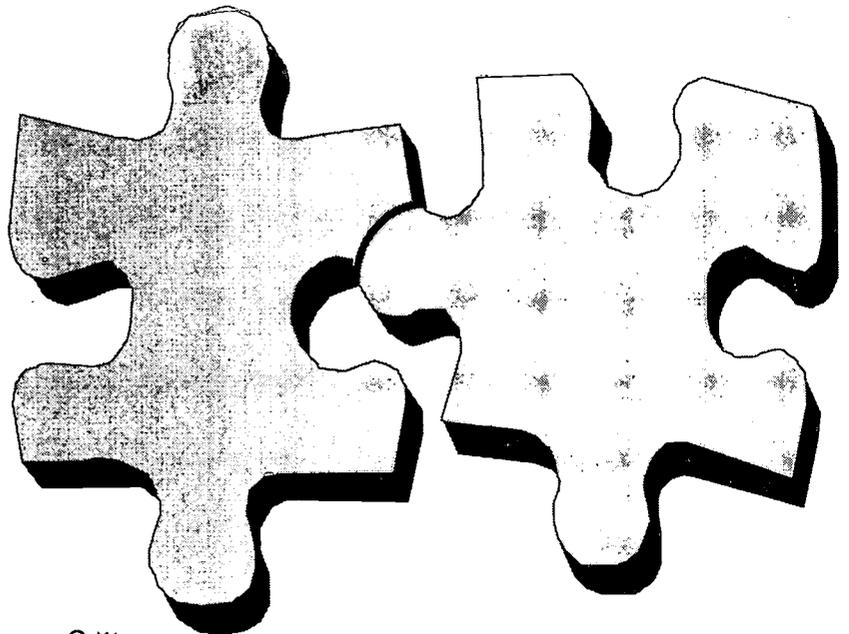
Objectives

After completing this session, you will be able to:

- ◆ identify the different NSLDS resources available to help schools, and
- ◆ use these resources to resolve problems.

Contents

- ◆ Customer Service Center
- ◆ Organization Contact Screens
- ◆ Problems That Schools Encounter



ORGANIZATION CONTACT SCREENS

```

RC16      _  Display(D)
-----
                                NSLDS                                06-30-1998
                                Organization Contact Information      12:16:54

Organization Type...: SCH      + Name: SCHOOL
Organization Code...: 001045   + Name: STONEWALL JACKSON STATE JUNIOR COL  +
Organization Branch: 00

For Detailed Contact information make a (s)election and press ENTER.

                                MORE:  +
Sel Function                    First Name  Last Name      Phone          Ext
- Primary Contact              STACY       WASHINGTON     703-232-9961  361
- SSN/ID Issues                ROGER      PALFREY       703-232-9987  387
- FAT/SAR/ISIR Issues         KESHIA     TODD          703-232-9993  393
- Default Issues              ANNE       CULVER        703-232-9998  398
- Overpayment Issues          HUGH      WHITE         703-232-9975  375
- Perkins Issues              BETTY     SWEARINGER    703-232-9902  302
- FFEL Issues                  JAMES     CHONG         703-232-9924  324

F3=EXIT  F4=PROMPT  F7=BACKWARD  F8=FORWARD
    
```

RC16 Organization Contact Information (List—by Function)

```

RC17
-----
                                NSLDS                                06-30-1998
                                Organization Contact Information Detail  12:16:55

Organization Code..: 00104500
Organization Name..: STONEWALL JACKSON STATE JUNIOR COL
Address.....:
City.....: RAINSVILLE          State: AL  Zip Code..: 35986-3333
Phone .....: 703-232-9000

Function.....: Perkins Issues

Contact Name First: BETTY          Update Date.....: 06-30-1998
                  Last.: SWEARINGER

Title.....: LOAN MANAGER
Phone.....: 703-232-9902          Ext.: 302
Fax.....: 703-232-9119
E Mail.....: B_SWEARINGER@JACKSON.EDU
Address.....: HOLKER HALL ROOM 250
                  3000 CAMPUS DRIVE
City.....: RAINSVILLE          State: AL  Zip Code..: 35986-3333

F3=EXIT  F4=PROMPT
    
```

RC17 Organization Contact Information Detail

PROBLEMS THAT SCHOOLS ENCOUNTER

NSLDS data sometimes do not match the information that the school has.

Notes:



Resolving Conflicting Data

- Identify conflicting data
- Identify data provider
- Contact data provider
- Contact NSLDS Customer Service Center, if necessary

Data providers are:

- ◆ For FFEL Program loans—the guaranty agency or ED’s Debt Collection Service (DCS), as appropriate.
- ◆ For Direct Loans—the Direct Loan servicer or ED’s DCS.
- ◆ For Perkins Loans—the school that reported the loan or ED’s DCS.
- ◆ For Pell Grant payment information—the school that reported the payment.
- ◆ For overpayments—the school that reported the overpayment or ED’s DCS.

Example Problem 1

A school might know that a student who was once in default has made satisfactory arrangements with his FFEL lender to repay the loan and has made six consecutive payments, so that this loan no longer prevents the student from being eligible for Title IV aid. However, NSLDS still shows that he is in default, so the Institutional Student Information Record (ISIR) you receive for him has a comment code 132 ("Applicant in default") and/or a status code of DU* ("Defaulted, unresolved") instead of DX* ("Defaulted, six consecutive payments"). This means you can't award him Title IV aid until the matter is resolved. What do you do?

*NSLDS Status Codes are listed in Session 7 and on pages 10-2 and 10-3 of the NSLDS Quick Reference Guide.

Example Problem 2

A student files the Free Application for Federal Student Aid (FAFSA). Her Social Security number (SSN) on the FAFSA matches a record in NSLDS, but her name and date of birth (DOB) on the FAFSA don't match the NSLDS record. The ISIR you receive for the student has a comment code 138, which means the SSNs match but the name and/or DOB do not match. As a result, no NSLDS data are sent. You can't award aid to the student until the matter is resolved. What do you do?

Working With Data Providers

When users experience problems with data providers, they should contact the NSLDS Customer Service Center at 1-800-999-8219.

Notes:



Lined area for taking notes, consisting of approximately 20 horizontal lines.

Problems While Working With NSLDS Screens

If you call the Customer Service Center, be at your workstation and be prepared to provide the information below.

Notes:



Problems While Working With NSLDS Screens

- Five important pieces of information to give the customer service representative:
 - type of workstation hardware and software
 - exact wording of any messages displayed on screen
 - NSLDS screen identifier
 - description of the problem
 - what you tried to do to fix the problem



ANSWER KEY

Notes:



Example Problem 1

Here is one approach you could take:

- ◆ Make sure you have proper documentation in the student's file showing that he has made satisfactory repayment arrangements and six consecutive payments.
- ◆ Award and disburse aid according to the student's eligibility.
- ◆ Use NSLDS Borrower Tracking screens to find the data provider that reported the student's loan was in default.
- ◆ Use the NSLDS Contact screens to obtain the name, telephone number, and address of the data provider.
- ◆ Contact the person at the data provider and ask him or her to report the change directly to NSLDS.

4

Connecting to NSLDS

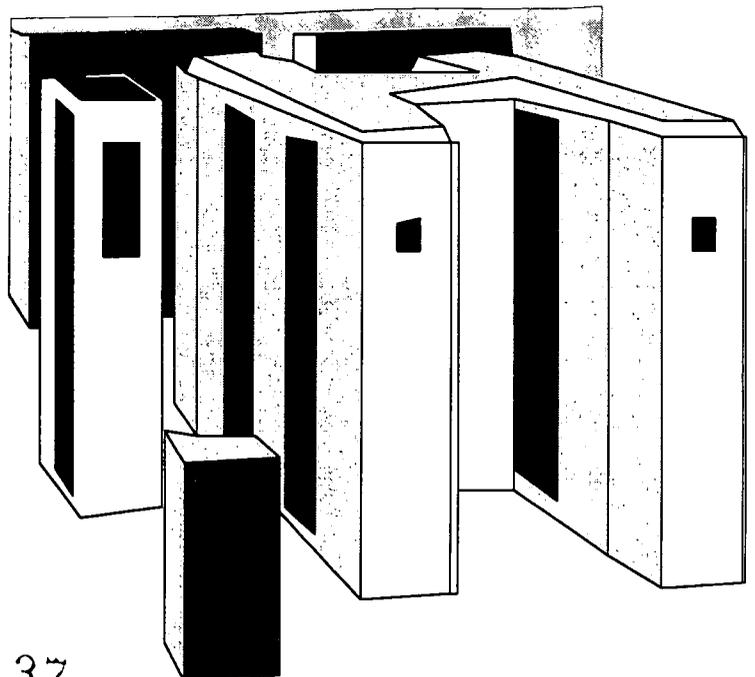
Objectives

After completing this session, you will be able to:

- ◆ determine hardware and software needs for submitting and receiving NSLDS data electronically, and
- ◆ describe the main capabilities of ED's Title IV WAN and NSLDS software.

Contents

- ◆ Title IV WAN
- ◆ Mainframe Schools
- ◆ Personal Computer (PC) Schools
- ◆ Year 2000 Compliant Systems



The current PC version of EDconnect runs under DOS or Windows:

- ◆ MS-DOS version 6.2 or higher, configured to provide maximum conventional and extended memory, with 620 K of conventional RAM available; or
- ◆ Windows 3.1, Windows 3.11, or Windows 95.

However, the minimum configuration required by January 1999 is shown below.

PC Configuration

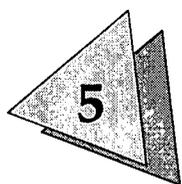
- Minimum configuration by January 1999:
 - IBM or fully IBM-compatible PC with at least a 200 MHz Pentium processor or compatible
 - Windows 95 or Windows NT 4.x
 - 64 MB of total memory
 - 4.0 GB SCSI hard drive
 - 3.5-inch 1.44 MB floppy disk drive

PC Configuration (cont'd)

- 56 K analog modem
- SVGA monitor
- Windows 95 keyboard
- Dedicated phone line
- Printer that prints on standard paper
- To use EDExpress Tutorial and AWARE software, 12x CD-ROM drive with sound card

Notes:





School and Third-Party Servicer Responsibilities

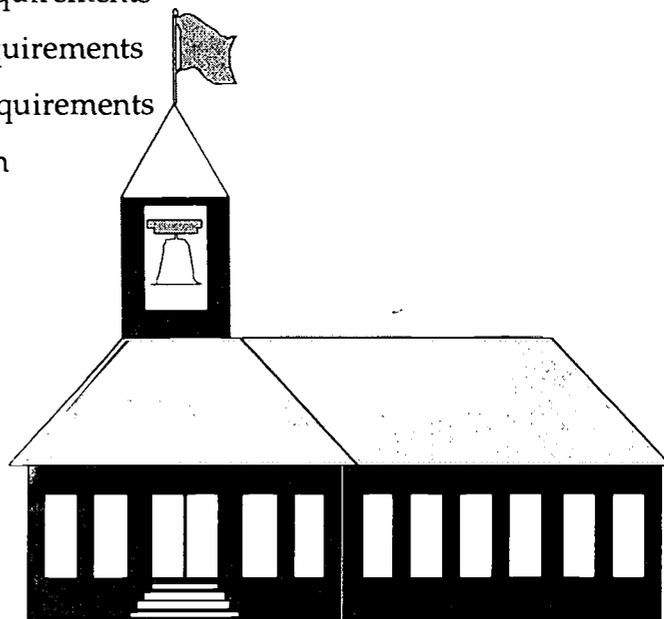
Objectives

After completing this session, you will be able to:

- ◆ describe SSCR, financial aid history, Perkins Loan, overpayment, and organization contact screen responsibilities,
- ◆ implement NSLDS security measures,
- ◆ develop procedures to assure the integrity of the data the school sends to NSLDS, and
- ◆ describe ED's electronic message process.

Contents

- ◆ Student Status Confirmation Report Requirements
- ◆ Financial Aid Transcript Requirements
- ◆ Perkins Loan Reporting Requirements
- ◆ Overpayment Reporting Requirements
- ◆ Organization Contact Screen Responsibilities
- ◆ Privacy Requirements
- ◆ Data Input and Integrity
- ◆ ED's Electronic Messages



STUDENT STATUS CONFIRMATION REPORT (SSCR) REQUIREMENTS

Schools are required to report the enrollment status of students who receive federal loans.

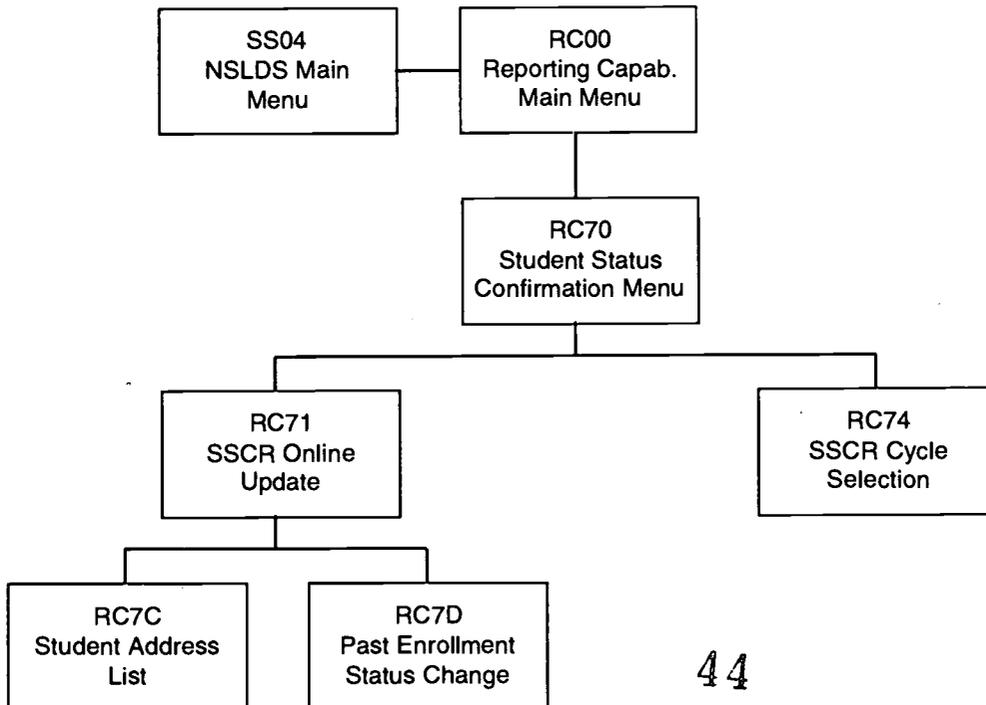
Notes:



SSCR Regulatory Requirements

- SSCR reporting is required by the Higher Education Act, as amended
- The requirements for FFEL Program loans are in 34 CFR 668.610(c)
- The requirements for Direct Loan Program loans are in 34 CFR 685.309(b)

Paths to the Main SSCR Screens Used by Schools



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Responsibilities in Submitting SSCR Roster Files

Notes:



SSCR Roster File

- On receiving the SSCR Roster File, the school must:
 - match the SSCR Roster File against enrollment records
 - update each student's enrollment status and enrollment status effective date
 - propose changes to student identifiers (SSN; last name, first name, middle initial; and DOB), as needed
 - update or add student address data, as needed

SSCR Roster File (cont'd)

- add new students to the SSCR Roster File, as needed
- return the updated SSCR Roster File, which becomes the SSCR Submittal File, to NSLDS within 30 days of the date the SSCR Roster File was sent to the school
- retrieve and, if necessary, process the Error Notification File provided by NSLDS

SSCR Implementation

Most schools have now received the Successful Completion letter shown on the next page. ED will:

- ◆ assist schools that have shown evidence of complying with required SSCR processing through NSLDS
- ◆ take enforcement action against schools not attempting to comply

SUCCESSFUL COMPLETION LETTER

Financial Aid Director
College XYZ
Newtown, PA 12223

Dear Financial Aid Director:

I am pleased to inform you that your school has successfully completed an NSLDS electronic SSCR cycle. You have received, completed, and returned an SSCR file and have properly processed its corresponding error report. Thank you very much for your efforts. The Department appreciates your help in moving forward with this new and important initiative.

Because of your success with the initial roster, effective immediately you are exempt from processing SSCRs generated and sent to you by guaranty agencies. All guaranty agencies have received a list of those schools that are exempt, but you should keep a copy of this letter in the event questions arise.

You will now begin to receive SSCRs from the NSLDS according to your individual processing schedule. That schedule is available to you via on-line SSCR screens in NSLDS. If you have not set your schedule, one has been set for you. Please review your schedule and modify it as necessary according to your school's calendar or workload.¹

All SSCR rosters must be returned to NSLDS within 30 days of receipt and responses to error files must be submitted within 10 days.

If you have any questions concerning the SSCR process, please feel free to call our Customer Service Center at (800) 999-8219.

Sincerely,

F. Lynn Alexander, Director
National Student Loan Data System
U.S. Department of Education

¹Because different schools have different academic calendars, NSLDS's SSCR process lets you determine how your school can best meet its reporting requirements. You may choose up to six cycles each year, **the more the better**. When establishing your schedule, please comply with the following: regular term-based schools (semester, quarter, or trimester) must complete at least one SSCR cycle each term; a summer session does not count as a term; schools that do not use regular terms must complete at least two SSCR cycles each year at dates they choose, but at least four months apart; all reporting cycles must be at least sixty days apart.



UNITED STATES DEPARTMENT OF EDUCATION
National Student Loan Data System
600 Independence Avenue, SW
Regional Office Building 3, Room 4520, M/S 5384
Washington, D.C. 20202-5384

MM/DD/YY

OPE ID:

FINANCIAL AID ADMINISTRATOR
STATE UNIVERSITY
US CITY, AA 99999

OVERDUE LETTER #1

Dear Financial Aid Administrator:

This letter is notification that your MM-DD-YYYY Student Status Confirmation Report (SSCR) file has not been returned by your school to the National Student Loan Data System (NSLDS). As you know, timely submission of SSCR data is necessary in order to provide for the protection of student borrowers under the federal loan programs as well as to ensure the fiscal integrity of the programs. It is extremely important that all SSCR files sent to your institution be returned to the NSLDS within 30 days of receipt. Unless you have already done so within the past ten days, please submit your completed SSCR immediately.

If you have experienced transmission or other technical programs with the SSCR, please contact the NSLDS Customer Service Center at (800) 999-8219. We look forward to receiving your SSCR within the next few days and thank you for your cooperation in this important effort.

Sincerely,

F. Lynn Alexander, Director
National Student Loan Data System
U.S. Department of Education

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UNITED STATES DEPARTMENT OF EDUCATION

National Student Loan Data System

600 Independence Avenue, SW

Regional Office Building 3, Room 4520, M/S 5384

Washington, D.C. 20202-5384

MM/DD/YY

OPE ID:

PRESIDENT
STATE UNIVERSITY
US CITY, AA 99999

OVERDUE LETTER #2

Dear President:

This letter alerts you that the Student Status Confirmation Report (SSCR) file that was sent to your school on MM-DD-YYYY by the National Student Loan Data System (NSLDS) has not yet been processed and returned to the NSLDS. The SSCR process requires timely submission of data in order to protect rights of student borrowers under Federal student loan programs as well as to ensure the fiscal integrity of the programs. It is extremely important that all SSCR files sent to your institution be returned to the NSLDS within 30 days of receipt. This is the second reminder we have sent. (The first reminder was sent to your school's Financial Aid Administrator and Registrar.)

Please be aware that not processing SSCR files in a timely way could result in your institution's being subject to one or more of a series of adverse actions that the Department of Education may take under its statutory and regulatory authority. Please submit your complete SSCR immediately. This alert is also being sent to your President and Registrar.

If you have experienced transmission or other technical problems with the SSCR, please contact the NSLDS Customer Service Center at (800) 999-8219. We look forward to receiving your SSCR within the next few days and thank you for your cooperation in this important matter.

Sincerely,

F. Lynn Alexander, Director
National Student Loan Data System
U.S. Department of Education

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UNITED STATES DEPARTMENT OF EDUCATION

National Student Loan Data System

600 Independence Avenue, SW

Regional Office Building 3, Room 4520, M/S 5384

Washington, D.C. 20202-5384

MM/DD/YY

OPE ID:

PRESIDENT
STATE UNIVERSITY
US CITY, AA 99999

OVERDUE LETTER #3

Dear President:

Approximately one week ago, I sent you a letter informing you that the Student Status Confirmation Report (SSCR) file that was sent to your school on MM-DD-YYYY by the National Student Loan Data System (NSLDS) has not been processed by your school and returned to the NSLDS. That letter was the second reminder sent to your school and it informed you that the Department of Education may take one or more adverse actions against your school if the SSCR was not promptly submitted. This letter is a final warning that if the most recent SSCR is not returned within ten days of the date of this letter, I will refer the matter to the Department's Administrative Actions and Appeals Division for immediate action as provided under regulations at 34 CFR 668, subpart G. Such actions could include the imposition of a fine or the initiation of a Limitation, Suspension, or Termination action that could remove your school from participation in all Title IV programs.

I regret that we have found it necessary to take such action but, as stated in the earlier letters, the importance of compliance with the requirements for submission of SSCR data cannot be minimized. A copy of this notice is also being sent to your Financial Aid Administrator.

If you have experienced transmission or other technical problems with the SSCR, please contact the NSLDS Customer Service Center at (800) 999-8219.

Sincerely,

F. Lynn Alexander, Director
National Student Loan Data System
U.S. Department of Education

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Notice of Criminal Liability under the Privacy Act

The information provided to me by the Department of Education is protected by the Privacy Act of 1974, as amended. The protection of this information, once entrusted to me, becomes my responsibility. Therefore, I agree to protect the privacy of all information that has been provided to me as an agent of the Department. I understand that the criminal penalties identified below may be enforced if I violate the requirements of the Privacy Act.

5 U.S.C. 552a, as amended,

(i)(1) Any officer or employee of an agency, who by virtue of his employment or official position, has possession of, or access to, agency records which contain individually identifiable information the disclosure of which is prohibited by this section or by rules or regulations established thereunder, and who knowing that disclosure of the specific material is so prohibited, willfully discloses the material in any manner to any person or agency not entitled to receive it, shall be guilty of a misdemeanor and fined not more than \$5,000.

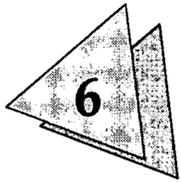
(2) Any officer or employee of any agency, who willfully maintains a system of records without meeting the notice requirements of subsection (e) (4) of this section shall be guilty of a misdemeanor and fined not more than \$5,000.

(3) Any person who knowingly and willfully requests or obtains any records concerning an individual from an agency under false pretenses shall be guilty of a misdemeanor and fined not more than \$5,000.

I certify that I have read and understood the criminal penalties of the Privacy Act, as stated above, and that I agree to comply with the government's requirements for the protection of any information covered by the Privacy Act.

Name and Date: _____

Typed Name: _____



Software Setup

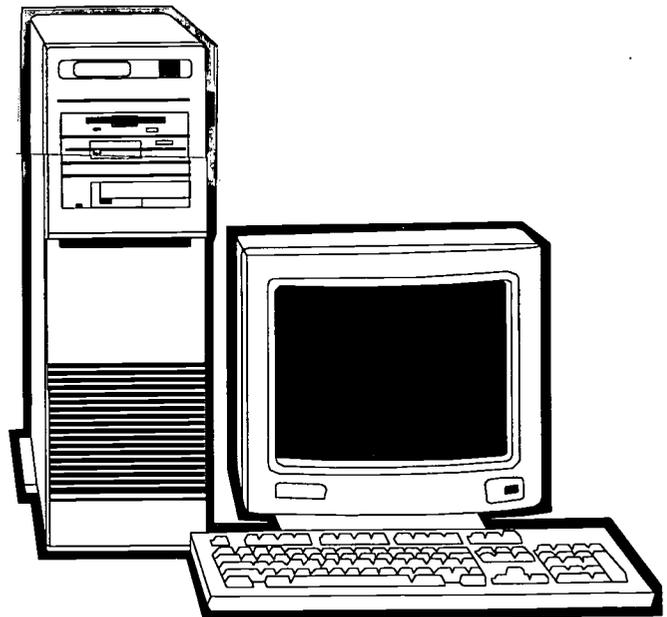
Objectives

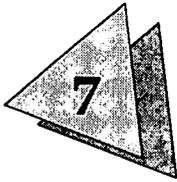
After completing this session, you will be able to:

- ◆ dial up and log on to access the National Student Loan Data System, and
- ◆ navigate through NSLDS screens.

Contents

- ◆ Connecting to the Title IV Wide Area Network and NSLDS
- ◆ General NSLDS Screen Navigation





Student Eligibility

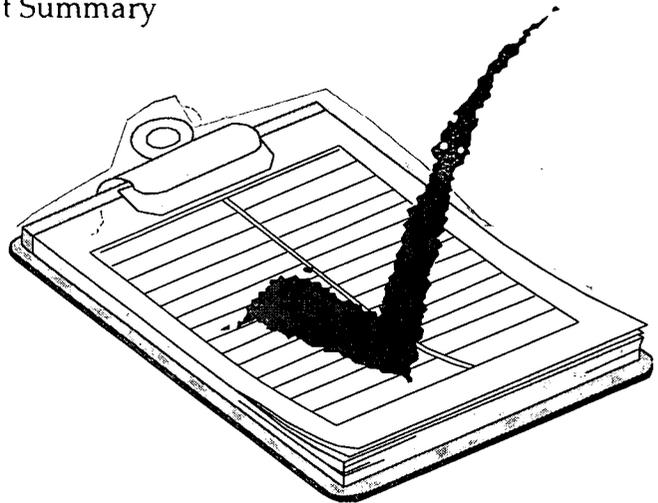
Objectives

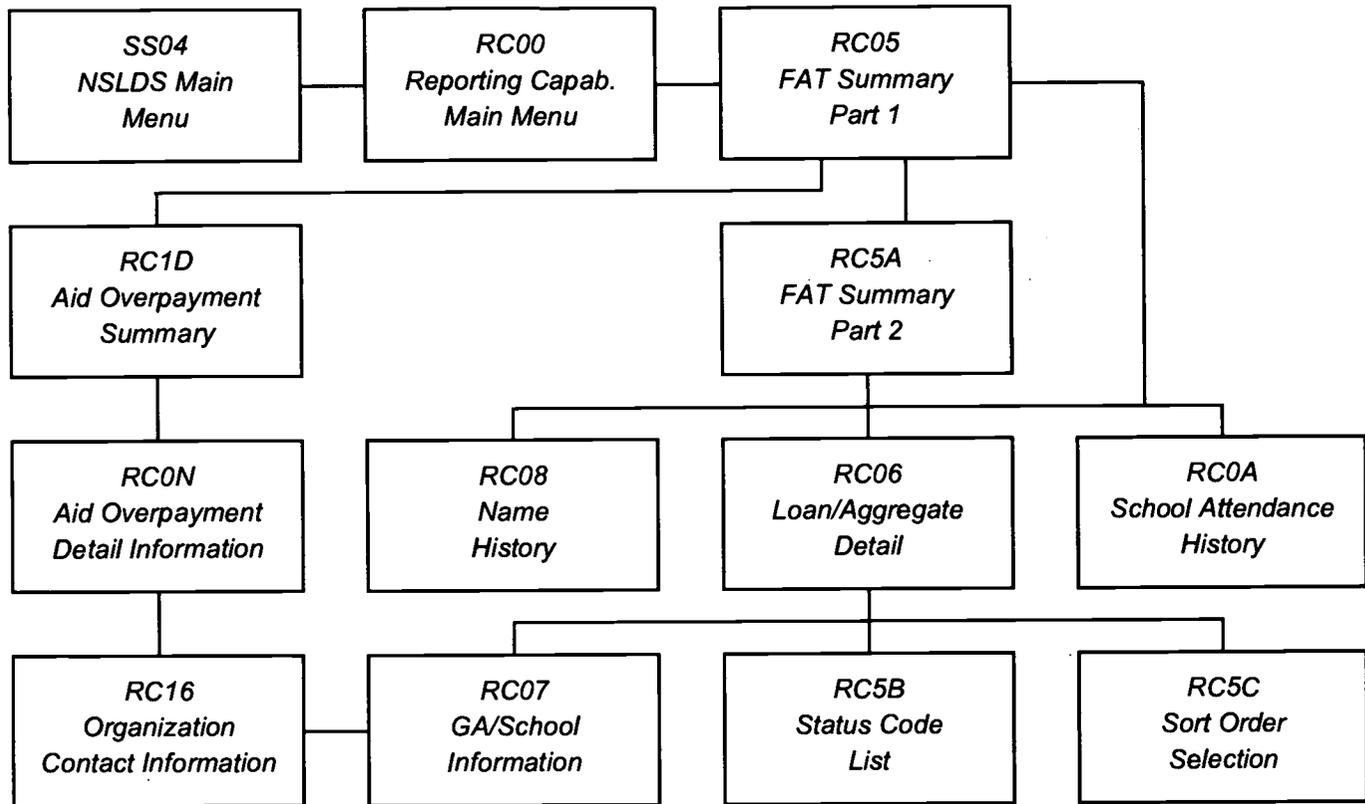
After completing this session, you will be able to:

- ◆ describe the processes used to determine student eligibility, and
- ◆ navigate through Financial Aid Transcript Summary and Aid Overpayment screens.

Contents

- ◆ Prescreening
- ◆ Postscreening
- ◆ Financial Aid Transcript Summary
- ◆ Aid Overpayment
- ◆ Case Studies





Map of NSLDS's Financial Aid Transcript Summary Function

SS04

NSLDS 03-02-1998
 NSLDS Main Menu 12:15:47

Input the number of your choice and press ENTER.

1. System Support Main Menu
 2. Reporting Capabilities Main Menu

RC00

NSLDS 03-02-1998
 Reporting Capabilities Main Menu 12:15:48

F3= Input the number of your choice and press ENTER.

1. Aggregate Inquiry Main Menu
 2. Default Rate Main Menu
 3. Report Selection Menu
 4. Borrower Tracking Security
 5. Financial Aid Transcript Summary

RC05 FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
 Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
 Financial Aid Transcript Summary Part 1 12:15:49

F3=

SSN..... First Name..... DOB...-_-... Schl Yr..1998
 Curr SSN: Last Name: Name Hist: N

For Overpayment Summary Info make a selection (S) and press ENTER

Sel Overpayment Contact Defaulted Loans....: Discharged.....:
 Pell....: Loan Sat. Repayment: Active Bankruptcy:
 FSEOG...:
 Perkins.: Perkins Cumulative Loan Amount...:

For Aggregate Detail make a selection (S) and press ENTER

Aggregate Amount for FFELP/Direct Loans

Subsidized Loans		
Outstanding Prin. Bal.:	Pending Disb.:	Total:
Unsubsidized Loans		
Outstanding Prin. Bal.:	Pending Disb.:	Total:
Consolidated Loans		
Outstanding Prin. Bal.:		Total:

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT

**Navigation Schematic for RC05
 Financial Aid Transcript Summary Part 1**

The RC05 Financial Aid Transcript Summary Part 1 screen is not yet populated with data. The cursor automatically moves to the SSN field. To populate the screen, do the following:

- Step 1: Type the student's **SSN**. As an example, use **043 90 6703**. The cursor automatically advances to the First Name prompt.
- Step 2: Type the student's **first name**. As an example, use **Tara Marie**.
- Step 3: Press **TAB** to advance to the next prompt, Date of Birth (DOB). Type the student's **DOB** in MM-DD-CCYY format. As an example, use **02-16-1975**. Do *not* type the hyphens—they are already there. The cursor automatically advances to the next prompt, School Year (Schl Yr).
- Step 4: The **School Year** field is prepopulated with the current year. Press **ENTER** to populate the screen with the student's information.

Notes:





The contact codes are as follows:

- ◆ SCH—school
- ◆ LEN—lender
- ◆ LNS—lender’s servicer
- ◆ DLS—Direct Loan Servicer
- ◆ EDR—ED region
- ◆ GA—guaranty agency
- ◆ SCS—school servicer
- ◆ N/A—not applicable

Notes:

There is a “+” sign in the MORE field, so press **F8** to view more loan information.

```

RC06      _  GA/School Information(GS)
-----
                                NSLDS                                03-02-1998
                                Loan Detail By Loan Begin Date, Outstanding Bal. (Descending) 12:15:55
SSN.....: 043906703  First Name: TARA MARIE  DOB: 02-16-1975  Name Hist: Y
Curr SSN: 043906703  Last Name.: NUNEZ                                MORE: -
Loan Detail              Loan      Loan      Loan      GA      School      --Contact---
                          Amount    Begin    End       Code    Code        Code      Type
-  FFEL STAFFORD SUB    $ 2,625  09-07-1993  05-14-1994  733  00257200  700043  LNS
  Status Cd ID as of 09-07-1993  Outst Bal. $ 2,625 as of 06-30-1996  Acad Lvl: 1
-  FEDERAL PERKINS      $ 4,500  07-01-1993  06-30-1995  N/A  00257200  00257200 SCH
  Status Cd DA as of 01-18-1995  Outst Bal. $ 4,500 as of 09-01-1994  Acad Lvl: N
  Status Cd   as of                Outst Bal.           as of                Acad Lvl:
  Status Cd   as of                Outst Bal.           as of                Acad Lvl:

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F9=STATUS CODE LIST  F10=SELECT SORT ORDER
    
```

RC06 Loan Detail (cont'd)

From the *RC06 Loan Detail* screen, you can access the status code list and select the information sort order. Press **F9** to view the first screen of status codes. Press **F8** to see the remaining codes.

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RC5B

NSLDS
Status Code List

03-02-1998
12:15:56

MORE: +

Status Code	Description
AE	ASSIGNED TO U.S. DEPARTMENT OF EDUCATION
BC	BANKRUPTCY CLAIM, DISCHARGED
BK	BANKRUPTCY CLAIM, ACTIVE
CA	CANCELLED
DA	DEFERRED
DB	DEFAULTED, THEN BANKRUPT, ACTIVE, CHAPTER 13
DC	DEFAULTED, COMPROMISE
DD	DEFAULTED, THEN DIED
DE	DEATH
DI	DISABILITY
DK	DEFAULTED, THEN BANKRUPT, DISCHARGED, CHAPTER 13
DL	DEFAULTED, IN LITIGATION
DO	DEFAULTED, THEN BANKRUPT, ACTIVE, OTHER
DP	DEFAULTED, PAID IN FULL

F3=EXIT F7=BACKWARD F8=FORWARD

RC5B Status Code List (1 of 2)

RC5B

NSLDS
Status Code List

03-02-1998
12:15:57

MORE: -

Status Code	Description
DS	DEFAULTED, THEN DISABLED
DT	DEFAULTED, COLLECTION TERMINATED
DU	DEFAULTED, UNRESOLVED
DW	DEFAULTED, WRITE-OFF
DX	DEFAULTED, SIX CONSECUTIVE PAYMENTS
FB	FORBEARANCE
ID	IN SCHOOL OR GRACE PERIOD
OD	DEFAULTED, THEN BANKRUPT, DISCHARGED, OTHER
PC	PAID IN FULL THROUGH CONSOLIDATION LOAN
PF	PAID IN FULL
RF	REFINANCED
RP	IN REPAYMENT
UI	UNREINSURED

F3=EXIT F7=BACKWARD F8=FORWARD

RC5B Status Code List (2 of 2)

RC06 — GA/School Information(GS)

NSLDS 03-02-1998

Loan Detail By Outstanding Bal. (Descending) 12:15:59

SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975 Name Hist: Y
 Curr SSN: 043906703 Last Name.: NUNEZ MORE: +

Loan Detail	Loan Amount	Loan Begin	Loan End	GA Code	School Code	--Contact-- Code	Type
- FFEL STAFFORD SUB Status Cd ID as of	\$ 5,500 08-29-1995	08-29-1995 Outst Bal.	05-16-1996 \$ 5,500 as of	733 09-30-1995	00258900	827288 Acad Lvl: 3	LEN
- FEDERAL PERKINS Status Cd DA as of	\$ 4,500 07-01-1993	07-01-1993 Outst Bal.	06-30-1995 \$ 4,500 as of	N/A 09-01-1994	00257200	00257200 Acad Lvl: N	SCH
- FFEL STAFFORD SUB Status Cd ID as of	\$ 5,500 09-03-1996	09-03-1996 Outst Bal.	05-22-1997 \$ 2,750 as of	733 08-13-1996	00258900	700204 Acad Lvl: 3	LNS
- FFEL STAFFORD SUB Status Cd ID as of	\$ 2,625 09-07-1993	09-07-1993 Outst Bal.	05-14-1994 \$ 2,625 as of	733 06-30-1996	00257200	700043 Acad Lvl: 1	LNS

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F9=STATUS CODE LIST F10=SELECT SORT ORDER

RC06 Loan Detail—Sorted by Outstanding Balance (Descending)—1 of 2

RC06 — GA/School Information(GS)

NSLDS 03-02-1998

Loan Detail By Outstanding Bal. (Descending) 12:16:00

SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975 Name Hist: Y
 Curr SSN: 043906703 Last Name.: NUNEZ MORE: -

Loan Detail	Loan Amount	Loan Begin	Loan End	GA Code	School Code	--Contact-- Code	Type
- FFEL STAFFORD SUB Status Cd ID as of	\$ 1,750 01-18-1995	01-18-1995 Outst Bal.	05-18-1995 \$ 1,750 as of	733 06-30-1996	00258900	700043 Acad Lvl: 2	LNS
- FFEL STAFFORD SUB Status Cd ID as of	\$ 1,750 09-05-1994	09-05-1994 Outst Bal.	05-13-1995 \$ 1,750 as of	733 06-30-1996	00257200	700043 Acad Lvl: 2	LNS
Status Cd as of		Outst Bal.		as of		Acad Lvl:	
Status Cd as of		Outst Bal.		as of		Acad Lvl:	

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F9=STATUS CODE LIST F10=SELECT SORT ORDER

RC06 Loan Detail—Sorted by Outstanding Balance (Descending)—2 of 2

Aggregate Detail

To view the aggregate detail for a specific loan type:

- Step 1: Press **F3** once or twice as necessary to return the *RC05 Financial Aid Transcript Summary Part 1* screen.
- Step 2: Type **AD** on the action bar of the *RC05 Financial Aid Transcript Summary Part 1* screen.
- Step 3: **Click with your mouse** on the selection bar next to the desired loan type in the Aggregate Detail section of the screen, and type **S**. As an example, select "Subsidized Loans."
- Step 4: Press **ENTER**. This brings you to the *RC06 Aggregate Detail* screen, which displays the loans that make up the aggregate loan amount.

Notes:



RC05 AD FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
 Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
 Financial Aid Transcript Summary Part 1 12:16:01

SSN..043906703 First Name..TARA MARIE__ DOB..02-16-1975 Schl Yr..1998
 Curr SSN: 043906703 Last Name: NUNEZ Name Hist: Y
 For Overpayment Summary Info make a selection (S) and press ENTER
 Sel Overpayment Contact Defaulted Loans..... N Discharged..... N
 Pell..... N N/A Loan Sat. Repayment: N Active Bankruptcy: N
 FSEOG...: N N/A
 Perkins.. N N/A Perkins Cumulative Loan Amount...: \$4,500

For Aggregate Detail make a selection (S) and press ENTER
 Aggregate Amount for FFELP/Direct Loans

S Subsidized Loans
 Outstanding Prin. Bal.: \$14,375 Pending Disb: \$ N/A Total: \$14,375

RC06 __ GA/School Information(GS)

NSLDS 03-02-1998
 Aggregate Detail By Loan Begin Date, Outstanding Bal. (Descending) 12:16:01

F3= SSN.....: 043906703 First Name: TARA MARIE DOB: 02-16-1975 Name Hist: Y
 Curr SSN: 043906703 Last Name.: NUNEZ MORE: +

Loan Detail	Loan Amount	Loan Begin	Loan End	GA Code	School Code	--Contact-- Code	Type
_ FFEL STAFFORD SUB Status Cd ID as of 09-03-1996	\$ 5,500	09-03-1996	05-22-1997	733	00258900	700204	LNS Acad Lvl: 3
_ FFEL STAFFORD SUB Status Cd ID as of 08-29-1995	\$ 5,500	08-29-1995	05-16-1996	733	00258900	827288	LEN Acad Lvl: 3
_ FFEL STAFFORD SUB Status Cd ID as of 01-18-1995	\$ 1,750	01-18-1995	05-18-1995	733	00258900	700043	LNS Acad Lvl: 2
_ FFEL STAFFORD SUB Status Cd ID as of 09-05-1994	\$ 1,750	09-05-1994	05-13-1995	733	00257200	700043	LNS Acad Lvl: 2

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F9=STATUS CODE LIST F10=SELECT SORT ORDER

Navigation Schematic for RC06 Aggregate Detail—1 of 2

Step 3: In the list of loans, type **S** to select the first loan.

Step 4: Press **ENTER**. This brings you to the *RC07 GA/School Information* screen.

Notes:



```

RC06   GA/School Information(GS)
-----
                        NSLDS                                03-02-1998
Aggregate Detail By Loan Begin Date, Outstanding Bal. (Descending) 12:16:02

SSN.....: 043906703  First Name: TARA MARIE  DOB: 02-16-1975  Name Hist: Y
Curr SSN: 043906703  Last Name.: NUNEZ                                MORE:  +

Loan Detail          Loan      Loan      Loan      GA      School  --Contact---
                    Amount    Begin    End       Code   Code    Code   Type

 FFEL STAFFORD SUB  $ 5,500  09-03-1996  05-22-1997  733  00258900  700204  LNS
Status Cd ID as of 09-03-1996  Outst Bal. $ 2,750 as of 08-13-1996  Acad Lvl: 3
    
```

```

RC07   Organization Contact(OC)
-----
                        NSLDS                                03-02-1998
                        GA/School Information                12:16:03

SSN.....: 043906703  First Name: TARA MARIE  DOB: 02-16-1975
Last Name: NUNEZ

                        Originating School Information

School/Branch Code: 00258900
Name.....: UNIVERSITY OF NEW HAMPSHIRE
Street Address....: MAIN STREET
City.....: DURHAM                                State: NH  Zip Code: 03824

                        Current GA Information

GA Code.....: 733      Name: NEW HAMPSHIRE HIGHER EDUCATION ASST.
Street Address....: P.O. BOX 877
City.....: CONCORD                                State: NH  Zip Code: 033020000
Resp Begin date...:

                        PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT
    
```

Navigation Schematic for RC07 GA/School Information

Name History

Notes:



To view a student's name history:

Step 1: Press **F3** twice to return to the *RC05 Financial Aid Transcript Summary Part 1* screen.
Check this screen to see if NSLDS has name history information on the student. If it does, there will be a "Y" next to "Name Hist" in the upper right-hand portion of the screen.

Step 2: Type **NH** on the action bar and press **ENTER**. This will bring you to the *RC08 Name History* screen.

RC05	<u>NH</u>	FAT Summary Part 2 (P2) Overpayment Summary (OS)	Loan Detail (LD) Name Hist (NH)	Aggregate Detail (AD) Attendance Hist (AH)
------	-----------	---	------------------------------------	---

NSLDS	03-02-1998
Financial Aid Transcript Summary Part 1	12:16:04

SSN..043906703	First Name..TARA MARIE__	DOB..02-16-1975	Schl Yr..1998
Curr SSN: 043906703	Last Name: NUNEZ	Name Hist: Y	

For	Sel	RC08
-----	-----	------

NSLDS	03-02-1998
Name History	12:16:05

For	SSN.....: 043906703	First Name: TARA MARIE	DOB: 02-16-1975
Agg	Current SSN: 043906703	Last Name.: NUNEZ	MORE:

First	M	Last	
TARA MARIE	M	NUNEZ	
TARA	M	SEARLES	

F3=

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD

Navigation Schematic for RC08 Name History

The *RC08 Name History* screen is used to correctly identify a student by displaying a history of all names used by the student on data submitted to NSLDS. Access to the *Name History* screen is only available if NSLDS contains more than one name for the student.

Notes:



School Attendance History

To view a student's attendance history:

Step 1: Press **F3** to return to the *RC05 Financial Aid Transcript Summary Part 1* screen.

Step 2: Type **AH** on the action bar and press **ENTER**. This brings you to the *RC0A School Attendance History* screen.

Aid Overpayment Summary (View Only)

To access overpayment summary information about a different student:

Step 1: Press **F3** to return to the *RC05 Financial Aid Transcript Summary Part 1* screen.

Step 2: Press **F3** to reach the *RC00 Reporting Capabilities Main Menu* screen. Type **5** (*Financial Aid Transcript Summary*) and press **ENTER**. This is the best way to obtain an unpopulated *FAT Summary Part 1* screen ready for inputting another student's data.

Step 3: On the *RC05 FAT Summary Part 1* screen, type the **SSN**, **first name**, and **DOB** for Alycia P. Renee as follows:

- **SSN: 444 44 4444**
- **First name: Alycia**
- **DOB: 01-17-1968**

Step 4: Press **ENTER** to populate the screen for Alycia.

Notes:



RC05 OS FAT Summary Part 2(P2) Loan Detail(LD) Aggregate Detail(AD)
 Overpayment Summary(OS) Name Hist(NH) Attendance Hist(AH)

NSLDS 03-02-1998
 Financial Aid Transcript Summary Part 1 12:16:06

SSN..444444444 First Name..ALYCIA_____ DOB..01-17-1968 Schl Yr..1998
 Curr SSN: 444444444 Last Name: RENEE Name Hist: N
 For Overpayment Summary Info make a selection (S) and press ENTER
 Sel Overpayment Contact Defaulted Loans.....: N Discharged.....: N
 S Pell.....: Y 00104500 Loan Sat. Repayment: N Active Bankruptcy: N
 - FSEOG...: S 00104500
 - Perkins.: Y 01135900 Perkins Cumulative Loan Amount...: \$ N/A

F3 Ag RC1D Overpayment Detail(OD)

NSLDS 03-02-1998
 PELL Aid Overpayment Summary 12:16:08

School Code: 00104500 School Name: STONEWALL JACKSON STATE JUNIOR
 SSN: 444444444 Name: ALYCIA P RENEE DOB: 01-17-1968

MORE:

Sel	Disbursement	Date	Type	Ovrpmt	Date Repaid	School/Br	Source	Reg	Inact
	(MM - DD - CCYY)			Indr	(MM - DD - CCYY)	Code		Code	Flg
-	09 - 12 - 1997		PE	Y		00104500	SCH		
-	01 - 26 - 1998		PE	R	01 - 26 - 1998	00104500	SCH		

Valid Types are: Pell (PE), FSEOG (SE), Perkins (PK)
 Valid Overpayment Indicators are: Overpayment (Y), Repaid (R),
 Satisfactory arrangement made (S)
 Valid Sources are: School (SCH), Transfer to/from ED (TRF), ED DCS (EDR)

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD

Navigation Schematic for RC1D Aid Overpayment Summary

The RC05 Financial Aid Transcript Summary Part 1 screen shows that NSLDS has overpayment data for Pell (Overpayment Indicator "Y"), for FSEOG (Overpayment Indicator "S"), and for Perkins (Overpayment Indicator "Y").

To display the Pell overpayment data:

Step 1: Type OS on the action bar.

Step 2: Type S on the Pell selection bar.

Step 3: Press ENTER. The Pell Aid Overpayment Summary screen appears.

Aid Overpayment Detail Information

Notes:



NSLDS has detailed information about each overpayment. To access the *RC0N Aid Overpayment Detail Information* screen:

Step 1: Type **OD** on the action bar of the *RC1D Aid Overpayment Summary* screen.

Step 2: Type **S** on the selection bar for the desired record. As an example, select the first Pell overpayment.

Step 3: Press **ENTER**. This will bring you to the *RC0N Aid Overpayment Detail Information* screen.

```

RC0N  __ Organization Contact(OC)
-----
                                NSLDS                                03-02-1998
                                Aid Overpayment Detail Information    12:16:10

School Code: 00104600      School Name: STONEWALL JACKSON STATE JUNIOR
SSN: 444444444 Name: ALYCIA      P RENEE                                DOB: 01-17-1968

Disbursement Date.....: 09-12-1997  Inactive Flag: (Y=Inactive, Blank=Active)
Overpayment Type.....: PE              Create Date..: 03-01-1998
Overpayment Indicator: Y              Update Date..:
Date Repaid.....:
Source.....: SCH
ED Region.....:

Originating School Information
School/Branch Code: 00104500
Name.....: STONEWALL JACKSON STATE JUNIOR COL
Street Address.....:
City.....: RAINSVILLE              State: AL  Zip Code: 35986

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT
    
```

RC0N Aid Overpayment Detail Information

The *RCON Aid Overpayment Detail Information* screen displays:

- ◆ create date (the date that the record was created),
- ◆ update date (the date that the record was updated),
- ◆ inactive flag, and
- ◆ originating school information (school code, name, and address).

Notes:

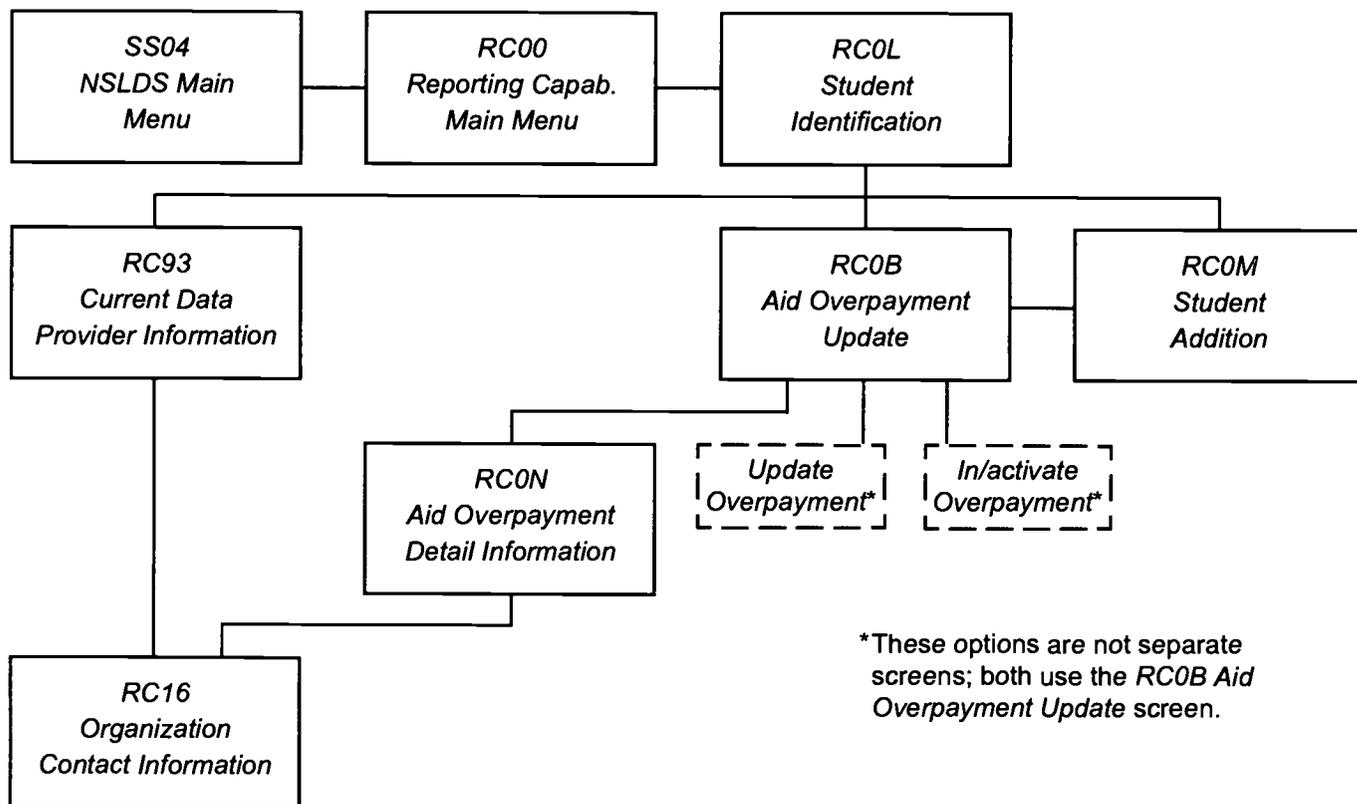


Accessing Aid Overpayment Screens Through NSLDS's *Aid Overpayment* Function

This method of accessing overpayment information allows you to submit student data to NSLDS.

Online Screen Navigation

The next page shows a "map" of the screens included in NSLDS's Aid Overpayment function. Please pull out this page for reference during the rest of the session.



Map of NSLDS's Aid Overpayment Function


```

SS04
-----
                NSLDS                      03-02-1998
              NSLDS Main Menu              12:16:11

Input the number of your choice and press ENTER.

  2  1. System Support Main Menu
     2. Reporting Capabilities Main Menu
    
```

```

RC00
-----
                NSLDS                      03-02-1998
              Reporting Capabilities Main Menu 12:16:12

Input the number of your choice and press ENTER.

  7  1. Aggregate Inquiry Main Menu
     2. Default Rate Main Menu
     3. Report Selection Menu
     4. Borrower Tracking Security
     5. Financial Aid Transcript Summary
     6. Student Status Confirmation Menu
     7. Aid Overpayment
    
```

```

RC0L  _  Data Provider Info(DP)  Overpayment Update(OU)  Add Student(AS)
-----
                NSLDS                      03-02-1998
              Student Identification        12:16:13

SSN.._____  First Name.._____  DOB... - - - (MM-DD-CCYY)

                NAME HISTORY

First          M Last                      DOB          State  Curr SSN

                PRIVACY ACT OF 1974 (AS AMENDED)

RC0B46-I: Please input search criteria for Student and press Enter

F3=EXIT  F7=BACKWARD  F8=FORWARD
    
```

Navigation Schematic for RC0L Student Identification

Current Data Provider Information

Notes:



To access current data provider information:

Step 1: Type **DP** on the *RCOL Student Identification* action bar.

Step 2: Press **ENTER**. This will bring you to the *RC93 Current Data Provider Information* screen.

```

RC93  _ Organization Contact(OC)
-----
                        NSLDS                      03-02-1998
                Current Data Provider Information      12:16:15

Student/Borrower Name: GREGORY          T COLLINS          SSN: 043865160
                                MORE:
_ GA Code.....: 725          Name: AMERICAN STUDENT ASSISTANCE
Street Address.....: 330 STUART STREET
City.....: BOSTON          State: MA  Zip Code: 021165292
Resp Begin Date....: 09-04-1991

_ School/Branch Code.: 00214600  Name: EMERSON COLLEGE
Street Address.....: 100 BEACON STREET
City.....: BOSTON          State: MA  Zip Code: 02116

                                Name:
Street Address.....:
City.....:          State:  Zip Code:

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC93 Current Data Provider Information

The *RC93 Current Data Provider Information* screen lists the data providers that submitted information on the student.

- ◆ The screen includes guaranty agency, Federal Direct Loan servicer, or school name and address.

To determine who to contact to resolve conflicting information, you would:

Step 1: Type **OC** on the *RC93 Current Data Provider Information* action bar.

Step 2: **TAB** to the desired data provider and type **S** to select it.

Step 3: Press **ENTER** to display the *Organization Contact Information* screen.

Notes:



Student Addition

To enter overpayment information for a student who is not yet included in the NSLDS database, you must first add the student to NSLDS.

On the *RCOL Student Identification* screen, to add a student you would:

Step 1: Type the student's **SSN, first name, and date of birth**.

Step 2: Type **AS** (Add Student) on the action bar.

Step 3: Press **ENTER**. This brings you to the *RCOM Student Addition* screen.

Aid Overpayment Update

The new record for the student you are adding will only be created if an overpayment is now entered on the *RCOB Aid Overpayment Update* screen. This screen is shown below.

Notes:



```

RCOB  _  Overpymt Detail(OD)  Update Overpymt(UO)  In/activate Overpymt(IO)
-----
                                NSLDS                                03-02-1998
                                Aid Overpayment Update                12:16:17

School Code: 00104500      School Name: STONEWALL JACKSON STATE JUNIOR
SSN: 578967890  Name: THOMAS      R JOHNSON      DOB: 05-24-1978
                                MORE:
Sel Disbursement Date Type Ovrpmt      Date Repaid      School/Br      Source      Reg      Inact
  (MM - DD - CCYY)      Indr (MM - DD - CCYY)      Code           Code      Code      Flg
- - - - -      - - - - -      - - - - -      - - - - -      - - - - -      - - - - -
- - - - -      - - - - -      - - - - -      - - - - -      - - - - -      - - - - -
- - - - -      - - - - -      - - - - -      - - - - -      - - - - -      - - - - -
- - - - -      - - - - -      - - - - -      - - - - -      - - - - -      - - - - -

Valid Types are: Pell (PE), FSEOG (SE), Perkins (PK)
Valid Overpayment Indicators are: Overpayment (Y), Repaid (R),
                                Satisfactory arrangement made (S)
Valid Sources are: School (SCH), Transfer to/from ED (TRF), ED DCS (EDR)

                                PRIVACY ACT OF 1974 (AS AMENDED)

RCOB38-I: When an overpayment is added, student will also be added.

F3=EXIT  F7=BACKWARD  F8=FORWARD
    
```

RCOB Aid Overpayment Update

To enter overpayment information for the student you are adding, you would:

Step 1: Type **UO** (Update Overpayment) on the action bar.

Step 2: Type **S** in the Select column on the first line.

Step 3: Type the Disbursement Date.

Step 4: Key in the code for the type of aid—PE for Pell, SE for FSEOG, or PK for Perkins.

Aid Overpayment Detail Information

Notes:



To access the RCON Aid Overpayment Detail Information screen, you would:

Step 1: Type **OD** on the action bar of the RCOB Aid Overpayment Update screen.

Step 2: **TAB** to the desired record and type **S**.

Step 3: Press **ENTER**.

```

RCON  __ Organization Contact(OC)
-----
                                NSLDS                03-02-1998
                                Aid Overpayment Detail Information  12:16:10

School Code: 00104600      School Name: STONEWALL JACKSON STATE JUNIOR
SSN: 444444444 Name: ALYCIA      P RENE E                DOB: 01-17-1968

Disbursement Date.....: 09-12-1997  Inactive Flag: (Y=Inactive, Blank=Active)
Overpayment Type.....: PE              Create Date...: 03-01-1998
Overpayment Indicator: Y              Update Date...:
Date Repaid.....:
Source.....: SCH
ED Region.....:

Originating School Information
School/Branch Code: 00104500
Name.....: STONEWALL JACKSON STATE JUNIOR COL
Street Address.....:
City.....: RAINSVILLE              State: AL  Zip Code: 35986

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT
    
```

RCON Aid Overpayment Detail Information

The RCON Aid Overpayment Detail Information screen displays all overpayment information and the create date, update date, and inactive flag for the overpayment record selected. This screen also displays the originating school information for the overpayment record selected.

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CASE STUDIES

Notes:



CASE STUDY 1

SSN: 043 78 6359
Name: Lynn Apostole
DOB: 06-02-1955

The semester has begun and Lynn hasn't received an award letter, so she makes an appointment to see her financial aid counselor. After reviewing the file, her financial aid counselor explains to Lynn that she can't get any Title IV aid because she defaulted on a previously awarded NDSL. Lynn explains that she has made satisfactory repayment arrangements for that loan.

1. *Did Lynn make satisfactory repayment arrangements?*
2. *Which school provided the status of the NDSL?*

CASE STUDY 2

SSN: 043 86 5256
Name: Roger Cruver
DOB: 01-02-1958

Roger visits the financial aid office because his SAR states that he is not eligible to receive federal student financial aid due to a default on a loan. Roger admits that he defaulted on several loans, but explains that he consolidated the loans; therefore, he should be eligible to receive federal student financial aid.

1. *Does NSLDS show that Roger consolidated any of his Title IV loans?*
2. *Are any of Roger's loans in default? Is Roger eligible to receive a Title IV loan?*

CASE STUDY 5

You will be given the identifiers for a "dummy" student in the NSLDS Training Database. Use the Aid Overpayment function to:

1. Find whether the student has existing overpayments.
2. Add a Pell overpayment.
3. Inactivate the Pell overpayment.
4. Activate the Pell overpayment again.
5. Enter data to show that the Pell overpayment has been repaid.

Notes:



CASE STUDY 6

Make up the identifiers for a "dummy" student to add to the NSLDS Training Database. Use the Aid Overpayment function to:

1. Add the new student to NSLDS.
2. Add a Perkins overpayment for this student.
3. Enter data to show that the student has made satisfactory arrangements to repay the Perkins overpayment.



ANSWER KEY

Notes:



CASE STUDY 1

Q1. Did Lynn make satisfactory repayment arrangements?

Step 1: Navigate to the *Reporting Capabilities Main Menu* screen, then type 5 and press ENTER to access the *Financial Aid Transcript Summary Part 1* screen.

Step 2: Key in the student's **SSN**, **First Name**, and **DOB** and press ENTER to populate the screen.

Step 3: Look at the Loan Sat. Repayment field to see if there is a "Y" (yes) or "N" (no). There is a "Y."

A1. Yes, Lynn made satisfactory repayment arrangements.

Q2. Which school provided the status of the NDSL?

Step 1: While still at the populated *RC05 Financial Aid Transcript Summary Part 1* screen, type LD on the action bar and press ENTER to access the *RC06 Loan Detail* screen.

Step 2: Press F8 to view more loan detail information until you see the NDSL. Notice that the Status Code for this loan is DX (Defaulted, Six Consecutive Payments), so that this loan's status would not prevent Lynn from receiving Title IV aid.

Step 3: Type **GS** on the action bar, **TAB** to the selection bar for the **NDSL**, then type **S** and press **ENTER**. This displays the *RC07 GA/School Information* screen.

Notes:



A2. Hesser College provided the status of the NDSL.

CASE STUDY 2

Q1. Does NSLDS show that Roger consolidated any of his Title IV loans?

Step 1: Press **F3** until you reach the *Reporting Capabilities Main Menu* screen, then navigate to the *Financial Aid Transcript Summary Part 1* screen. (This is the best way to obtain an unpopulated FAT screen ready for inputting a new student's data.)

Step 2: Key in the student's **SSN**, **First Name**, and **DOB** and press **ENTER** to populate the *Part 1* screen.

Step 3: Look at the *Aggregate Detail* section of the *Part 1* screen to see if there is a loan amount listed on the *Consolidated Loans* row.

A1. No, according to NSLDS, Roger didn't consolidate any of his loans, because there is no amount entered in the Consolidated Loans section of the Financial Aid Transcript Summary Part 1 screen.

Q2. Are any of Roger's loans in default? Is Roger eligible to receive a Title IV loan?

Notes:



Step 1: To check on the status of Roger's individual loans, type LD on the action bar of the *Financial Aid Transcript Summary Part 1* screen and press ENTER. This brings you to the *RC06 Loan Detail* screen.

Step 2: Look at the status codes of the loans, pressing F8 as necessary to view the other loans. Most of the loans have a "DU" (Defaulted, Unresolved) status code.

A2. According to NSLDS, Roger is in default on several Title IV loans, so he is not eligible to receive a Title IV loan.

Roger may have consolidated his defaulted loans, and NSLDS may not yet have received the updated information. If Roger can document that his loans have been consolidated, the FAA may disburse aid based on that documentation even if NSLDS has not yet been updated.

When NSLDS is updated, the "DU" loan status codes will change to "PC" (Paid in Full Through Consolidation Loan).

CASE STUDY 4

Notes:



Q1. What amounts did Joanne borrow for each subsidized loan, and what are the outstanding balances?

Step 1: Press **F3** until you reach the *Reporting Capabilities Main Menu* screen, then navigate to the *Financial Aid Transcript Summary Part 1* screen. (Again, this is the best way to obtain an unpopulated FAT screen ready for inputting a new student's data.)

Step 2: Key in the student's **SSN**, **First Name**, and **DOB** and press **ENTER** to populate the *Part 1* screen.

Step 3: Type **AD** on the action bar.

Step 4: In the *Aggregate Detail* section of the screen, click the mouse to position the cursor next to *Subsidized Loans*. Type **S** and press **ENTER**. This brings you to the *RC06 Aggregate Detail* screen with subsidized loans displayed.

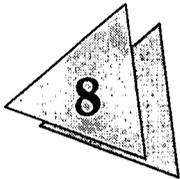
A1. Joanne borrowed the following subsidized loans:

<i>Loan Type</i>	<i>Amt.</i>	<i>Outstanding Bal.</i>
<i>FFEL Stafford</i>	<i>\$8,500</i>	<i>\$2,125</i>
<i>FFEL Stafford</i>	<i>\$7,590</i>	<i>\$7,590</i>
<i>FFEL Stafford</i>	<i>\$5,733</i>	<i>\$5,043</i>
<i>FFEL Stafford</i>	<i>\$2,767</i>	<i>\$2,767</i>
<i>FFEL Stafford</i>	<i>\$1,500</i>	<i>\$1,500</i>
<i>FFEL Stafford</i>	<i>\$4,000</i>	<i>\$4,000</i>
<i>FFEL Stafford</i>	<i>\$3,900</i>	<i>\$3,900</i>
<i>FFEL Stafford</i>	<i>\$2,625</i>	<i>\$2,625</i>
<i>FFEL Stafford</i>	<i>\$2,625</i>	<i>\$2,625</i>

Notes:



A series of horizontal lines for taking notes, starting from the top right and extending down the page.



Borrower Tracking

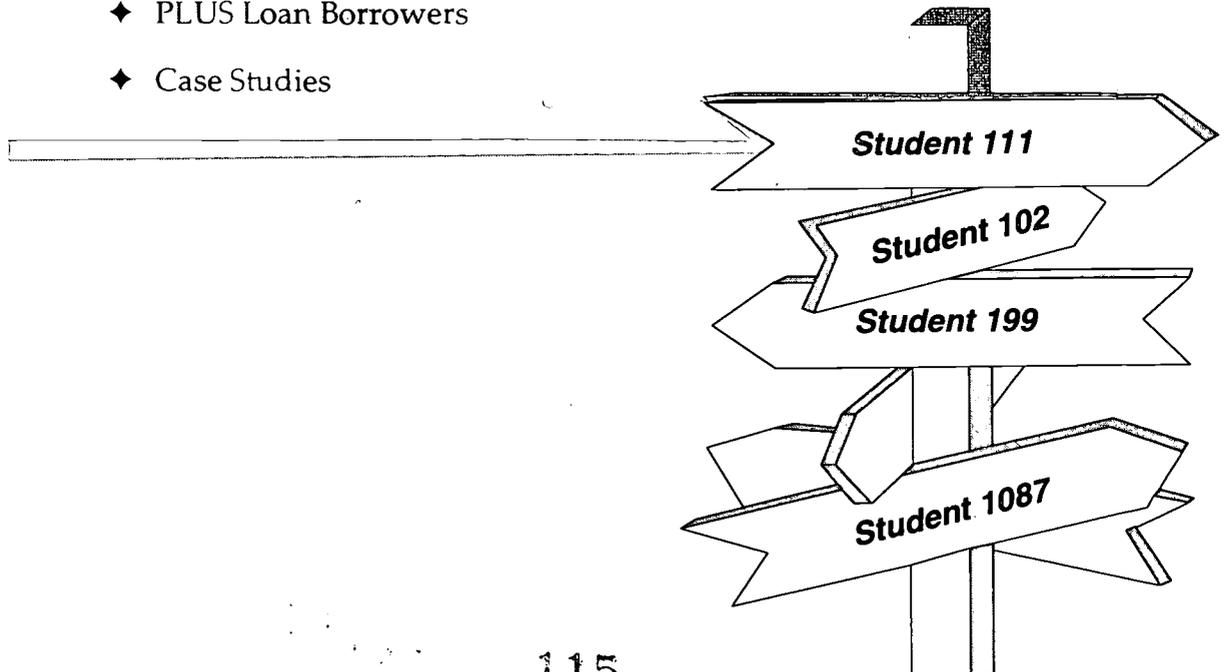
Objectives

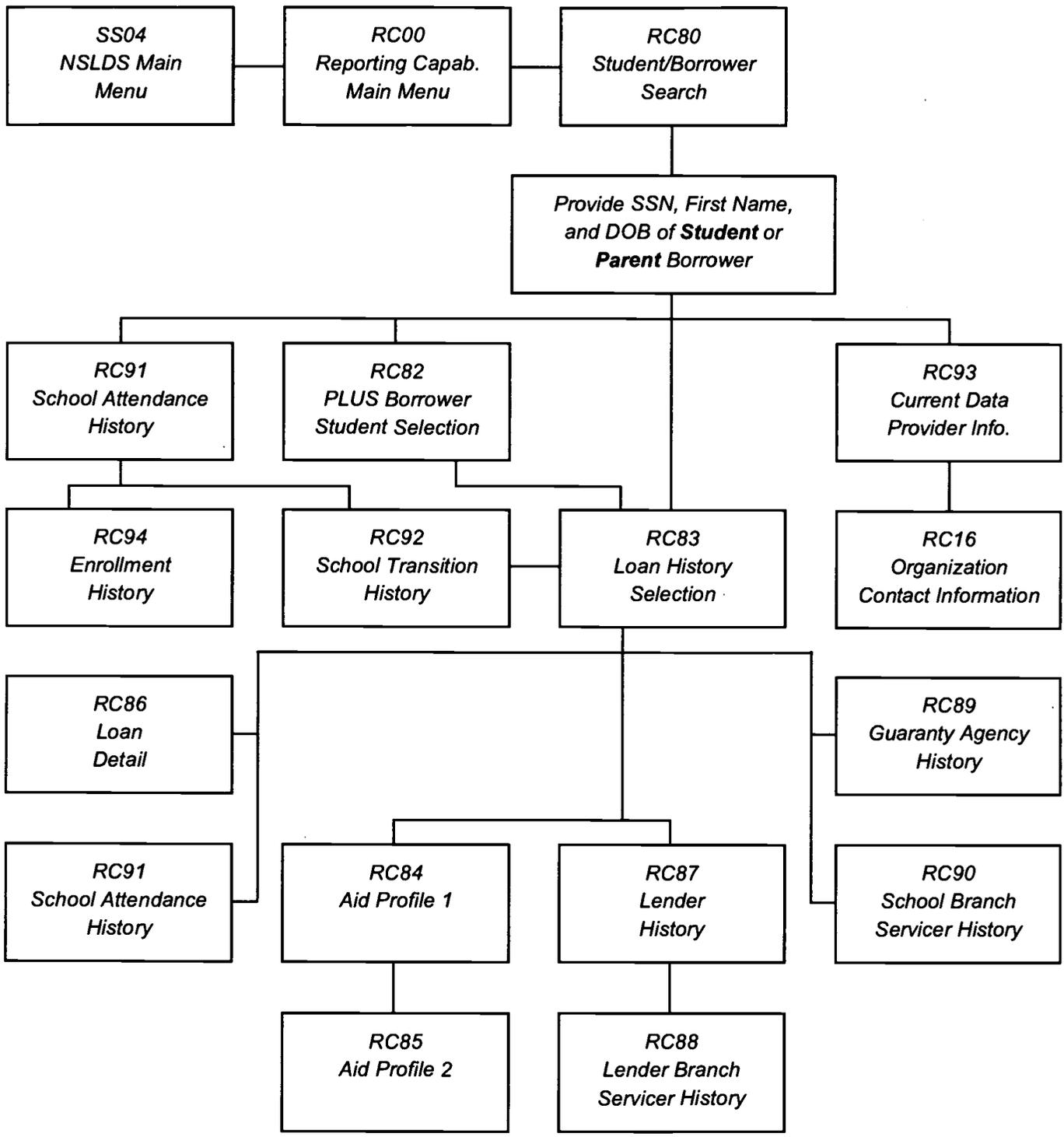
After completing this session, you will be able to:

- ◆ navigate through NSLDS's borrower tracking screens, and
- ◆ use the information on these screens.

Contents

- ◆ Student Borrowers
- ◆ PLUS Loan Borrowers
- ◆ Case Studies





Map of NSLDS's Borrower Tracking Function


```

SS04
-----
                NSLDS                      03-16-1998
                NSLDS Main Menu           09:08:10

Input the number of your choice and press ENTER.

 2 1. System Support Main Menu
    2. Reporting Capabilities Main Menu
    
```

```

RC00
-----
                NSLDS                      03-16-1998
                Reporting Capabilities Main Menu 09:08:11

F3 Input the number of your choice and press ENTER.

 4 1. Aggregate Inquiry Main Menu
    2. Default Rate Main Menu
    3. Report Selection Menu
    4. Borrower Tracking Security
    
```

```

RC80  ___ curr Data Provider info(DP)  L0an hist(LO)  Attendance Hist(AH)
      Plus borrower Student selection(PS)
-----
                NSLDS                      03-16-1998
                Student/Borrower Search     09:08:12

F3 SSN.. _____ First Name.. _____ DOB.. __-__-____ (MM-DD-YYYY)
   PLUS Borrower (P)/Student (S).. S

                NAME HISTORY
Sel First      M Last      DOB      State  Curr SSN

                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD
    
```

Navigation Schematic for RC80 Student/Borrower Search

STUDENT BORROWERS

Notes:



Current Data Provider Information

To access the RC93 Current Data Provider Information screen:

Step 1: Type DP on the action bar in the RC80 Student/Borrower Search screen.

Step 2: TAB to Name History and type S next to the name history record you want to see.

Step 3: Press ENTER.

```

RC80  DP curr Data Provider info(DP) LOan hist(LO) Attendance Hist(AH)
      Plus borrower Student selection(PS)
-----
                                NSLDS                                03-16-1998
                                Student/Borrower Search              09:08:13

SSN.. 043865160  First Name.. GREGORY_____  DOB.. 11-01-1971 (MM-DD-YYYY)
PLUS Borrower(P)/Student(S).. S

                                NAME HISTORY                                MORE:
Sel First      M Last                                DOB      State  Curr SSN
 S GREGORY  T COLLINS                                11-01-1971  043865160
    
```

```

RC93  _ Organization Contact(OC)
-----
                                NSLDS                                03-16-1998
                                Current Data Provider Information      09:08:15

F3=F Student/Borrower Name: GREGORY      T COLLINS      SSN: 043865160
                                MORE:
_ GA Code.....: 725      Name: AMERICAN STUDENT ASSISTANCE
  Street Address.....: 330 STUART STREET
  City.....: BOSTON      State: MA  Zip Code: 021165292
  Resp Begin Date....: 09-04-1991

_ School/Branch Code.: 00214600  Name: EMERSON COLLEGE
  Street Address.....: 100 BEACON STREET
  City.....: BOSTON      State: MA  Zip Code: 02116

                                Name:
  Street Address.....:
  City.....:      State:      Zip Code:

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

Navigation Schematic for RC93 Current Data Provider Information

The RC93 Current Data Provider Information screen displays guaranty agency (GA)/ school names and addresses in date specific order. GA information is displayed first, followed by school information. GA information is listed if a student has FFEL loans. School information is listed only if the student has campus-based loans. The "Responsible Begin Date" is the date that the data provider is responsible for the loan.

Loan History

To access the RC83 Loan History Selection screen:

Step 1: Press **F3** from the RC93 Current Data Provider Information screen to return to the RC80 Student/Borrower Search screen.

On the Student/Borrower Search screen, the Name History section shows that this student has used only one name. Since there is only one choice in the Sel column, you don't need to type **S** to select it—the system will choose it by default.

Step 2: Type **LO** on the action bar and press **ENTER**. This brings you to the RC83 Loan History Selection screen.

Notes:



```

RC80  LO curr Data Provider info(DP) LOan hist(LO) Attendance Hist(AH)
      Plus borrower Student selection(PS)
-----
                        NSLDS                                03-16-1998
                Student/Borrower Search                    09:08:13

SSN.. 043865160 First Name.. GREGORY____ DOB.. 11-01-1971 (MM-DD-YYYY)
PLUS Borrower(P)/Student(S).. S
                        NAME HISTORY                                MORE:
Sel First      M Last      DOB      State  Curr SSN
 GREGORY  T COLLINS  11-01-1971  043865160
    
```

```

RC83 ___ Aid profile 1(A1)      Loan Detail(LD)      Lender History(LH)
      Guar agency Hist(GH)      Attendance His(AH)  School servicer His(SH)
-----
                        NSLDS                                03-16-1998
                Loan History Selection                    09:08:17

F3=E
Student Name: GREGORY      T COLLINS      SSN: 043865160
PLUS Name...: LESLIE      J BENKOVIC  SSN: 052727808
Current School/Branch Code: 00214600
Current School Name.....: EMERSON COLLEGE
City.....: BOSTON      State: MA

      Curr      MORE:  +
      Loan      Originating
Sel Type  Certification/  Period  Period  Amount  Status  School/Branch
-  SU      01-26-1995  09-12-1994  05-02-1995  5000  RP      00214600
-  SF      09-22-1994  09-12-1994  05-02-1995  5500  RP      00214600
-  SL      12-03-1993  09-13-1993  05-03-1994  4000  RP      00214600
-  SF      11-03-1993  09-13-1993  05-03-1994  3500  RP      00214600
-  PU      10-04-1993  09-13-1993  05-03-1994  1000  PF      00214600
-  SF      10-23-1992  09-14-1992  05-06-1993  2625  RP      00214600
-  PU      10-05-1992  09-14-1992  05-03-1993  1000  PF      00214600

      PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

Navigation Schematic for RC83 Loan History Selection

The RC83 Loan History Selection screen displays the following information:

- ◆ current school,
- ◆ loan type,
- ◆ certification/guaranty date,
- ◆ loan period begin and end dates,
- ◆ loan amount,

- ◆ current loan status, and
- ◆ originating school/branch.

Notes:



If there is a "+" in the MORE field, this means there are additional loans. Press F8 to view them.

RC83	—	Aid profile 1(A1)	Loan Detail(LD)	Lender History(LH)			
		Guar agency Hist(GH)	Attendance His(AH)	School servicer His(SH)			
NSLDS				03-16-1998			
Loan History Selection				09:08:18			
Student Name: GREGORY		T COLLINS		SSN: 043865160			
PLUS Name...: LESLIE		J BENKOVIC		SSN: 052727808			
Current School/Branch Code: 00214600							
Current School Name.....: EMERSON COLLEGE							
City.....: BOSTON			State: MA				
				Curr MORE: -			
	Loan	Certification/	Period	Period	Curr	MORE: -	
Sel	Type	Guaranty Date	Begin Date	End Date	Amount	Status	Originating
—	PL	09-29-1992	09-14-1992	05-06-1993	4000	RP	00214600
—	SF	09-04-1991	09-04-1991	05-31-1992	2625	RP	00993600
PRIVACY ACT OF 1974 (AS AMENDED)							
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN							

RC83 Loan History Selection (Showing "MORE" Information)

Notice that there is now a "-" sign in the MORE field, reminding you that there are loans on a previous screen. Press F7 to view the previous screen.

A list of loan type codes is provided on the next page.

A list of loan status codes is provided on page 13.

Loan Program	Loan Type Codes	Definition
FFEL	CL PL SF SL SU SN	Consolidation PLUS Stafford Subsidized Federal SLS Stafford Unsubsidized Stafford Non-Subsidized
FDLP	D1 D2 D4 D5 D6 D7	Direct Stafford Subsidized Direct Stafford Unsubsidized Direct PLUS Direct Consolidation Unsubsidized Direct Consolidation Subsidized Direct Consolidation PLUS
FISL	FI RF	Federally Insured Student Loan Refinanced
Perkins	DU EU IC NU PU	National Defense Student Loan Perkins Expanded Lending Option Income Contingent Loan National Direct Student Loan Perkins Loan

Loan Type Codes

Status Code	Description
AE	Assigned to U.S. Department of Education
BC	Bankruptcy Claim, Discharged
BK	Bankruptcy Claim, Active
CA	Cancelled
DA	Deferred
DB	Defaulted, Then Bankrupt, Active, Chapter 13
DC	Defaulted, Compromise
DD	Defaulted, Then Died
DE	Death
DI	Disability
DK	Defaulted, Then Bankrupt, Discharged, Chapter 13
DL	Defaulted, In Litigation
DO	Defaulted, Then Bankrupt, Active, Other
DP	Defaulted, Paid In Full
DS	Defaulted, Then Disabled
DT	Defaulted, Collection Terminated
DU	Defaulted, Unresolved
DW	Defaulted, Write-Off
DX	Defaulted, Six Consecutive Payments
FB	Forbearance
ID	In School or Grace Period
OD	Defaulted, Then Bankrupt, Discharged, Other
PC	Paid in Full Through Consolidation Loan
PF	Paid in Full
RF	Refinanced
RP	In Repayment
UI	Unreinsured

Loan Status Codes

Aid Profile 1

Aid profile information is displayed on two screens—*RC84 Aid Profile 1* and *RC85 Aid Profile 2*.

To view the *RC84 Aid Profile 1* screen:

Step 1: Type **A1** on the action bar of the *RC83 Loan History Selection* screen.

Step 2: Type **S** next to the loan record you want to select for viewing.
As an example, select "SU."

Step 3: Press **ENTER**. This brings you to the *RC84 Aid Profile 1* screen.

The *RC84 Aid Profile 1* screen displays:

- ◆ school branch,
- ◆ school branch servicer,
- ◆ loan period begin and end dates,
- ◆ certification/guaranty date,
- ◆ outstanding principal balance and date,
- ◆ outstanding interest balance and date, and
- ◆ current lender branch and servicer.

Notes:



Aid Profile 2

Notes:



To view the *RC85 Aid Profile 2* screen:

Step 1: Type **A2** on the action bar of the *RC84 Aid Profile 1* screen.

Step 2: Press **ENTER**.

RC85	Loan Detail(LD)	Lender History(LH)	Guaranty agency His(GH)
	LOan history(LO)		
	NSLDS		03-16-1998
	Aid Profile 2		09:08:21
Student Name:	GREGORY T COLLINS		SSN: 043865160
PLUS Name...:	LESLIE J BENKOVIC		SSN: 052727808
Originating Lender:	813478	Name: LOWELL FIVE CENT SAVINGS BANK	
Address.....:	34 JOHN STREET		
	LOWELL	MA 018520000	Phone: 5084521300
Current Guaranty Agency:	725	Name: AMERICAN STUDENT ASSISTANCE	
Address.....:	330 STUART STREET		
	BOSTON	MA 021165292	
Originating Guar Agency:	725	Name: AMERICAN STUDENT ASSISTANCE	
Address.....:	330 STUART STREET		
	BOSTON	MA 021165292	
PRIVACY ACT OF 1974 (AS AMENDED)			
F3=EXIT F12=RETURN			

RC85 Aid Profile 2

The *RC85 Aid Profile 2* screen is an extension of the *Aid Profile 1* screen.

- ◆ This screen displays the originating lender and current and originating guaranty agency information.
- ◆ You can access this screen only from the *Aid Profile 1* screen.

Loan Detail

Notes:



To access the *RC86 Loan Detail* screen from the *RC85 Aid Profile 2* screen:

Step 1: Type **LD** on the action bar.

Step 2: Press **ENTER**.

```

RC86  _ Aid profile 1(A1)  Lender History(LH)  Guaranty agency History(GH)
      School servicer History(SH)  L0an history(LO)
-----
                                NSLDS                                03-16-1998
                                Loan Detail                            09:08:22

Student Name: GREGORY          T COLLINS                      SSN: 043865160
PLUS Name...: LESLIE          J BENKOVIC                     SSN: 052727808
Loan Type: SU  Amount:      5000    Certification/Guaranty Date...: 01-26-1995
Period Begin Date....: 09-12-1994  Period End Date.....: 05-02-1995

Outstanding Principal Bal:  5000    Outstanding Principal Bal Date: 01-26-1995
Outstanding Interest Bal.:                Outstanding Interest Bal Date.: 01-26-1995

                                MORE:
-- Disbursement --  -- Cancellation --  ---- Refund ----  ---- Status ----
Date      Amount    Date      Amount    Date      Amount    Date      Code
01-26-1995  5000                11-04-1995  RP
                                01-26-1995  ID

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC86 Loan Detail

The *RC86 Loan Detail* screen displays the current loan status as well as financial details. It is useful in determining the dates and amounts associated with loan disbursement, cancellation, and refund.

Lender History

Notes: _____



To see which lender currently holds this loan:

Step 1: Type **LH** on the action bar of the *RC86 Loan Detail* screen.

Step 2: Press **ENTER**.

```

RC87  _  Aid profile 1(A1)   Loan Detail(LD)   Lender Br serv his(LB)
      Guar agency His(GH)  L0an history(LO)
-----
                                NSLDS                                03-16-1998
                                Lender History                        09:08:23

Student Name: GREGORY          T COLLINS                      SSN: 043865160
PLUS Name...: LESLIE          J BENKOVIC                     SSN: 052727808

Loan Type: SU  Amount: 5000    Certification/Guaranty Date...: 01-26-1995
Period Begin Date...: 09-12-1994  Period End Date.....: 05-02-1995
Sel
  _ Lender Code...: 829988  Lender Branch Code: 0000  Phone Number: 6178491325
    Lender Name...: NELLIE MAE - TREASURER
    Street Address: 50 BRAINTREE HILL PARK SUITE 300
    City.....: BRAINTREE          State: MA  Zip Code: 021840000
    Responsible Begin Date: 02-25-1995  Responsible End Date: 12-31-9999
  _ Lender Code...: 813478  Lender Branch Code: 0000  Phone Number: 5084521300
    Lender Name...: LOWELL FIVE CENT SAVINGS BANK
    Street Address: 34 JOHN STREET
    City.....: LOWELL          State: MA  Zip Code: 018520000
    Responsible Begin Date: 01-26-1995  Responsible End Date: 02-24-1995

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC87 Lender History

The *RC87 Lender History* screen displays:

- ◆ lender code,
- ◆ lender branch code,
- ◆ lender name and address,
- ◆ telephone number, and
- ◆ responsible begin and end dates.

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Lender Branch Servicer History

Notes:



To access the *RC88 Lender Branch Servicer History* screen from the *RC87 Lender History* screen:

Step 1: Type **LB** on the action bar.

Step 2: Type **S** next to the record you want to select for viewing. As an example, select the first record.

Step 3: Press **ENTER**.

```

RC87   LB Aid profile 1(A1)      Loan Detail(LD)      Lender Br serv his(LB)
       GH Guar agency His(GH)    LOan history(LO)

      NSLDS                                03-16-1998
      Lender History                        09:08:24

Student Name: GREGORY          T COLLINS          SSN: 043865160
PLUS Name...: LESLIE          J BENKOVIC         SSN: 052727808

Loan Type: SU Amount: 5000      Certification/Guaranty Date...: 01-26-1995
Period Begin Date...: 09-12-1994  Period End Date.....: 05-02-1995
Sel
 S Lender Code...: 829988  Lender Branch Code: 0000  Phone Number: 6178491325
  Lender Name...: NELLIE MAE - TREASURER
  Street Address: 50 BRAINTREE HILL PARK SUITE 300
  City.....: BRAINTREE          State: MA  Zip Code: 021840000
  Responsible Begin Date: 02-25-1995  Responsible End Date: 12-31-9999
  Lender Code...: 813478  Lender Branch Code: 0000  Phone Number: 5084521300
  Lender Name...: LOWELL FIVE CENT SAVINGS BANK
  Street Address: 34 JOHN STREET
  City.....: LOWELL            State: MA  Zip Code: 018520000
  Responsible Begin Date: 01-26-1995  Responsible End Date: 02-24-1995

      PRIVACY ACT OF 1974 (AS AMENDED)
RC866-I: No Lender Branch Servicer History for the loan

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC87 Lender History Screen Showing "No Lender Branch Servicer History" Message

Notice the message "*No Lender Branch Servicer History for the loan*" at the bottom of the screen. This means that there is no branch for the lender.

Guaranty Agency History

Notes:



To view information on the guaranty agencies that have guaranteed this loan:

Step 1: Type **GH** on the action bar of the *RC87 Lender History* screen.

Step 2: Type **S** next to the desired lender. As an example, type **S** next to the first available choice.

Step 3: Press **ENTER**.

```

RC89  —  Aid profile 1(A1)  Loan Detail(LD)  Lender History(LH)
          L0an history(L0)
-----
                                NSLDS                      03-16-1998
                                Guaranty Agency History      09:08:26

Student Name: GREGORY          T COLLINS                SSN: 043865160
PLUS Name...: LESLIE          J BENKOVIC           SSN: 052727808

Loan Type: SU  Amount: 5000      Certification/Guaranty Date...: 01-26-1995
Period Begin Date...: 09-12-1994  Period End Date.....: 05-02-1995

GA Code: 725  GA Name: AMERICAN STUDENT ASSISTANCE
GA Street Address.....: 330 STUART STREET
City.....: BOSTON                State: MA  Zip Code: 021165292
Responsible Begin Date: 01-26-1995

GA Code:          GA Name:
GA Street Address.....:
City.....:                State:      Zip Code:
Responsible Begin Date:

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN

```

RC89 Guaranty Agency History

The screen shows the following guaranty agency information for the specific loan record selected, in date order:

- ◆ guaranty agency name,
- ◆ address, and
- ◆ responsible begin date.

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School Branch Servicer History

Notes:



From the RC89 Guaranty Agency History screen:

Step 1: Press **F3** to return to the RC83 Loan History Selection screen.

Step 2: Type **SH** on the action bar.

Step 3: **TAB** to the desired loan record and type **S**. As an example, select the first loan of type "PU" (Perkins).

Step 4: Press **ENTER**.

If there is no school branch servicer, a message will appear at the bottom of the RC83 Loan History Selection screen.

```

RC83   SH  Aid profile 1(A1)      Loan Detail(LD)      Lender History(LH)
      Guar agency Hist(GH)  Attendance His(AH)  School servicer His(SH)
-----
                                NSLDS                      03-16-1998
                                Loan History Selection      09:08:27

Student Name: GREGORY          T COLLINS              SSN: 043865160
PLUS Name... : LESLIE         J BENKOVIC            SSN: 052727808
Current School/Branch Code: 00214600
Current School Name..... : EMERSON COLLEGE
City..... : BOSTON              State: MA

                                Curr      MORE:  +
                                Loan      Originating
Sel Type  Certification/   Period   Period   Amount Status School/Branch
-----
-   SU   01-26-1995   09-12-1994   05-02-1995   5000   RP   00214600
-   SF   09-22-1994   09-12-1994   05-02-1995   5500   RP   00214600
-   SL   12-03-1993   09-13-1993   05-03-1994   4000   RP   00214600
-   SF   11-03-1993   09-13-1993   05-03-1994   3500   RP   00214600
 S  PU   10-04-1993   09-13-1993   05-03-1994   1000   PF   00214600
-   SF   10-23-1992   09-14-1992   05-06-1993   2625   RP   00214600
-   PU   10-05-1992   09-14-1992   05-03-1993   1000   PF   00214600

                                PRIVACY ACT OF 1974 (AS AMENDED)

RC862-I: No School Branch Servicer History for the loan

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

**RC83 Loan History Selection Screen Showing
"No School Branch Servicer History" Message**

School Attendance History

Notes:



To view school attendance history data:

Step 1: On the *RC83 Loan History Selection* screen, type **AH** on the action bar.

Step 2: Press **ENTER**.

```

RC91  _  Transition History (TH)  Plus borrower Student selection (PS)
      LOan history (LO)  Enrollment History (EH)
-----
                        NSLDS                        03-16-1998
                        School Attendance History      09:08:29

Student Name: GREGORY      T COLLINS                SSN: 043865160
PLUS Name...: LESLIE      J BENKOVIC                SSN: 052727808
Sel  Make a Selection(S) for Transition History OR Enrollment History  MORE:
_ School/Branch Code: 00214600  Type/Control: C
  Name: EMERSON COLLEGE
  Street Address: 100 BEACON STREET
  City: BOSTON                State: MA                Zip Code: 02116

_ School/Branch Code: 00993600  Type/Control: B
  Name: MIDDLESEX COMMUNITY COLLEGE
  Street Address: SPRINGS ROAD
  City: BEDFORD                State: MA                Zip Code: 017309124

School/Branch Code:                Type/Control:
Name:
Street Address:
City:                State:                Zip Code:

                        PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC91 School Attendance History

The *School Attendance History* screen displays the schools at which the student has received aid or an in-school deferment. This screen is useful in contacting a school where the student has received aid. Also, if the school has sent enrollment history data to NSLDS via the SSCR process, information about the school will be displayed on this screen.

School Transition History

Notes:



To find out if a school has operated under a different name:

Step 1: From the *RC91 School Attendance History* screen, type **TH** on the action bar.

Step 2: **TAB** to the desired selection and type **S**. As an example, select the first available choice.

Step 3: Press **ENTER**.

A message will appear at the bottom of the *RC91 School Attendance History* screen if the school has not operated under another name.

```

RC91  TH Transition History(TH) Plus borrower Student selection(PS)
      LOan history(LO) Enrollment History(EH)
-----
                        NSLDS                               03-16-1998
                  School Attendance History                 09:08:30

Student Name: GREGORY      T COLLINS                      SSN: 043865160
PLUS Name... : LESLIE     J BENKOVIC                      SSN: 052727808
Sel  Make a Selection(S) for Transition History OR Enrollment History MORE:
[S]  School/Branch Code: 00214600  Type/Control: C
      Name: EMERSON COLLEGE
      Street Address: 100 BEACON STREET
      City: BOSTON                               State: MA           Zip Code: 02116

_   School/Branch Code: 00993600  Type/Control: B
      Name: MIDDLESEX COMMUNITY COLLEGE
      Street Address: SPRINGS ROAD
      City: BEDFORD                               State: MA           Zip Code: 017309124

School/Branch Code:           Type/Control:
Name:
Street Address:
City:                           State:           Zip Code:

                        PRIVACY ACT OF 1974 (AS AMENDED)

RC901-I: No Transition History exists for this School

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

**RC91 School Attendance History Screen Showing
"No School Transition History" Message**

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Enrollment History

Notes:



To access a student's enrollment history:

Step 1: From the *RC91 School Attendance History* screen, type **EH** on the action bar.

Step 2: **TAB** to the school you wish to select and type **S**. As an example, select the first available choice.

Step 3: Press **ENTER**.

```

RC94
-----
                        NSLDS                        03-16-1998
                        Enrollment History            09:08:32

Student Name: GREGORY      T COLLINS                SSN: 043865160
PLUS Name...: LESLIE      J BENKOVIC             SSN: 052727808
School/Branch Code: 00214600
Name.....: EMERSON COLLEGE

Enrollment
Code   Description
G      GRADUATED
F      FULL TIME

                                MORE:
                                Effective Date
                                12-31-1995
                                09-22-1994

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC94 Enrollment History

The *RC94 Enrollment History* screen displays a student's enrollment history at a given school, with the following information:

- ◆ school/branch code,
- ◆ school name,
- ◆ enrollment codes,
- ◆ description of enrollment codes, and
- ◆ effective dates.

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PLUS LOAN BORROWERS

Press **F3** until you reach the *RC00 Reporting Capabilities Main Menu*. Then type **4** (*Borrower Tracking Security*) and press **ENTER**. This is the best way to obtain an unpopulated *RC80 Student/Borrower Search* screen.

Notes:



PLUS Borrower Student Selection

You can access a parent's loan information two ways: with student or parent data.

Method 1—Using Student Data

Step 1: **TAB** to the SSN field on the *RC80 Student/Borrower Search* screen and type the *student's SSN, first name, and DOB*. As an example, use the following data:

- ◆ SSN: **043 90 1308**
- ◆ First Name: **Jennifer**
- ◆ DOB: **11-17-1972**

Step 2: In the PLUS Borrower (P)/Student(S) field, the **S** (for Student) is already present, so just press **ENTER** to populate the screen for this student.

Step 3: Type **PS** on the action bar and press **ENTER** to display the *RC82 PLUS Borrower Student Selection* screen.

Loan History (PLUS Borrower)

Notes:



To access loan history information:

Step 1: From the *RC82 PLUS Borrower Student Selection* screen, type **LO** on the action bar.

Step 2: Press **ENTER**.

```

RC83  _  Aid profile 1(A1)      Loan Detail(LD)      Lender History(LH)
        Guar agency Hist(GH)  Attendance His(AH)  School servicer His(SH)
-----
                                NSLDS                                03-16-1998
                                Loan History Selection                09:08:35

Student Name: JENNIFER      S ALVARADO              SSN: 043901308
PLUS Name...: SUZANNE      M MORRIS                SSN: 053646721
Current School/Branch Code: 00257500
Current School Name.....: FRANKLIN PIERCE COLLEGE
City.....: RINDGE              State: NH

                                Curr      MORE:
                                Loan      Originating
Sel Type  Certification/  Period      Period      Amount Status  School/Branch
-   PL      08-05-1993      09-08-1993  05-17-1994  3090  RP      00257500
-   PL      08-05-1992      09-09-1992  05-18-1993  4000  RP      00257500
-   PL      01-21-1992      09-09-1991  05-17-1992  4000  RP      00257500

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC83 Loan History Selection (PLUS Borrower)

Loan Detail (PLUS Borrower)

To access loan detail information:

Step 1: From the *RC83 Loan History Selection* screen, type **LD** on the action bar.

Step 2: **TAB** to the desired loan record and type **S**. As an example, type **S** next to the first loan of type "PL."

Step 3: Press **ENTER**.

The *RC86 Loan Detail* screen displays the current loan status as well as other details.

Notes:



RC83 LD Aid profile 1(A1) Loan Detail(LD) Lender History(LH)
 Guar agency Hist(GH) Attendance His(AH) School servicer His(SH)

NSLDS 03-16-1998
 Loan History Selection 09:08:36

Student Name: JENNIFER S ALVARADO SSN: 043901308
 PLUS Name...: SUZANNE M MORRIS SSN: 053646721
 Current School/Branch Code: 00257500
 Current School Name.....: FRANKLIN PIERCE COLLEGE
 City.....: RINDGE State: NH

Sel	Type	Guaranty Date	Period Begin Date	Period End Date	Amount	Curr Loan Status	MORE: Originating School/Branch
<input checked="" type="checkbox"/>	PL	08-05-1993	09-08-1993	05-17-1994	3090	RP	00257500

RC86 Aid profile 1(A1) Lender History(LH) Guaranty agency History(GH)
 School servicer History(SH) LOan history(LO)

NSLDS 03-16-1998
 Loan Detail 09:08:37

F3=EXIT Student Name: JENNIFER S ALVARADO SSN: 043901308
 PLUS Name...: SUZANNE M MORRIS SSN: 053646721
 Loan Type: PL Amount: 3090 Certification/Guaranty Date: 08-05-1993
 Period Begin Date.....: 09-08-1993 Period End Date.....: 05-17-1994

Outstanding Principal Bal: 1797 Outstanding Principal Bal Date: 06-30-1996
 Outstanding Interest Bal.: 11 Outstanding Interest Bal Date.: 06-30-1996

MORE:
 -- Disbursement -- -- Cancellation -- ---- Refund ---- ---- Status ----
 Date Amount Date Amount Date Amount Date Code
 08-16-1993 3090 08-16-1993 RP

PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

Navigation Schematic for RC86 Loan Detail (PLUS Borrower)

Lender History (PLUS Borrower)

Notes: _____



To access lender history:

Step 1: From the *RC86 Loan Detail* screen, type **LH** on the action bar.

Step 2: Press **ENTER** to display the *RC87 Lender History* screen.

```

RC87  _  Aid profile 1(A1)   Loan Detail(LD)   Lender Br serv his(LB)
        Guar agency His(GH)  LOn history(LO)
-----
                                NSLDS                      03-16-1998
                                Lender History              09:08:38

Student Name: JENNIFER      S ALVARADO                SSN: 043901308
PLUS Name...: SUZANNE      M MORRIS                  SSN: 053646721

Loan Type: PL  Amount:    3090      Certification/Guaranty Date...: 08-05-1993
Period Begin Date....: 09-08-1993  Period End Date.....: 05-17-1994
Sel
  _ Lender Code...: 829988  Lender Branch Code: 0000  Phone Number: 6178491325
    Lender Name...: NELLIE MAE - TREASURER
    Street Address: 50 BRAINTREE HILL PARK SUITE 300
    City.....: BRAINTREE          State: MA  Zip Code: 021840000
    Responsible Begin Date: 10-15-1995  Responsible End Date: 12-31-9999
  _ Lender Code...: 813843  Lender Branch Code: 0000  Phone Number: 6037884769
    Lender Name...: PEOPLES BANK OF LITTON
    Street Address: 3 MAIN STREET
    City.....: LITTLETON          State: NH  Zip Code: 035610000
    Responsible Begin Date: 08-05-1993  Responsible End Date: 10-14-1995

                                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC87 Lender History (PLUS Borrower)

This screen provides a summary of all the lenders associated with a specific loan as well as information about the lender currently holding the loan and the lender's address.

Guaranty Agency History (PLUS Borrower)

Notes:



To access guaranty agency information:

Step 1: At the RC87 Lender History screen, type GH on the action bar.

Step 2: TAB to the desired lender code and type S. As an example, type S next to the first lender code choice.

Step 3: Press ENTER.

```

RC89  _ Aid profile 1(A1)  Loan Detail(LD)  Lender History(LH)
      Loan history(LO)
-----
                        NSLDS                        03-16-1998
                        Guaranty Agency History      09:08:40

Student Name: JENNIFER      S ALVARADO      SSN: 043901308
PLUS Name...: SUZANNE      M MORRIS      SSN: 053646721

Loan Type: PL  Amount:   3090      Certification/Guaranty Date...: 08-05-1993
Period Begin Date....: 09-08-1993  Period End Date.....: 05-17-1994

GA Code: 733  GA Name: NEW HAMPSHIRE HIGHER EDUCATION ASST.
GA Street Address.....: P.O. BOX 877
City.....: CONCORD      State: NH  Zip Code: 033020000
Responsible Begin Date: 08-05-1993

GA Code:      GA Name:
GA Street Address.....:
City.....:      State:      Zip Code:
Responsible Begin Date:

                        PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC89 Guaranty Agency History (PLUS Borrower)

Aid Profile 1 (PLUS Borrower)

Notes:



There are two aid profile screens—RC84 Aid Profile 1 and RC85 Aid Profile 2.

The Aid Profile 1 screen provides a summary of the parent's selected loan, as well as the current loan servicer.

To access RC84 Aid Profile 1:

Step 1: From the RC89 Guaranty Agency History screen, type A1 on the action bar.

Step 2: Press ENTER.

RC84	—	Aid profile 2 (A2)	Loan Detail (LD)	Guaranty agency His (GH)
		Lender History (LH)	School servicer His (SH)	LOan history (LO)
		NSLDS	03-16-1998	
		Aid Profile 1	09:08:41	
Student Name:	JENNIFER	S ALVARADO	SSN:	043901308
PLUS Name...:	SUZANNE	M MORRIS	SSN:	053646721
School/Branch Code:	00257500	School Status:		
School Name.:	FRANKLIN PIERCE COLLEGE			
Address.....:	COLLEGE ROAD			
	RINDGE	NH	03461	
School Branch Servicer Code:				
Loan Period Begin Date.....:	09-08-1993	Loan Period End Date.:	05-17-1994	
Certification/Guaranty Date:	08-05-1993	Loan Amount:	3090	Loan Type: PL
Outstanding Principal Bal...:	1797	Outstanding Principal Bal Date:	06-30-1996	
Outstanding Interest Bal...:	11	Outstanding Interest Bal Date.:	06-30-1996	
Current Lender/Br:	829988 0000	Name:	NELLIE MAE - TREASURER	
Lender Branch Address:	50 BRAINTREE HILL PARK SUITE 300			
	BRAINTREE	MA	021840000	Phone: 6178491325
Current Lender Branch Servicer:	700043			
PRIVACY ACT OF 1974 (AS AMENDED)				
F3=EXIT	F12=RETURN			

RC84 Aid Profile 1 (PLUS Borrower)

Aid Profile 2 (PLUS Borrower)

Notes:



To access the *Aid Profile 2* screen:

Step 1: From the *RC84 Aid Profile 1* screen, type **A2** on the action bar.

Step 2: Press **ENTER**.

RC85	—	Loan Detail(LD)	Lender History(LH)	Guaranty agency His(GH)
		LOan history(LO)		
			NSLDS	03-16-1998
			Aid Profile 2	09:08:42
Student Name:	JENNIFER	S ALVARADO	SSN:	043901308
PLUS Name...:	SUZANNE	M MORRIS	SSN:	053646721
Originating Lender:	813843	Name:	PEOPLES BANK OF LITTON	
Address.....:	3 MAIN STREET			
	LITTLETON	NH	035610000	Phone: 6037884769
Current Guaranty Agency:	733	Name:	NEW HAMPSHIRE HIGHER EDUCATION ASST.	
Address.....:	P.O. BOX 877			
	CONCORD	NH	033020000	
Originating Guar Agency:	733	Name:	NEW HAMPSHIRE HIGHER EDUCATION ASST.	
Address.....:	P.O. BOX 877			
	CONCORD	NH	033020000	
PRIVACY ACT OF 1974 (AS AMENDED)				
F3=EXIT	F12=RETURN			

RC85 Aid Profile 2 (PLUS Borrower)

The *RC85 Aid Profile 2* screen identifies the originating lender, current guaranty agency, and original guaranty agency.

School Branch Servicer History (PLUS Borrower)

This screen can be accessed from the RC83 *Loan History Selection* screen exactly as for student borrowers.

- ◆ School branch servicer history information only applies to Perkins Loans.

Notes:



School Attendance History (PLUS Borrower)

This screen can be accessed from the RC83 *Loan History Selection* screen exactly as for student borrowers.

- ◆ The information refers to the school the student was to attend when the parent applied for the PLUS loan.
- ◆ This does not mean that the parent attended this school.

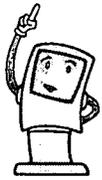
School Transition History (PLUS Borrower)

This screen can be accessed from the RC91 *School Attendance History* screen exactly as for student borrowers.

Enrollment History (PLUS Borrower)

This screen can be accessed from the RC91 *School Attendance History* screen exactly as for student borrowers.

- ◆ The screen displays a student's enrollment status at a given school, not the parent's enrollment status.



ANSWER KEY

Notes:



CASE STUDY 1

Q. What amount did Ian's father previously borrow and what is the name of the lender?

Method 1—Using Student Data

Step 1: Navigate to the *Reporting Capabilities Main Menu* screen and choose *Borrower Tracking Security* to display an unpopulated *Student/Borrower Search* screen.

Step 2: TAB to the SSN field and key in the *student's SSN, First Name, and DOB*. In the PLUS Borrower(P)/Student(S) field, the S (for Student) is already present, so just press ENTER to populate the *RC80 Student/Borrower Search* screen.

Step 3: Type PS on the action bar and press ENTER to access the *RC82 PLUS Borrower Student Selection* screen.

Step 4: Type LO on the action bar and press ENTER to access the *RC83 Loan History Selection* screen.

Step 5: Type LH on the action bar and press ENTER to access the *RC87 Lender History* screen.

A. Ian's father borrowed \$3,550. The lender was New Hampshire Higher Ed Loan Corp.

Method 2—Using Parent Data

Step 1: Navigate to the *Reporting Capabilities Main Menu* screen and choose *Borrower Tracking Security* to display an unpopulated *Student/Borrower Search* screen.

Step 2: **TAB** to the SSN field and key in the *parent's SSN, First Name, and DOB*. In the PLUS Borrower(P)/ Student(S) field, type **P** (for PLUS Borrower) and then press **ENTER** to populate the *RC80 Student/Borrower Search* screen.

Step 3: Type **PS** on the action bar and press **ENTER** to access the *RC82 PLUS Borrower Student Selection* screen.

Step 4: Type **LO** on the action bar and press **ENTER** to access the *RC83 Loan History Selection* screen.

Step 5: Type **LH** on the action bar and press **ENTER** to access the *RC87 Lender History* screen.

A. Ian's father borrowed \$3,550. The lender was New Hampshire Higher Ed Loan Corp.

Notes:



Series of horizontal lines for taking notes.

CASE STUDY 2

Notes:



Q. Were two of James' loans cancelled? If so, what were the amounts, and when were the loans cancelled?

Step 1: Navigate to the *Reporting Capabilities Main Menu* screen and choose *Borrower Tracking Security* to display an unpopulated *Student/Borrower Search* screen.

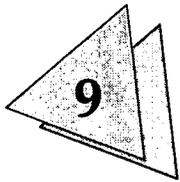
Step 2: **TAB** to the **SSN** field and key in the student's **SSN**, **First Name**, and **DOB**. In the **PLUS Borrower(P)/ Student(S)** field, the **S** (for Student) is already present, so just press **ENTER** to populate the *RC80 Student/Borrower Search* screen.

Step 3: On the populated *Student/Borrower Search* screen, notice that James has received aid under another last name—"Mattei." To check the loans he received under that name, type **LO** on the action bar, type **S** on the selection bar for "James S. Mattei," and press **ENTER**. This brings you to the *RC83 Loan History Selection* screen.

Step 4: None of the loans on the first *Loan History Selection* screen has a Current Loan Status of CA (Cancelled). However, there is a "+" in the **MORE** field, so press **F8** to view more loans. On the second screen, two loans have the CA code.

Step 5: To view more information about the first cancelled loan, type **LD** on the action bar of the *RC83 Loan History Selection* screen, type **S** on the selection bar for the first cancelled loan record, and press **ENTER**. This brings you to the *RC86 Loan Detail* screen for the first cancelled loan.

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Student Status Confirmation Reports

Objectives

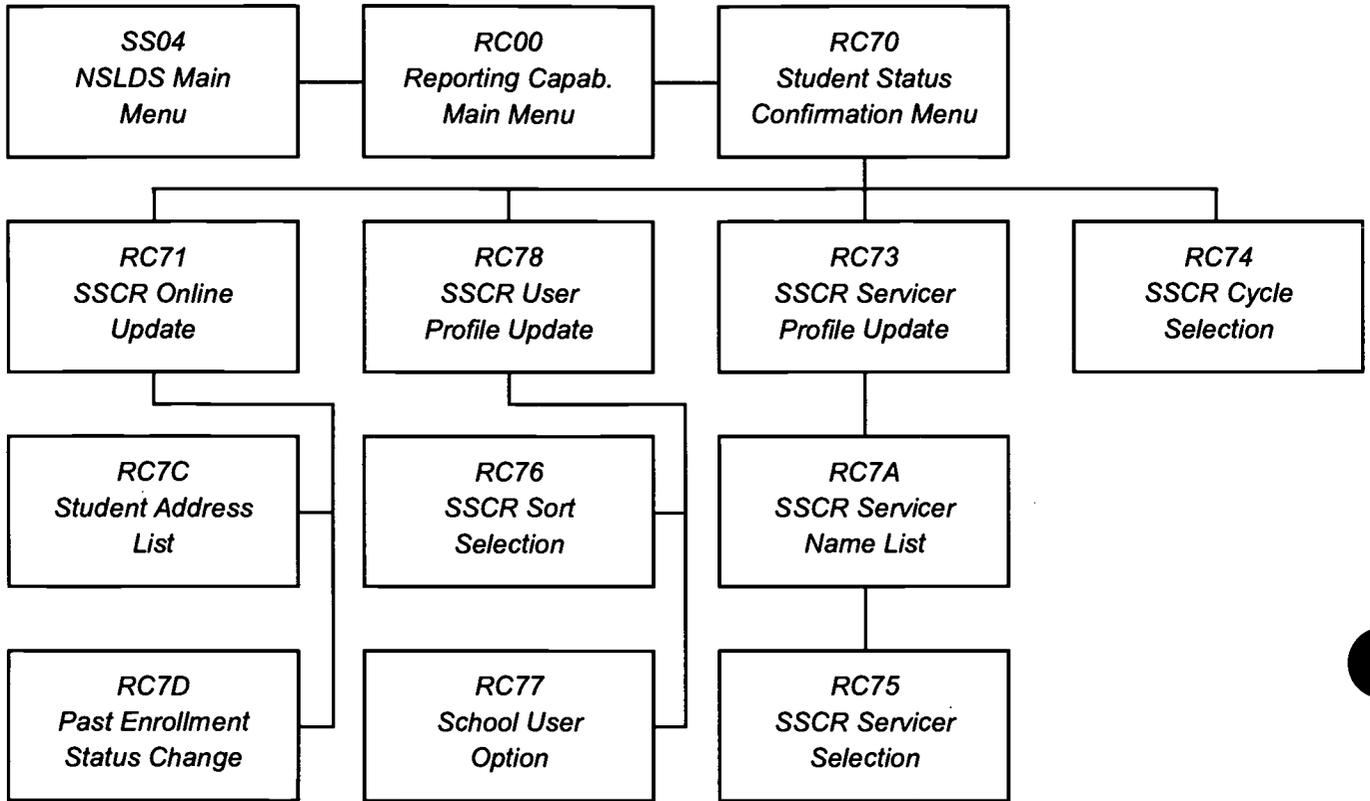
After completing this session, you will be able to:

- ◆ navigate through NSLDS's Student Status Confirmation Report (SSCR) screens, and
- ◆ update SSCR information online.

Contents

- ◆ Student Status Confirmation Update
- ◆ SSCR Cycle Selection
- ◆ Case Studies





Map of NSLDS's Student Status Confirmation Report Function

Student Status Confirmation Menu

The SSCR function is accessed from the NSLDS Main Menu as follows:

Step 1: At the SS04 NSLDS Main Menu, type 2 (Reporting Capabilities Main Menu).

Step 2: Press ENTER.

Step 3: At the RC00 Reporting Capabilities Main Menu, type 6 (Student Status Confirmation Menu).

Step 4: Press ENTER.

Notes:



SS04

NSLDS
NSLDS Main Menu

03-17-1998
12:15:47

Input the number of your choice and press ENTER.

2 1. System Support Main Menu
2. Reporting Capabilities Main Menu

RC00

NSLDS
Reporting Capabilities Main Menu

03-17-1998
12:15:48

Input the number of your choice and press ENTER.

F3 **6** 1. Aggregate Inquiry Main Menu
2. Default Rate Main Menu
3. Report Selection Menu
4. Borrower Tracking Security
5. Financial Aid Transcript Summary
6. Student Status Confirmation Menu

RC70

NSLDS
Student Status Confirmation Menu

03-17-1998
12:15:49

Input the number of your choice and press ENTER.

_ 1. Student Status Confirmation Update
2. SSCR User Profile Update
3. SSCR Servicer Profile Update
4. SSCR Cycle Selection

F3=EXIT

Navigation Schematic for RC70 Student Status Confirmation Menu

The RC70 Student Status Confirmation Menu screen gives you four options:

1. Student Status Confirmation Update
2. SSCR User Profile Update
3. SSCR Servicer Profile Update
4. SSCR Cycle Selection

STUDENT STATUS CONFIRMATION UPDATE

Notes:



Choose the first option on the menu, *Student Status Confirmation Update*, as follows:

Step 1: Type 1.

Step 2: Press ENTER.

This brings you to the *RC71 SSCR Online Update* screen.

SSCR Online Update

The *RC71 SSCR Online Update* screen is used to view and change SSCR data.

```

RC71      D_  Display student(D)  Update sscr(U)  List Address(LA)
          Past enrollment Status change(PS)
-----
                      NSLDS                      03-17-1998
                      SSCR Online Update          12:15:50

School/Branch Code..: 00104600 TALLADEGA COLLEGE
SSN..... First Name.._____ DOB...-_- (MM-DD-YYYY)
Last Name:                      Curr SSN.:
----- Current Student Status Change (Mandatory) -----
Anticipated Completion Date..-_- (MM-DD-YYYY)
Enrollment Code... Enrollment Code Effect Date....-_- (MM-DD-YYYY)
Certification Date.....-_- (MM-DD-YYYY)
Student Designator.._____ (Optional)
----- Student Information Change (Optional) -----
SSN..... First Name.._____ Middle Initial...
Last Name.._____ DOB...-_- (MM-DD-YYYY)
--- Permanent Address Information (Optional)---
Address line 1.._____
Address line 2.._____
City..... State... Zip Code.._____
Country.._____ Effective Date...-_- (MM-DD-YYYY)

PRIVACY ACT OF 1974 (AS AMENDED)

RC004-I: Please enter key fields and press ENTER

F3=EXIT
    
```

RC71 SSCR Online Update

Display Student Information (SSCR Online Update Screen)

Notes:



To populate the RC71 SSCR Online Update screen with a student's information, you would:

Step 1: Type the student's SSN, first name, and DOB.

Step 2: Press ENTER.

```

RC71      D  Display student(D)  Update sscr(U)  List Address(LA)
          Past enrollment Status change(PS)
-----
                      NSLDS                      03-17-1998
                      SSCR Online Update          12:15:51

School/Branch Code.: 00104600 TALLADEGA COLLEGE
SSN..043882658  First Name..COREY_____  DOB..12-06-1974 (MM-DD-YYYY)
Last Name:_____  Curr SSN.:_____

Ar RC71      U  Display student(D)  Update sscr(U)  List Address(LA)
En En       Past enrollment Status change(PS)
-----
                      NSLDS                      03-17-1998
                      SSCR Online Update          12:15:52

School/Branch Code.: 00104600 TALLADEGA COLLEGE
SSN..043882658  First Name..COREY_____  DOB..12-06-1974 (MM-DD-YYYY)
La Last Name: REED_____  Curr SSN.: 043882658
Ad ----- Current Student Status Change (Mandatory) -----
Ad Anticipated Completion Date..__-__-__ (MM-DD-YYYY)
Ci Enrollment Code..  Enrollment Code Effect Date....__-__-__ (MM-DD-YYYY)
Co Certification Date.....__-__-__ (MM-DD-YYYY)

Student Designator.._____ (Optional)
      ---- Student Information Change (Optional) ----
RC SSN....._____  First Name.._____  Middle Initial..__
F3 Last Name.._____  DOB..__-__-__ (MM-DD-YYYY)
      --- Permanent Address Information (Optional)---
Address line 1.._____
Address line 2.._____
City....._____  State..__  Zip Code.._____
Country.._____  Effective Date..__-__-__ (MM-DD-YYYY)

          PRIVACY ACT OF 1974 (AS AMENDED)

RC704-I: Please make changes and press ENTER

F3=EXIT
    
```

RC71 SSCR Online Update (Populated)

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CODES	ENROLLMENT STATUS
A	Approved Leave of Absence
D	Deceased
F	Full Time
G	Graduated
H	Half Time or More, But Less Than Full Time
L	Less Than Half Time
W	Withdrawn
X	Never Attended
Z	No Record Found

SSCR Enrollment Codes

Update SSCR Student Information (SSCR Online Update Screen)

Notes:



To update the student's enrollment data, you would:

Step 1: Type the following information in the appropriate fields on the RC71 SSCR Online Update screen:

- ◆ Anticipated Completion Date
- ◆ Enrollment Code
- ◆ Enrollment Code Effective Date
- ◆ Certification Date
- ◆ Student Designator (optional)

Step 2: Press ENTER.

```

RC71      U  Display student(D)  Update sscr(U)  List Address(LA)
          Past enrollment Status change(PS)
-----
                      NSLDS                      03-17-1998
                      SSCR Online Update          12:15:53

School/Branch Code.: 00104600 TALLADEGA COLLEGE
SSN..043882658  First Name..COREY_____  DOB..12-06-1974 (MM-DD-YYYY)
Last Name: REED                               Curr SSN.: 043882658
----- Current Student Status Change (Mandatory) -----
Anticipated Completion Date..05-24-1998 (MM-DD-YYYY)
Enrollment Code..F  Enrollment Code Effect Date....09-05-1997 (MM-DD-YYYY)
                  Certification Date.....03-17-1998 (MM-DD-YYYY)
Student Designator..741293_____ (Optional)
                  ---- Student Information Change (Optional) ----
SSN....._____  First Name.._____  Middle Initial.._
Last Name.._____  DOB..__-__-__ (MM-DD-YYYY)
                  --- Permanent Address Information (Optional)---
Address line 1.._____
Address line 2.._____
City....._____  State..__  Zip Code.._____
Country.._____  Effective Date..__-__-__ (MM-DD-YYYY)

PRIVACY ACT OF 1974 (AS AMENDED)

AA022-I: Successfully UPDATED

F3=EXIT
    
```

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RC71 SSCR Online Update (After Updating Enrollment Information)

To add a new address for a student:

On the RC71 SSCR Online Update screen, to add a new address for a student you would:

Step 1: Type U on the action bar.

Step 2: Type the following information in the appropriate fields:

- ◆ Address Lines 1 and 2
- ◆ City
- ◆ State
- ◆ Zip Code
- ◆ Country
- ◆ Effective Date

Step 3: Press ENTER.

Notes:



```

RC71      U  Display student(D)  Update sscr(U)  List Address(LA)
          Past enrollment.Status change(PS)
-----
                      NSLDS                      03-17-1998
                      SSCR Online Update          12:15:53

School/Branch Code... 00104600 TALLADEGA COLLEGE
SSN..043882658  First Name..COREY_____  DOB..12-06-1974 (MM-DD-YYYY)
Last Name: REED                               Curr SSN.: 043882658
----- Current Student Status Change (Mandatory) -----
Anticipated Completion Date..05-24-1998 (MM-DD-YYYY)
Enrollment Code..F  Enrollment Code Effect Date....09-05-1997 (MM-DD-YYYY)
                      Certification Date.....03-17-1998 (MM-DD-YYYY)
Student Designator..741293_____ (Optional)
----- Student Information Change (Optional) -----
SSN....._____  First Name.._____  Middle Initial...
Last Name.._____  DOB...-_-_____ (MM-DD-YYYY)
----- Permanent Address Information (Optional) -----
Address line 1..445 THIRD STREET_____
Address line 2.._____
City.....SILVER SPRING_____  State..MD  Zip Code..20901_____
Country..US_____  Effective Date..05-24-1998 (MM-DD-YYYY)

          PRIVACY ACT OF 1974 (AS AMENDED)

AA022-I: Successfully UPDATED

F3=EXIT
    
```

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RC71 SSCR Online Update (After Updating Address Information)

After entering the new address, to review the addresses associated with a student you would:

Notes:



Step 1: Type **LA** on the action bar of the *RC71 SSCR Online Update* screen.

Step 2: Press **ENTER**.

```

RC7C
-----
                        NSLDS                        03-17-1998
                        Student Address List          12:15:54

First Name: COREY      Last Name: REED              SSN: 043882658
Sel      Please make a selection(S) and press ENTER      MORE:
- Address line 1: 445 THIRD STREET
  Address line 2:
  City.....: SILVER SPRING          State: MD  Zip: 20901
  Country.....: US                  Effective Date: 05-24-1998
- Address line 1: 2030 F ST. NW
  Address line 2:
  City.....: MINNEAPOLIS           State: MN  Zip: 22563
  Country.....: US                  Effective Date: 09-15-1997
  Address line 1:
  Address line 2:
  City.....:
  Country.....:                     State:      Zip:
  Address line 1:                     Effective Date:
  Address line 2:
  City.....:
  Country.....:                     State:      Zip:
  Address line 1:                     Effective Date:
  Address line 2:
  City.....:
  Country.....:
  Address line 1:
  Address line 2:
  City.....:
  Country.....:

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC7C Student Address List

Past Enrollment Status Change

Notes:



NSLDS stores all enrollment records that your school has submitted. To view the student's past enrollment, you would:

Step 1: Type **PS** on the action bar of the *RC71 SSCR Online Update* screen.

Step 2: Press **ENTER**.

This would bring you to the *RC7D Past Enrollment Status Change* screen.

```

RC7D      _ Add(A)  Change(C)  Delete(DE)
-----
                    NSLDS                      03-17-1998
                Past Enrollment Status Change    12:15:55

Sch/Br Code.: 00104600  TALLADEGA COLLEGE
Student Name: COREY      REED                      SSN: 043882658
Anticipated Compl Date: 05-24-1998  (MM-DD-YYYY)    (MM-DD-YYYY)
Enrollment Code.._  Effective Date.._--_--_  Cert Date.._--_--_
----- Current Status -----
Enroll Code: F  Effec Date: 09-05-1997  Cert Date: 09-15-1997  Source: SSCR
Make a selection(S) and press ENTER for UPDATE or DELETE
  Enroll
Sel Code          Description                Effec Date  Certi Date

                PRIVACY ACT OF 1974 (AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC7D Past Enrollment Status Change

The *RC7D Past Enrollment Status Change* screen allows you to access and make online changes to a student's past enrollment status. You can add, change, and delete data such as:

- ◆ enrollment code,
- ◆ effective date, and
- ◆ certification date.

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The screen below shows the process of adding a past enrollment period record for a student.

Notes:



```

RC7D      A  Add(A)  Change(C)  DElete(DE)
-----
                        NSLDS                        03-17-1998
                        Past Enrollment Status Change  12:15:56

Sch/Br Code.: 00104600  TALLADEGA COLLEGE
Student Name: COREY      REED                      SSN: 043882658
Anticipated Compl Date: 05-24-1998  (MM-DD-YYYY)    (MM-DD-YYYY)
Enrollment Code..A  Effective Date..10-01-1996    Cert Date..03-17-1998
    
```

```

RC7D      _  Add(A)  Change(C)  DElete(DE)
-----
                        NSLDS                        03-17-1998
                        Past Enrollment Status Change  12:15:57

Sch/Br Code.: 00104600  TALLADEGA COLLEGE
Student Name: COREY      REED                      SSN: 043882658
Anticipated Compl Date: 05-24-1998  (MM-DD-YYYY)    (MM-DD-YYYY)
Enrollment Code..A  Effective Date..10-01-1996    Cert Date..03-17-1998
----- Current Status -----
Enroll Code: F  Effec Date: 09-05-1997  Cert Date: 03-17-1998  Source: SSCR
Make a selection(S) and press ENTER for UPDATE or DELETE
  Enroll
Sel Code      Description                      Effec Date  Certi Date
-   A  APPROVED LEAVE OF ABSENCE          10-01-1996  03-17-1998

                        MORE:
                        Effec Date  Certi Date

                        PRIVACY ACT OF 1974 (AS AMENDED)

AA017-I: Successfully ADDED

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC7D Past Enrollment Status Change—Adding the First Enrollment Record

The screen below shows the process of adding a second past enrollment period record for the same student.

Notes:



```

RC7D      A  Add(A)  Change(C)  DElete(DE)
-----
                        NSLDS                      03-17-1998
                        Past Enrollment Status Change 12:15:58

Sch/Br Code.: 00104600 TALLADEGA COLLEGE
Student Name: COREY      REED                      SSN: 043882658
Anticipated Compl Date: 05-24-1998 (MM-DD-YYYY)      (MM-DD-YYYY)
Enrollment Code..L   Effective Date..01-12-1994   Cert Date..03-17-1998
----- Current Status -----
Enroll Code: F  Effec Date: 09-05-1997  Cert Date: 03-17-1998  Source: SSCR
Make a selection(S) and press ENTER for UPDATE or DELETE
  Enroll
Sel Code      Description                      Effec Date  Certi Date
-   A   APPROVED LEAVE OF ABSENCE           10-01-1996  03-17-1998
  MORE:
  
```

```

RC7D      _  Add(A)  Change(C)  DElete(DE)
-----
                        NSLDS                      03-17-1998
                        Past Enrollment Status Change 12:15:59

Sch/Br Code.: 00104600 TALLADEGA COLLEGE
Student Name: COREY      REED                      SSN: 043882658
Anticipated Compl Date: 05-24-1998 (MM-DD-YYYY)      (MM-DD-YYYY)
Enrollment Code..L   Effective Date..01-12-1994   Cert Date..03-17-1998
----- Current Status -----
Enroll Code: F  Effec Date: 09-05-1997  Cert Date: 03-17-1998  Source: SSCR
Make a selection(S) and press ENTER for UPDATE or DELETE
  Enroll
Sel Code      Description                      Effec Date  Certi Date
-   A   APPROVED LEAVE OF ABSENCE           10-01-1996  03-17-1998
-   L   LESS THAN HALF TIME                 01-12-1994  03-17-1998

                        PRIVACY ACT OF 1974 (AS AMENDED)

AA017-I: Successfully ADDED

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
  
```

RC7D Past Enrollment Status Change—Adding the Second Enrollment Record

Past Enrollment Status Change— "Change" Option

The Change option allows you to edit a student's enrollment period information online.

As an example, suppose there is an error in the effective date of the sample student's period of less than half time enrollment. To correct the effective date, you would:

Step 1: Type **C** on the action bar.

Step 2: **TAB** past the Enrollment Code field to the Effective Date field and key in the new date.

Step 3: In the Certification Date field, key in today's date.

Step 4: In the Current Status section, type **S** next to the desired choice—the Less Than Half Time record.

Step 5: Press **ENTER**.

Notes:



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```

RC7D      C  Add(A)  Change(C)  Delete(DE)
-----
                        NSLDS                        03-17-1998
                        Past Enrollment Status Change    12:16:00

Sch/Br Code.: 00104600  TALLADEGA COLLEGE
Student Name: COREY      REED                      SSN: 043882658
Anticipated Compl Date: 05-24-1998  (MM-DD-YYYY)      (MM-DD-YYYY)
Enrollment Code..L  Effective Date..09-09-1993  Cert Date..03-17-1998
----- Current Status -----
Enroll Code: F  Effec Date: 09-05-1997  Cert Date: 03-17-1998  Source: SSCR
Make a selection(S) and press ENTER for UPDATE or DELETE

Enroll
Sel Code      Description      Effec Date  Certi Date
-   A   APPROVED LEAVE OF ABSENCE      10-01-1996  03-17-1998
g   L   LESS THAN HALF TIME           01-12-1994  03-17-1998
    
```

```

RC7D      _  Add(A)  Change(C)  Delete(DE)
-----
                        NSLDS                        03-17-1998
                        Past Enrollment Status Change    12:16:01

Sch/Br Code.: 00104600  TALLADEGA COLLEGE
Student Name: COREY      REED                      SSN: 043882658
Anticipated Compl Date: 05-24-1998  (MM-DD-YYYY)      (MM-DD-YYYY)
Enrollment Code..L  Effective Date..09-09-1993  Cert Date..03-17-1998
----- Current Status -----
Enroll Code: F  Effec Date: 09-05-1997  Cert Date: 03-17-1998  Source: SSCR
Make a selection(S) and press ENTER for UPDATE or DELETE

Enroll
Sel Code      Description      Effec Date  Certi Date
-   A   APPROVED LEAVE OF ABSENCE      10-01-1996  03-17-1998
-   L   LESS THAN HALF TIME           09-09-1993  03-17-1998
    
```

PRIVACY ACT OF 1974 (AS AMENDED)

AA022-I: Successfully UPDATED

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN

RC7D Past Enrollment Status Change—Changing an Enrollment Record

The changes have been made, as shown in the Current Status section. The message "Successfully UPDATED" is displayed at the bottom of the screen.

Past Enrollment Status Change— "Delete" Option

This option lets you delete an enrollment period previously reported for a student.

As an example, suppose the sample student was not actually enrolled for the 1993-94 academic year. To delete this enrollment period, you would:

Step 1: Type **DE** on the action bar.

Step 2: In the Current Status section, type **S** next to the desired choice—the Less Than Half Time record.

Step 3: Press **ENTER**.

Notes:



```

RC7D      DE  Add(A)  Change(C)  DElete(DE)
-----
                                NSLDS                03-17-1998
                                Past Enrollment Status Change  12:16:02

Sch/Br Code.: 00104600  TALLADEGA COLLEGE
Student Name: COREY      REED                      SSN: 043882658
Anticipated Compl Date: 05-24-1998  (MM-DD-YYYY)      (MM-DD-YYYY)
Enrollment Code..L  Effective Date..09-09-1993  Cert Date..03-17-1998
----- Current Status -----
Enroll Code: F  Effec Date: 09-05-1997  Cert Date: 03-17-1998  Source: SSCR
Make a selection(S) and press ENTER for UPDATE or DELETE

  Enroll
Sel Code      Description                      Effec Date  Certi Date
-   A   APPROVED LEAVE OF ABSENCE          10-01-1996  03-17-1998
g  L   LESS THAN HALF TIME                09-09-1993  03-17-1998
    
```

```

RC7D      _  Add(A)  Change(C)  DElete(DE)
-----
                                NSLDS                03-17-1998
                                Past Enrollment Status Change  12:16:02

Sch/Br Code.: 00104600  TALLADEGA COLLEGE
Student Name: COREY      REED                      SSN: 043882658
Anticipated Compl Date: 05-24-1998  (MM-DD-YYYY)      (MM-DD-YYYY)
Enrollment Code..L  Effective Date..09-09-1993  Cert Date..03-17-1998
----- Current Status -----
Enroll Code: F  Effec Date: 09-05-1997  Cert Date: 03-17-1998  Source: SSCR
Make a selection(S) and press ENTER for UPDATE or DELETE

  Enroll
Sel Code      Description                      Effec Date  Certi Date
-   A   APPROVED LEAVE OF ABSENCE          10-01-1996  03-17-1998

                                MORE:

                                PRIVACY ACT OF 1974 (AS AMENDED)

AA018-I: Successfully DELETED

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
    
```

RC7D Past Enrollment Status Change—Deleting an Enrollment Record

The Less Than Half Time record has been deleted, as shown in the Current Status section. The message "Successfully DELETED" is displayed at the bottom of the screen.

SSCR CYCLE SELECTION

Notes:



To access the SSCR Cycle Selection screen:

Step 1: Press **F3** to return to the *RC70 Student Status Confirmation Menu*.

Step 2: Type **4** (*SSCR Cycle Selection*).

Step 3: Press **ENTER**.

RC70

NSLDS 03-17-1998
 Student Status Confirmation Menu 12:16:13

Input the number of your choice and press ENTER.

4 1. Student Status Confirmation Update
 2. SSCR User Profile Update
 3. SSCR Servicer Profile Update
 4. SSCR Cycle Selection

RC74 U Update(U)

NSLDS 03-17-1998
 SSCR Cycle Selection 12:16:14

F3- School/Branch Code...: 00104600 TALLADEGA COLLEGE
 Select the School Category

 _ 1. Quarter
 2. Semester
 3. Others

Cycle Number	Month	Last Generated	Required Indicator (Y)
1	JANUARY		-
2	FEBRUARY		-
3	MARCH		-
4	APRIL		-
5	MAY		-
6	JUNE		-
7	JULY		-
8	AUGUST		-
9	SEPTEMBER		-
10	OCTOBER		-
11	NOVEMBER		-
12	DECEMBER		-

RC747-I: Select a Category and Update SSCR cycle

F3=EXIT

Navigation Schematic for RC74 SSCR Cycle Selection

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The *SSCR Cycle Selection* screen prompts you to "Select a Category and Update SSCR cycle."

Notes:



You must select one of the following School Categories:

1. Quarter
2. Semester
3. Others

The table below shows how many cycles you can select and how far apart they must be.

SCHOOL CATEGORY	CYCLES
Quarter	Minimum of 3 cycles, 1 each regular term (Fall, Winter, and Spring), 3 months apart.
Semester	Minimum of 2 cycles, 1 each term (Fall and Spring), 4 months apart. If 4 or more cycles are selected, they must be 2 months apart.
Others	Minimum of 2 cycles, 4 months apart. If 5 or 6 cycles are selected, they must be 2 months apart.
Default	6 cycles, 1 every even month.

- Notes:
1. No more than 6 cycles may be selected.
 2. For term institutions, a minimum of 1 cycle is required for each term.

Scheduling SSCR Cycles

Step 1: Press the **HOME** key to bring the cursor to the action bar and type **U**.

Step 2: **TAB** to the School Category field.

Step 3: Type the number of the School Category. The cursor automatically advances to the Required Indicator column to the right of January.

Step 4: Type **Y** for each desired month, pressing **TAB** to advance to other months.

Step 5: Press **ENTER**.

Your SSCR schedule is updated and a confirmation message "*Successfully UPDATED*" is displayed at the bottom of the screen.

Notes:



Removing SSCR Cycles

To remove an existing cycle:

Step 1: On the *RC74 SSCR Cycle Selection* screen, check that the appropriate number is already entered in the School Category field—in our example, this should be the number "1".

Step 2: Advance to the month you want to remove by pressing **TAB** or using other methods of moving the cursor.

Step 3: Use the **DELETE** key to delete the **Y** at the March cycle (or type **N** over the **Y**).

Step 4: Press **ENTER**.

The **Y** is now removed from the March cycle, and a confirmation message "*Successfully UPDATED*" is displayed at the bottom of the screen.

Notes:



RC74 U Update(U)

NSLDS 03-17-1998
SSCR Cycle Selection 12:16:17

School/Branch Code...: 00104600 TALLADEGA COLLEGE

Select the School Category

- 1 1. Quarter
- 2. Semester
- 3. Others

Cycle Number	Month	Last Generated	Required Indicator (Y)
1	JANUARY		Y
2	FEBRUARY		-
3	MARCH		[deleted]
4	APRIL		-
5	MAY		Y
6	JUNE		-
7	JULY		-
8	AUGUST		-
9	SEPTEMBER		Y
10	OCTOBER		-
11	NOVEMBER		Y
12	DECEMBER		-

RC74 U Update(U)

NSLDS 03-17-1998
SSCR Cycle Selection 12:16:18

School/Branch Code...: 00104600 TALLADEGA COLLEGE

Select the School Category

- 1 1. Quarter
- 2. Semester
- 3. Others

Cycle Number	Month	Last Generated	Required Indicator (Y)
1	JANUARY		Y
2	FEBRUARY		-
3	MARCH		-
4	APRIL		-
5	MAY		Y
6	JUNE		-
7	JULY		-
8	AUGUST		-
9	SEPTEMBER		Y
10	OCTOBER		-
11	NOVEMBER		Y
12	DECEMBER		-

AA022-I: Successfully UPDATED

F3=EXIT

RC74 SSCR Cycle Selection—Removing the March Cycle

CASE STUDIES

Notes:



CASE STUDY 1

You will be given the identifiers for a "dummy" student in the NSLDS Training Database.

Use the SSCR function to update your student's enrollment information as follows:

- ◆ Anticipated Completion Date:
05-24-1998
- ◆ Enrollment Code: F
- ◆ Enrollment Code Effective Date:
09-05-1997
- ◆ Certification Date: use today's date
- ◆ Student Designator: 741293

CASE STUDY 2

You will be given the identifiers for a "dummy" student in the NSLDS Training Database.

Use the SSCR function to add a new address for your student as follows:

- ◆ 445 Third Street, Silver Spring, MD
20901 US
- ◆ Effective Date: 05-24-1998

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ANSWER KEY

Notes:



CASE STUDY 1

See page Nine-11 for model procedures and screens relevant to this case study.

CASE STUDY 2

See pages Nine-12 through Nine-14 for model procedures and screens relevant to this case study.

CASE STUDY 3

See pages Nine-24 through Nine-29 for model procedures and screens relevant to this case study.

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Wrap Up

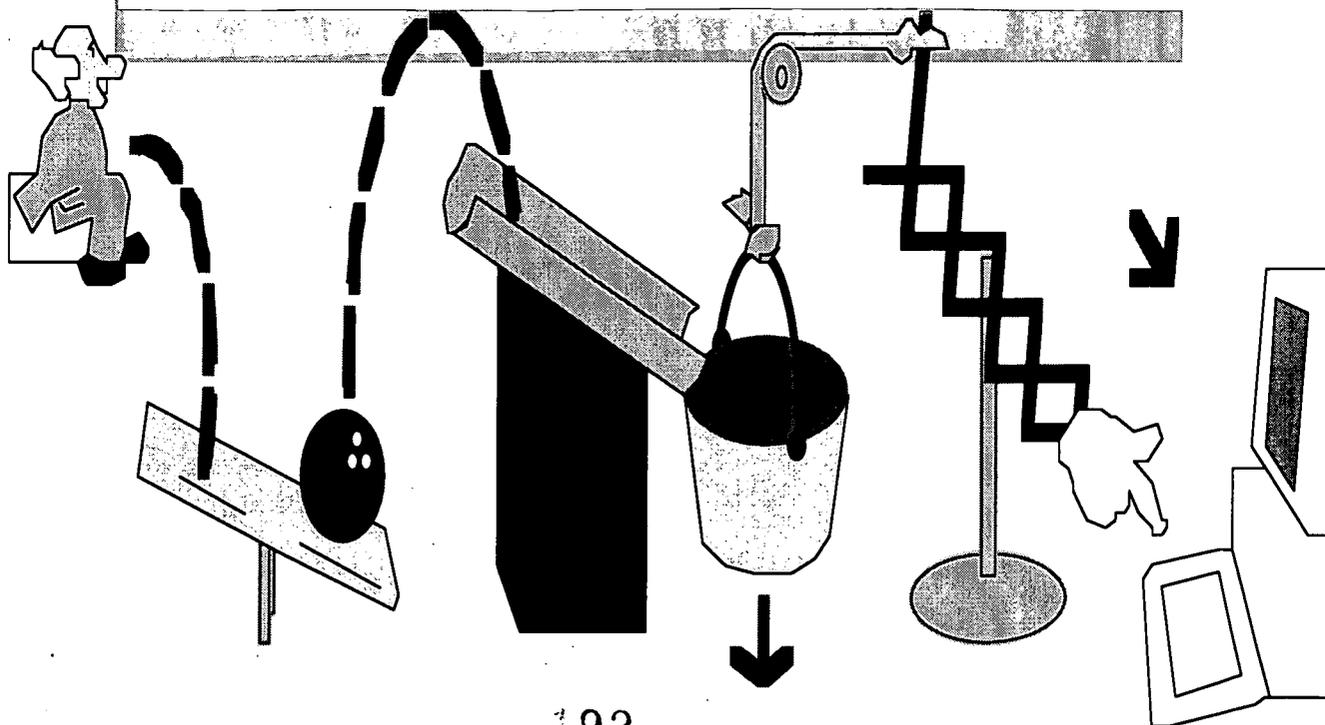
Objectives

By completing this session, you will:

- ◆ provide feedback on improving NSLDS, and
- ◆ provide feedback on improving the workshop.

Contents

- ◆ Wrap Up





U.S. Department of Education
Office of Postsecondary Education
Student Financial Assistance Programs

Form Approved
OMB Number: 1840-0112
Expiration Date: 11/30/99

Training Assessment Form

Title IV Student Financial Assistance Programs

Date: _____ Region: _____ Location: _____

The information collected on this form will be used by Student Financial Assistance Programs to determine the effectiveness of the training and materials provided. Any information you provide will be deemed confidential. You are not required to answer any of the questions on this form. Names will not be published in any compilation of this data.

Identification of Respondent (optional)

Name _____	Position _____
Institution/Agency _____	Type of Institution/College: <input type="checkbox"/> One-year or less <input type="checkbox"/> Public <input type="checkbox"/> Two- or Three-year <input type="checkbox"/> Private nonprofit <input type="checkbox"/> Four-year or more <input type="checkbox"/> Private proprietary
Street or P.O. Box # _____	
City _____	
State _____ Zip Code _____	
Length of time in financial aid related responsibilities: (years/months) _____	
Title IV Programs you participate in: <input type="checkbox"/> <i>Federal Pell</i> <input type="checkbox"/> <i>Federal Direct Loans</i> <input type="checkbox"/> <i>Federal Family Educational Loan Programs</i> <input type="checkbox"/> <i>Federal Campus-Based Programs</i>	

Training Content (Please respond to each of the following questions.)

1. Did the workshop provide information that you can apply to your work? Yes/No If No, why not?

2. Which sessions were the most beneficial to you?

3. Which sessions were the least beneficial to you?

4. How would you suggest the training content be expanded or reduced?

Training Facilities

5. Were you satisfied with the facilities (training room(s), hotel accommodations, location, accessibility, learning environment, etc.)?
Yes/No If No, why not?

Training Materials

6. Check all the phrases that describe the training *materials*, including the *overheads*:

- | | | |
|--|---|--|
| <input type="checkbox"/> Well-organized | <input type="checkbox"/> Consistent | <input type="checkbox"/> Useful charts and illustrations |
| <input type="checkbox"/> Difficult to follow | <input type="checkbox"/> Inconsistent | <input type="checkbox"/> Not enough charts and illustrations |
| <input type="checkbox"/> Clear and concise | <input type="checkbox"/> Contributed to my learning | <input type="checkbox"/> Relevant case studies and exercises |
| <input type="checkbox"/> Too complex | <input type="checkbox"/> Not relevant to my job | <input type="checkbox"/> Not enough case studies and exercises |
| <input type="checkbox"/> Accurate | <input type="checkbox"/> Attractive and attention-getting | <input type="checkbox"/> Useful for future reference |
| <input type="checkbox"/> Inaccurate | <input type="checkbox"/> Too detailed | <input type="checkbox"/> Other _____ |

Instructors

7. Circle Yes or No for each characteristic.

(Instructor's Name)	Clear Presenter ?		Well-Organized Presenter ?		Knowledge-able About Subject ?		Responsive To Questions ?		(Other Comments)
	Yes	No	Yes	No	Yes	No	Yes	No	

Comments

8. What suggestions would you offer to improve the workshop/materials? _____

9. What additional training would you like the U. S. Department of Education to provide? _____

10. Other Comments and Suggestions

(Please use this space and the back of this page to elaborate on any of the previous questions, or to make additional comments or suggestions about this training.)

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U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement (OERI)
Educational Resources Information Center (ERIC)



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