Federal Student Aid
An OFFICE of the U.S. DEPARTMENT of EDUCATION

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NATIONAL STUDENT LOAN DATA SYSTEM: HELP TEXT

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WELCOME

The National Student Loan Data System (NSLDS) Login page enables users to logon to the NSLDS Professional Access Website, using their FSA User ID and Password. Once a user has successfully logged into NSLDS, if a user has multiple profiles, they will be prompted to select the appropriate organization code for their business needs. Once the user has successfully navigated to the User Access Verification page, the NSLDS Home page appears.

The NSLDS Login Page contains the following topics:

- Sign-Up Information
- Log In Information
- About NSLDS
- Official Cohort Default Rates

IMPORTANT HELP TEXT NOTICE:

The Help Text is separated by View access and Online Update access. Authorized users with update capabilities can modify the information on NSLDS Web pages. This Help Text provides instructions for Authorized Users making web updates with '(Authorized Users)' in the title of the section.

NATIONAL STUDENT LOAN DATA SYSTEM

The National Student Loan Data System (NSLDS) Login page enables authorized users to log into the NSLDS Professional Access Website; using their FSA User ID and Password.

On this page, there are three selectable cards displayed and a link the Official Cohort Default Rate Searchable Database. The Sign-Up Information card directs the user to the SAIG Enrollment site, which contains information about enrolling for NSLDS access. The Log In Information card directs the user to help text for assistance logging into NSLDS. The About NSLDS card directs the user to System Requirements, Contact NSLDS, and News & Events. the Official Cohort Default Rates link directs users to the Searchable Database of Schools, Guaranty Agencies, and Lenders Cohort Default Rates. The Help Center can also be accessed via the Help Center link located at the top of the page. The Contact Us link directs the user to the About NSLDS Professional Access Web Site page.

How to log on to the NSLDS Professional Access Site:

1) Click **Log in** located at the top right corner to be directed to the FSA Access and Identity Management System (AIMS) Login page
2) Input FSA User ID and Password and click **Login**
3) On the Privacy Act & Warning page
    a. Review the Privacy Act & Warning Information
    b. Click **Accept**
4) On the Token Validation Page
    a. Enter the **Token Validation**
    b. Click **Validate**
5) On the Rules of Behavior page
    a. Review the Rules of Behavior
    b. Select the box to **Acknowledge the Rules of Behavior**
    c. Click **Accept**
6) Once a user has successfully logged into NSLDS,
    a. The user is directed to the NSLDS Homepage
    b. If a user has multiple profiles, they will be prompted to select the appropriate organization code for their business needs (Table 1)

LOGIN (MULTIPLE ORGANIZATIONS)

A user associated with multiple organizations needs to select an organization prior to logging into NSLDS.

1. Filter by **Organization Code** or **Organization Name** in the dropdown
    a. Organization Code requires at least one digit entered (8 max)
    b. Organization Name requires at least one character entered (70 max)
2) Click on the bubble to select the desired organization
3) Click on the **Select** button

An error message displays when the filters selected do not return any matches. All matches in the results table can be sorted by the following criteria:

- Organization Code
- Organization Name
- User SAIG Mailbox

- **Table 1: User Logging in Organization Selection**

First time user logs on	User has previously logged on
User must select an organization to proceed	To proceed with the previously selected organization, click Cancel
After a successful organization selection, users are directed to the NSLDS Home Dashboard. If a user would like to change their profile, users can select the profile dropdown and click on "Select Another Organization".	

SIGN UP INFORMATION

Link to the SAIG Enrollment site.

LOG IN INFORMATION

The link within this section directs the user to Help Text detailing how to login to NSLDS Professional web site. Users can also find information on password assistance.

ABOUT THE NSLDS SITE

The About NSLDS Professional Access Website page contains the following sections:

- **System Requirements** –information about browser configuration
- **Contact NSLDS** – email and toll free/contact information for NSLDS
- **News & Events** – clickable links to view newsletters and reference materials for archived years

OFFICIAL COHORT DEFAULT RATES

Near the bottom of the Login page is a link to the Official Cohort Default Rate Searchable Database. The link directs the user to the public CDR pages; to search for School, Guaranty Agency, and Lender Official Cohort Default Rates.

HELP CENTER AND CONTACT US

The Help Center and Contact Us buttons are located at the top right of the page.

HELP CENTER

The Help Center page displays two sections:

- Help Text Document
- Frequently Asked Questions

In the Help Text Document section, the user can click on the **Download PDF** link to view the full Help Text Document or to download the PDF.

In the Frequently Asked Questions section, NSLDS displays Frequently Asked Questions (FAQs) divided into the following topics:

- About the National Student Loan Data System (NSLDS) Site
- Technical/Browser Questions
- Access Questions
- User ID Questions

- Data Accuracy
- Frequently Referenced Department of Education Documentation
- Frequently Asked Questions Regarding NSLDS Data

Upon selecting a topic from the Frequently Asked Questions section, the link directs users to the selected section within the FAQ page. The first question and answer is displayed, while the remaining can be expanded by clicking the accordion sign next to a question or **Expand All/Collapse All**. The user can navigate back to the top of the FAQs page by clicking **Back to Top** located at the bottom of the page.

NSLDS HOMEPAGE

At the top of every NSLDS page the user will see the Federal Student Aid | NSLDS logo banner which includes the user information. Beneath this information, the navigation banner includes the main categories Aid Recipient, School, Enrollment, Data Providers, Reports, Admin Tools, and Resources (additional information on each section below). Additionally, each page on NSLDS will display the page name followed by the page content.

Once a user has successfully logged into the NSLDS Site, the user is redirected to the NSLDS Homepage. Under the page name the user will see a card with their organization name, status, and OPEID/organization ID. Beneath this card, the page contains three additional sections:

- **Popular Site Links** – quickly navigate to webpages frequently visited throughout NSLDS
- **Template Downloads** – downloadable templates and **Go to Spreadsheet Submittals** button
- **Announcements** – announcements relevant to new information on the NSLDS site

POPULAR SITE LINKS

The Popular Site Links section has the four pages most frequently visited by the user throughout the NSLDS site. These links direct users to the Enrollment Dashboard, Financial Aid Dashboard, School Profile page and Reports.

TEMPLATE DOWNLOADS

On the NSLDS Homepage, the Template Downloads section displays next to the Popular Site Links section. In the Template Downloads section, authorized users can download Spreadsheet Submittal Templates based on their user role.

Below is a list of all the spreadsheet submittal templates that exist within NSLDS. Users should note that some Templates may be unavailable based on Partner group:

Table 2: Spreadsheet Submittal Templates

Template Download
Enrollment Spreadsheet Submittal Template
Exit Counseling Spreadsheet Submittal Template
FLS Spreadsheet Submittal Template
IDR Spreadsheet Submittal Template
Loan Discharge Spreadsheet Submittal Template
Loan Forgiveness Spreadsheet Submittal Template
Perkins Spreadsheet Submittal Template

Reaffirmation Spreadsheet Submittal Template

Users can click on **Go to Spreadsheet Submittals** which redirects the user to either the Data Provider Submittal page or the Spreadsheet Submittal page, depending on the user.

ANNOUNCEMENTS

The Announcements section is at the bottom of the NSLDS Homepage. All NSLDS users have the capability to view the Announcements. This section highlights the most up to date and relevant NSLDS announcements, and contains the following Announcement details:

- Announcement Title
- Announcement Information
- Date the announcement was posted
- Time (EST) the announcement was posted

NSLDS allows users to view additional information about the Announcement by expanding the accordion and clicking on the **Show More** link, which shows the entire announcement. NSLDS displays a notification when a new NSLDS Announcement has been posted. Notifications will only be posted for 14 days.

AID RECIPIENT

To access an aid recipient's financial aid data, click **Search Aid Recipient** in the top right corner of the navigation banner. Upon selecting this option, a pop-up menu appears giving the user the option to either select a Previously Searched Aid Recipient or enter key identifiers into the Search By section.

SEARCH AID RECIPIENT

Users have the option to search a previously retrieved aid recipient or use the search fields to locate an aid recipient, using key identifiers. Aid recipients can be searched by varying criteria, such as:

- First Name
- Date of Birth
- SSN
- Award ID
- NSLDS Label

If the search results in a single aid recipient, the page automatically populates with that student's information. If there are multiple results, a selection search result appears. After selecting an aid recipient, the aid recipient appears in a banner at the top of the page below the navigation banner. In the aid recipient banner, the user can:

1. View identifier history by selecting the **H** icon before the SSN.
    a. Users with Update Access can update the Aid Recipients identifiers, from Identifier History, by clicking on Update Borrower Identifiers.
2. View the full unmasked SSN by clicking on the **eye** icon.
3. Or completely clear the aid recipient by selecting **Clear Aid Recipient**

FINANCIAL AID DASHBOARD

Once the user has located an aid recipient, the Financial Aid Dashboard populates with the recipient's financial aid information. The Financial Aid Dashboard contains data about a borrower's Total Outstanding Balance, Aggregate Loan Calculation Award ID Bypass, loans, grants, Master Promissory Note (MPNs), Teacher Loan Forgiveness, and Active-Duty Status.. Based on the user profile and access levels, users can view some or all, of these pages. Users can view additional information using the call-out buttons and hyperlinked text. The Financial Aid Dashboard consists of:

1. **Aid Recipient Alerts** – This section, if applicable, displays alerts or warning icons that may need special attention.
2. **Total Outstanding Balance** – This section displays the Outstanding Principal Balance (OPB), the Outstanding Interest Balance (OIB), and Total Other Fees. Users can also select the **View Loans** option to navigate to the Loan Summary page.
3. **Award ID Bypass (authorized users only)** - Award ID Bypass allows for the association of an Award ID to an existing borrower.
4. **Aggregate Loan Calculations** – This section displays the Borrower's aggregate loan totals displayed by loan type.
5. **Grants** - The Grants section displays Lifetime Eligibility Used (LEU) for Pell Grants, Iraq and Afghanistan Service Grant (IASG), and Teacher Education Assistance for College and Higher Education (TEACH) Grants.
6. **Master Promissory Notes** – The Master Promissory Note (MPN) section displays all Master Promissory Note (MPN) information for the selected student or PLUS borrower. The information includes MPN Type, MPN Status and Plus Borrower SSN (if applicable).
7. **Teacher Loan Forgiveness** – This section displays all active Teacher Loan Forgiveness records.
8. **Active-Duty Status** – This section allows users to view Active-Duty Status information (if applicable, section does not present if there is no data to populate it).

AID RECIPIENT ALERTS

After an aid recipient has been retrieved, alerts or warning icons may appear towards the top of the page, the page name and the dashboard. These Icons only appear when the aid recipient meets certain triggering criteria. The following table describes the possible warnings. For a description of each icon, visit the Icon Library.

Table 4: Loan and Grant Warning Icons

Icon	Triggering Criteria	Warning or Information	Link
	Loan Icons		
Bankruptcy	The Aid Recipient has an Active Bankruptcy Flag of 'Y'.	Warning	N/A
Defaulted	The Aid Recipient has an Active Defaulted Loan Flag of 'Y'.	Warning	Loan Summary Page with Defaulted Loans Filter applied
Discharged	The Aid Recipient has one of the following Discharge Loan Codes as stored in NSLDS: - D (Death) - P (Permanent) **OR** The Aid Recipient has a loan with a status of 'PZ'.'	Warning	N/A

Reaffirmation	The Aid Recipient holds at least one loan that is associated with an active Reaffirmation Record as stored in NSLDS.	Information	Reaffirmation Page
Overpayments	If the Aid Recipient has at least one of the following with an active overpayment stored in NSLDS: - Pell Grant - Perkins Loan - Academic Competitiveness Grants (ACG) - National Science Mathematics Access to Retain Talent Grants (SMART) - Teacher Education Assistance for College and Higher Education Grants (TEACH) - Iraq and Afghanistan Service Grant (IASG) -Federal Supplemental Education Opportunity Grant (FSEOG)	Warning	Overpayments Page
Additional Unsubsidized Loans	The Aid Recipient has an Additional Unsubsidized Loans Indicator of 'Y'.	Warning	N/A
Fraud	The Aid Recipient has a Fraud Flag of 'Y'.	Warning	N/A
Close or Equal to Undergrad Subsidized Limit	The Aid Recipient is close or equal to the undergraduate aggregate limit for subsidized loans.	Warning	N/A
Exceeds Undergrad Subsidized Limit	The Aid Recipient exceeds the undergraduate aggregate limit for subsidized loans.	Warning	Loan Summary Page with Exceeds Undergrad Sub Filter applied
Close or Equal to Undergrad Combined Limit	The Aid Recipient is close or equal to the undergraduate aggregate combined limit.	Warning	N/A
Exceeds Undergrad Combined Limit	The Aid Recipient exceeds the undergraduate aggregate combined limit.	Warning	Loan Summary Page with Exceeds Undergrad Comb. Filter applied
Close or Equal to Grad Subsidized Limit	The Aid Recipient is close or equal to the graduate aggregate limit for subsidized loans.	Warning	N/A
Exceeds Grad Subsidized Limit	The Aid Recipient exceeds the graduate aggregate limit for subsidized loans.	Warning	Loan Summary Page with Exceeds Grad Sub Filter applied
Close or Equal to Grad Combined Limit	The Aid Recipient is close or equal to the graduate aggregate combined limit.	Warning	N/A
Exceeds Grad Combined Limit	The Aid Recipient exceeds the graduate aggregate combined limit.	Warning	Loan Summary Page with Exceeds Grad Comb. Filter applied
Teacher Loan Forgiveness	The Aid Recipient or at least one of the Aid Recipient's loans is associated with a TLF Record as Stored in NSLDS.	Information	Financial Aid Dashboard, the TLF Section
Grant Icons			

Close to Pell Grant LEU Limit	The Aid Recipient's Pell Grant LEU stored in NSLDS meets the following criteria: - Is greater than or equal to 500% AND - Is less than 600%.	Warning	Grants Page with the Pell Grant Tab selected
Meets or Exceeds Pell Grant LEU Limit	The Aid Recipient's Pell Grant LEU stored in NSLDS is greater than or equal to 600%.	Warning	Grants Page with the Pell Grant Tab selected
Close to IASG Grant LEU Limit	The Aid Recipient's IASG LEU stored in NSLDS meets the following criteria: - Is greater than or equal to 500% AND - Is less than 600%.	Warning	Grants Page with the IASG Tab selected
Meets or Exceeds IASG Grant LEU Limit	The Aid Recipient's IASG LEU stored in NSLDS is greater than or equal to 600%.	Warning	Grants Page with the IASG Tab selected

TOTAL OUTSTANDING BALANCE

The Total Outstanding Balance section displays the Total Outstanding Principal Balance (OPB), the Total Outstanding Interest Balance (OIB), and Total Other Fees. The user can click **View Loans** to navigate to the Loan Summary page.

LOAN SUMMARY

The Loan Summary page displays information of the selected borrower's loans. The Total Outstanding Balance section displays the following information and the last date the information was updated:

- **Total Outstanding Principal Balance** – The cumulative dollar value due on all loans, as reported by the data provider.
- **Total Outstanding Interest Balance** – The cumulative accrued outstanding interest balance on all loans, as reported by the data provider.
- **Total Other Fees** – The accumulated fees added to late or defaulted loans. Examples of other fees are late fees, collection costs, or court costs.

Each loan is separated into loan detail cards. Each loan detail card may contain:

- **Loan ID** - Unique identifier for the loan record assigned by NSLDS.
- **Loan Type** – The type of Title IV award made with a formal agreement for repayment with interest.
- **Status** – The two-character code, effective date and description indicating the status of the loan.
- **Award Year** - The award year which begins on July 1 of the first year listed and ends on June 30 of the second year listed. Format CCYY-CCYY.
- **Loan Amount -** The original loan amount before any cancellations.
- **Loan Date** - For FFEL, the date the loan was originally guaranteed; for Direct and Perkins Loans, the date the loan was originally approved.
- **Loan Period** - The period of study for which the loan was originally taken out.
- **School Name** – The school ~~that~~ the student ~~currently attends or~~ attended when the loan was obtained.
- **Academic Level** - The student's academic level at the time the loan was taken out.
- **Federal Loan Servicer** - The name and code of the Federal Loan Servicer associated with the loan.

- **Outstanding Principal Balance** - The cumulative dollar value due on a loan, as reported by the data provider.
- **Outstanding Interest Balance** - The cumulative accrued outstanding interest balance on the loan, as reported by the data provider.
- **Cumulative Disbursed Amount** - The cumulative amount of the loan disbursed to a borrower.
- **Aggregate OPB** - The cumulative dollar value due for the given aggregate loan type.
- **Capitalized Interest** - The cumulative amount of unpaid accrued interest that has been added to the outstanding principal balance.
- **Most Recent Disbursement Date** - The date of the most recent disbursement to the borrower for a specific loan.
- **Guaranty Agency** – The name and code of the Guaranty Agency associated with the loan.
- **Lender** - The name and code of the lender associated with a FFEL loan.
- **Lender Servicer** - The name and code of the lender servicer associated with a FFEL loan.
- **Indicator of Separate Loan** - An indicator used to differentiate among multiple FFEL loans awarded on the same loan date to the same borrower attending the same school. This field is used mostly by Guaranty Agencies.

Each loan card has the option to **View Loan Details**. Additionally, an authorized user can export the loan summary information to an Excel file by clicking **Export to CSV**.

LOAN SUMMARY FILTER/SORT

The sort is defaulted to Loan Date from most recent to oldest loan on file for the aid recipient. The user can click **Filter** to apply one filter from the following list:

- Aggregates
- Exceeds Limits
- Loan Type
- Federal Loan Servicer
- Guaranty Agency
- Lender/Servicer
- School
- Loan Status

The user can sort the loans and details, by clicking **Sort By**:

- Loan Type
- Default/Non-Default
- Loan Status
- School Name
- Outstanding Principal Balance
- Loan Date
- Loan Period Begin Date
- Loan Holder

LOAN DETAIL

On the Loan Details page, information displayed is dynamic depending on the type of loan selected by the user. The loan holder and type of loan impacts the Loan Detail layout that the user sees:

- Federally Held Direct Loans
- Federally Held FFEL Loans
- Federally Held Perkins Loans
- Commercially Held FFEL Loans
- School Serviced Perkins Loans

The Loan Details section by Loan Type table explains the sections that appears for each Loan Type when viewing the Loan Detail page. Each row relates to a section of the Loan Details page. Users can use this table to determine the sections that appear for the Loan Type on the Loan Details page. The Activities row directs the user to Table 6: Activities displayed by Loan Type.

Table 5: Loan Detail Sections by Loan Type

Loan Detail Sections	Federally Held Direct Loans	Federally Held FFEL Loans	Federally Held Perkins Loans	Commercially Held FFEL Loans	School Serviced Perkins Loans
Loan Information	✓	✓	✓	✓	✓
Amounts for Loan	✓	✓	✓	✓	✓
CDR Information	✓	✓		✓	
Loan Status	✓	✓	✓	✓	✓
Activities	Refer to the Activities displayed for Loan Type (Table 6)				
Collections	✓	✓	✓	✓	
Claim Details		✓	✓	✓	
Public Service Loan Forgiveness	✓	✓		✓	
Loan Holder History	✓	✓	✓	✓	✓
IDR Progress Toward Forgiveness	✓				
Underlying Loan Linking	✓				
Loss of Subsidy	✓				
Rehabilitation	✓	X	X	X	

Activities is a section within the Loan Details page that displays actions that have been taken with the Loan. The Activities section displays information based on the type of Loan the user is viewing and which organization is holding the loan. Authorized users can modify the details of each section by clicking **Update**.

Table 6: Activities displayed for Loan Type

Activity	Federally Held Direct Loan	Federally Held FFEL Loan	Federally Held Perkins Loan	Commercially Held FFEL Loan	School Held Perkins Loan
Disbursements	✓	✓	✓	✓	✓
Cancellations	✓	✓	✓	✓	✓
Refunds	✓	✓		✓	
Capitalized Interest	✓	✓		✓	
Deferments	✓	✓	✓	✓	✓
Forbearance	✓	✓	✓	✓	
Service Member Civil Relief Act (SCRA)	✓	✓		✓	
Imminent Danger /Hostile Fire Pay (IDP/HFP)	✓				
Discharge	✓	✓		✓	
Forgiveness	✓	✓	✓	✓	
Repayment Plans	✓	✓	✓	✓	
Payments	✓	✓	✓	✓	
Interest Benefit	✓	✓		✓	
Rebate Status	✓	✓		✓	

On the Loan Detail page, at the bottom left-hand corner of each Loan Detail card, last updated information displays. Last updated information details are listed below.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

If there is no information to populate a particular Loan Detail section card, the Loan Detail section does not display. For example, if a Loan does not have IDR Progress towards Forgiveness, the IDR Progress towards Forgiveness does not appear as a section on the Loan Details page. **Note** – CDR information does not contain last modified information because the information is sourced from fields throughout the Loan Detail page.

LOAN DETAIL (AUTHORIZED USER)

On the bottom left of the Loan Details page, authorized users can click **Delete Loan** to delete the Loan Record.

Note – During an update session for Federally-Held loans, when an FLS user deletes a record, the record automatically is removed from the display. The action is saved until the user selects **Submit**.

NSLDS allows authorized users to delete a Loan Record that has no Disbursement record or a cumulative disbursement amount equal to $0. Loan Records that do NOT meet the criteria for the Loan Record to be deleted OR the logged in user does NOT have privileges to delete a Loan, NSLDS does NOT display the **Delete Loan** button.

To Delete Loan:

1) Click **Delete** at the bottom of the loan record

2) Confirm details of the loan record in the pop up
3) Select the box to **acknowledge the statement**
4) Click **Delete Loan**

Note: If the Loan Record being deleted is the only Loan Record for the Aid Recipient and the Aid Recipient has no other aid in NSLDS, NSLDS deletes the Aid Recipient in addition to the Loan Record.

On the bottom right of the Loan Details page, authorized users can save all updates made during a session for FFEL and Perkins Loans.

For Commercially Serviced FFEL Loans, authorized users can submit edits online using one of the following methods:

- Submit without batch locking the Loan Record
- Submit with batch locking the Loan Record with making edits to the Loan Record
- Submit with batch locking without making any edits to the Loan Record

The batch lock functionality allows users to submit updates to Commercially Serviced FFEL Loans on the NSLDS Professional Access Website, while preventing the Data Provider from reporting and processing updates on the Loan Record via normal batch reporting. Therefore, once a loan is batch locked, NSLDS does not process the GA Batch reporting received by NSLDS for the Loan Record

Users can Unlock a Loan via the Loan Details Page by clicking the **Unlock Loan** button at the top of the Loan Details page. NSLDS only displays the Unlock Loan button if the Loan Record is locked.

Once a User clicks the **Submit** button or the **Submit and Lock** button, NSLDS submits all the data elements for the Loan Record. NSLDS displays a 'Confirm Updates' pop up. Within the pop up NSLDS asks the user to confirm the submission of edits made to each record.

For School Serviced Perkins Loan Records, authorized users can **Validate** their edits made to one or multiple sections against the entire loan record, prior to clicking **Submit** for the loan record.

FEDERALLY HELD LOANS

A user can determine the type of Direct Loan by viewing the Loan Details card at the top of the page. The Loan Details information card displays the following information:

- **Loan Last Updated Date** - The date the loan was last modified via web, batch, or spreadsheet submittal.
- **Federal Serviced Loan Note** – Hyperlink that displays a pop up with explanation of a Federal Serviced Loan Record.
- **Number for the Loan Record -** Unique identifier for the loan record assigned by NSLDS.

The Loan Details page contains individual loan record details. If the Aid Recipient has multiple loan records, the user can click **Next** located in the top right corner to navigate to the remaining loan records. The Loan Details page contains a navigation page on the left side of the page to allow the user to move between sections.

When viewing a Federally Serviced Loan, the page is separated into the following sections:

- Amounts for Loan
- Loan Information
- CDR Information
- Loan Status
- Rehabilitation
- Activities
- Collections
- Claim Details

- Public Service Loan Forgiveness
- Loan Holder History
- IDR Progress Toward Forgiveness
- Underlying Loan Linking
- Loss of Subsidy

Users should note that these sections are visible if there is data to display. If there is no data to display within the section, then the section does not appear in the Loan Details page.

AMOUNTS FOR LOAN

The Amounts for Loan section displays current loan amount information reported for the Loan Record.

- **Loan Date** - For Direct Loans, the date the loan was originally disbursed.
- **Loan Amount** - The original loan amount before any cancellations.
- **OPB Date** - The date the outstanding principal balance was updated.
- **OPB Amount** - The cumulative dollar value due on a loan. If the field is preceded by an exclamation mark, the amount may include capitalized interest and/or other fees.
- **OIB Date** - The date that the outstanding interest balance was updated.
- **OIB Amount** - The cumulative accrued outstanding interest balance on the loan.
- **Cumulative Capitalized Interest Date**– The date the cumulative amount of unpaid interest was updated.
- **Cumulative Capitalized Interest Amount** - The cumulative amount of unpaid accrued interest that has been added to the outstanding principal balance.
- **Other Fees Amount** - The accumulated fees added to late or defaulted loans. Examples of other fees may include late fees, collection costs, or court costs.

Within the Amounts for Loan section, users can **View Outstanding Amount Balance History. Note**: Reference the Total Outstanding Balance History section of the Help Text for details on the Outstanding Amount Balance History page.

Last updated information displays in the bottom of the section.

- **Last Updated –** Date the information was last updated.
- **Method –** Latest method used to submit the loan details information.
- **Source -** The entity that reports specified data.

Amounts for Loan (Authorized User)

Authorized users on a Federally Held Loan Details page can view the following additional field(s) when reviewing the Amounts for Loans details table:

- **Outstanding Catch Up Balance Amount** – The catch up payment amount currently remaining on the loan.

To Edit Amounts for Loan:

1. Click **Update** within the Amounts for Loan section
2. On the Update Amounts for Loan and Loan Information page, In the Amounts for Loan section, the user can make changes to the following:
    a. Loan Date
    b. Loan Amount
    c. OPB Date
    d. Outstanding Principal Balance (OPB)
    e. Other Fees
    f. Outstanding Interest Balance (OIB)
    g. Outstanding Catch Up Balance
3. In the Loan Details section, make changes to the following:

    a. Loan Type
    b. Loan Period Start Date
    c. Loan Period End Date
    d. Academic Year Begin Date
    e. Academic Year End Date
    f. Academic Level
    g. Dependency Status
    h. Actual Interest Rate
    i. Statutory Interest Rate
    j. Date Entered Repayment
4. In the Payment Details section, make changes to the following:
    a. Delinquency Begin Date
    b. Delinquency End Date
    c. Next Payment Due
    d. Borrower Fee Paid
    e. Borrower Interest Paid
    f. Borrower Principal Paid
    g. Life to Date Months in Forbearance
    h. Life to Date Months in Deferment
    i. Date of Default for CDR
5. In the Loan Organizations section, make changes to the following
    a. OPEID
    b. School
6. In the MPN Details section, make changes to the following:
    a. MPN ID
    b. MPN Status
    c. MPN Expiration Date
7. In the Loan Identifiers section, make changes to the following:
    a. Award ID
    b. Program Code
    c. Loan CRC Code
    d. Consolidation Loan ID
    e. Lender of Last-Resort Loan
8. In the SULA Details section, make changes to the following:
    a. SULA Eligible Indicator
    b. SULA Eligible Date
    c. Subsidy Status
9. Click **Submit**

LOAN INFORMATION

The Loan Information section displays current loan information based on the loan type. The information is separated into six sections.

- Loan Information
- Loan Details
- Loan Organizations
- Loan Identifiers
- Payment Details
- MPN Details
- SULA Details

Additionally, a user can click **Review Reaffirmation** to view the Reaffirmation History for the loan. **Note**: Refer to the Reaffirmation Tab Section of the Help Text for a more in-depth explanation of the section and user capabilities for the page.

When viewing the Federally Held Loan Detail page, the Loan Information section contains the following information:

- Loan Information
  - **Loan Type** - The type of Title IV award made with a formal agreement for repayment with interest.
  - **Status** - The two-character code and description indicating the status of the loan including the date that the status was updated.
- Loan Details
  - **Loan Period -** The period of study for which the loan was originally taken out.
  - **Award Year -** The award year used in the student's undergraduate or graduate loan limits determination.
  - **Academic Year** - Student's grade level submitted by the school.
  - **Academic Level -** The student's academic level at the time the loan was provided.
  - **Dependency Status -** Field that indicates the dependency used in the student's undergraduate or graduate loan limits determination. The dependency indicator is based on the Undergraduate or Graduate Award Year's corresponding award year ISIR and the Central Processing System's (CPS) determined dependency status. In some cases, when an Undergraduate Award Year cannot be linked to a corresponding ISIR, additional steps are used to determine this value (i.e., academic level from the reported loans and/or age of the applicant at the time of the Undergraduate Award Year).
  - **Actual Interest Rate –** Annual interest rate a lender charges on a loan, which may be equal to or less than the applicable interest rate on that loan.
  - **Statutory Interest Rate –** Applicable interest rate that can be charged for the loan.
  - **Date Entered Repayment -** The date the loan entered repayment.
  - **Aggregate OPB -** The cumulative dollar value due for the given aggregate loan type.
  - **Discharge Code –** Valid values consist of Death or Permanent.
    - **Note –** determined by pre-post screening.
- Loan Organizations
  - **School Name –** The name and code of the organization that disbursed the loan.
  - **Federal Loan Servicer –** The name and code of the federal loan servicer associated with the loan.
- Loan Identifiers
  - **Award ID -** A unique identifier for a financial award across programs and systems, and across academic years.
  - **NSLDS Label –** Unique identifier for the loan record assigned by NSLDS. 12 digits long.
  - **Program Code –** Identifies the loan program.
  - **Program Code –** Identifies the loan program.
  - **Loan CRC Code –** Credit Reform Code - a six (6) position code that signifies the calculated risk associated with the loan based on the loan type, school type, length of program and the years the borrower has been in school.
  - **Consolidation Loan ID –** A unique identifier for a financial award across programs and systems, and across academic years. It is the Award ID for the Consolidation Loan that was made to pay off this loan.
  - **Lender of Last Resort Loan –** Indicates if the loan is a lender of last resort loan.
- Payment Details
  - **Delinquency Begin Date –** The begin date the delinquency was entered into NSLDS.
  - **Delinquency End Date –** The end date the delinquency was entered into NSLDS.
  - **Next Payment Due –** The date of the earliest unpaid installment as of reporting.
  - **Date Last Payment Applied –** The date the last payment the borrower paid on the loan was applied to the account.
  - **Current Cumulative Amount of Payment –** The cumulative amount of payment as the sum of all payment amounts stored in NSLDS for the loan record.

- **Borrower Fee Paid** – Total amount of borrower fee payments made by or on behalf of the borrower.
- **Borrower Interest Paid** – The total amount of interest payments made by or on behalf of the borrower.
- **Borrower Principal Paid** – The total amount of principal payments made by or on behalf of the borrower.
- **Life to Date Months in Forbearance** – The number of regular installments forborne.
- **Life To Date Months in Deferment** – The number of regular installments deferred.
- **Date of Default for CDR** – The date that the loan was considered to be in default for the purposes of being applied to the Cohort Default Rate.

- MPN Details
  - **MPN ID** – Specifies the unique identifier for a Master Promissory Note.
  - **MPN Status** – Current status of the Master Promissory Note.
    - A = active note
    - I = inactive note
    - C = closed
    - E = inactive endorser
    - N = no MPN
  - **MPN Expiration Date** – Date that is returned on a response as to when the master promissory note is set to expire.
- SULA Details
  - **SULA Eligible Indicator** – Indicates the borrower is subject to the 150% Direct Subsidized Loan Usage Limit.
  - **SULA Eligible Date** – Indicates the date when the Subsidized Usage Limit Applies Flag is set to 'Yes'.
  - **Subsidy Status** – This data element is determined by the NSLDS System. It indicates if the loan record has a 'Loss of Subsidy' or a 'Reinstatement of Subsidy'.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** - Latest method used to submit the loan details information.
- **Source** - The entity that reports specified data.

Loan Information (Authorized User)

Authorized users can update Federally Held Loans Information by selecting Update.

To Edit Amounts for Loan and Loan Information:

1. Click **Update** within the Loan Information section
2. On the Update Amounts for Loan and Loan Information page, In the Amounts for Loan section, the user can make changes to the following:
   a. Loan Date
   b. Loan Amount
   c. OPB Date
   d. Outstanding Principal Balance (OPB)
   e. Other Fees
   f. Outstanding Interest Balance (OIB)
   g. Outstanding Catch Up Balance
3. In the Loan Details section, make changes to the following:
   a. Loan Type
   b. Loan Period Start Date
   c. Loan Period End Date
   d. Academic Year Begin Date
   e. Academic Year End Date
   f. Academic Level
   g. Dependency Status

    h. Actual Interest Rate
    i. Statutory Interest Rate
    j. Date Entered Repayment
4. In the Payment Details section, make changes to the following:
    a. Delinquency Begin Date
    b. Delinquency End Date
    c. Next Payment Due
    d. Borrower Fee Paid
    e. Borrower Interest Paid
    f. Borrower Principal Paid
    g. Life to Date Months in Forbearance
    h. Life to Date Months in Deferment
    i. Date of Default for CDR
5. In the Loan Organizations section, make changes to the following
    a. OPEID
    b. School
6. In the MPN Details section, make changes to the following:
    a. MPN ID
    b. MPN Status
    c. MPN Expiration Date
7. In the Loan Identifiers section, make changes to the following:
    a. Award ID
    b. Program Code
    c. Loan CRC Code
    d. Consolidation Loan ID
    e. Lender of Last-Resort Loan
8. In the SULA Details section, make changes to the following:
    a. SULA Eligible Indicator
    b. SULA Eligible Date
    c. Subsidy Status
9. Click **Submit**

Users can click **Review Reaffirmation** within the loan and be navigated to the Reaffirmation page. **Note**: Reference the Reaffirmation section of the Help Text for more details.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

CDR INFORMATION

The CDR Information section displays information related to the Cohort Default Rate (CDR) as reported for the Loan Record:

- **Date Entered Repayment** – The date the loan entered repayment.
- **Date of Default for CDR** - The date the loan defaulted, as defined in regulations.
- **Rehabilitation Date** – Indicates the date that the borrower has rehabilitated a loan.
- **Cohort Fiscal Year** – The fiscal year for which that the CDR calculation is run. Set as 10/01/Prior Year to 09/30/Cohort Fiscal Year.

Unlike the other sections within the Loan Details page, the CDR information section does not have an update option. Authorized users can modify the fields using the information below:

- **Date Entered Repayment** – Update in Loan Information section
- **Date of Default for CDR** – Update in Loan Information section
- **Default Claim Date** - Update in Claim Details section
- **Rehabilitation Section** - Update in Claim Details section

LOAN STATUS

The Loan Status section displays the history of valid Loan Status records reported for the Loan Record. In the top right of the Loan Status section is an Outstanding Amount Balance History link that directs to the Outstanding Amount Balance History page. The Loan Status table displays the following information:

- **Status Date** - The date a Loan Status became effective.
- **Status** - The two-character code and description indicating the status of the loan.
- **Source** - The method that was used to submit the data to NSLDS.
- **System Date** – The date the Loan Status Record was stored in the NSLDS System.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** - Latest method used to submit the loan details information.
- **Source** - The entity that reports specified data.

Within the Loan Status section, users can **View Outstanding Amount Balance History**. **Note**: Reference the Total Outstanding Balance section of the Help Text for details of the Outstanding Amount Balance History page.

Loan Status (Authorized User)
To Add, Edit, or Delete Loan Status:

1. Click **Update** within the Loan Status section
2. To Add Loan Status
    a. Click **Add Loan Status**
    b. Select the **Date**
    c. Select the **Status** from the dropdown
    d. Select **Save**
3. To Edit Loan Status
    a. Click **Edit** next to the Loan Status record
    b. Make changes to editable fields:
        i. Date
        ii. Status
    c. Select **Save**
4. To Delete Loan Status
    a. Select Delete **checkbox** next to the Loan Status record
5. Click **Submit**
6. Click **Confirm Updates**

REHABILITATION (AUTHORIZED USER)

The Rehabilitation section displays all individual Rehabilitation records reported for Federally Serviced Loans. Only authorized users associated with the current holder of the Loan Record can view and update the Rehabilitation record. The following information is shown in the table:

- **Date** - The date that the rehabilitation started.
- **Amount** – The amount that has been rehabilitated by the lender.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** - Latest method used to submit the loan details information.
- **Source** - The entity that reports specified data.

To Add, Edit, or Delete Rehabilitation for Federally Serviced Loans:

1. Click **Update** within the Rehabilitation section
2. To Add Rehabilitation
    a. Click **Add Rehabilitation**
    b. Enter the **Date**
    c. Enter the **Rehabilitation Amount**
    d. Click **Save**
3. To Edit Rehabilitation
    a. Click **Edit** next to the Rehabilitation record
    b. Make changes to editable fields:
        i. Date
        ii. Rehabilitation Amount
    c. Click **Save**
4. To Delete Rehabilitation
    a. Select Delete **checkbox** next to the Underlying Loan Linking record
5. Click **Submit**
6. Click **Confirm Updates**

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

ACTIVITIES

Based on the type of loan, the Activities section displays variety of activity types. Authorized users can edit the details of each activity by clicking **Update** in the Activity type section.

Disbursements

The Disbursements section contains a table displaying all individual disbursement records reported for the Loan Record. Some terms only display for authorized users.

- **Date** – The date the loan disbursement was made.
- **Cumulative Amount** - The cumulative amount of funds released to a borrower.
- **Disbursement Amount** – The amount of funds disbursed to a borrower.
- **Late Disbursement Indicator** – This indicates if the disbursement was issued after the Financial Award End Date or the borrower's last date of at least half-time enrollment, whichever is earlier.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Disbursements (Authorized User)

To Add, Edit, or Delete Disbursement:

1. Click **Update** within the Disbursements section
2. To Add a Disbursement
    a. Click **Add Disbursement**
    b. Select the **Date**
    c. Input the Disbursement Amount
    d. Select the **Late Disbursement Indicator** from the dropdown
    e. Click **Save**
3. To Edit a Disbursement
    a. Click **Edit** next to the Disbursement record
    b. Make changes to editable fields:
        i. Date
        ii. Disbursement Date
        iii. Late Disbursement Indicator
    c. Click **Save**
4. To Delete a Disbursement
    a. Select Delete **checkbox** next to the Disbursement record
5. Click **Submit**
6. Click **Confirm Updates**

Last updated information displays in the bottom of the section.

- **Last Updated -** Date the information was last updated.
- **Method –** Latest method used to submit the loan details information
- **Source –** The entity that reports specified data.

Refunds

The Refund section contains a table displaying information of all individual refund records reported for the Loan Record.

- **Date -** The date that a lender received a refund from a school.
- **Cumulative Amount –** The total amount of the refund paid to a lender on a loan.
- **Refund Amount -** The amount of refund paid to a lender on a loan.

Last updated information displays in the bottom of the section.

- **Last Updated -** Date the information was last updated.
- **Method –** Latest method used to submit the loan details information
- **Source –** The entity that reports specified data.

Refunds (Authorized User)

Authorized users who have access can add, edit, and delete in the Refund section by clicking **Update**.

To Add, Edit, and Delete a Refund:

1. Click **Update** within the Refund section
2. To Add a Refund
    a. Click **Add Refund**
    b. Select the **Date**
    c. Input the Individual Amount
    d. Click **Save**
3. To Edit a Refund
    a. Click **Edit** next to the Refund record
    b. Make changes to editable fields:
        i. Date
        ii. Individual Amount

    c. Click **Save**
4. To Delete a Refund
    a. Select Delete **checkbox** next to the Refund record
5. Click **Submit**
6. Click **Confirm Updates**

Capitalized Interest (Authorized User)

The Capitalized Interest section contains a table displaying information of all individual capitalized interest records reported for the Loan Record.

- **Date –** The date that the capitalized interest occurred on the Title IV loan record.
- **Cumulative Amount –** The cumulative amount of unpaid accrued interest that has been added to the outstanding principal balance.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method –** Latest method used to submit the loan details information
- **Source –** The entity that reports specified data.

Authorized users can add, edit, and delete in the Capitalized Interest section by clicking **Update**.

To Add, Edit, or Delete Capitalized Interest:

1. Click **Update** within the Capitalized Interest section
2. To Add a Capitalized Interest
    a. Click **Add Capitalized Interest**
    b. Select the **Date**
    c. Input the Cumulative Amount
    d. Click **Save**
3. To Edit Capitalized Interest
    a. Click **Edit** next to the Capitalized Interest record
    b. Make changes to editable fields:
        i. Date
        ii. Cumulative Amount
    c. Click **Save**
4. To Delete a Capitalized Interest
    a. Select Delete **checkbox** next to the Capitalized Interest record
5. Click **Submit**
6. Click **Confirm Updates**

Cancellations

The Cancellations section contains a table displaying information of all individual cancellation records reported for the Loan Record. Some terms only display for certain loan types.

- **Date –** The latest date that all or part of the Title IV loan was canceled.
- **Cumulative Amount –** The total amount of the Title IV loan that was canceled.
- **Cancellations Amount –** The amount of the Title IV loan that was canceled.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method –** Latest method used to submit the loan details information

- **Source** – The entity that reports specified data.

Cancellations (Authorized User)

To Add or Edit a Cancellation:

1. Click **Update** within the Cancellations section
2. To Add a Cancellation
    a. Click **Add Cancellation**
    b. Select the **Date**
    c. Input the Cancellations Amount
    d. Click **Save**
3. To Edit a Cancellation
    a. Click **Edit** next to the Cancellation record
    b. Make changes to editable fields:
        i. Date
        ii. Cancellation Amount
    c. Click **Save**
4. Click **Submit**
5. Click **Confirm Updates**

Service Members Civil Relief Act (SCRA) (Authorized User)

Authorized users can view the Service Members Civil Relief Act (SCRA) section. A table displays the information of all individual SCRA records reported for the Loan Record.

- **SCRA Begin Date** – The begin date of which the SCRA benefit was applied to the loan.
- **SCRA End Date** - The end date of which the SCRA benefit was applied to the loan.
- **SCRA Notification Date** – The date of borrower's notification for SCRA benefit.
- **Transfer In Date** -The effective date on which the current servicer transferred the loan onto their system.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

To Add, Edit, or Delete SCRA:

1. Click **Update** within the Service Members Civil Relief Act section
2. To Add Service Members Civil Relief Act
    a. Click **Add SCRA**
    b. Select the **SCRA Begin Date**
    c. Select the **SCRA End Date**
    d. Select the **SCRA Notification Date**
    e. Click **Save**
3. To Edit Service Members Civil Relief Act
    a. Click **Edit** next to the SCRA record
    b. Make changes to editable fields:
        i. SCRA Being Date
        ii. SCRA End Date
        iii. SCRA Notification Date
    c. Click **Save**
4. To Delete Service Members Civil Relief Act

    a. Select Delete **checkbox** next to the SCRA record
5. Click **Submit**
6. Click **Confirm Updates**

Deferments

The Deferments section contains a table displaying information of all individual deferment records reported for the Loan Record.

- **Start Date** – The date when a deferment begins.
- **End Date** – The date when a deferment is projected to end. Includes post-deferment grace period if applicable.
- **Type** – One of the deferment reasons for postponing repayment of loan principal and interest.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Deferments (Authorized User)

To Add, Edit, or Delete Deferment:

1. Click **Update** within the Deferments section
2. To Add a Deferment
    a. Click **Add Deferment**
    b. Select the **Start Date**
    c. Select the **End Date**
    d. Select the **Type** of deferment from the dropdown
    e. Click **Save**
3. To Edit Deferment
    a. Click **Edit** next to the Deferment record
    b. Make changes to editable fields:
        i. Start Date
        ii. End Date
        iii. Type
    c. Click **Save**
4. To Delete Deferment
    a. Select Delete **checkbox** next to the Deferment record
5. Click **Submit**
6. Click **Confirm Updates**

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Forbearance

The Forbearance section contains a table displaying information of all individual forbearance records reported for the Loan Record.

- **Start Date** – The date when forbearance begins.

- **End Date** – The date when forbearance is projected to end or actually ends.
- **Type** – The type of forbearance that has been approved for the borrower.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Forbearance (Authorized User)

To Add, Edit, or Delete Forbearance:

1. Click **Update** within the Forbearance section
2. To Add a Forbearance
    a. Click **Add Forbearance**
    b. Select the **Start Date**
    c. Select the **End Date**
    d. Select the **Type** of forbearance from the dropdown
    e. Click **Save**
3. To Edit Forbearance
    a. Click **Edit** next to the Forbearance record
    b. Make changes to editable fields:
        i. Start Date
        ii. End Date
        iii. Type
    c. Click **Save**
4. To Delete Forbearance
    a. Select Delete **checkbox** next to the Forbearance record
5. Click **Submit**
6. Click **Confirm Updates**

Rebate (Authorized User)

The Rebate Status section contains a table displaying information of all individual rebate status records reported for the Loan Record:

- **Type** – The type of rebate applied to the loan.
- **Status** - The status of the rebate being reported.
- **Status Date** - The date the rebate status was effective.
- **Cumulative Amount** – The field is by NSLDS. It is the sum of the Disbursement Record's individual Disbursement Amount and the individual Disbursement Amount of all prior Disbursement Records (based on Date of Disbursement)
- **Rebate Amount** – The amount of rebate applied to the loan account.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

To Add, Edit, or Delete Rebate:

1. Click **Update** within the Rebate section
2. To Add Rebate
    a. Select the **Rebate Type** from the dropdown

    b. Select the **Rebate Status** from the dropdown
    c. Select the **Status Date**
    d. Input the Rebate Amount
    e. Click **Save**
3. To Edit Rebate
    a. Click **Edit** next to the Rebate record
    b. Make changes to editable fields:
        i. Rebate Type
        ii. Rebate Status
        iii. Status Date
        iv. Rebate Amount
    c. Click **Save**
4. To Delete Rebate
    a. Select Delete **checkbox** next to the Rebate record
5. Click **Submit**
6. Click **Confirm Updates**

Interest Benefit (Authorized User)

The Interest Benefit section contains a table displaying information of all individual interest benefit reported for the Loan Record:

- **Type** – Specifies the type of interest benefit applied to the loan account.
- **Status** – The status of the interest benefit being reported.
- **Status Date** - The date the Benefit Status was effective.
- **Rate** – The percent of Interest Benefit applied to the loan amount.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

To Add, Edit, or Delete Interest Benefit for a Direct and FFEL Loan:

1. Click **Update** within the Interest Benefit section
2. To Add Interest Benefit
    a. Select the **Type** from the dropdown
    b. Input the Rate
    c. Select the **Status** from the dropdown
    d. Select the **Status Date**
    e. Click **Save**
3. To Edit Interest Benefit
    a. Click **Edit** next to the Interest Benefit record
    b. Make changes to editable fields:
        i. Type
        ii. Status
        iii. Status Date
        iv. Rate
    c. Click **Save**
4. To Delete Interest Benefit
    a. Select Delete **checkbox** next to the Interest Benefit record
5. Click **Submit**
6. Click **Confirm Updates**

Repayment Plan

The Repayment Plan section contains a table displaying information of all individual repayment plan records reported for the Loan Record. Some terms only display for authorized users.

- **Type** - A code indicating the type of current repayment plan for a loan that has entered repayment.
- **Disclosure Date** - The date the servicer distributed the disclosure of loan repayment terms to the borrower.
- **1st Payment Due Date** - The first payment due following the disclosure date.
- **Scheduled Payment Effective Date** – The date on which the Scheduled Payment Amount was effective.
- **Estimated Payoff Date** – The date, as of the disclosure date, that the servicer estimates the loan is paid in full.
- **IDR Plan Anniv Date** - The date on which the income-driven payment amount resets based on a borrower's recertification.
- **Scheduled Pay Amount** – The total monthly educational loan payments.
- **Standard Schedule Payment Amount** – Represents the 10-year standard payment amount calculated using the loan balance on eligible loans that were outstanding when the borrower initially entered repayment on the loan.
- **Permanent Standard Scheduled Amount** – Represents the 10-year standard payment amount calculated using the loan balance that was outstanding when the borrower began repayment on the loan under this IDR plan.
- **Term (in months)** - The term or length of the repayment period in months for the current repayment plan.
- **Bill Cycle** – Specifies the payment due day (day of the month) that the borrower has selected for the pay cycle.
- **Bill Type** - Valid Values:
    - MH = Monthly Hardcopy statement
    - CO = Coupons
    - ME = Monthly Email Reminder
    - AD = Automatic Direct Debit
- **Non PFH Reason** – Represents the reason for the borrower's change to Non-Partial Financial Hardship (PFH) repayment plan.
    - A – Borrower is not qualified for PFH based on reported income
    - B – Borrower did not submit a valid recertification
    - Blank – Not applicable
- **Negative Amortization Indicator** – Represents the scheduled amount, at the time of disclosure, is less than the accruing interest.
- **Total Catch Up Payment Amount** – The total catch up payment amount for a borrower on a Revised Pay As You Earn (REPAYE) repayment plan.
- **Scheduled Catch Up Payment Amount** – The scheduled monthly catch up payment amount for a borrower on a Revised Pay As You Earn repayment plan.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Repayment Plan (Authorized User)

To Add, Edit, or Delete Repayment Plan for all loan types:

1. Click **Update** within the Repayment Plan section
2. To Add Repayment Plan
    a. Click **Add Repayment Plan**
    b. Select the **Disclosure Date**
    c. Select the **1st Payment Due Date**
    d. Select the **Schedule Payment Effective Date**

    e. Select the **Estimated Payoff Date**
    f. Select the **IDR Plan Anniversary Date**
    g. Input the Scheduled Payment Amount
    h. Input the Total Catch Up Payment Amount
    i. Input the Scheduled Catch Up Payment Amount
    j. Input the Standard Scheduled Payment Amount
    k. Select the **Repayment Plan Type** from the dropdown
    l. Input the Repayment Plan Term
    m. Input the Permanent Standard Scheduled Payment Amount
    n. Select the **Bill Cycle** from the dropdown
    o. Select the **Bill Type** from the dropdown
    p. Select the **Non-PFH Reason** from the dropdown
    q. Select the **Negative Amortization** Indicator from the dropdown
    r. Click **Save**
3. To Edit Repayment Plan
    a. Click **Edit** next to the Repayment Plan record
    b. Make changes to editable fields:
        i. Type
        ii. Disclosure Date
        iii. 1st Payment Due Date
        iv. IDR Plan Anniversary Date
        v. Term (in months)
        vi. Scheduled Payment Effective Date
        vii. Estimated Payoff Date
        viii. Scheduled Payment Amount
        ix. Total Catch Up Payment Amount
        x. Scheduled Catch Up Payment Amount
        xi. Standard Schedule Payment Amount
        xii. Permanent Standard Scheduled Amount
        xiii. Bill Cycle
        xiv. Bill Type
        xv. Non PFH Reason
        xvi. Negative Amortization Indicator
    c. Click **Save**
4. To Delete Repayment Plan
    a. Select Delete **checkbox** next to the Repayment Plan record
5. Click **Submit**
6. Click **Confirm Updates**

Discharge

The Discharge section contains a table displaying information of all individual discharge records reported for the Loan Record:

- **Type** - One of the discharge reason codes for discharging all or part of a loan.
- **Date** – The date when all or part of the Title IV loan was discharged.
- **Posted Date** – The date on which loan discharge was posted to a borrower's account.
- **Discharge Amount** – The discharge amount, displayed by type, for the Title IV loan displayed.
- **Cumulative OPB** - The cumulative dollar value due on a loan, as reported by the data provider.
- **Cumulative OIB** – The cumulative accrued outstanding interest balance on the loan, as reported by the data provider.
- **Indicator** – Indicates if the loan discharge reported is a partial or full discharge.
- **Cumulative Discharge** – The total amount discharged for the selected recipient.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Discharge (Authorized User)

To Add, Edit, or Delete Discharge:

1. Click **Update** within the Discharge section
2. To Add Discharge
    a. Click **Add Discharge**
    b. Select the **Discharge Date**
    c. Select the **Type** of Discharge from the dropdown
    d. Select the **Partial or Full** Indicator from the dropdown
    e. Select the **Indicator** from the dropdown
    f. Click **Save**
3. To Edit Discharge
    a. Click **Edit** next to the Discharge record
    b. Make changes to editable fields:
        i. Type
        ii. Date
        iii. Posted Date
        iv. Amount
        v. Cumulative OPB
        vi. Cumulative OIB
        vii. Indicator
    c. Click **Save**
4. To Delete Discharge
    a. Select Delete **checkbox** next to the Discharge record
5. Click **Submit**
6. Click **Confirm Updates**

Forgiveness

The Forgiveness section contains a table displaying information of all individual forgiveness records reported for the Loan Record:

- **Type** – The type of forgiveness applied to the loan account.
- **Date** – The date when all or part of a direct loan was reduced due to a loan forgiveness program.
- **Posted Date** –The date on which loan forgiveness was posted to a borrower's account.
- **Cumulative Amount** – The total amount forgiven for the selected aid recipients
- **Forgiveness Amount** – The discharge amount, displayed by type, for the Title IV loan displayed.
- **Previously Applied** – Specifies if the borrower has previously applied for Teacher Loan Forgiveness.
- **State** – The state in the US where a person applied for Teacher Loan Forgiveness.
- **Eligible Institution Type** – The institution type where the borrower/student taught during the period that qualifies for loan forgiveness.
- **Indicator** – Indicates if the loan forgiveness reported is a partial or full forgiveness.
- **Cumulative OPB** – The cumulative dollar value due on a loan, as reported by the data provider. Some terms do not display for users.
- **Cumulative OIB** – The cumulative accrued outstanding interest balance on the loan, as reported by the data provider. Some fields do not display for users.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Forgiveness (Authorized User)

To Add, Edit, or Delete Forgiveness for all loan types:

1. Click **Update** within the Forgiveness section
2. To Add Forgiveness
    a. Click **Add Forgiveness**
    b. Select the **Date**
    c. Select the **Posted Date**
    d. Select the **Partial** or **Full Indicator** from the dropdown
    e. Input the Forgiveness Amount
    f. Select the **Type of Forgiveness** from the dropdown
    g. Select the **Type of Eligible Institution** from the dropdown
    h. Select the **State of Application** from the dropdown
    i. Input the Cumulative OPB
    j. Input the Cumulative OIB
    k. Select the **Previously Applied** response from the dropdown
    l. Click **Save**
3. To Edit Forgiveness
    a. Click **Edit** next to the Forgiveness record
    b. Make changes to editable fields:
        i. Type
        ii. Date
        iii. Posted Date
        iv. Forgiveness Amount
        v. Cumulative OPB
        vi. Cumulative OIB
        vii. Previously Applied
        viii. State
        ix. Eligible Institution Type
        x. Indicator
    c. Click **Save**
4. To Delete Forgiveness
    a. Select Delete **checkbox** next to the Forgiveness record
5. Click **Submit**
6. Click **Confirm Updates**

Imminent Danger/Hostile Fire Pay (IDP/HFP) (Authorized User)

The Imminent Danger/Hostile Fire Pay (IDP/HFP) section contains a table displaying information of all individual IDP/HFP records reported for the Loan Record:

- **Start Date** – The begin date of the IDP and HFP Interest Reduction Benefit period for the loan.
- **End Date** – The end date of the IDP and HFP Interest Reduction Benefit period for the loan.
- **Applied Date** – Indicates the date the Federal Loan Servicer applied the IDP and HFP Interest Reduction Benefit to the loan for the applicable period.
- **Indicator** – Indicates if the interest Rate Benefit was received as a result of the DoD-ED Match Process.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

To Add, Edit, or Delete Imminent Danger/Hostile Fire:

1. Click **Update** within the IDP/HFP Pay section
2. To Add Imminent Danger/Hostile Fire Pay
    a. Click **Add IDP/HFP**
    b. Select the **Start Date**
    c. Select the **End Date**
    d. Select the **Applied Date**
    e. Select the **Indicator** from the dropdown
    f. Click **Save**
3. To Edit Imminent Danger/Hostile Fire Pay
    a. Click **Edit** next to the SCRA record
    b. Make changes to editable fields:
        i. Start Date
        ii. End Date
        iii. Applied Date
        iv. Indicator
    c. Click **Save**
4. To Delete Imminent Danger/Hostile Fire Pay
    a. Select Delete **checkbox** next to the IDP/HFP record
5. Click **Submit**
6. Click **Confirm Updates**

Payments (Authorized User)

Authorized users can view the Payment section. This page is not available to school users. A table displays the following information of all individual payment records reported for the Loan Record:

- **Effective Date** – The date the payment was posted to the NSLDS system.
- **Type** – The type of payment transaction being reported.
- **Cumulative Amount** – The total aggregate payment amount received on the payment effective date.
- **Payment Amount** - The payment amount received on the payment effective date.
- **Cumulative OPB** - The cumulative dollar value due on a loan, as reported by the data provider.
- **Cumulative OIB** – The cumulative accrued outstanding interest balance on the loan, as reported by the data provider.
- **Cumulative OFB** – The portion of the payment amount received on the payment effective date which was applied to the Outstanding Fee Balance (OFB).
- **Zero Dollar Indicator** – Indicates that the borrower's calculated monthly installment is currently zero dollars ($0.00) and the borrower's monthly installment date is advancing.
- **Total Payment Amount Applied to Neg. Amort.** – The portion of the payment amount received on the payment effective date which was applied to outstanding interest that was accrued as a result of negative amortization.
- **Total Payment Amount Applied to Non-Cap Int.** – The portion of the payment amount received on the payment effective date which was applied to outstanding interest that would not have capitalized had it not been paid.
- **Total Payment Amount Applied to Cap Int.** – The portion of the payment amount received on the payment effective date which was applied to outstanding interest that would have capitalized had it not been paid.
- **Total Payment Amount Applied Catch Up** – The portion of the payment amount received on the payment effective date which was applied to the scheduled catch up payment amount.
- **Transfer in Date** – The effective date on which the current servicer transferred the loan onto their system.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

To Add, Edit, or Delete Payment records for all loan types:

1. Click **Update** within the Payment section
2. To Add Payment
    a. Select the **Effective Date**
    b. Select the **Type** from the dropdown
    c. Input the Payment Amount
    d. Input the OPB Amount
    e. Input the OIB Amount
    f. Input the OFB Amount
    g. Select the **Zero Dollar Indicator**
    h. Input Total Payment Amt. Applied to Neg. Amort.
    i. Input Total Payment Amt. Applied to Non-Cap Int.
    j. Input Total Payment Amt. Applied to Cap Int.
    k. Input Total Amt. Applied Catch Up
    l. Select the **Transfer in Date**
    m. Click **Save**
3. To Edit Payment
    a. Click **Edit** next to the Payment record
    b. Make changes to editable fields:
        i. Type
        ii. Payment Amount
        iii. Cumulative OPB
        iv. Cumulative OIB
        v. Cumulative OFB
        vi. Total Payment Amount Applied to Neg. Amort.
        vii. Total Payment Amount Applied to Non-Cap Int.
        viii. Total Payment Amount Applied to Cap Int.
        ix. Total Payment Amount Applied Catch Up
        x. Zero Dollar Indicator
        xi. Transfer in Date
    c. Click **Save**
4. To Delete Payment
    a. Select Delete **checkbox** next to the Payment record
5. Click **Submit**
6. Click **Confirm Updates**

COLLECTIONS

The Collections section displays various collection types in their own sections:

- Treasury Offset Program
- DMCS
- Admin. Wage Garnishment
- Department of Justice

For each collection type, the following information displays for the collection record. Some fields only display for authorized users.

- **Date** - The date when the ED Servicer last applied DCS principal and/or interest collections to a loan.
- **Cumulative Principal Amount** - The cumulative amount collected and applied to principal through the part of a collection that was applied toward reducing the outstanding principal amount on the loan.
- **Cumulative Interest Amount** - The cumulative amount of a collection that was applied to interest through the part of a collection that was applied toward reducing the outstanding interest amount on the loan.
- **Latest updated**- The date the loan was last updated.
- **Method** - The loan was last updated by FLS Batch Reporting, Spreadsheet Submittal, or Web.
- **Source**- The organization (entity) the user is logged in as.

Collections (Authorized User)

Authorized users with update capabilities can click **Update** within each Collection type section. After clicking update, follow the steps below to add, edit, or delete**:**

1. To Add Collection
    a. Click **Add Collection Type**
    b. Select the **Date**
    c. Input the Cumulative Principal Amount
    d. Input the Cumulative Interest Amount
    e. Input the Cumulative Amount of Collection Applied to Fees
    f. Click **Save**
2. To Edit Collection
    a. Click **Edit** Collection Type
    b. Make changes to editable fields:
        i. Date
        ii. Cumulative Principal Amount
        iii. Cumulative Interest Amount
        iv. Cumulative Amount of Collection Applied to Fees
    c. Click **Save**
3. To Delete Collection Type
    a. Select Delete **checkbox** next to the Collection Type record
4. Click **Submit**
5. Click **Confirm Updates**

PUBLIC SERVICE LOAN FORGIVENESS (PSLF) (AUTHORIZED USER)

The Public Service Loan Forgiveness (PSLF) section displays the current and historical PSLF Records reported for the Loan Record.

- **Fiscal Year –** The fiscal year in which qualifying payments were made.
- **Matched Months –** The total number of months in which qualifying payments were made.
- **Updated Date –** The date the record was updated in NSLDS

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method –** Latest method used to submit the loan details information
- **Source –** The entity that reports specified data.

To Add, Edit, or Delete a Public Service Loan Forgiveness:

1. Click **Update** within the Public Service Loan Forgiveness section
2. To Add Public Service Loan Forgiveness
    a. Enter the Fiscal Year
    b. Enter the Matched Months
    c. Click **Save**
3. To Edit Public Service Loan Forgiveness
    a. Click **Edit** next to the Public Service Loan Forgiveness record
    b. Make changes to editable fields:
        i. Fiscal Year
        ii. Matched Months
    c. Click **Save**
4. To Delete Public Service Loan Forgiveness
    a. Select Delete **checkbox** next to the Public Service Loan Forgiveness record
5. Click **Submit**
6. Click **Confirm Updates**

INCOME DRIVEN REPAYMENT (IDR) PROGRESS TOWARD FORGIVENESS (AUTHORIZED USER)

The Income Driven Repayment (IDR) Progress Toward Forgiveness section contains a table displaying all IDR Progress Toward Forgiveness records reported for Direct and FFEL Loan Records:

- **Submission Date** – The date the IDR Progress toward Forgiveness update was submitted.
- **Maximum Repayment Term** – The total qualifying months of payments or deferments required for forgiveness under the IBR or IBR2014 plan as determined at the time of IDR application (or other evaluation), regardless of what plan is entered.
- **Progress Earned** – The accumulated count of earned qualifying months of payments or deferments required for forgiveness under the IBR or IBR2014 plan as of submittal date.
- **Progress Earned at Prior Servicers** – The accumulated count of earned qualifying months of payments or deferments required for forgiveness under the IBR or IBR 2014 plan made to a prior servicer(s).

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.
-

To Edit an IDR Progress Toward Forgiveness for a FFEL Loan:

1. Click **Update** within the IDR Progress Toward Forgiveness section
2. To Edit IDR Progress Toward Forgiveness
    a. Click **Edit** next to the IDR Progress Toward Forgiveness record
    b. For all types of IDR Progress, make changes to editable fields:
        i. Maximum Repayment Term
        ii. Progress Earned
        iii. Progress Earned at Prior Servicers
    c. Click **Save**
3. Click **Submit**
4. Click **Confirm Updates**

LOAN HOLDER HISTORY

The Loan Holder History section displays a history of the Loan Holders (Federal Loan Servicers and Guaranty Agencies), Lenders, Lender Services, and Schools that are currently or historically associated with the Loan Record.

The page displays five sections, if applicable to the loan record:

- Federal Loan Servicer
- Guaranty Agency
- Lender
- Lender Servicer
- School

Note: By default, NSLDS displays the section that is the current holder of the loan first.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method –** Latest method used to submit the loan details information
- **Source –** The entity that reports specified data.

Loan Holder History (Authorized User)

Authorized users can edit, transfer, and delete records in the Loan Holder History section by clicking **Update**. The Update Loan Holder History page displays, and users can edit or delete an existing Loan Holder or transfer the loan. Note - that transfer access is only available in one of the Federal Loan Servicer or Guaranty Agency sections, depending on which agency type currently holds the loan. Therefore, if a Federal Loan Servicer is the current holder of a FFEL Loan, only the Federal Loan Servicer section has the transfer capabilities. The Guaranty Agency section does not have the transfer capabilities unless the loan is transferred back to a Guaranty Agency.

Federal Loan Servicer

The Federal Loan Servicer section displays a history of the Federal Loan Servicers that are currently or historically associated with the Loan Record.

- **Start Date –** The date the servicer became responsible for servicing the loan record.
- **End Date –** The date the servicer stopped being responsible for servicing the loan record.
- **Code –** The organization code associated with the servicer.
- **Federal Loan Servicer –** The name and code of the federal loan servicer associated with the loan.

Federal Loan Servicer (Authorized User)

To Edit, Delete, or Transfer a Federal Loan Servicer record:

1. To Edit
    a. Click **Edit** next to the existing holder of the loan record
    b. Make changes to the following fields:
        i. Start Date
        ii. Code (Federal Loan Servicer)
    c. Click **Apply Update**
    d. Click **Save Loan Holder History**
2. To Delete
    a. Select the Delete **checkbox** next to the existing holder of the loan record
    b. Click **Submit**
    c. Click **Save Loan Holder History**
3. To Transfer

a. Click **Transfer** located on the bottom left page
b. Enter the Award ID (only required if FLS takes record)
c. Select the **Start Date**
d. Enter the Code
e. Click **Transfer Loan**

Note: Loans that have been transferred, can only be updated within the most recent period by Loan Holders of the same user group. If the holder was a Guaranty Agency, and the loan was transferred to a Federal Loan Servicer, the current holder (FLS) is restricted from modifying details of the loan while it was GA held.

Guaranty Agency

The Guaranty Agency section displays details of the history of GA Loan Holders that are currently or historically associated with the Loan Record. This section displays for FFEL Loans only.

- **Start Date** – The date the guaranty agency became responsible for servicing the loan record.
- **End Date** – The date the guaranty agency stopped being responsible for servicing the loan record.
- **Code** – The organization code associated with the guaranty agency.
- **Guaranty Agency** – The name of the guaranty agency that is associated with the loan.

Guaranty Agency (Authorized User)

To Edit and Delete a Guaranty Agency record:

1. To Edit
   a. Click **Edit** next to the existing holder of the loan record
   b. Make changes to the following fields:
      i. Start Date
      ii. Code
   c. Click **Apply Update**
   d. Click **Save Loan Holder History**
2. To Delete
   a. Select the Delete **checkbox** next to the existing holder of the loan record
   b. Click **Save Loan Holder History**

Lender

The Lender section displays details of the Lenders that currently or historically are associated with the Loan Record. This section displays for FFEL Loans only.

- **Start Date** – The date the servicer became responsible for servicing the loan record.
- **End Date** – The date the servicer stopped being responsible for servicing the loan record.
- **Code** – The organization code associated with the servicer.
- **Lender** – The name of the lender associated with the loan.

Lender (Authorized User)

To Edit and Delete a Lender record:

1. To Edit
   a. Click **Edit** next to the existing holder of the loan record
   b. Make changes to the following fields:
      i. Start Date
      ii. Code
   c. Click **Apply Update**
   d. Click **Save Loan Holder History**
2. To Delete
   a. Select the **Delete** box next to the existing holder of the loan record
   b. Click **Save Loan Holder History**

Lender Servicer

The Lender Servicer section displays details of the Lender Servicers that currently or historically are associated with the Loan Record. This section displays for FFEL Loans only.

- **Start Date** – The date the servicer became responsible for servicing the loan record.
- **End Date** – The date the servicer stopped being responsible for servicing the loan record.
- **Code** – The organization code associated with the servicer.
- **Lender Servicer** – The name of the lender organization that services the loan.

Lender Servicer (Authorized User)

To Edit and Delete a Lender Servicer record:

1. To Edit
    a. Click **Edit** next to the existing holder of the loan record
    b. Make changes to the following fields:
        i. Start Date
        ii. Code
    c. Click **Apply Update**
2. To Delete
    a. Select the **Delete** box next to the existing holder of the loan record
    b. Click **Save Loan Holder History**

School

The School section displays details of the Schools that currently or historically are associated with the Loan Record. This section displays for Perkins Loans only.

- **Start Date** – The date the servicer became responsible for servicing the loan record.
- **End Date** – The date the servicer stopped being responsible for servicing the loan record.
- **OPEID** - The eight-digit Office of Postsecondary Education ID of the school location.
- **School Name** - The name of the organization that disbursed the loan.

School (Authorized User)

Authorized users who have access can edit and delete an existing loan holder on the Update Loan Holder History page.

To Edit and Delete a School record:

1. To Edit
    a. Click **Edit** next to the existing holder of the loan record
    b. Make changes to the following fields:
        i. Start Date
        ii. Code
    c. Click **Apply Update**
2. To Delete
    a. Select the **Delete** box next to the existing holder of the loan record
    b. Click **Save Loan Holder History**

UNDERLYING LOAN LINKING (AUTHORIZED USER)

Authorized users can view the Underlying Loan Linking section for Direct and FFEL Consolidation Loans. Only users who are associated with the current holder of the Loan Record can view and update the Underlying Loan Linking section. The following types of loans display in this section:

- Direct Consolidation Unsubsidized

- Direct Consolidated Subsidized
- Direct PLUS Consolidation
- Direct Consolidation Subsidized
- FFEL Consolidation

For the loan record, the following information displays:

- **NSLDS Label for Underlying Loan** – The unique NSLDS identifier of the underlying loan paid off through this consolidation.
- **Amount of Payoff for Underlying Loan** – Indicates the total payoff amount of the underlying loan for this consolidation.
- **Date of Payoff for Underlying Loan** – Indicates the payoff date of the underlying loan for this consolidation.
- **Loan Group Type of Underlying Loan** – Specifies the underlying loan group type. Groupings
    - SUBS – Subsidized group type
    - USUB – Unsubsidized group type
    - PPLU – Parent PLUS group type
    - GPLU – Graduate PLUS group type
    - CAMP – Campus-based group type
    - OTHR – Other group type

To Add, Edit, or Delete an Underlying Loan Linking for a Direct and FFEL Loan:

1. Click **Update** within the Underlying Loan Linking section
2. To Add Underlying Loan Linking
    a. Enter the NSLDS Label for Underlying Linking
    b. Enter the Amount of Payoff for Underlying Loan
    c. Select the **Date of Payoff** for Underlying Loan
    d. Select the **Loan Group Type** of Underlying Loan from the dropdown
    e. Click **Save**
3. To Edit Underlying Loan Linking
    a. Click **Edit** next to the Underlying Loan Linking record
    b. Make changes to editable fields:
        i. Underlying Loan
        ii. Amount of Payoff for Underlying Loan
        iii. Date of Payoff for Underlying Loan
        iv. Loan Group Type of Underlying Loan
    c. Click **Save**
4. To Delete Underlying Loan Linking
    a. Select Delete **checkbox** next to the Underlying Loan Linking record
5. Click **Submit**
6. Click **Confirm Updates**

LOSS OF SUBSIDY (AUTHORIZED USER)

Authorized users can view the Loss of Subsidy section for loan records that are Direct Stafford Subsidized (SULA Eligible) Federally Serviced Loans. Only users who are associated with the current holder of the Loan Record can view and update the Loss of Subsidy section.

- Sent from NSLDS
    - **Subsidy Status** – The subsidy status provided by NSLDS to the Federal Loan Servicer in the Subsidy Notification file.
        - L = loss of subsidy
        - R = reinstatement of subsidy

- **Subsidy Status Effective Date –** The effective date of the subsidy status provided by NSLDS to the Federal Loan Servicer in the Subsidy Notification file.
- **System Begin Date** – The date on which the subsidy status was added to the NSLDS database.

- Response Received from a FLS
  - **Response Received Date -** The date NSLDS received a confirmation action from the servicer
  - **Action Code –** Specifies the action taken by the Federal Loan Servicer in response to the subsidy status provided by NSLDS.
    - A1 – Subsidy Action Applied
    - A2 – Subsidy Action Applied – Loan Currently Closed (Not through Consolidation)
    - A3 – Subsidy Action Applied – Subsidy Status Applied and Sent to consolidating servicer
    - N1 – Subsidy Action Not Applied – Loan Transferred to Another Servicer
    - N2 – Subsidy Action Not Applied – Loan Not Found
    - N3 – Subsidy Action Not Applied – Loan Consolidated (only applicable when the consolidation loan is at the same servicer as the underlying loan)
    - N4 – Subsidy Action Not Applied – Loan Consolidated to Another Servicer
  - **Action Effective Date –** The date on which the Federal Loan Servicer took action on the subsidy status provided by NSLDS.
  - **Transfer To –** The servicer to which the loan has been transferred.
    - Only report when Action Code is equal to N1 or N4
  - **System End Date –** The date on which the subsidy status was ended on the NSLDS database.

To Add or Edit a Loss of Subsidy for a loan record:

1. Click **Update** within the Loss of Subsidy section
2. To Confirm Subsidy Status
   a. Select the **Action Code** from the dropdown
   b. Enter the Action Effective Date
   c. Select the **Transfer** to from the dropdown
      i. Only editable if N1 or N4 is selected as Action Code
   d. Click **Save**
3. To Edit Loss of Subsidy
   a. Click **Edit** next to the Loss of Subsidy Response Received by NSLDS
   b. Make changes to editable fields:
      i. Action Code
      ii. Action Effective Date
   c. Click **Save**
4. Click **Submit**
5. Click **Confirm Updates**

COMMERCIALLY HELD FFEL LOANS

A user can determine the type of Loan by viewing the Loan Details card at the top of the page. The Loan Details information card for an FFEL loan displays the following information:

- **#** - Aid recipient's number identifier for the loan record. This number is assigned by NSLDS.
- **Loan Last Updated** - The date the loan was last modified via web, batch, or spreadsheet submittal.
- **Commercially Serviced Loan Note –** Indicates that the loan record is commercially serviced

If the Aid Recipient has multiple loan records, the user can click **Next** located in the top right corner to navigate to remaining loan records. The Loan Details page contains a navigation page on the left side of the page to navigate between sections.

When viewing Commercially Held FFEL Loan details, the page is separated into the following sections: :

- Amounts for Loan
- Loan Information
- CDR Information
- Loan Status
- Activities
- Collections
- Claims
- Loan Holder History

The above sections display as links along the side of the Loan Details page, to allow navigation between sections.

AMOUNTS FOR LOAN

The Amounts for Loan section displays the following loan amount information:

- **Loan Date –** For FFEL loans, the date the loan was originally guaranteed.
- **OPB Date** - The date the outstanding principal balance was updated.
- **OIB Date** - The date the outstanding interest balance was updated.
- **Other Fees Date -** Identifies the date the additional fees currently owed on the loan was last updated.
- **Loan Amount –** The original amount guaranteed by the Guaranty Agency.
- **OPB Amount** - The cumulative dollar value due on a loan. If the field is preceded by an exclamation mark, the amount may include capitalized interest and/or other fees.
- **OIB Amount** - The cumulative accrued outstanding interest balance on the loan.
- **Other Fees Amount** - The accumulated fees added to late or defaulted loans. Examples of other fees are late fees, collection costs, or court costs.

Within the Amounts for Loan section, users can **View Outstanding Amount Balance History. Note**: Reference the Total Outstanding Balance section of the Help Text for details of the Outstanding Amount Balance History page.

Last updated information displays in the bottom of the section.

- **Last Updated -** Date the information was last updated.
- **Method –** Latest method used to submit the loan details information
- **Source –** The entity that reports specified data.

Amounts for Loan (Authorized User)
The Amounts for Loan section displays the following loan amount information for authorized users.

- **Guaranty Date –** For FFEL loans, the date the loan was originally guaranteed.
- **OPB Date** - The date the outstanding principal balance was updated.
- **OIB Date** - The date the outstanding interest balance was updated.
- **Cumulative Capitalized Interest Date**– The date the cumulative amount of unpaid interest was updated.
- **Guaranty Amount –** The original amount guaranteed by the Guaranty Agency.
- **OPB Amount** - The cumulative dollar value due on a loan. If the field is preceded by an exclamation mark, the amount may include capitalized interest and/or other fees.
- **OIB Amount** - The cumulative accrued outstanding interest balance on the loan.
- **Cumulative Capitalized Interest Amount** - The cumulative amount of unpaid accrued interest that has been added to the outstanding principal balance.
- **Other Fees Amount** - The accumulated fees added to late or defaulted loans. Examples of other fees are late fees, collection costs, or court costs

To Edit Amounts for Loan:

1. Click **Update** within the Amounts for Loan
2. In the Amounts for Loan section, make changes to the following:
    a. Guaranty Date
    b. OPB Date
    c. OIB Date
    d. Amount of Guaranty
    e. Outstanding Principal Balance (OPB) Amount
    f. Outstanding Interest Balance (OIB) Amount
    g. Other Fees
3. In the Loan Details section, make changes to the following:
    a. Loan Type
    b. Loan Period
    c. Academic Level
    d. Statutory Interest Rate
    e. Type of Interest Rate
    f. The Date the Aid Recipient Entered Repayment
4. In the Loan Organizations section, changes to the following
    a. OPEID
    b. School
    c. Code for Originating FFEL Lender
5. In the Loan Identifiers section, make changes to the following:
    a. Data Provider Loan ID
    b. Indicator of Lender of Last Resort Loan
    c. Indicator of Subsidy
    d. Indicator of Separate Loan
6. Click **Submit**

LOAN INFORMATION

The Loan Information section displays current loan information based on the loan type. The information is separated into three sections.

- Loan Details
- Loan Organizations
- Loan Identifiers

A user can click **Review Reaffirmation** to view the Reaffirmation History for the loan. Each Reaffirmation record displays in individual card views with loan details above. Users can select **View All Reaffirmations** to be redirected to all reaffirmed loans for this borrower. **Note**: Refer to the Reaffirmation Tab Section of the Help Text for a more in-depth explanation of the section and user capabilities for the page.

Below are additional fields that are viewable for an Authorized user:

- Loan Details
    - **Loan Period -** The period of study for which the loan was originally taken out.
    - **Academic Level -** The student's academic level at the time the loan was provided.
    - **Actual Interest Rate** - Annual interest rate a lender charges on a loan, which may be equal to or less than the applicable interest rate on that loan.
    - **Statutory Interest Rate -** Applicable interest rate that can be charged for the loan.
    - **Date Entered Repayment –** The actual date or the date when the scheduled repayment period begins.
    - **Aggregate OPB -** The cumulative dollar value due for the given aggregate loan type.
    - **Discharge Code –** Valid values consist of Death or Permanent.

- Loan Organizations
    - **Guaranty Agency –** The name of the guaranty agency that guarantees the loan.
    - **Lender –** The name of the lender organization that funded and serviced the loan.
    - **School Name –** The name of the organization that disbursed the loan.
    - **Code for Originating FFEL Lender –** The code for lender that issued promissory note for a FFELP loan.
- Loan Identifiers
    - **Award ID** - A unique identifier for a financial award across programs and systems, and across academic years.
    - **Data Provider Loan ID -** A code used by a data provider (Guaranty Agency, Direct Loan Servicer, Debt Collection Service or Perkins school) for internal loan identification.
    - **NSLDS Label -** Unique identifier for the loan record assigned by NSLDS. 17 digits long.
    - **Indicator of Separate Loan -** An indicator used to differentiate among multiple loans of the same type with the same date of guaranty for the same borrower or student.
    - **Lender of Last Resort Loan –** Indicates if the loan is a lender of last resort loan.
    - **Indicator of Subsidy –** Indicator determined by NSLDS if the loan has a subsidy status currently stored in NSLDS. Note: only applies for D0 loan types.
    - **Next Gen NSLDS Label -** Unique identifier for the loan record assigned by NSLDS. 12 digits long.

Last updated information displays in the bottom of the section.

- **Last Updated -** Date the information was last updated.
- **Method –** Latest method used to submit the loan details information
- **Source –** The entity that reports specified data.

Loan Information (Authorized User)

For Authorized users, the Loan Information section displays the following fourth section:

- Payment Details

Authorized Users can see the following additional fields within each section:

- Loan Identifiers
    - **Program Code –** Identifies the loan program.
    - **Loan CRC Code –** Credit Reform Code - a six (6) position code that signifies the calculated risk associated with the loan based on the loan type, school type, length of program and the years the borrower has been in school.
    - **Consolidation Loan ID –** A unique identifier for a financial award across programs and systems, and across academic years. It is the Award ID for the Consolidation Loan that was made to pay off this loan.
    - **Lender of Last Resort Loan –** Indicates if the loan is a lender of last resort loan.
    - **Underlying Parent PLUS on Consolidation Loan Indicator** –
    - **Joint Consolidation Indicator** -
- Payment Details
    - **Delinquency Begin Date –** The begin date the delinquency was entered into NSLDS.
    - **Delinquency End Date –** The end date the delinquency was entered into NSLDS.
    - **Days Delinquent -** Number of days since the borrower last made a full payment.
    - **Next Payment Due –** The date of the earliest unpaid installment as of reporting.
    - **Date Last Payment Applied –** The date the last payment the borrower paid on the loan was applied to the account.
    - **Current Cumulative Amount of Payment –** The cumulative amount of payment as the sum of all payment amounts stored in NSLDS for the loan record.
    - **Borrower Fee Paid –** Total amount of borrower fee payments made by or on behalf of the borrower.
    - **Borrower Interest Paid –** The total amount of interest payments made by or on behalf of the borrower.
    - **Borrower Principal Paid –** The total amount of principal payments made by or on behalf of the borrower.

- **Life To Date Months in Deferment –** The number of regular installments deferred.
- **Life to Date Months in Forbearance –** The number of regular installments forborne.
- **Date of CDR Default –** Date the loan defaulted, as defined in regulations, used for the Cohort Default Rate calculation.

To Edit Loan Information:

1. Click **Update** within the Loan Information section
2. In the Amounts for Loan section, make changes to the following:
    a. Guaranty Date
    b. OPB Date
    c. OIB Date
    d. Amount of Guaranty
    e. Outstanding Principal Balance (OPB) Amount
    f. Outstanding Interest Balance (OIB) Amount
    g. Other Fees
3. In the Loan Details section, make changes to the following:
    a. Loan Period
    b. Academic Level
    c. Statutory Interest Rate
    d. The Date the Aid Recipient Entered Repayment
    e. Aggregate OPB
    f. Discharge Code
4. In the Loan Organizations section, changes to the following
    a. OPEID
    b. School
5. In the Loan Identifiers section, make changes to the following:
    a. NSLDS Label
    b. Data Provider Loan ID
    c. Indicator of Lender of Last Resort Loan
    d. Indicator of Subsidy
    e. Indicator of Separate Loan
    f. Next Gen NSLDS Label
6. Click **Submit**

Users can click **Review Reaffirmation** within the loan and be navigated to the Reaffirmation page. **Note**: Reference the Reaffirmation section of the Help Text for more details.

CDR INFORMATION

The CDR Information section displays information related to the CDR as reported for the Loan Record:

- **Date Entered Repayment –** The date the loan entered repayment.
- **Date of Default for CDR** – The date the Loan Record defaulted.
- **Rehabilitation Date –** Indicates the date that the borrower has rehabilitated a loan.
- **Default Claim Date –** The most recent date of insurance claim payment with a claim reason code equal to 'DF'.
- **Cohort Fiscal Year** – The year for which the CDR calculation is run, starts in October of the current year and ends in September of the following year.

Unlike the other sections within the Loan Details page, the CDR information section does not have an update option. Authorized users can modify the fields using the information below:

- Date Entered Repayment – Update in Loan Information section
- Date of Default for CDR – Update in Loan Information section

- Default Claim Date - Update in Claim Details section
- Rehabilitation Section - Update in Claim Details section

LOAN STATUS

The Loan Status section displays history of a valid Loan Status record information reported for the Loan Record:

- **Status Date** - The date a Loan Status became effective.
- **Status** - The two-character code and description indicating the status of the loan.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Loan Status (Authorized User)
Authorized users can see the following additional fields in the Loan Status section:

- **Source** - The loan was last updated by Batch, Spreadsheet Submittal, or Web.
- **System Date** - The date the Loan Status Record was stored in the NSLDS System.

To Add, Edit, or Delete Loan Status for FFEL Loan:

1. Click **Update** within the Loan Status section
2. To Add Loan Status
    a. Click **Add Loan Status**
    b. Select the **Date**
    c. Select the **Status** from the dropdown
    d. Click **Save**
3. To Edit Loan Status
    a. Click **Edit** next to the Interest Benefit record
    b. Make changes to editable fields:
        i. Date
        ii. Status
    c. Click **Save**
4. To Delete Loan Status
    a. Select Delete **checkbox** next to the Interest Benefit record
5. Click **Apply**

Within the Loan Status section, users can **View Outstanding Amount Balance History**. **Note**: Reference the Total Outstanding Balance section of the Help Text for details of the Outstanding Amount Balance History page.

ACTIVITIES

The Activities section for a Commercially Held Loan displays the following sections. Note:If any of the following sections do not have any values applicable to the Loan, the field or section may not be viewable.

Disbursements
The Disbursements section contains a table displaying all individual disbursement record information reported for the Loan Record:

- **Date** – The date the loan disbursement was made.
- **Cumulative Amount** - The cumulative amount of funds released to a borrower.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Disbursements (Authorized User)

Authorized users can see the following fields in the disbursement section:

- **Disbursement Amount** – The amount of funds disbursed to a borrower.
- **Late Disbursement Indicator** – Indicates if the disbursement was late.

To Add, Edit, or Delete Disbursement:

1. Click **Update** within the Disbursements section
2. To Add a Disbursement
    a. Click **Add Disbursement**
    b. Select the **Date**
    c. Input the Cumulative Disbursement Amount
    d. Click **Save**
3. To Edit Disbursement
    a. Click **Edit** next to the Disbursement record
    b. Make changes to editable fields:
        i. Date
        ii. Cumulative Disbursement Amount
    c. Click **Save**
4. To Delete Disbursement
    a. Select Delete **checkbox** next to the Disbursement record
5. Click **Apply**

Refunds

The Refunds section contains a table displaying information of all individual refund records reported for the Loan Record:

- **Date** - The date the lender received a refund from a school.
- **Cumulative Amount** – The total amount of the refund paid to a lender on a loan.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Refunds (Authorized User)

Authorized users can see the following fields in the Refund section:

- **Refund Amount** - The amount of refund paid to a lender on a loan.

To Add, Edit, or Delete a Refund:

1. Click **Update** within the Refund section
2. To Add a Refund
    a. Click **Add Refunds**
    b. Select the **Date**

    c. Input the Cumulative Refund Amount
    d. Select **Save**
3. To Edit Refund
    a. Click **Edit** next to the Refund record
    b. Make changes to editable fields:
        i. Date
        ii. Cumulative Refund Amount
    c. Select **Save**
4. To Delete Refund
    a. Select Delete **checkbox** next to the Refund record
5. Click **Apply**

Cancellations

The Cancellations section contains a table displaying information of all individual cancellation records reported for the Loan Record

- **Date** – The latest date all or part of the Title IV loan was canceled.
- **Cumulative Amount** – The total amount of the Title IV loan that was canceled.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Cancellations (Authorized User)

Authorized users can see the following fields in the Cancellations section:

- **Cancellation Amount** – The amount of the Title IV loan that was canceled.

To Add, Edit, or Delete a Cancellation:

1. Click **Update** within the Cancellation section
2. To Add a Cancellation
    a. Click **Add Cancellation**
    b. Select the **Date**
    c. Input the Cumulative Cancellation Amount
    d. Click **Save**
3. To Edit Cancellation
    a. Click **Edit** next to the Cancellation record
    b. Make changes to editable fields:
        i. Date
        ii. Cumulative Cancellation Amount
    c. Click **Save**
4. To Delete Cancellation
    a. Select Delete **checkbox** next to the Cancellation record
5. Click **Apply**

Deferments

The Deferments section contains a table displaying information of all individual deferment records reported for the Loan Record.

- **Start Date** – The date when a deferment begins.
- **End Date** – The date when a deferment ends or is projected to end. Includes post-deferment grace period if applicable.
- **Type** – The type of deferment approved for the postponement of repayment of loan principal and interest.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Deferments (Authorized User)

To Add, Edit, or Delete Deferment:

1. Click **Update** within the Deferment section
2. To Add a Deferment
    a. Click **Add Deferment**
    b. Select the **Start Date**
    c. Select the **End Date**
    d. Select the **Type** of deferment from the dropdown
    e. Select **Save**
3. To Edit Deferment
    a. Click **Edit** next to the Deferment record
    b. Make changes to editable fields:
        i. Start Date
        ii. End Date
        iii. Type
    c. Select **Save**
4. To Delete Deferment
    a. Select Delete **checkbox** next to the Deferment record
5. Click **Apply**
-

Discharge

The Discharges section displays a table of all individual discharge records reported for the Loan Record:

- **Type** - One of the discharge reason codes for discharging all or part of a loan.
- **Date** – The date when all or part of the Title IV loan was discharged.
- **Posted Date** – The date on which loan discharge was posted to a borrower's account.
- **Discharge Amount** – The discharge amount, displayed by type, for the Title IV loan displayed.
- **Cumulative OPB** - The cumulative dollar value due on a loan, as reported by the data provider.
- **Cumulative OIB** – The cumulative accrued outstanding interest balance on the loan, as reported by the data provider.
- **Indicator** – Indicates if the loan discharge reported is a partial or full discharge.
- **Cumulative Discharge** – The total aggregate amount discharged from all of the Discharge records.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Discharge (Authorized User)

To Add, Edit, or Delete Discharge:

1. Click **Update** within the Discharge section
2. To Add Discharge
    a. Click **Add Discharge**
    b. Select the **Discharge Date**
    c. Select the **Type** of Discharge from the dropdown
    d. Select the **Partial or Full Indicator** from the dropdown
    e. Input the Cumulative Amount
    f. Input the Cumulative OPB
    g. Input the Cumulative OIB
    h. Select the **Posted Date of Discharge**
    i. Click **Save**
3. To Edit Discharge
    a. Click **Edit** next to the Discharge record
    b. Make changes to editable fields:
        i. Discharge Date
        ii. Type of Discharge
        iii. Partial or Full Indicator
        iv. Cumulative Amount
        v. Amount
        vi. Cumulative OPB
        vii. Cumulative OIB
        viii. Posted Date of Discharge
    c. Click **Save**
4. To Delete Discharge
    a. Select Delete **checkbox** next to the Discharge record
5. Click **Apply**

COLLECTIONS

The Collections section displays various collection types:

- Treasury Offset Program
- DMCS
- Admin. Wage Garnishment
- Department of Justice
- Guaranty Agency

Each Collection type section displays information for the collection. Some fields only display for certain users:

- **Date** - The date when the ED Servicer's collection was applied to the loan account.
- **Cumulative Principal Amount** - The cumulative amount collected and applied to principal through the part of a collection that was applied toward reducing the outstanding principal amount on the loan.
- **Cumulative Interest Amount** - The cumulative amount of a collection that was applied to interest through the part of a collection that was applied toward reducing the outstanding interest amount on the loan.

Last updated information displays in the bottom of the section.

- **Last Updated** – Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Collections (Authorized User)

Authorized users can view the following fields in the Collections section:

- **Cumulative Amount Collection Applied to Fees** - The cumulative amount of a collection that was applied to fees through the part of a collection that was applied toward reducing the outstanding interest amount on the loan.

To Add, Edit, or Delete Collection:

1. To Add Collection
    a. Click **Add Collection Type**
    b. Select the **Date**
    c. Input the Cumulative Principal Amount
    d. Input the Cumulative Interest Amount
    e. Input the Cumulative Amount of Collection Applied to Fees
    f. Click **Save**
2. To Edit Collection
    a. Click **Edit** Collection Type
    b. Make changes to editable fields:
        i. Date
        ii. Cumulative Principal Amount
        iii. Cumulative Interest Amount
        iv. Cumulative Amount of Collection Applied to Fees
    c. Click Delete **checkbox**
3. To Delete Collection Type
    a. Select Delete **checkbox** next to the Collection Type record
4. Click **Apply**

CLAIM DETAIL

The Claim Detail section displays the following claim types:

- Insurance Claim Payment
- Insurance Claim Refund
- Reinsurance Claim Payment
- Bankruptcy Claim Refund
- Supplemental Reinsurance Payment Request
- Repurchase

Insurance Claim Payment

The Insurance Claim Payment section contains a table displaying information of all individual insurance claim payments reported for the Loan Record:

- **Date** – The date when a Guaranty Agency paid an insurance claim or supplemental claim to a lender. [The Loan Record Detail Report (LRDR) may show an insurance claim payment date that is different than the one that displays here.]
- **Cumulative Amount Paid** – The cumulative amount of principal and interest including supplemental claims paid to a lender by a Guaranty Agency for an insurance claim on an FFELP loan. Amount does not include claims that were made prior to repurchase.
- **Reason Code** – The code indicating the reason the latest insurance claim, including supplemental claims, was paid to a lender.
- **Date Paid** – The date when the government pays a reinsurance claim to a guaranty agency.
- **Reimbursement Rate** – The code indicating the rate at which the government paid a claim to the Guaranty Agency on a specific loan.

- **Indication of Rehabilitation –** The code indicating whether a repurchased loan was rehabilitated (9 consecutive payments within 10 months were made and the Guaranty Agency sold it back to a lender). Possible Indicator values are:
    - Y - indicating loan has been rehabilitated
    - N - indicating loan has been repurchased but not rehabilitated
    - E - indicating loan has been repurchased due to a claim made in error
    - N/A - loan has not been repurchased.

Insurance Claim Payment (Authorized User)

To Add, Edit or Delete Insurance Claim Payment:

1. Click **Update** within the Insurance Claim Payment section
2. To Add Insurance Claim Payment
    a. Click **Add Insurance Claim Payment**
    b. Select the **Date**
    c. Input the Cumulative Insurance Claim Amount
    d. Select the **Reason Cod**e from the dropdown
    e. Click **Save**
3. To Edit Insurance Claim Payment
    a. Click **Edit** next to the Insurance Claim Payment record
    b. Make changes to editable fields:
        i. Date
        ii. Cumulative Insurance Claim Amount
        iii. Reason Code
    c. Click **Save**
4. To Delete Insurance Claim Payment
    a. Select Delete **checkbox** next to the Insurance Claim Payment record
5. Click **Apply**

Last updated information displays in the bottom of the section.

- **Last Updated –** Date the information was last updated.
- **Method –** Latest method used to submit the loan details information
- **Source –** The entity that reports specified data.

Insurance Claim Refund

The Insurance Claim Refund section contains a table displaying information of all individual insurance claim refunds reported for the Loan Record:

- **Date –** The date when a Guaranty Agency received an insurance claim refund from a lender.
- **Cumulative Amount Paid –** The cumulative dollar amount of refund(s) from a lender to a Guaranty Agency. Refunds may occur because of an overpayment of a claim, late refunds from the institution to the lender, or borrower payments to the lender after default and prior to the request for reinsurance. If reinsurance has been requested from ED, report the amount as a collection. Amount does not include refunds that were made prior to repurchase.

Insurance Claim Refund (Authorized User)

To Add, Edit, or Delete Insurance Claim Refund:

1. Click **Update** within the Insurance Claim Refund section
2. To Add Insurance Claim Refund
    a. Click **Add Insurance Claim Refund**
    b. Select the **Date**
    c. Input the Cumulative Insurance Claim Amount

    d. Click **Save**
3. To Edit Insurance Claim Refund
    a. Click **Edit** next to the Insurance Claim Refund record
    b. Make changes to editable fields:
        i. Date
        ii. Cumulative Insurance Claim Amount
    c. Click **Save**
4. To Delete Insurance Claim Refund
    a. Select Delete **checkbox** next to the Insurance Claim Refund record
5. Click **Apply**

Last updated information displays in the bottom of the section.

- **Last Updated** – Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Reinsurance Claim Payment

The Reinsurance Claim Payment section displays all supplemental reinsurance payments reported for the Loan Record:

- **Date** – The date when a Guaranty Agency requested reinsurance.
- **Cumulative Amount Paid** – The dollar amount of a reinsurance claim requested of ED by a Guaranty Agency. Amount does not include claims that were made prior to repurchase.
- **Reason Code** – The code indicating the reason the latest reinsurance claim, including supplemental insurance, was paid to a Guaranty Agency.
- **Date Paid** – The date when the government pays a reinsurance claim to a guaranty agency.
- **Reimbursement Rate** – The code indicating the rate at which the government paid a claim to the Guaranty Agency on a specific loan. The rate codes includes: Code 1 (100%); Code 2 (90%); Code 3 (80%); Code 0 (0%).

Reinsurance Claim Payment (Authorized User)

To Add, Edit, or Delete Reinsurance Claim Payment:

1. Click **Update** within the Reinsurance Claim Payment section
2. To Add Reinsurance Claim Payment
    a. Click **Add Reinsurance Claim Payment**
    b. Select the **Date**
    c. Input the Cumulative Claim Amount
    d. Select the **Reason Code** from the dropdown
    e. Select the **Date Paid**
    f. Input the Reimbursement Rate
    g. Click **Save**
3. To Edit Reinsurance Claim Payment
    a. Click **Edit** next to the Reinsurance Claim Payment record
    b. Make changes to editable fields:
        i. Date
        ii. Cumulative Claim Paid
        iii. Reason Code
        iv. Date Paid
        v. Reimbursement Rate
    c. Click **Save**
4. To Delete Reinsurance Claim Payment

    a. Select Delete **checkbox** next to the Reinsurance Claim Payment record
5. Click **Apply**

Last updated information displays in the bottom of the section.

- **Last Updated** – Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Bankruptcy Claim Refund

The Bankruptcy Claim Refund section displays all individual bankruptcy claim refunds reported for the Loan Record:

- **Date** – The date when a bankruptcy claim (previously paid as a reinsurance claim) was refunded to ED by a Guaranty Agency.
- **Cumulative Amount Paid** – The cumulative amount remitted to ED for bankruptcy claim refund(s) on a loan. A guarantor refunds reinsurance to ED after the following sequence of events: the guarantor pays a bankruptcy claim to a lender before the bankruptcy court decides whether the loan is discharged; the guarantor collects reinsurance from ED; and the loan is not discharged by bankruptcy court. Amount does not include refunds that were made prior to repurchase.

Bankruptcy Claim Refund (Authorized User)

To Add, Edit, or Delete Bankruptcy Claim Refund:

1. Click **Update** within the Bankruptcy Claim Refund section
2. To Add Bankruptcy Claim Refund
    a. Click **Add Reinsurance Claim Paym**ent
    b. Select the **Date**
    c. Input the Cumulative Bankruptcy Claim Amount
    d. Click **Save**
3. To Edit Bankruptcy Claim Refund
    a. Click **Edit** next to the Bankruptcy Claim Refund record
    b. Make changes to editable fields:
        i. Date
        ii. Cumulative Bankruptcy Claim Amount
    c. Click **Save**
4. To Delete Bankruptcy Claim Refund
    a. Select Delete **checkbox** next to the Bankruptcy Claim Refund record
5. Click **Apply**

Last updated information displays in the bottom of the section.

- **Last Updated** – Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Supplemental Reinsurance Payment Request

The Supplemental Reinsurance Payment section displays all supplemental reinsurance payment reported for the Loan Record:

- **Date** – The date when a supplemental reinsurance claim request is submitted to ED by a Guaranty Agency
- **Cumulative Amount Paid** – The cumulative dollar amount of supplemental reinsurance claim request(s) of ED by a Guaranty Agency. Amount does not include requests that were made prior to repurchase.

Supplemental Reinsurance Payment Request (Authorized User)

To Edit or Delete Supplemental Reinsurance Payment:

1. Click **Update** within the Supplemental Reinsurance Payment section
2. To Add Supplemental Reinsurance Payment
    a. Click **Add Supplemental Reinsurance Payment**
    b. Select the **Date**
    c. Input the Claim Amount
    d. Click **Save**
3. To Edit Supplemental Reinsurance Payment
    a. Click **Edit** next to the Supplemental Reinsurance Payment record
    b. Make changes to editable fields:
        i. Date
        ii. Claim Amount
    c. Click **Save**
4. To Delete Supplemental Reinsurance Payment
    a. Select Delete **checkbox** next to the Supplemental Reinsurance Payment record
5. Click **Apply**

Last updated information displays in the bottom of the section.

- **Last Updated** – Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Repurchase

The Repurchase section contains a table that displays information of individual repurchase claims reported for the Loan Record:

- **Date** – The date when a loan previously paid by a claim is repurchased by a lender (reasons may include loan rehabilitation).
- **Cumulative Amount** – The principal dollar amount of repurchased claims (including repurchases of bankruptcy claims).
- **Indication of Rehabilitation** – The code indicating whether a repurchased loan was rehabilitated (9 consecutive payments within 10 months were made and the Guaranty Agency sold it back to a lender). Possible Indicator values are:
    - Y – indicating loan has been rehabilitated
    - N – indicating loan has been repurchased but not rehabilitated
    - E – indicating loan has been repurchased due to a claim made in error
    - N/A – loan has not been repurchased.

Repurchase (Authorized User)

To Add, Edit, or Delete Repurchase Claim:

1. Click **Update** within the Repurchase Claim section
2. To Add Repurchase Claim
    a. Select the **Date**
    b. Input the Cumulative Repurchase Amount
    c. Select the **Rehabilitation Indicator** from the dropdown
    d. Click **Save**
3. To Edit Repurchase Claim
    a. Click **Edit** next to the Repurchase Claim record
    b. Make changes to editable fields:

        i. Date
        ii. Cumulative Repurchase Amount
        iii. Rehabilitation Indicator
    c. Click **Save**
4. To Delete Repurchase Claim
    a. Select Delete **checkbox** next to the Repurchase Claim record
5. Click **Apply**

Last updated information displays in the bottom of the section.

- **Last Updated** – Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

LOAN HOLDER HISTORY

The Loan Holder History section displays a history of the Loan Holders (Federal Loan Servicers and Guaranty Agencies), Lenders and Lender Services that are currently or historically associated with the Loan Record.

The page displays the following sections, if applicable to the loan record:

- Guaranty Agency
- Federal Loan Servicer
- Lender
- Lender Servicer

Note: By default, NSLDS displays the section that is the current holder of the loan first.

Last updated information displays in the bottom of the section.

- **Last Updated** – Date the information was last updated.
- **Method** – Latest method used to submit the loan details information
- **Source** – The entity that reports specified data.

Federal Loan Servicer

The Federal Loan Servicer section only displays if a FFEL Loan was transferred to a FLS, the section contains details of the Federal Loan Servicer record:

- **Start Date** – The date the servicer became responsible for servicing the loan record.
- **End Date** – The date the current servicer stopped being responsible for servicing the loan record.
- **Code** – The organization code associated with the servicer.
- **Federal Loan Servicer** – The name of the federal loan servicer associated with the loan.

Federal Loan Servicer (Authorized User)

To Edit and Delete a Federal Loan Servicer record:

1. To Edit
    a. Click **Edit** next to the existing holder of the loan record
    b. Make changes to the following fields:
        i. Start Date
        ii. Code (FLS)
    c. Click **Save**
    d. Click **Submit**
2. To Delete

a. Select the **Delete** box next to the existing holder of the loan record
b. Click **Save Loan Holder History**

Guaranty Agency

The Guaranty Agency section displays details of the history of GA Loan Holders for Commercially Serviced FFEL Loans only.

- **Start Date** – The date the servicer became responsible for servicing the loan record.
- **End Date** – The date the servicer stopped being responsible for servicing the loan record.
- **Code** – The organization code associated with the servicer.
- **Guaranty Agency** – The name of the guaranty agency that guarantees the loan.

Guaranty Agency (Authorized User)

To Edit and Delete a Guaranty Agency record:

1. To Edit
    a. Click **Edit** next to the existing holder of the loan record
    b. Make changes to the following fields:
        i. Start Date
        ii. Code
    c. Click **Apply Update**
    d. Click **Save Loan Holder History**
2. To Delete
    a. Select the Delete **checkbox** next to the existing holder of the loan record
    b. Click **Save Loan Holder History**
3. To Transfer
    a. Click **Transfer** located on the bottom left page
    b. Enter the Award ID (only required if FLS takes record)
    c. Select the **Start Date**
    d. Enter the Code
    e. Click **Transfer Loan**

Lender

The Lender section displays details of the Lender that is associated with the Loan Record.

- **Start Date** – The date the lender became responsible for servicing the loan record.
- **End Date** – The date the Lender stopped being responsible for servicing the loan record.
- **Code** – The organization code associated with the lender.
- **Lender** – The name of the lender associated with the loan.

Lender (Authorized User)

To Edit and Delete a Lender record:

3. To Edit
    a. Click **Edit** next to the existing holder of the loan record
    b. Make changes to the following fields:
        i. Start Date
        ii. Code (Lender)
    c. Click **Save**
    d. Click **Submit**
4. To Delete
    a. Select the **Delete** box next to the existing holder of the loan record

b. Click **Save Loan Holder History**

Lender Servicer

The Lender Servicer section displays details of the Lender Servicer that is associated with the Loan Record.

- **Start Date** – The date the lender servicer became responsible for servicing the loan record.
- **End Date** – The date the lender servicer stopped being responsible for servicing the loan record.
- **Code** – The organization code associated with the lender servicer.
- **Lender Servicer** – The name of the lender servicer organization that services the loan.

Lender Servicer (Authorized User)

To Edit and Delete a Lender Servicer record:

1. To Edit
    a. Click **Edit** next to the existing holder of the loan record
    b. Make changes to the following fields:
        i. Start Date
        ii. Code (Lender Servicer)
    c. Click **Save**
    d. Click **Submit**
2. To Delete
    a. Select the **Delete** box next to the existing holder of the loan record
    b. Click **Save Loan Holder History**

SCHOOL SERVICED PERKINS LOANS

A user can determine the type of Loan by viewing the Loan Details card at the top of the page. The Loan Details information card displays the following information:

- **#** - Aid recipient's number identifier for the loan record. This number is assigned by NSLDS.
- **Loan Last Updated** – The date the loan was last modified via web, batch, or spreadsheet submittal.
- **School Serviced Loan Note** – Indicates that the loan record is a school serviced Perkins loan record.

The Loan Detail page contains individual loan record details. For Aid Recipients with multiple loan records, users can click **Next** located in the top right corner to navigate to remaining loan records. The Loan Details page contains a navigation page on the left side of the page to navigate between sections.

The School Serviced Perkins Loans details page is separated into the following sections:

- Amounts for Loan
- Loan Information
- Loan Status
- Activities
- Loan Holder History

AMOUNTS FOR LOAN

The Amounts for Loan section displays loan amount information:

- **Loan Date** - Date when a Perkins loan was originally disbursed.
- **OPB Date** - The date the outstanding principal balance was updated.

- **Loan Amount -** The original guarantee or disbursed amount of the loan.
- **Outstanding Principal Balance (OPB) Amount -** The cumulative dollar value due on a loan, as reported by the data provider.

Within the Amounts for Loan section, users can **View Outstanding Amount Balance History. Note**: Reference the Total Outstanding Balance section of the Help Text for details of the Outstanding Amount Balance History page.

Amounts for Loan (Authorized User)

The Amounts for Loan section displays the following loan amount information for authorized users.

- **OIB Date** – The date that the outstanding interest balance was updated.
- **Cumulative Capitalized Interest Date** – The date the cumulative amount of unpaid interest was updated.
- **OIB Amount** – The cumulative accrued outstanding interest balance on the loan.
- **Cumulative Capitalized Interest Amount** – The cumulative amount of unpaid accrued interest that has been added to the outstanding principal balance.
- **Other Fees Amount** – The accumulated fees added to late or defaulted loans. Examples of other fees are late fees, collection costs, or court costs.

To Edit Amounts for Loan:

1) Click **Update** in Amounts for Loan section
2) In the Amounts for Loan section, make edits to the following:
    a. Loan Date
    b. Loan Amount
    c. OPB Date
    d. Outstanding Principal Balance (OPB)
3) In the Loan Details section, make edits to the following:
    a. Discharge Code
    b. Loan Period
    c. Academic Level
    d. Actual Interest Rate
    e. Aggregate OPB
    f. The date the Aid Recipient entered repayment
4) In the Loan Organizations section:
    a. Click **Select School**
    b. Enter **OPEID** or **School Name** to Search
    c. Click **Search**
    d. Click **Select** next to the School
5) In the Loan Identifiers section, make edits to the following:
    a. Data Provider Loan ID
    b. NSLDS Label
    c. Next Gen NSLDS Label

Last updated information displays in the bottom of the section.

- **Last Updated –** Date the information was last updated.
- **Method –** Latest method used to submit the loan details information
- **Source –** The entity that reports specified data.

LOAN INFORMATION

The Loan Information section displays current loan information based on the loan type. The information is separated into four sections.

- Loan Details
- Loan Organizations
- Loan Identifiers
- Payment Details

A user can click **Review Reaffirmation** to view the Reaffirmation History for the loan. Each Reaffirmation record displays in individual card views with loan details above. Users can select **View All Reaffirmations** to be redirected to all reaffirmed loans for this borrower. **Note**: Refer to the Reaffirmation Tab Section of the Help Text for a more in-depth explanation of the section and user capabilities for the page.

Within the Loan Information sections, are the following fields:

- Loan Information
  - **Loan Type** – The type of Title IV award made with a formal agreement for repayment with interest.
  - **Status** – The two-character code and description indicating the status of the loan.
- Loan Details
  - **Loan Period** – The period of study for which the loan was originally taken out.
  - **Academic Level** – The student's academic level at the time the loan was provided.
  - **Actual Interest Rate** – Annual interest rate a lender charges on a loan, which may be equal to or less than the applicable interest rate on that loan.
  - **Statutory Interest Rate** – Applicable interest rate that can be charged for the loan.
  - **Date Entered Repayment** – The actual date or the date when the scheduled repayment period begins.
  - **Aggregate OPB** – The cumulative dollar value due for the given aggregate loan type.
  - **Discharge Code** – Valid values consist of Death or Permanent.
- Loan Organizations
  - **School** – The eight-digit OPEID code and the name of the organization that disbursed the loan.
- Loan Identifiers
  - **Data Provider Loan ID** – A code used by a data provider (Guaranty Agency, Direct Loan Servicer, Debt Collection Service or Perkins school) for internal loan identification.
  - **NSLDS Label** – Unique identifier for the loan record assigned by NSLDS. 17 digits long.
  - **Next Gen NSLDS Label** – Unique identifier for the loan record assigned by NSLDS. 12 digits long.
  - **Award ID** – A unique identifier for a financial award across programs and systems, and across academic years.
  - **Program Code** – Identifies the loan program.
  - **Consolidation Loan ID** – A unique identifier for a financial award across programs and systems, and across academic years. It is the Award ID for the Consolidation Loan that was made to pay off this loan.
  - **Lender of Last Resort Loan** – Indicates if the loan is a lender of last resort loan.

Loan Information (Authorized User)

Authorized users can view the following fields in Amounts for Loan section:

- **OIB Date** – The date that the outstanding interest balance was updated.
- **Other Fees Date** – Identifies the date that the additional fees currently owed on the loan was last updated.
- **Outstanding Catch Up Balance Date** - The original guarantee or disbursed amount of the loan.
- **OIB Amount** - The cumulative accrued outstanding interest balance on the loan.
- **Other Fees Amount** - The accumulated fees added to late or defaulted loans. Examples of other fees are late fees, collection costs, or court costs.
- **Outstanding Catch Up Balance Amount** – The catch up payment amount currently remaining on the loan.

To Edit Loan Information:

1) Click **Update** in Loan Information section
2) In the Amounts for Loan section, the user can make edits to the following:
    a. Loan Date
    b. Loan Amount
    c. OPB Date
    d. Outstanding Principal Balance (OPB)
3) In the Loan Details section, make edits to the following:
    a. Discharge Code
    b. Loan Period
    c. Academic Level
    d. Actual Interest Rate
    e. Aggregate OPB
    f. The date the Aid Recipient entered repayment
4) In the Loan Organizations section, make edits to the following:
    a. Click **Select School**
    b. Enter **OPEID** or **School Name** to Search
    c. Click **Search**
    d. Click **Select** next to the School
5) In the Loan Identifiers section, make edits to the following:
    a. Data Provider Loan ID
    b. NSLDS Label
    c. Next Gen NSLDS Label

Last updated information displays in the bottom of the section.

- **Last Updated -** Date the information was last updated.
- **Method –** Latest method used to submit the loan details information
- **Source –** The entity that reports specified data.

ACTIVITIES

The Activities section contains various sections of all possible activities for a Perkins Loan.

Disbursements
The Disbursements section contains a table displaying all individual disbursement records reported for the Loan Record:

- **Date –** The date the loan disbursement was made.
- **Cumulative Amount -** The cumulative amount of funds released to a borrower.
- **Disbursement Amount –** The amount of funds disbursed to a borrower.

Last updated information displays in the bottom of the section.

- Last Updated - Date the information was last updated.
- Method - Latest method used to submit the loan details information.
- Source - The entity that reports specified data.

Disbursements (Authorized User)

To Add, Edit, or Delete Disbursement:

1. Click **Update** within the Disbursements section
2. To Add a Disbursement
    a. Click **Add Disbursement**
    b. Select the **Date**
    c. Input the Cumulative Disbursement Amount
    d. Click **Save**
3. To Edit Disbursement
    a. Click **Edit** next to the Disbursement record
    b. Make changes to editable fields:
        i. Date
        ii. Cumulative Disbursement Amount
    c. Click **Save**
4. To Delete Disbursement
    a. Select **Delete** next to the Disbursement record
5. Click **Apply**

Last updated information displays in the bottom of the section.

Cancellations

The Cancellations section contains a table displaying information of all individual cancellation records reported for the Loan Record:

- **Date –** The latest date that all or part of the Title IV loan was canceled.
- **Cumulative Amount –** The total amount of the Title IV loan that was canceled.
- **Cancellations Amount –** The amount of the Title IV loan that was canceled.
- **Type** – The reason for cancelling the Perkins loan.
- **Source** - The entity that reported the specified data.

Note: Federal Loan Servicers do not report Cancellations for Perkins Loans; however, Schools do have the ability to report cancellations for Perkins Loans while the loan is held by the School. Therefore, this section allows users to view the cancellations reported for the loan while it was held by the School.

Last updated information displays in the bottom of the section.

- **Last Updated -** Date the information was last updated.
- **Method -** Latest method used to submit the loan details information.
- **Source -** The entity that reports specified data.

Deferments

The Deferments section contains a table displaying information of all individual deferment records reported for the Loan Record:

- **Start Date –** The date when a deferment begins.
- **End Date –** The date when a deferment ends or is projected to end. Includes post-deferment grace period if applicable.
- **Type –** The deferment reasons for postponing repayment of loan principal and interest.

Deferments (Authorized User)

To Add, Edit, or Delete Deferments:

1. Click **Update** within the Deferment section
2. To Add a Deferment
    a. Click **Add Deferments**
    b. Select the **Deferment Type** from the dropdown
    c. Select the **Start Date**
    d. Select the **End Date**
    e. Click **Save**
3. To Edit Deferment
    a. Click **Edit** next to the Deferment record
    b. Make changes to editable fields:
        i. Deferment Type
        ii. Start Date
        iii. End Date
    c. Click **Save**
4. To Delete Deferment
    a. Select **Delete** next to the Deferment record
5. Click **Apply**

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** - Latest Method used to submit the loan details information.
- **Source** - The entity that reports specified data.

Forbearance

The Forbearance section contains a table displaying information of all individual forbearance records reported for the Loan Record.

- **Start Date** – The date when forbearance begins.
- **End Date** – The date when forbearance ends or is projected to end.
- **Type** – The type of forbearance that has been approved for the borrower.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Source** - The entity that reports specified data.
- **Method** - Latest Method used to submit the loan details information.

Discharge

The Discharge section contains a table displaying information of all individual discharge records reported for the Loan Record:

- **Type** - One of the discharge reason codes for discharging all or part of a loan.
- **Date** – The date when all or part of the Title IV loan was discharged.
- **Posted Date** – The date on which loan discharge was posted to a borrower's account.
- **Discharge Amount** – The discharge amount, displayed by type, for the Title IV loan displayed.
- **Cumulative OPB** - The cumulative dollar value due on a loan, as reported by the data provider.
- **Cumulative OIB** – The cumulative accrued outstanding interest balance on the loan, as reported by the data provider.
- **Indicator** – Indicates if the loan discharge reported is a partial or full discharge.
- **Cumulative Discharge** – The total amount discharged for the selected recipient.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.

- **Method** - Latest Method used to submit the loan details information.
- **Source** - The entity that reports specified data.

Forgiveness
The Forgiveness section contains a table displaying information of all individual forgiveness records reported for the Loan Record:

- **Type** – The type of forgiveness applied to the loan account.
- **Date** - The date when all or part of a direct loan was reduced due to a loan forgiveness program.
- **Posted Date** – The date on which loan forgiveness was posted to a borrower's account.
- **Cumulative Amount**- The total amount forgiven for the selected aid recipients
- **Forgiveness Amount** – The discharge amount, displayed by type, for the Title IV loan displayed.
- **Previously Applied** – Specifies if the borrower has previously applied for Teacher Loan Forgiveness.
- **Eligible Institution Type** – The institution type where the borrower/student taught during the period that qualifies for loan forgiveness.
- **State** – The state in the US where a person applied for Teacher Loan Forgiveness.
- **Indicator** - Indicates if the loan forgiveness reported is a partial or full forgiveness.

Last updated information displays in the bottom of the section.

- **Last Updated** - Date the information was last updated.
- **Method** - Latest Method used to submit the loan details information.
- **Source** - The entity that reports specified data.

LOAN HOLDER HISTORY

The Loan Holder History section displays a School section containing details of the Loan Holder record.

School
The School section displays all valid Loan Holder records reported for the Loan Record.

- **Start Date** – The date the servicer became responsible for servicing the loan record.
- **End Date** – The date the servicer stopped being responsible for servicing the loan record.
- **OPEID** - The eight-digit Office of Postsecondary Education ID of the school location.
- **School Name** - The name of the organization that disbursed the loan.

OUTSTANDING AMOUNT BALANCE HISTORY

The Outstanding Amount Balance History page contains two tables, Outstanding Amount Balance History and Capitalized Interest History tables.

The Outstanding Amount Balance History table contains the following details:

- **System Effective Begin Date** - The begin date of an Outstanding Principal Balance, Outstanding Interest Balance, and/or a Loan Status Code was in effect.
- **System Effective End Date** – The end date of an Outstanding Principal Balance, Outstanding Interest Balance, and/or a Loan Status Code was in effect.
- **Outstanding Principal Balance (OPB)** - The cumulative dollar value due on a loan, as reported by the data provider.

- **Date of OPB** - The date the outstanding principal balance was updated.
- **Outstanding Interest Balance (OIB)** - The cumulative accrued outstanding interest balance on the loan, as reported by the data provider.
- **Date of OIB** - The date the outstanding interest balance was updated.
- **Loan Status** - The two-character code and description indicating the status of the loan.
- **Loan Status Date** - The date a Loan Status became effective.
- **Historically Correct Loan Status** - The yes or no indicator signifies whether the loan status reported in the "Loan Status" column is considered to be correct when a subsequent Loan Status update is made. If a Data Provider reports a new loan status with a date prior to a previously reported status code date, this indicator is changed to "No."

NSLDS indicates there has been a change to a particular piece of data by displaying a blue 'i' icon next to the changed data. NSLDS displays a Tool Tip to describe the change when the user hovers over the icon. The user can sort records ascending or descending by System Effective Begin Date or System Effective End Date using the sort triangles found at the top of the columns.

The table can be filtered by the following values:

- Status Code – All of the available Loan Status codes appear in this dropdown
- Historically Correct Loan Status – Yes or No
- Outstanding Principal & Interest Balance – All or As of Quarter End

The user can select **Reset** to clear all of the filter values.

The Capitalized Interest History table contains the following details:

- **Date** – The date the Capitalized Interest was reported.
- **Amount** – The amount of Capitalized Interest reported on the specified date.

NSLDS sorts the records in the Capitalized Interest History table in descending order by the capitalized interest date. Users can **Sort** the Amount and Date columns by the arrows displayed next to the field name. The table can be filtered by date range by inputting the Start Date and End Date. The user can select Reset to clear the filter Start and End Dates.

AWARD ID BYPASS (AUTHORIZED USER)

The Award ID Bypass section allows authorized users to view current Award ID Bypass information or add an Award ID Bypass. By clicking the **Award ID Bypass** button, the user navigates to the Award ID Bypass page.

The table contains information about the Award ID Bypass record:

- **Award ID** - A unique identifier for a financial award across programs and systems, and across academic years.
- **Person Role** - Person Role associated with the SSN.
- **Date Added** – The date Award ID bypass record was added.
- **Added By** - The user ID of the person who added the student information.
- **Source** - The entity (i.e. GA code) that reported the specified data.
- **Delete –** Hyperlink that allows the user to Delete the record.

On the Award ID Bypass page, a user can click **Add Award ID Bypass** to create a new record.

To Add Award ID Bypass:

1. Click **Add Award ID Bypass**
2. Select the **Borrower Type**
3. Enter the Award ID
4. Click **Save Award ID Bypass**
    a. The button is disabled until all required fields are filled

A user can Delete an Award ID Bypass record from the table by clicking **Delete** next to the intended record.

To Delete Award ID Bypass:

1. Click **Delete** next to the record
2. Confirm the provided data for the record is correct
    a. Aid Recipient
    b. SSN
    c. DOB
3. Click **Delete Award ID Bypass**

AGGREGATE LOAN CALCULATIONS

The Aggregate Loan Calculations section displays a table containing the Borrower's Aggregates. The following details display for each Loan Type category the borrower has:

- **Loan Type** - The type of Title IV award made with a formal agreement for repayment with interest.
- **Award Year** - Field that indicates the award year used in the student's undergraduate or graduate loan limits determination. This award year is calculated based on the loan period begin date from the most recently reported loan for the student.
- **Dependency Status** - Field that indicates the dependency used in the student's undergraduate or graduate loan limits determination. The dependency indicator is based on the Undergraduate or Graduate Award Year's corresponding award year ISIR and the Central Processing System's (CPS) determined dependency status. In some cases, when an Undergraduate Award Year cannot be linked to a corresponding ISIR, additional steps are used to determine this value (i.e. academic level from the reported loans and/or age of the applicant at the time of the Undergraduate Award Year).
- **Undergraduate, Graduate and Aggregate Undergraduate and Graduate Totals** – The sum of undergraduate and graduate totals from the following types of loans:
    - Direct Stafford Subsidized (SULA Eligible) (D0),
    - Direct Stafford Subsidized (D1),
    - Direct Stafford Unsubsidized (D2),
    - Direct Consolidation Unsubsidized (D5),
    - Direct Consolidation Subsidized (D6),
    - Direct Consolidation Subsidized (SULA Eligible) (D9),
    - FFEL Refinanced Loan (RF),
    - Subsidized and Non-subsidized FFEL Stafford Loan (SF),
    - FFEL Subsidized Loan Supplemental (SL),
    - FFEL Unsubsidized Stafford Loan (SU),
    - FISL Federally Insured Loan (FI),
    - FFEL Consolidation (CL).
- **Aggregate Principal Balance** – The cumulative dollar value due for the given aggregate loan type.
- **Pending Disbursements** – The sum of the net loan amount that is awaiting disbursement to the borrower for this aggregate, separated out by Undergraduate and Graduate and Total (sum of Undergraduate and Graduate) portions.

The Aggregate Loan Calculations section contains an "Other Loan Types" table for Perkins, Graduate PLUS, Parent PLUS, and TEACH Loan details. If there are no "Other Loan Types," the table appears with blank values. Below is a description of what a user could see in the Other Loan Types table:

- **Loan Type** - Aggregate amounts are displayed for the following loan types:
    - **Undergraduate, Graduate and Total (sum of Undergraduate and Graduate) Subsidized Loans** - Direct Stafford Subsidized (SULA Eligible) (D0), Direct Stafford Subsidized (D1), FFEL Stafford Subsidized (SF), Direct Consolidation Stafford Subsidized (D6), Direct Consolidation Subsidized (SULA Eligible) (D9), and that portion of FFEL Consolidation (CL) loans that can be attributed to underlying subsidized loans.

- **Undergraduate, Graduate and Total (sum of Undergraduate and Graduate) Unsubsidized Loans** - Direct Stafford Unsubsidized (D2), Direct Consolidation Unsubsidized (D5), FFEL Refinanced Loan (RF), Non-subsidized FFEL Stafford Loan (SF), FFEL Supplemental Loan (SL), FFEL Stafford Unsubsidized (SU), FISL Federally Insured Loan (FI), and that portion of FFEL Consolidation (CL) loans that can be attributed to underlying unsubsidized loans.
- **Undergraduate, Graduate and Total (sum of Undergraduate and Graduate) Combined Loans** - Direct Stafford Subsidized (SULA Eligible) (D0), Direct Stafford Subsidized (D1), Direct Stafford Unsubsidized (D2), Direct Consolidation Unsubsidized (D5), Direct Consolidation Subsidized (D6), Direct Consolidation Subsidized (SULA Eligible) (D9), FFEL Refinanced Loan (RF), Subsidized and Non-subsidized FFEL Stafford Loan (SF), FFEL Subsidized Loan Supplemental (SL), FFEL Unsubsidized Stafford Loan (SU), FISL Federally Insured Loan (FI), FFEL Consolidation (CL).
- **Undergraduate, Graduate and Total (sum of Undergraduate and Graduate) Consolidation Loans, Unallocated** - That portion of FFEL Consolidation (CL), Direct Consolidation Subsidized (D6) and Direct Consolidation Unsubsidized (D5) loans that cannot be attributed to underlying subsidized or unsubsidized loans.
- **Perkins** - Federal Perkins Loans - National Defense Loan (DU), Perkins Expanded Lending (EU), Income Contingent Loan (IC), National Direct Student Loan (NU), Federal Perkins Loan (PU).
- **PLUS/PLUS Graduate Loans** - FFEL PLUS Loan (PL), Direct PLUS (D4), FFEL PLUS Graduate (GB), Direct PLUS Graduate (D3) Direct PLUS Consolidated (D7). A PLUS/PLUS Graduate Loan row appears in the Aggregate Loan Information table only when the student/borrower displayed on the page holds a PLUS and/or a PLUS Graduate Loan.
- **TEACH Loan (Direct Unsubsidized Loans)** - Direct Unsubsidized Loan (D8). A Direct Unsubsidized Loan (TEACH) row appears in the Aggregate Loan Information table only if the student/borrower's TEACH Grant was converted to a Loan.

- **Total Principal Balance** - Sums Aggregate Outstanding Principal Balance and Pending Disbursements, separated out by Undergraduate and Graduate and Total (sum of Undergraduate and Graduate) portions. Amount used when considering whether a borrower is "Close or Equal to" or "Exceeding" aggregate limits.

GRANTS

The Grant section allows users to view all grants awarded to an aid recipient. These Grant types include:

- Pell Grants
- Teacher Education Assistance for College and Higher Education (TEACH)
- Iraq and Afghanistan Service Grants (IASG)
- Academic Competitiveness Grants (ACG)
- National Science Mathematics Access to Retain Talent (SMART) Grants

The number next to each grant type indicates the total number of grants of that type awarded.

The **Pell Grants** tab displays information for the aid recipient's grant:

- **Lifetime Eligibility Used**- is based on a 12 semester or 6-year regulation, which is calculated based on the percentage of Pell Grant disbursed versus the amount of Pell Grant Scheduled, beginning with the 1973 and 1974 award year. The LEU maximum has been set to 600 percent for the total of all Pell awards received. The LEU displays as a percent value in the range between 0 percent and 999.999 percent. For example, if a student received 100 percent of his Pell Grant eligibility during the 2008-2009 award year, 100 percent in the 2009-2010 Award Year, and three quarters for 2010-2011, his LEU at that point in time during the 2010-2011 Award Year is 275 percent (100% + 100% + 75% = 275%). NSLDS displays the most recently reported value from Common Origination and Disbursement (COD).
- **Post 9/11 Deceased Veteran Dependent** - Indicator for a student receiving the maximum Pell Grant eligibility because their parent or guardian was a member of the Armed Forces and has passed away because of military service in Iraq or Afghanistan after 9/11/2001 (Pell Grant only).
- **Award Year** - The school year in which the student received a grant, as reported by the awarding campus.

- **Scheduled Award Amount** – Scheduled amount of the Pell Grant award, Iraq and Afghanistan (IASG) award, ACG and SMART Grant Award. For TEACH Grants every grant displays the maximum scheduled award ($4,000).
- **Award Amount** - The amount of the grant the school expects to pay the student.
- **Total Disbursement Amount** – Sum of the disbursed amount for all grants received by the borrower.
- **School Name** - The school that the student currently attends or attended when the grant was obtained.
- **Expected Family Contribution (EFC)**- Index produced by the Congressional Methodology (CM) program that assesses an applicant's financial needs.
- **Transaction Number** - Transaction number on the SAR or ISIR for the payment accepted by the school.
- **Latest Disbursement Date** - Latest disbursement date Common Origination and Disbursement (COD) website processed the payment record.
    - **Note**: Beginning with the school year 1999/2000, this field is the date a disbursement is made to the student.
- **Scheduled Award Used by Award Year** – Amount of Award used by the student for the specified award year. For example, if a student received three quarters of this scheduled Pell Grant or Iraq and Afghanistan Service Grant (IASG) eligibility for 2007-2008, his % Schedule Award Used by Award Year is 75 percent.
- **Child of Fallen Hero** - Indicator for a student receiving the maximum Pell Grant eligibility because their parent or guardian died in the line of duty as a police officer, firefighter, or other public safety officer. The student, at the time of the parent or guardian's death, was enrolled at an institution of higher education or was less than 24 years old (Pell Grant only).
- **Verification Flag** - Result of verification by school (e.g., N/R,V,S,and W)
- **Posted by COD** - The date when the grant is listed as disbursed on the Common Origination and Disbursement (COD) system.
- **Additional Pell Eligibility** - From the 2009-2010 award year through the 2010-2011 award year, eligible students could receive up to two Federal Pell Grants within a single award year. This field indicates a student was eligible for two Pell Grants in a single award year.
- **1st Time Pell Recipient**- For purposes of the Federal Pell Grant Program, this field indicates a student received a Pell Grant for the first time during a period of enrollment between the 2008-2009 award year and ending with the 2011-2012 award year.

The **TEACH Grants** tab displays information for the aid recipient's grant:

- **Total Disbursement Amount** – Sums the Disbursed Amounts for all TEACH Grants received by the borrower.
- **Percentage of Eligibility Used** - Total percentage of the student's annual Pell eligibility used for all schools across all award years for the aid recipient's undergraduate and graduate program
- **Eligibility Remaining Amount** – The percent of student's Pell eligibility remaining for the aid recipient's undergraduate and graduate program
- **Award Year** - The school year in which the student received a grant, as reported by the awarding campus.
- **Scheduled Award Amount -** The amount of the TEACH Grant award
- **Award Amount -** The amount of the grant the school expects to pay the Aid Recipient
- **Total Disbursement Amount** – The cumulative net amount of the loan disbursed to a borrower.
- **Original Disbursed Amount** - The amount of the grant the school has disbursed to the student.
- **School Name** – OPEID and name of the school that submitted the TEACH Grant.
- **Academic Year Level** - Student's grade level submitted by the school.
- **Transaction Number** – Transaction number on the SAR or ISIR for the payment accepted by the school.
- **Latest Disbursement Date** - Latest disbursement date COD processed the payment record.
    - **Note**: Beginning with the school year 1999/2000, this field is the date a disbursement is made to the student.
- **Award ID** - A unique identifier for a financial award across programs and systems, and across academic years.
- **Agreement to Serve Status** – Indicator of Student having completed their Agreement to Serve
- **Reported Source** – The system that reported the TEACH Grant
- **Posted by COD** – The date when the grant is listed as disbursed on the Common Origination and Disbursement (COD) system.
- **Grant Status** – The status of the TEACH Grant.

- **Discharge Amount** – The amount of the award that has been discharged.
- **Discharge Type** – Discharge reason codes for discharging all or part of a TEACH Grant.

TEACH Grants converted to a loan display a warning icon that says **LOAN**. This warning icon functions as a link to direct users to the **Loan Details** page for the associated loan.

The **IASG** tab displays historical information for the aid recipient's grant:

- **Lifetime Eligibility Used** - The Iraq and Afghanistan Service Grant (IASG) Lifetime Eligibility Used (LEU) is the sum of all IASG Grant % Scheduled Award Used by Award Year for all award years, beginning with students that receive their first IASG disbursement on or after July 1, 2009. The LEU displays in the range value between 0 percent and 600 percent. Common Origination and Disbursement (COD) calculates this for students flagged as 1st Time IASG Grant recipients, based on having received their first IASG Grant award disbursement in the 2010-2011 Award Year or thereafter. NSLDS displays the most recently reported value from Common Origination and Disbursement (COD).
- **Award Year** - The school year in which the student received a grant, as reported by the awarding campus.
- **Scheduled Award Amount** - Scheduled amount of the IASG award.
- **Award Amount** - The amount of the grant the school expects to pay the student.
- **Total Disbursement Amount** - Sums the Disbursed Amounts for all IASGs received by the borrower.
- **School Name** - OPE ID and name of the school that submitted the IASG.
- **Expected Family Contribution** -Index produced by the Congressional Methodology (CM) program that assesses an applicant's financial needs.
- **Transaction Number** - Transaction number on the SAR or ISIR for the payment accepted by the school.
- **Latest Disbursement Date** - Latest disbursement date COD processed the payment record.
    a. **Note**: Beginning with the school year 1999/2000, this field is the date a disbursement is made to the student.
- **Scheduled Award Used by Award Year** - Amount of Award used by the student for the specified award year. For example, if a student received three quarters of this scheduled Pell Grant or Iraq and Afghanistan Service Grant (IASG) eligibility for 2007-2008, % Schedule Award Used by Award Year is 75 percent.
- **Verification Flag** - Result of verification by school (e.g., N/R,V,S,and W)**Posted by COD** - The date when the grant is listed as disbursed on the Common Origination and Disbursement (COD) system.

The **ACG** tab displays historical information for the aid recipient's grant:

- **Award Year** - The school year in which the student received a grant, as reported by the awarding campus.
- **Scheduled Award Amount** - Scheduled amount of the ACG award.
- **Award Amount** - The amount of the grant the school paid the student.
- **Total Disbursed Amount** - Sums the Disbursed Amounts for all ACGs received by the borrower.
- **School Name** - OPEID and name of the school that submitted the ACG.
- **Academic Year Level** - Student's grade level submitted by the school.
- **Transaction Number** - Transaction number on the SAR or ISIR for the payment accepted by the school.
- **Latest Disbursement Date** - Latest disbursement date Common Origination and Disbursement (COD) processed the payment record.
    a. **Note**: Beginning with the school year 1999/2000, this field is the date a disbursement is made to the student.
- **Award ID** - A unique identifier for a financial award across programs and systems, and across academic years.
- **School Reason** - School submitted eligibility/payment reason.
- **Total Eligibility Used by Academic Year Level** - The Aid Recipient's total percent of eligibility used by academic year level.
- **Posted by COD** - The date when the grant is listed as disbursed on the Common Origination and Disbursement (COD) system.

- **High School Program** - School submitted High School program code.
- **Total Eligibility Used by Scheduled Award** – The percent of eligibility the Aid Recipient has used.

The **SMART Grants** tab displays historical information for the aid recipient's grant:

- **Award Year** - The school year in which the student received a grant, as reported by the awarding campus.
- **Scheduled Award Amount** - Scheduled amount of the SMART Grant award.
- **Award Amount** - The amount of the grant the school paid the student.
- **Total Disbursement Amount** - Sums the Disbursed Amounts for all SMART Grants received by the borrower.
- **School Name** - OPEID and name of the school that submitted the SMART Grant.
- **Academic Year Level** - Student's grade level submitted by the school.
- **Transaction Number** - Transaction number on the SAR or ISIR for the payment accepted by the school.
- **Latest Disbursement Date** - Latest disbursement date Common Origination and Disbursement (COD) processed the payment record.
    a. **Note**: Beginning with the school year 1999/2000, this field is the date a disbursement is made to the student.
- **Award ID** - A unique identifier for a financial award across programs and systems, and across academic years.
- **CIP Year** - Calendar Year that refers to the decade edition of the Classification of Instructional Programs (CIP) catalog (2010, 2020, etc.).
- **Total Eligibility Used by Academic Year Level** - The Aid Recipient's total percent of eligibility used by academic year level.
- **Posted by COD** - The date when the grant is listed as disbursed on the Common Origination and Disbursement (COD) system.
- **CIP Code** - Classification of Instructional Programs (CIP) Code for the educational program for which the Debt Measures were calculated.
- **Total Eligibility Used by Scheduled Award** – The percent of eligibility the Aid Recipient has used.

MASTER PROMISSORY NOTES

The Master Promissory Notes (MPN) section contains information about the selected Aid Recipient's MPNs:

- **MPN Type** – Type of MPN whether it is Direct Stafford, Direct Parent PLUS, or Direct Graduate PLUS
- **Status** – Indicator of the status of an MPN.
- **PLUS Borrower SSN** – The borrower's social security number. Upon clicking this link, the user is directed to the Aid Recipient's Financial Aid Dashboard
    - All NSLDS users can view the entire SSN by clicking the **eye** icon

Note: Direct Stafford MPN Type displays N/A for SSN. NSLDS displays MPN information for both Direct Parent PLUS Loans taken out by the Aid Recipient AND Direct Parent PLUS Loans taken out by a Parent PLUS Borrower on behalf of the Aid Recipient. Therefore, NSLDS displays two Direct Parent PLUS Loans rows in the MPN table if the Aid Recipient took out Direct Parent PLUS Loan AND had Direct Parent PLUS Loans taken out by a Parent PLUS Borrower. NSLDS indicates if the MPN is taken out by a Parent PLUS Borrower on behalf of the Aid Recipient by displaying "PLUS Borrower Info" next to the MPN Type.

TEACHER LOAN FORGIVENESS

The Teacher Loan Forgiveness (TLF) section displays all active Teacher Loan Forgiveness records associated with the Aid Recipient:

- **Guaranty Agency/Federal Loan Servicer** - The name and code of the Guaranty Agency or Federal Loan Servicer associated with the TLF.
- **Lender** - The name and code of the lender associated with the TLF.
- **Full Time Teacher of** - The type of Teacher Loan Forgiveness the student/borrower has applied to request loan forgiveness based on the following certifications: Secondary School, Highly Qualified, Secondary Math, Secondary Science, Elementary Special Ed., Secondary Special Ed.
- **Previously Applied** - Indicates whether a student/borrower has previously applied for TLF.
- **State** - The state code in which the borrower has applied for TLF.
- **Forgiven Amount** - The amount of forgiveness applied to the student.
- **Paid Date** - The date the GA pays the holder; if GA is the holder, the date applied to the borrower's account.
- **Posted Date** - The date on which loan forgiveness was posted to a borrower's account.
- **Eligibility Institution Type** - The institution type where the student/borrower taught during the period that qualifies for loan forgiveness.
- **Total Forgiven Amount** – Total amount forgiven for the student.

TEACHER LOAN FORGIVENESS (AUTHORIZED USER)

Authorized users can do the following:

To Add Teacher Loan Forgiveness:

1. Click **Add Teacher Loan Forgiveness**
2. Select **Eligible Institution Type** from the dropdown
3. Select **Full Time Teacher Of** from the dropdown
4. Enter **GA Code**
5. Enter **Lender Code**
6. Enter **Forgiveness Amount**
7. Select the **Paid Date**
8. Select the **State** from the dropdown
9. Select an answer for **Previously Applied**
10. Click **Submit Teacher Loan Forgiveness**

To Edit & Delete Teacher Loan Forgiveness:

1. Click **Edit**
2. Make changes to editable fields
    a. Eligible Institution Type
    b. Lender Code
    c. Forgiveness Amount
    d. State
    e. Previously Applied

    Note: A user can delete the record by clicking **Delete**
3. Click **Save**

ACTIVE DUTY STATUS

The Active Duty Status section displays Active Duty Status records associated with the selected Aid Recipient:

- **Begin Date** - The date on which the service member entered Active Duty military status.
- **Active Duty Status Ended?** – Indicator for the end of the service member's duty.
- **End Date** - The date on which the service member's Active Duty military status ended.
- **Service Component** - The service member's assigned branch of Military Service.
- **Source** - The entity (i.e. GA code) that reports specified data.

ACTIVE DUTY STATUS (AUTHORIZED USER)

Authorized users can do the following:

To Add an Active Duty Record:

1. Click **Add Active Duty Status**
2. Select **Service Component** from the dropdown
3. Select **Begin Date**
4. Select a response for Has Active Duty Status Ended?
5. Select **End Date**
    a. Select the "Check here if the actual end date is unknown" box if End Date is unknown
6. Click **Submit Active Duty Status**

To Edit & Delete Active Duty Records:

1. Click **Edit**
2. Make changes to editable fields
    a. Service Component
    b. Has the Active Duty Status Ended?
    c. End Date
    Note: A user can delete the record by clicking **Delete**
3. Click **Save Active Duty Status**

REAFFIRMATION

The Reaffirmation page allows all NSLDS users to view an aid recipient who inadvertently over borrowed on one or more loans above their borrowing limit. The Reaffirmation page displays all active and inactive reaffirmation records associated with the selected aid recipient's loan records. Authorized users may add, update and delete Reaffirmation records.

This page displays a list of loans that contain reaffirmation history. Each Reaffirmation record displays the following fields:

- **School Name** – OPE ID and name of school.
- **Award ID** - A unique identifier for a financial award across programs and systems, and across academic years.
- **Loan Date** - Date when a Direct loan was originally disbursed or a FFELP loan was originally guaranteed.
- **Indicator of Separate Loan** - An indicator used to differentiate among multiple loans of the same type with the same date of guaranty for the same borrower or student. This field appears only for FFEL Loans.
- **Reaffirmation Date** - The date on which the signed reaffirmation agreement was received by the servicer.
- **Begin Date** - The date the reaffirmation was entered into NSLDS.
- **End Date** - The date the reaffirmation was ended on NSLDS.
- **1st Disbursement Date** - The date the loan disbursement was made.
- **Loan Amount** - The original guarantee or disbursed amount of the loan.
- **Interest Rate** - The statutory interest rate for the loan.
- **Annual Exceeded Amount** - The amount that exceeds the annual loan limit.
- **Source** - The entity (i.e. GA code) that reports specified data.

Users can expand each loan card to review:

- **Aggregate Undergraduate Subsidized Exceeded Amount** - The dollar amount, as determined by the loan servicer, to be in excess of the borrower's aggregate undergraduate subsidized loan limit.
- **Aggregate Undergraduate Combined Exceeded Amount** - The dollar amount, as determined by the loan servicer, to be in excess of the borrower's aggregate undergraduate combined loan limit.

- **Aggregate Graduate Subsidized Exceeded Amount** - The dollar amount, as determined by the loan servicer, to be in excess of the borrower's aggregate graduate subsidized loan limit.
- **Aggregate Graduate Combined Exceeded Amount** - The dollar amount, as determined by the loan servicer, to be in excess of the borrower's aggregate graduate combined loan limit.

REAFFIRMATION (AUTHORIZED USER)

Authorized users can add, update, or delete a reaffirmation record.

Steps to Add Reaffirmation:

1) Click **Add Reaffirmation**
2) From the table, select the loan that you would like to add a reaffirmation for
3) Enter the **Reaffirmation Date**
4) Enter the **1st disbursement date**
5) Enter the **Interest Rate**
6) Enter the **Loan Amount**
7) Enter the **Annual Exceeded Amount** (if applicable)
8) In the Aggregate Undergraduate section (if applicable)
    a. Enter the **Subsidized Exceeded Amount**
    b. Enter the **Combined Exceeded Amount**
9) In the Aggregate Graduate section (if applicable)
    a. Enter the **Subsidized Exceeded Amount**
    b. Enter the **Combined Exceeded Amount**
10) After reviewing all the fields click the **Submit Reaffirmation** button

Steps to Update and Delete Reaffirmation:

1) Click **Update Reaffirmation** next to the record
2) Make changes to the following fields:
    a. **Reaffirmation Date**
    b. **1st Disbursement Date**
    c. **Interest Rate**
    d. **Loan Amount**
    e. **Annual Exceeded Amount**
3) In the Aggregate Undergraduate section:
    a. Input the **Subsidized Exceeded Amount**
    b. Input **Combined Exceeded Amount**
4) In the Aggregate Graduate section:
    a. Input **Subsidized Exceeded Amount**
    b. Input **Combined Exceeded Amount**
5) After reviewing all the fields click the **Save Reaffirmation** button
6) The user also has the option to delete the reaffirmation by clicking **Delete Reaffirmation** button

OVERPAYMENT

The Overpayment Page allows authorized users to view their associated Overpayment information. All NSLDS Users are able toview an Aid Recipient's Overpayment records for the selected Aid Recipient. Authorized users can Add, Delete, and Update an Overpayment record. All other users can only **View History**.

The Overpayment page displays a list of aid records that contain overpayment history. Each Overpayment record displays the following fields:

- **Title IV Aid Type –** The type of Title IV Student Assistance funds for which the Aid Recipient has received an excess.
- **Status –** The status of the overpayment record.
- **Borrowed At** – The School OPE ID and name of the school that is associated with the Overpayment record.
- **Repayment Date –** The date the overpayment was satisfied, or an indication if the repayment has not occurred.
- **Status Date –** The effective date corresponding to the Overpayment Status.
- **Modified Date –** The most recent updated Date for the Overpayment record.
- **Outstanding Principal Balance –** The Amount of Grant or the Outstanding Principal Balance.
- **Disbursement Date –** The date the Aid Recipient was issued the aid.
- **Overpayment Source –** The entity name and/or code identifying where the overpayment exists.
- **Modified By –** Username of the user who added or modified the Overpayment record OR "Batch" to indicate the Overpayment record was modified through Batch Processing.
- **Date Created –** The date the overpayment was entered into NSLDS.
- **Region Code –** The ED Region code in which the source of the Overpayment is located.
- **Modified Source -** The source of the entity associated with the user that made the modification.

When a user clicks on **View History** in an Overpayment record, historical information for the associated record is provided via pop up (Overpayment History). In the pop up, users can see disbursement details and details of who modified (updated) the record. The Overpayment History pop up displays the following information:

- **Aid Recipient** – The first and last name for the Aid Recipient.
- **SSN** – The aid recipient's Social Security Number.
- **DOB** – The aid recipient's date of birth.
- **Title IV Aid Type** – The type of Title IV student assistance funds for which the Aid Recipient has received an excess'.
- **Borrowed At** – The School OPEID that the Overpayment record is associated with.
- **Disbursement Date** – The date the Aid Recipient was issued the aid.
- **Status** - The status of the overpayment record.
- **Status Date** – The effective date corresponding to the Overpayment status.
- **Repayment Date** – The date the overpayment was satisfied, or an indication if the repayment has not occurred.
- **Date Created** – The date the overpayment was entered into NSLDS.
- **Overpayment Source** – The entity name and/or code identifying where the Overpayment exists.
- **Region Code** – The ED Region Code in which the source of the Overpayment is located.
- **Modified By** – Username of the user who added or modified the Overpayment record OR "Batch" to indicate the Overpayment record was modified through Batch Processing.
- **Modified Date** – The most recent updated Date for the Overpayment record.
- **Modified Source** – The entity that reported the specified data.

OVERPAYMENT (AUTHORIZED USER)

To Add a New Overpayment:

1) Click **Add Overpayment** button
2) In the Search List dropdown, select the **Method** in which the school is searched for:
    a. School OPEID
    b. School Name
3) Select the **School** from the list of returned options
4) Enter the **Disbursement Date**
5) Select the **Title IV Fund Type** from the drop-down menu
6) Enter the **Status Date**
7) Select the **Status** from the drop-down menu

8) Select the **Overpayment Source** from the drop-down menu
    a. If ED Region is selected, a Region code field appears
9) Enter the **Outstanding Principal Balance**
10) Click **Submit Overpayment** to save the changes on the NSLDS system. The user can select Cancel to return to the Overpayment page without the changes being saved.

If an Aid Recipient has not been selected, upon navigating to the Overpayment page, a message displays to select an Aid Recipient using the Search Aid Recipient option. If the Aid Recipient does not exist in NSLDS, the user can select **Add Overpayment** and follow the instructions below. **Note: User is on the Overpayment page and an Aid Recipient has not been selected.**

1) A Find Aid Recipient box populates to locate the student to add an overpayment
2) Enter the Aid Recipients SSN
3) Enter the Date of Birth of the Aid Recipient
4) Enter First Name and Last Name (Middle Name is optional for the search)
5) Click the **Search** button for a return of students matching the entered criteria
   Note: If no Aid Recipient is returned, continuing to Create Overpayment results in an Aid Recipient being created.
6) Reference To **Add a New Overpayment** steps to continue with adding a new overpayment
7) Click on **Submit Overpayment** at the bottom of the Add Overpayment page.

To Delete an Overpayment:

1) Select **Delete Overpayment** next to the overpayment record
2) Indicate the reasoning for deletion in the Comment section
3) Click **Confirm** to delete the overpayment record

Note: NSLDS deletes the Aid Recipient associated with the Overpayment record if the only aid in NSLDS is for an Overpayment.

To Update an Overpayment:

1) Select **Update Overpayment** next to the overpayment record
2) Updates can only be performed to the following fields:
    a. Status Date
    b. Status
    c. Overpayment Source
    d. Region Code
    e. Outstanding Principal Balance
    f. Outstanding Interest Balance

2. Select **Save Overpayment** to record the changes. Select **Cancel** to return to the Overpayment page without the changes being saved.

STUDENT CONTACT INFORMATION

The Student Contact Information page displays three tabs: **Postal Address**, **Email Address**, and **Phone Number**. Users can view all contact information associated with the Aid Recipient. Schools that report contact information for a student can use this page to update a contact record. Online users with Enrollment Update capabilities can add, edit, or delete Postal Address, Email Address, and Phone Number for students at their school.

POSTAL ADDRESS

The **Postal Address** tab can be filtered and it displays the following information:

- **Postal Address** – Student's postal addresses including street, city, state, country and postal code.
- **Effective Date** – Effective date provided by the source.
- **Source** - The entity (i.e. GA code) that reports specified data.
- **Modified By** – The user who last modified the postal address.
- **Modified Date** - The date the postal address was last modified.
- **Validated** - An indication of whether the Postal Address is the preferred Postal Address for the Aid Recipient.
- **Edit** – Hyperlink to edit the Postal Address Record.
- **Delete** – Hyperlink to delete the Postal Address record.

A user can **Filter** the above details by Source and Validated.

POSTAL ADDRESS (AUTHORIZED USER)

Authorized users can also add, edit, and delete Postal Address information.

To Add a Postal Address:

1) Click **Add Postal Address**
2) Select the **Effective Date** of the address. This date may be a current or future date.
3) Enter the **Street Address – Line 1**
   a) Enter the **Street Address – Line 2** (optional)
1) Enter the **City**
2) Select **State** from drop down menu (optional)
3) Select **Country** from drop down menu (optional)
4) Enter the **Postal Code**
5) Indicate if the Address is valid by checking or leaving blank the '**Validated**' check box (optional)
6) Click **Submit Postal Address**

To Edit a Postal Address:

1) Click **Edit** next to record
2) Make changes to any field:
   a. Street Address – Line 1
   b. Street Address – Line 2
   c. City
   d. State
   e. Country
   f. Postal Code
   g. Address is valid checkbox
3) Click **Save Postal Address**

To Delete a Postal Address:

1) Click **Delete** next to record
2) Confirm Postal Address details displayed in pop up
3) Click **Delete Postal Address**

EMAIL ADDRESS

The **Email Address** tab displays the following information:

- **Email Address** – Aid Recipient's email addresses.
- **Effective Date** - Effective date provided by the source.
- **Source** - The entity (i.e. GA code) that reports specified data.
- **Modified By** - The user who last modified the email address.
- **Modified Date**-The date the user who last modified
- **Validated** - An indication of whether the Email Address is a preferred one for Aid Recipient.
- **Edit** - Link to 'Edit' the Email Address Record.
- **Delete** – Hyperlink to delete the email address record.
-

A user can **Filter** the above details by Source and Validated.

EMAIL ADDRESS (AUTHORIZED USER)

To Add an Email Address:

1) Click **Add Email Address**
2) Select the **Effective Date** of the email address. This date may be a current or future date.
3) Enter the **Email Address**
4) Indicate that the Email Address is valid by checking the **'Validated'** check box (optional)
5) Click the **Submit Email Address** button

To Edit a Student Email Address:

1) Click **Edit** next to record
2) Make changes to any field:
    a. Effective Date
    b. Email Address
    c. Address is Valid checkbox
3) Click **Save Email Address**

To Delete an Email Address:

1) Click **Delete** next to record
2) Confirm Email Address details displayed in pop up
3) Click **Delete Email Address**

PHONE NUMBER

The **Phone Number** tab displays the following information:

- **Phone Type** – The phone number type provided by the source.
- **Phone Number** – Aid Recipient's phone numbers.
- **Source** - The entity (i.e. GA code) that reports specified data.
- **Modified By** - The user who last modified the phone number.
- **Modified Date** - The date the phone number record was modified.
- **Validated** - An indication of whether the Phone Number is a preferred one for Aid Recipient.
- **Edit** - Link to 'Edit' the phone number record.
- **Delete** – Hyperlink to delete the phone number record.

A user can **Filter** the above details by Source, Validated, and Phone Type.

PHONE NUMBER (AUTHORIZED USER)

To Add a Phone Number

1) Click **Add Phone Number**
2) Select **Phone Type** from the drop-down menu. Types are H-Home, C-Cell, W-Work, O-Other.
    a) If Other is selected, the user can input a description for **Type**
3) Select the **Country Code** from the dropdown menu, prepopulated with +1 for U.S. phone numbers
4) Enter **Phone Number**.
5) Indicate that the Phone Number is valid by checking the '**Valid**' check box.
6) Click **Save Phone Number** to submit the new record

To Edit a Phone Number:

1) Click **Edit** next to record
2) Make changes to any field:
    a. Phone Type
    b. Phone Number
    c. Address is Validated checkbox
3) Click **Save Phone Number**

To Delete a Phone Number:

1) Click **Delete** next to record
2) Confirm Phone Number details displayed in pop up
3) Click **Delete Phone Number**

ENROLLMENT

The Enrollment Summary page displays four tiles with links to assist users with navigation:

- Enrollment History Update
- Campus Enrollment Details
- Program Enrollment Details
- Push to Roster

The Current Enrollment section contains a table that displays the current enrollment summary for the Aid Recipient:

- **OPEID** - The eight-digit Office of Postsecondary Education Identification number for the school at which enrollment was reported.
- **School Name** - The name of the school at which enrollment was reported for the student. Click the school name to view the student's enrollment details at the school. If the information about the student's enrollment at this school was not reported by the school itself.
- **Most Recent Status** - The status most recently reported for the student at that school. Users wanting to view the full history of a student's status at one or more schools should navigate to the Program Enrollment Details page.
- **Effective Date** - The date when the most recently reported status took effect. The following special rules apply:
    - 'NSLDS sets the Effective Date to be equal to the Certification Date for the Enrollment Status 'X' (Never Attended) and 'Z' (No Record Found) when the date is not reported by the school.
    - NSLDS sets Effective Date equal to 12/31/9999 when it is not supplied by the school for records with an Enrollment Status of 'D' (Deceased).
- **Anticipated Completion Date** - The date the student completed, or was expected to complete, his or her studies.
- **Certification Date** - The date as of which a school certifies that a student's enrollment information is accurate and up-to-date.
- **Certification Method** - The method a school uses to certify enrollment information. Schools can certify enrollment information using either the batch enrollment reporting process or the Enrollment Maintenance page on this site.

Source - The entity (i.e. GA code) that reported the specified data, a small warning icon appears after the school's name.

Each school row is expandable to show Program Enrollment details at the school:

- **CIP Year** - The year corresponding to the CIP code reported.
- **CIP Code** - The six-digit Classification of Instructional Programs (CIP) code, without a period, identifying a program's academic content, and the official CIP title for that CIP code. Not the school's name for the program.
- **CIP Description** – The description of the CIP Program.
- **Credential Level** - The degree of qualification accredited with the completion of the program.
- **Reported Program Length** - The Published Program Length of the instructional program in years, months, or weeks as reported by the school.
- **Weeks in Title IV Academic Year** - The total number of weeks of instruction in the school's Title IV academic year.
- **Published Program Length in Years** - The Published Program Length of the instructional program in years. If the school uses a different unit (months or weeks) for reporting Published Program Length to NSLDS this value is calculated by NSLDS.
- **Program Begin Date** - The date on which the student began attending the program.
    - NSLDS uses Common Origination and Disbursement (COD)'s Payment Period Begin Date as the Program Begin Date for all program enrollment data reported by Common Origination and Disbursement (COD) system.
- **Special Program Indicator** – Designation that the instructional program that is outside standard accreditation.
- **Most Recent Status** - The student's current program enrollment status.
- **Effective Date** – The date on which Program Status went into effect.
- **Certification Date** - The date as of which a school certifies that a student's enrollment information is accurate and up-to-date.
- **Certification Method** - The method a school uses to certify enrollment information. Schools can certify enrollment information using either the batch enrollment reporting process or the Enrollment Maintenance page on this site.

ENROLLMENT (AUTHORIZED USER)

Authorized users can click **Update** next to an Enrollment Record in the Current Enrollment section. The Update link directs the user to the Update Enrollment page.

To Edit Contact Information:

1) Click **Edit Contact Information** next to the student DOB on the Update Enrollment page
2) Make changes to the following fields:
    a. Street Address – Line 1
        i. Street Address – Line 2 (optional)
    b. City
    c. State or Province
    d. Country
    e. Postal Code
    f. Phone Number
    g. Email Address
    h. Effective Date
    i. Valid Address Checkbox
3) Select Save to record changes. Cancel returns the user to the previous screen without the updates being recorded.

To Update a Student's Enrollment Information:

1) Enter the Certification Date
2) Enter the Student Designator

3) Use the checkbox to select either Select Student or Student is not currently enrolled in a program.
4) User has the option to select Reset to clear the enrollment information
5) Enter the Location
6) Enter the Most Recent Status
7) Enter the Effective Date
8) Enter the ACD
9) Enter the Term Begin Date
10) Enter the Term End Date
11) Enter the Program Enrollment Information
    a. CIP Year
    b. CIP Code
    c. Credential Level
    d. Reported Program Length
    e. Weeks in Title IV Academic Year
    f. Program Begin Date
    g. Special Program Indicator
    h. Program Status
    i. Status Effective Date
12) Add a new Program by selecting Add Program
    a. Select the CIP Year from the dropdown
    b. Enter the CIP Code
    c. Select the Credential Level from the dropdown
    d. Enter the Reported Program Length Numerical value
        i. Select the Reported Program Length measurement
    e. Enter Weeks in Title IV Academic Year
    f. Select the Program Begin Date
    g. Select the Special Program Indicator from the dropdown
    h. Select the Program Status from the dropdown
    i. Select the Status Effective Date
    j. Select Add Program to accept changes or Cancel to return to the previous screen
13) Once a new program has been added, an Edit chip (tag indicator) appears to the right of the **Student is not currently enrolled in a program** checkbox. The user can either Edit the recently added Program or Remove Program.
14) Once all of the changes have been made to the student's enrollment record, the user can select Certify towards the bottom of the page.
15) Certification Confirmation page, after reviewing that the information provided is correct, the user can select **Certify Checked Student(s)** to apply the information to the database or click **Cancel** to reset all updates and return to the previous Enrollment Maintenance page.

Within the Current Enrollment section, users can choose to **Add Student to an Additional Location**, to add enrollment details at an additional location. The Add Student to an Additional Location link directs users to the AddStudent to an Additional Location page with five sections:

- Student Information
- Contact Information
- Certification Information
- Campus Enrollment Information
- Program Enrollment Information

To Add Student to an Additional Location:

1) In the Student Information section, verify the following fields are correct:

a. SSN
b. First Name
c. Middle Name
d. Last Name
e. Date of Birth

2) In the Contact Information section, complete the required fields:
   a. Permanent Address Effective Date
   b. Street Address – Line 1
   c. Street Address – Line 2 (optional)
   d. City
   e. Country
   f. State
   g. Postal Code
   h. Email Address (optional)
   i. Phone Number (optional)
3) In the Certification Information section:
   a. Select the **Certification Date**
4) In the Campus Enrollment Information section:
   a. Select **Location** from dropdown
   b. Select **Status** from dropdown
   c. Select **Effective** Date
   d. Select **Anticipated Completion Date**
   e. Select **Term Begin Date**
   f. Select **Term End Date**
   g. Enter Student Designator
5) In the Program Enrollment Information section:
   a. If applicable, select checkbox of **Student is not currently enrolled in a program**
      Note: If student is currently enrolled in a program, user can click Add Program button located next to the Program Enrollment Information. Reference the Steps To Add a Program (Step 3 onward).
6) Once all changes have been made to the student's enrollment record, the user can select Certify towards the bottom of the page by selecting **Certify Student** to bring up the Add Student to an Additional Location pop up. The user has the option to Reset the information that has been entered or Cancel and return to the previous Enrollment Summary page.
7) Add Student to an Additional Location pop up, after reviewing that the information provided is correct, the user can select **Confirm** to apply the information to the data base or click **Cancel** to reset all updates and return to the previous Add Student to an Additional Location page.

ENROLLMENT HISTORY UPDATE

The Enrollment History Update page allows school users to update historical enrollment and program identifiers for current or former students. The page consists of three sections:

- Campus Enrollment Details
- Program Enrollment Details
- Enrollment History Update Details

Note: To change the school location, the user can use the Retrieve Location dropdown and click **Retrieve**.

The Campus Enrollment Details section displays all active enrollment statuses for the selected aid recipient.

The following details display in the table:

- **Anticipated Completion Date** - The date the student completed, or was expected to complete, his or her studies.

- **Student Designator** - Displays student records ordered by the identifier you use on your internal system, provided you report that identifier to NSLDS as part of the Enrollment Reporting process.
- **Enrollment Status** - The student's program enrollment status, along with the effective date in which the status was in effect.
- **Effective Date** – The date on which Program status went into effect.
- **Delete Row** – Checkbox that allows the user to delete a campus enrollment record.
- **Add Enrollment Status Row** – Add a campus enrollment record to ensure accurate historical enrollment records. The table is organized by descending Effective Date and should be considered when adding an Enrollment Status Row.

Note: The first blank row of Enrollment Status and Effective Date in the table serves to allow the user to add records as the most current enrollment record.

To Add an Enrollment Record:

1) Click **Add Row Below**
2) Select the **Enrollment Status** from the dropdown menu
3) Enter the Effective Date
4) At the bottom of the page, enter Certification Date if different from prepopulated value
5) Click **Certify Student**

To Delete an Enrollment Record:

1) Select **Delete Row** for the record
2) Click **Certify Student** located at the bottom of the page
3) Confirm the correct record has '**Yes**' in Marked to Delete column
4) At the bottom of the page, input Certification Date if different from prepopulated value
5) Click **Certify Student**

The Program Enrollment Details section displays active program's enrollment history. Each program is separated into individual cards with the following details:

- **CIP Year** - The year corresponding to the CIP code reported.
- **CIP Code** - The six-digit Classification of Instructional Programs (CIP) code, without a period, identifying a program's academic content, and the official CIP title for that CIP code. Not the school's name for the program.
- **Credential Level** – The degree of qualification accredited with the completion of the program.
- **Reported Program Length** - The Published Program Length of the instructional program in years, months, or weeks as reported by the school.
- **CIP Description** – The description of the CIP Program.
- **Program Begin Date** - The date on which the student began attending the program.
    - NSLDS uses Common Origination and Disbursement (COD)'s Payment Period Begin Date as the Program Begin Date for all program enrollment data reported by Common Origination and Disbursement (COD) system.
- **Weeks in Title IV Academic Year** - The total number of weeks of instruction in the school's Title IV academic year.
- **Published Program Length in Years** - The Published Program Length of the instructional program in years. If the school uses a different unit (months or weeks) for reporting Published Program Length to NSLDS this value is calculated by NSLDS.
- **Special Program Indicator** - Designation that the instructional program that is outside standard accreditation.
- **Source** - The entity (i.e. GA code) that reports specified data.
- **Source Code** – Organizational code for entity that reported the enrollment information.
- **Status** - The student's program enrollment status.
- **Effective Date** – The date on which Program status went into effect.

- **Active** - A flag identifying whether a record reflects the NSLDS's current understanding of a student's enrollment history. Active records reflect that history. Inactive records reflect enrollment data previously submitted to the NSLDS but corrected by a later submission.
- **Earliest Certification Date** – The earliest date as of which a school certifies that a student's enrollment information is accurate and up-to-date.
- **Latest Certification Date** - Latest Date on which NSLDS received certification of the status.
- **Latest Certification Method** - Latest Method used to certify the enrollment record.
- **Times Certified -** The number of certifications included in the date range between the Earliest Certification Date and ending with the Latest Certification Date for an enrollment status.
- **Latest Date Received** - Indicates the day when NSLDS processed the most recent report of that program's enrollment status from that source.
- **Current** – Indicator to designate that the corresponding program enrollment status is the most recent Status reported by that source (Current, Not Current)

An updated program is denoted with a 'chip' containing New, Edited or Delete to notify the user prior to certifying the changes.

To Add a Program:

1) Click **Add a Program**
2) Select the **CIP Year** from the dropdown menu
3) Enter the **CIP Code**
4) Select the **Credential Level** from the dropdown menu
5) Enter the Reported Program Length numerical value
    a. Select the **Reported Program Length** measurement from the dropdown menu
6) Enter the Weeks in Title IV Academic Year
7) Enter the Program Begin Date
8) Select the **Special Program Indicator** from the dropdown menu
9) Click **Add Program**
   Note: A user can click **Edit Program Identifiers** or **Remove Program** before continuing to **Certify Student** and add record.
   Note: Reference the Steps to complete Add Enrollment Status.
10) At the bottom of the page, input Certification Date if different from prepopulated value
11) Click **Certify Student**

CAMPUS ENROLLMENT DETAILS

The Campus Enrollment Details page displays a history of all campus enrollment records for the aid recipient at the school location. Users can apply any of the Filter and Sort Options for the campus-level details.

- Filter Options
    - School Location
    - Record Type
    - Effective Date From
    - Effective Date To
    - Source
- Sort Options
    - Sort Schools By
        - OPEID
        - School Name
    - Sort Records By
        - Source

        - Effective Date
        - ACD
        - Certification Date
        - Date Received

The Campus Enrollment Details displays the following details for each record:

- **Date Received** - Indicates the day when NSLDS processed the enrollment information.
- **Source** - The entity (i.e. GA code) that reports specified data.
- **Source Code** – Organizational code for entity that reported the enrollment information.
- **Status** – Program Enrollment Status Code.
- **Effective Date** – The date on which Program status went into effect.
- **Active** - A flag identifying whether a record reflects NSLDS's current understanding of a student's enrollment history. Active records reflect that history. Inactive records reflect enrollment data previously submitted to NSLDS but corrected by a later submission.
- **ACD** – Anticipated Completion Date.
- **Certification Date** - The date as of which a school certifies that a student's enrollment information is accurate and up-to-date.
- **Certification Method** - The method a school uses to certify enrollment information. Schools can certify enrollment information using either the batch enrollment reporting process or the Enrollment Maintenance page on this site.
- **Term Begin Date** – The date on which school term begins.
- **Term End Date** – The date on which school term ends.

PROGRAM ENROLLMENT DETAILS

The Program Enrollment Details page displays a history of campus enrollment statuses for each program ever attended by the aid recipient. Users can apply any of the Filter and Sort Options for the program-level details.

- Filter Options
    - School Location
    - CIP Code
    - CIP Year
    - Reported Program Length
    - Reported Program Length in Years
    - Credential Level
    - Source
    - Record Type
- Sort Options
    - Sort Schools By
        - OPE ID
        - School Name
    - Sort Programs By
        - CIP Code
        - Reported Program Length
        - Credential Level
    - Sort Records By
        - Source
        - Effective Date
        - Earliest Certification Date
        - Latest Certification Date
        - Latest Date Received

The Program Enrollment Details displays the following details for each record:

- **CIP Year** – Calendar Year that refers to the decade edition of the Classification of Instructional Programs (CIP) catalog (2010, 2020, etc.).
- **CIP Code** – Identifier for program in the catalog of the Classification of Instructional Programs (CIP).
- **Credential Level** – The degree of qualification accredited with the completion of the program.
- **Reported Program Length** – Duration of program, as submitted by certified enrollment source.
- **CIP Description** – The description of the CIP Program.
- **Program Begin Date** - The date on which the student began attending the program.
- **Weeks in Title IV Academic Year** - The total number of weeks of instruction in the school's Title IV academic year.
- **Published Program Length in Years** - The Published Program Length of the instructional program in years.
- **Special Program Indicator** - Designation that the instructional program that is outside standard accreditation.
- **Source** - The entity (i.e. GA code) that reports specified data.
- **Source Code** – Organizational code for the entity that reported the enrollment information.
- **Status** – The Program Enrollment Status Code.
- **Effective Date** - The Effective Date, which is the date when the most recently reported status took effect.
- **Active** - A flag identifying whether a record reflects the NSLDS's current understanding of a student's enrollment history. Active records reflect that history. Inactive records reflect enrollment data previously submitted to the NSLDS but corrected by a later submission.
- **Earliest Certification Date** – The earliest date as of which a school certifies that a student's enrollment information is accurate and up-to-date.
- **Latest Certification Date** - Latest Date on which NSLDS received certification of the status.
- **Latest Certification Method** - Latest Method used to certify the enrollment record.
- **Times Certified -** The number of certifications included in the date range between the Earliest Certification Date and ending with the Latest Certification Date for an enrollment status.
- **Latest Date Received** - Indicates the day when NSLDS processed the most recent report of that program's enrollment status from that source.
- **Current** – Indicator to designate that the corresponding program enrollment status is the most recent Status reported by that source (Current, Not Current)

Within each Program Enrollment Record, a user can click **View Certification Details** to access all certification history for the program.

The Program Certification Details page contains the Certification History by Enrollment Status section, which displays details of the certification status at the selected program:

- **Certification Date** - The date as of which a school certifies that a student's enrollment information is accurate and up-to-date.
- **Date Received** - Indicates the day when NSLDS processed the most recent report of that program enrollment status from that source.
- **Certification Method** - The method a school uses to certify enrollment information. Schools can certify enrollment information using either the batch enrollment reporting process or the Enrollment Maintenance page on this site.

The above can by filtered by Display Statuses:

- Active and Inactive
- Active Only
- Inactive Only

PUSH TO ROSTER

The Push to Roster page contains two sections, the first section displays pending Push to Roster submissions and the second section allows schools to include the aid recipient on their roster for enrollment certification.

- Pending Roster Additions
- Push Student to a Roster

The Pending Roster Additions section displays details of the pending Push to Roster submissions:

- **OPEID** - The eight-digit Office of Postsecondary Education ID of the school location.
- **School Name** - The name of the school location at which enrollment was reported for the student. Click the school name to access the school's Organization Contact List page. If the enrollment information was not reported by the school, a small warning icon appears after the school's name.
- **Enrollment Effective Date** - The date when a student's enrollment status first took effect. Used for Campus-Level and Program-level enrollment status.
- **Submitted Date** - The date that the school submitted the record to NSLDS.
- **Submitted Method** - The reporting process used to request the aid recipient be added to another school location's enrollment roster

The Push Student to a Roster section allows users to push a student to an enrollment roster.

Steps to Push Student to a Roster:

1) Click **Select School**
2) Select the **Search Type** from the dropdown menu
3) Enter the OPEID or School Name
4) Select the **School** from the returned Search List
5) Click **Select**
6) Verify Push to School field is populated with School
7) Enter the Enrollment Effective Date if different from repopulated one
8) Click **Submit** to save the changes made. If the user selects **Reset**, the changes made to each field is cleared.

SSN LOOKUP

The SSN Lookup page allows the user to identify if a student has any information in NSLDS previously reported by another organization. If information the user is trying to submit to NSLDS conflicts with another organization's data, the School should contact the organization(s) listed to resolve the SSN conflict(s).

To Search SSN:

1) Enter the SSN (enter leading zeroes, if applicable)
2) Click **Search.** The user can select **Reset** to clear the information entered in the SSN field.
    a. If NSLDS does not contain records for the entered SSN, it displays "No results were found for the entered SSN"
    b. If NSLDS locates records for the entered SSN, results are displayedfor all organizations that have reported information for the SSN entered
3) Click on **Organization Name** to navigate to School or Data Provider profile

The SSN table of results displays:

- **Organization Type** - The type of organization that previously reported on the SSN.
- **Organization Code** - The code of the organization that previously reported on the SSN.
- **Organization Name** - Name of the organization that previously reported on the SSN.
- **Person Role(s)** - Person Roles associated with the SSN.

EXIT COUNSELING

The Direct Loan Exit Counseling page allows users to view a student's Direct Loan Exit Counseling history. When a specific Aid Recipient has not been identified, the page directs the user to use the Aid Recipient search to populate the page with the student's information.

The Direct Loan Exit Counseling tab provides historical information about Direct Loan Exit Counseling submitted for a student. The Direct Loan Exit Counseling tab can be sorted by OPEID or Completion Date. All OPEID and School Names are hyperlinks to Provider Profiles. Within the Direct Loan Exit Counseling table, users can see the following:

- **OPEID** – The eight-digit Office of Postsecondary Education ID of the school location.
- **School Name** – The name of the organization that conducted the counseling.
- **Completion Date** – The date that the Exit Counseling was completed by the aid recipient.
- **Media Type** – The type of media used to submit the exit counseling information.
- **Source** – The entity (i.e. School) that reported the specified data.

PSLF DASHBOARD

Within the Aid Recipient navigation dropdown, PSLF Dashboard can be viewed to review Public Service Loan Forgiveness (PSLF) Information related to the aid recipient. The PSLF Dashboard is broken down into three accordion sections:

- PSLF Employment Certification
- PSLF Application
- PSLF Loan Summary.

PSLF EMPLOYMENT CERTIFICATION

The Public Service Loan Forgiveness (PSLF) Employment Certification tab displays a listing of all PSLF Employment records that have been reported to NSLDS. The PSLF Employment Certification tab can be sorted by Federal EIN, Employment Begin/End Date, or Certification Date. The PSLF Employment Certification tab contains the following:

- **Certification Date** – The date which the employer certified the Employment Certification Form.
- **Certification Form ID** – The unique identifier for an Employment Certification Form (ECF).
- **Federal EIN** – The unique nine-digit number used to identify a business entity.
- **Employer Name** – The employer's name.
- **Employment Begin Date** – The date on which employment began.
- **Employment End Date** – The date on which employment ended.
- **Employer Type** – The eligible employer type for Public Service Loan Forgiveness.
    - **GA** - Government AmeriCorps
    - **GO** - Government
    - **GP** - Government Peace Corps
    - **NP** - Non-profit
    - **PR** - Private Non-profit

Each PSLF Employment Certification record can be expanded to display the following fields:

- **Employer Certification** - Indicates if the borrower was able to obtain employer certification.
- **Employment Status** – The borrower's status during the term of employment provided on the Employment Certification Form.
- **Hours Per Week** – The number of hours per week (on average) the borrower was an active employee.
- **Service Type** – The servicer type provided while employed at a private non-profit organization.

- **Modified By –** Username of the user who added or modified the the PSLF Record OR "Batch" to indicate the PSLF record was modified through Batch Processing.
- **Modify Date –** The most recent updated Date for the PSLF record.
- **Creation Date** – The date the record was created on NSLDS.
- **Source** – The entity (i.e. 579-PHEAA) that reports specified data.

PSLF EMPLOYMENT CERTIFICATION (AUTHORIZED USER)

Within the PSLF Employment Certification tab, Authorized users can Add PSLF Employment Certification records, update existing PSLF Employment Certification records, or delete an existing PSLF Employment Certification Records.

To Add PSLF Employment Certification:

1) Click **Add PSLF Employment Certification**
2) Enter the **Employer Name**
3) Enter the **Federal EIN**
4) Enter **Certification Form ID**
5) Enter **Certification Date**
6) Enter **Employer Type**
7) Enter the **Service Type if applicable**
8) Enter **Employment Begin Date**
9) Enter **Employment End Date**
10) Enter **Employer Certification Indicator**
11) Enter **Employment Status**
12) Enter **Hours Per Week** worked
13) Click **Submit PSLF Employment Certification** or **Cancel** to discard the added PSLF Employment Certification record

Once this record has been successfully added, the following message will display at the top of the PSLF Employment Certification section, "A new PSLF Employment Certification record has been successfully added."

To Edit PSLF Employment Certification:

1) Click **Edit** in the last column of the PSLF Employment Certification record
2) Make any updates to fields:
    a. **Employer Name**
    b. **Federal EIN**
    c. **Certification Form ID** (non-modifiable)
    d. **Certification Date**
    e. **Employer Type**
    f. **Service Type if applicable**
    g. **Employment Begin Date**
    h. **Employment End Date**
    i. **Employer Certification Indicator**
    j. **Employment Status**
    k. **Hours Per Week**
3) Click **Submit PSLF Employment Certification** to save the edits to the PSLF record, **Delete** to remove the PSLF record from the table, or **Cancel** to discard edits made to the record
    a. Upon selecting **Delete**, a pop-up confirmation screen will appear.
    b. Select **Delete PSLF Employment Certification** to confirm deletion of the record or cancel to return to the Edit PSLF Employment Certification screen.

Once this record has been successfully edited, the following message will display at the top of the PSLF Employment Certification section, "A PSLF Employment Certification record has been successfully updated." Once a record has been

successfully deleted, the following message will display at the top of the PSLF Employment Certification section, “A PSLF Employment Certification record has been deleted.”

PSLF APPLICATION

The Public Service Loan Forgiveness (PSLF) Application accordion displays a listing of all PSLF Application records that have been reported to NSLDS. The PSLF Application accordion can be sorted by Application Process Date. The PSLF Application accordion contains the following:

- **PSLF Application Form/Sequence ID** – The unique identifier and sequence number for a PSLF Application Form ID.
- **Application Process Date** – The specific date on which the PSLF Application Form was processed by the PSLF Servicer.
- **Federal EIN** – The unique nine-digit number used to identify a business entity.
- **Employer Name** - The employer’s name.
- **PSLF Approved** – Specifies if the borrower has been approved for forgiveness under PSLF.
- **TEPSLF Approved** – (Temporary Public Service Loan Forgiveness) Specifies if the borrower has been approved for forgiveness under TEPSLF.
- **Not Forgiven, Service Applied** – Indicates if the borrower was not approved for TEPSLF or PSLF, but the employment service was applied to the loan.
- **Qualified For Forgiveness, Forbearance Applied** – Indicates if the borrower qualified for TEPSLF or PSLF and forbearance was applied to the loan.
- **Application History** – Link to the PSLF Application History page.

Each PSLF Application record can be expanded to display the following sections and fields:

- **PSLF Application**
    - **Application Received Date** – The date the application was received by the servicer
    - **Forbearance Indicator** – The indicator that the borrower believes they qualify for forgiveness under PSLF or TEPSLF and is requesting a forbearance while the application is being processed
    - **501(c3) indicator** – The borrower’s employer is tax-exempt under Section 501(c)(3) of the Internal Revenue Code (IRC)
    - **Employment Status** – The borrower’s employment status
    - **Employment Begin Date** – The date on which employment began
    - **Employment End Date** – The date on which employment ended
    - **Not for Profit Indicator** – The borrower’s employer is not-for-profit organization that is not tax-exempt under Section 501(c)(3) of the Internal Revenue Code (IRC)
    - **Hours Per Week** – The number of hours per week the borrower was an active employee
    - **Political/ Labor Union Indicator** – The borrower’s employer is a partisan political organization or a labor union.
    - **General Qualification Indicator** – The borrower completed the form to find out how many qualifying payments they have made or if their employer is a qualified employer
    - **Still Employed Indicator** – The indicator that the borrower is still employed
    - **Type of Service Provided** – The type of service the borrower’s private non-profit employer provides
    - **Forgiveness Indicator** – The indicator that the borrower believes they quality for forgiveness under PSLF or TEPSLF
    - **Governmental Organization Indicator** – The indicator thathe borrower’s employer is a governmental organization
- **PSLF Employer Official**
    - **Official Title** – The title of the authorized official that completed the employer certification
    - **Official Name** – The name of the authorized official that completed the employer certification
    - **Official Country Code** – The Country Code information of the authorized official that completed the employer certification

- **Official Phone Number** – The phone number of the authorized official that completed the employer certification.

- **PSLF Application Denial Reason**
  - **Reason Codes** – The denial reason code(s) for the PSLF Application Form
- **Last Modified**
  - **Modified By** – Username of the user who added or modified the PSLF Record OR "Batch" to indicate the PSLF record was modified through Batch Processing.
  - **Modify Date** – The most recent updated Date for the PSLF record.
  - **Source** – The entity (i.e. 579-PHEAA) that reports specified data.

PSLF APPLICATION (AUTHORIZED USER)

Within the PSLF Application Accordion, Authorized users can Add PSLF Application records or review existing PSLF Application records.

To Add PSLF Application Form:

1) Click **Add PSLF Application Form**
2) Enter the **PSLF Application Form ID**
3) View the **PSLF Application Form Sequence ID**
4) Enter **Application Process Date**
5) Enter **Federal EIN**
6) Enter **Employer Name**
7) Enter the **PSLF Approved Indicator**
8) Enter **TEPSLF Approved Indicator**
9) Enter **Not Forgiven, but Service Applied**
10) Enter **Qualified for Forgiveness, Forbearance Applied**
11) Enter **Application Received Date**
12) Enter **Employment Status**
13) Enter **Hour Per Week**
14) Enter **General Qualification Indicator**
15) Enter **Forgiveness Indicator**
16) Enter **Forbearance Indicator**
17) Enter **Still Employed Indicator**
18) Enter **Employment Begin Date**
19) Enter **Employment End Date**
20) Enter **Governmental Organization Indicator**
21) Enter **501 (c3) Indicator**
22) Enter **Not For Profit Indicator**
23) Enter **Political/Union Indicator**
24) Enter **Type of Service Provided**
25) Enter **Official's Title**
26) Enter **Official's Name**
27) Enter **Official's Phone Country Code**
28) Enter **Official's Phone Number**
29) Select **Add Denial Reason** to add application denial information for the Aid Recipient
    a. Upon selecting **Add Denial Reason** a pop-up appears to enter the Denial Reason dropdown. Multiple Denial Reason's can be selected.
        i. B - Borrower Name
        ii. C – Date of Birth
        iii. D – Borrower Signature
        iv. E – Borrower Sign Date
        v. F – Employer Name

vi. G – EIN
vii. H – Employer Mailing Address
viii. I – Employer Begin Date
ix. J – Employer End Date
x. K – Employment Dates Switched
xi. L – Employment Status
xii. M – Employment Hours/Weeks
xiii. N – Employer Org Type
xiv. O – Employer Non-For-Profit Org Type
xv. P – Employer Auth Official Name
xvi. Q – Employer Auth Official Title
xvii. R – Auth Official Signature
xviii. S – Auth Official Telephone Number
xix. T – Auth Official Signature Date
xx. U – Auth Official – Title
xxi. V – Processor Determined Employer Not Gove, Tax Exempt or Non-for-Profit
xxii. W – Ineligible Loan Types
xxiii. X - TBD
xxiv. Z – Borrower Selected Org Not Gove, Tax Exempt or Non-for-profit
xxv. AA – Borrower Payments <120 Employment (Full-time) Approved (AA)
xxvi. BH – FSA Denied Forgiveness
xxvii. DB - Employment Dates Prior to Disb Date
xxviii. EA - Unable to Obtain Cert Box Checked - Alternative Documentation Provided
xxix. EO - Unable to Obtain Cert Box Checked - Organization Still Operational
xxx. EP - Inconclusive - Government Org
xxxi. ER - Unable to Obtain Cert Box Checked - Organization Not Operational
xxxii. FP - Borrower Selected Tax Exempt Not-For-Profit - Processor Determined Not Non-For-Profit
xxxiii. IE - Employment Dates Prior to Program Start
xxxiv. IF - Form Version
xxxv. LU - Borrower Selected Labor Union
xxxvi. NG - Borrower Selected Governmental Org - Processor Determined Not Gov Org
xxxvii. NV - Inconclusive – Not-For-Profit
xxxviii. PO - Borrower Selected Partisan Political Org
xxxix. QP -Borrower Payments < 120 Employment (Will be displayed in conjunction with AA/CC)
xl. SC - Auth Official - Self Certification
xli. SQ - Borrower Selected Tax Exempt Not-For-Profit - Processor Determined Qualifying Service Ineligible
xlii. TB - TEPSLF Both Payments
xliii. TE - Borrower Selected Tax Exempt - Processor Determined Not Tax
xliv. TF - TEPSLF First Payment
xlv. TI - TEPSLF No Income Received
xlvi. TP - Inconclusive – Tax Exempt
xlvii. TQ - TEPSLF Borrower Payments < 120 Employment
xlviii. TR - TEPSLF Reprocess PSLF
xlix. TS - TEPSLF Second Payment
l. TP - Inconclusive – Tax Exempt
li. VE - Inconclusive – Not-For-Profit Qualifying Service
lii. VH - Processor Determined Employer is International Org
liii. VP - Processor Determined Employer is Partisan Political Org

b. Select **Save** to record the denial reason or **Cancel** to discard the denial reason.
c. Select the Delete checkbox if a Denial Reason needs to be removed.

30) Click **Submit PSLF Employment Certification** or **Cancel** to discard the added PSLF Application record

Once this record has been successfully added, the following message will display at the top of the PSLF Application section, “A PSLF Application Form record has been successfully added.” After successfully adding a PSLF Application Form record, Users have the option to **Add Sequence** or **Delete Form**. When the authorized user selects **Delete Form**, the authorized user is deleting the PSLF Application Form. To delete a sequence, the authorized user must enter the Application History page. Users will be able to Add Sequence by clicking the Add Sequence button. On this page Users will be able to enter a new Sequence for the PSLF Application Form.

Within the PSLF Application Accordion, users can view PSLF Application History by selecting the **View History** link in the PSLF Application table. Upon selecting the link, the user will be taken to the PSLF Application History page. On this page, users can see the sequence history to the selected PSLF Application. Authorized users can Delete Sequence by selecting the **Delete Sequence** option in the most recent PSLF Application Sequence Form. If the user selects **Delete Sequence**, a Delete PSLF Application Form Sequence pop-up will appear to request confirmation to **Delete PSLF Form Sequence ID** or **Cancel** to discard the delete request and return to the PSLF Application History page.

Authorized users can Edit Sequence by selecting **Edit Sequence** in any of the PSLF Application Sequence Forms. An authorized user can update the PSLF Application Form except for the PSLF Application Form ID field and PSLF Application Form Sequence ID field. To confirm the change is made, the authorized user can select **Submit** to save the changes or **Cancel** to discard any changes made.

PSLF LOAN SUMMARY

Within the PSLF Loan Summary accordion, users can select **View Loan Summary** to be directed to the Aid Recipient’s Loan Summary page. The PSLF Loan Summary Accordion contains Loan Information cards for each loan held by the PSLF Servicer. Each Loan Information card contains the following information:

- **Loan Number** - Unique identifier for the loan record assigned by NSLDS.
- **Loan Type** – The type of Title IV award.
- **Status** – The two-character code, effective date and description indicating the status of the loan.
- **View PSLF Loan Details** – Link to the PSLF Loan Details page.
- **Loan Amount -** The original loan amount before any cancellations.
- **Loan Date** - For FFEL, the date the loan was originally guaranteed; for Direct and Perkins Loans, the date the loan was originally disbursed.
- **Loan Period** - The period of study for which the loan was originally taken out.
- **School Name** – The school ~~that~~ the student ~~currently attends or~~ attended when the loan was obtained.
- **Federal Loan Servicer** - The name and code of the Federal Loan Servicer associated with the loan.
- **Outstanding Principal Balance** - The cumulative dollar value due on a loan, as reported by the data provider.
- **Outstanding Interest Balance** - The cumulative accrued outstanding interest balance on the loan, as reported by the data provider.
- **Cumulative Disbursed Amount** - The cumulative amount of the loan disbursed to a borrower.
- **Most Recent Disbursement Date** - The date of the most recent disbursement to the borrower for a specific loan.

PSLF LOAN DETAILS

Upon selecting the **PSLF Loan Details** link, the user is directed to the PSLF Loan Details page. This page can be broken down into three accordions:

- Counter
- Payment Month/Year Applied
- Public Service Loan Forgiveness by Fiscal Year

COUNTER

The **Counter** accordion can be expanded to view PSLF Count Records. The Counter accordion section contains the following values:

- **Last Payment Date** – The date the last payment the borrower paid on the loan was applied to the account
- **Most Recent Employment Certification Date** – The date of the most recent employer certified PSLF Application
- **Most Recent PSLF Application Form ID** – A unique identifier for the most recent PSLF Application Form
- **Most Recent PSLF Application Form Sequence ID** – A unique sequence number for the most recent PSLF Application Form ID
- **Unassessed Payment Count** – The count of payments made by the borrower that have not been determined as a qualifying, eligible, or ineligible payment for PSLF or TEPSLF
- **Cumulative Qualifying Payment Count –** The cumulative count of qualifying payments made by the borrower that meet the requirements for PSLF or TEPSLF
- **Cumulative Eligible Payment Count –** The cumulative count of eligible payments made by the borrower for PSLF or TEPSLF
- **Cumulative Eligible Payment Count not Counted as Qualifying Payment –** The cumulative count of eligible payments made by the borrower that did not meet the requirements to qualify for PSLF or TEPSLF
- **Cumulative Ineligible Payment Count** – The cumulative count of payments made by the borrower that did not meet the requirements to be eligible for PSLF or TEPSLF
    - **Not a Fully Satisfied Month Ineligible Count** – The count of payments made by the borrower that were ineligible because the payments did not meet the requirements for a fully satisfied month for PSLF or TEPSLF
    - **No Bill Eligible Count** – The count of payments made by the borrower that were ineligible for PSLF or TEPSLF because no bill was due
    - **Repayment Schedule Ineligible Count** – The count of payments made by the borrower that were ineligible because the repayment schedule type is not valid for PSLF or TEPSLF
    - **Deferment/Forbearance Exists Ineligible Count** – The count of payments made by the borrower that were ineligible for PSLF or TEPSLF because the payments were made while the loan was in deferment or forbearance
    - **No Payment Count** – The count of payment(s) not made by the borrower toward the PSLF or TEPSLF requirements
    - **Outside of Window Ineligible Count** – The count of payments made by the borrower that were ineligible because the payment was not made within 15 days of the due date for PSLF or TEPSLF
    - **Exclusion Period Ineligible Count** – The count of payments made by the borrower where the same service time could not be used for both TEPSLF and PSLF, therefore the payment was assigned to TEPSLF
    - **Pre-conversion Count** – The count of payments made by the borrower before the loan was transferred to the PSLF servicer that were determined to be ineligible based on a manual review
    - **Manual Review Ineligible Count** – The count of payments made by the borrower that were ineligible based on a manual review by the PSLF servicer
    - **No Supporting Repayment Schedule Ineligible Count –** The count of payments made by the borrower that were ineligible for PSLF because there was no repayment schedule established for the loan
    - **Ineligible Employment Count** – The count of payments made by the borrower that were ineligible because the borrower's employer did not meet the requirements for qualified employment under PSLF or TEPSLF

COUNTER (AUTHORIZED USER)

Authorized users can add a count record by selecting **Add Counter**. Upon selecting **Add Counter**, the authorized user is directed to the PSLF Loan Details page Counter page. The authorized user can add the following:

1. Enter **Last Payment Date**
2. Enter **Most Recent Employment Certification Date**
3. Enter **Most Recent PSLF Application Form Sequence ID**

4. Enter **Unassessed Payment Count**
5. Enter the **Total PSLF Count** and **TEPSLF Count** for the following fields:
    a. Cumulative Qualifying Payment Count
    b. Cumulative Eligible Payment Count
    c. Cumulative Eligible Payment Count not Counted as Qualifying Payment
    d. Cumulative Ineligible Payment Count
        i. Not a Fully Satisfied Month Ineligible Count
        ii. No Bill Eligible Count
        iii. Repayment Schedule Ineligible Count
        iv. Deferment/Forbearance Exists Ineligible Count
        v. No Payment Count
        vi. Outside of Window Ineligible Count
        vii. Exclusion Period Ineligible Count
        viii. Pre-conversion Count
        ix. Manual Review Ineligible Count No Supporting Repayment Schedule Ineligible Count
        x. Ineligible Employment Count
6. Select **Submit** to save the additional count record or **Cancel** to discard any changes.

Authorized users can **Update** and **Delete** counter records by selecting the **Update** button in the bottom right corner of the accordion section. Upon selecting **Update**, the Counter section fields become modifiable and the authorized user can add the following:

1. Enter **Last Payment Date**
2. Enter **Most Recent Employment Certification Date**
3. Enter **Most Recent PSLF Application Form ID**
4. Enter **Most Recent PSLF Application Form Sequence ID**
5. Enter **Unassessed Payment Count**
6. Enter the **Total PSLF Count** and **TEPSLF Count** for the following fields:
    a. Cumulative Qualifying Payment Count
    b. Cumulative Eligible Payment Count
    c. Cumulative Eligible Payment Count not Counted as Qualifying Payment
    d. Cumulative Ineligible Payment Count
        i. Not a Fully Satisfied Month Ineligible Count
        ii. No Bill Eligible Count
        iii. Repayment Schedule Ineligible Count
        iv. Deferment/Forbearance Exists Ineligible Count
        v. No Payment Count
        vi. Outside of Window Ineligible Count
        vii. Exclusion Period Ineligible Count
        viii. Pre-conversion Count
        ix. Manual Review Ineligible Count No Supporting Repayment Schedule Ineligible Count
        x. Ineligible Employment Count
7. Select **Submit** to save the additional count record or **Cancel** to discard any changes. The authorized user can select **Delete** to remove the counter record from the PSLF Loan Details page.

PAYMENT MONTH/YEAR APPLIED

The Payment Month/Year Applied accordion can be expanded to provide information regarding PSLF Payment records. This section is separated by Year and PSLF/TEPSLF cumulative Payment Counts.

NSLDS will calculate cumulative PSLF Payment Counts and TEPSLF Payment Counts containing the following information:

- **Qualifying Payment** – The cumulative count of qualifying payments made by the borrower to meet the requirements of PSLF or TEPSLF

- **Eligible Payments** – The cumulative count of eligible payments made by the borrower that did not meet the requirements to qualify for PSLF or TEPSLF
- **Ineligible Payments** – The cumulative count of payments made by the borrower that did not meet the requirements to be eligible for PSLF or TEPSLF
- **Unassessed Payments** – The count of payments made by the borrower that have not been determined as a qualifying, eligible, or ineligible payment for PSLF or TEPSLF

Upon opening a Year accordion, the following information will display:

- **Payment Month** – The month of the payment year in which the payment for PSLF and/or TEPSLF was applied to a loan.
- **PSLF Payment Status** – The status of the PSLF Applied payment for the month/year combination
- **PSLF Determination Type** – Specifies how the Payment Month/Year applied was determined as being an eligible or qualifying payment month/year combination
- **PSLF Ineligible Payment Reason** – The Ineligible Payment Reason for the PSLF payment month/year combination
- **PSLF Conversion Date** – The date the eligible payment month/year combination became a qualifying payment month/year combo
- **TEPSLF Payment Status** – The status of the TEPSLF Applied payment for the month/year combination
- **TEPSLF Determination Type** – Specifies howthe Payment Month/Year applied was determined as being eligible or qualifying payment month/year combination
- **TEPSLF Ineligible Payment Reason** – The Ineligible Payment Reason for the TEPSLF payment month/year combination
- **TEPSLF Conversion Date** – The date the eligible payment month/year combination became a qualifying payment month/year combo

PAYMENT MONTH/YEAR APPLIED (AUTHORIZED USER)

Authorized users will have the capability to update, add or delete Payment Month/Year Applied record information.

To Add Payment Month/Year Applied records, follow these steps:

1) Select **Add Payment Month/Year Applied**, an **Add Payment Month/Year Applied** pop-up will appear,
    a. Enter **PSLF Payment Year**
    b. Enter **PSLF Payment Month**
    c. Enter **PSLF Payment Status**
    d. Enter **PSLF Determination Type**
    e. Enter **PSLF Ineligible Payment Reason**
    f. Enter **PSLF Eligible to Qualifying Payment Conversion Date**
    g. Enter **TEPSLF Payment Status**
    h. Enter **TEPSLF Determination Type**
    i. Enter **TEPSLF Ineligible Payment Reason**
    j. Enter **TEPSLF Eligible to Qualifying Payment Conversion Date**
    k. Select **Save** to keep the record on the PSLF Loan Details page or **Cancel** to discard the record created.
2) Once the authorized user has saved their changes, a **New** action chip will display in the Action column. These changes will not be saved until the user **Submit** the changes in the bottom of the Payment Month/Year Applied accordion section. The user can select **Cancel** to remove all changes made during this editing session.

To Update Payment Month/Year Applied records, follow these steps:

1) Select **Update** in the bottom right corner of the accordion section
2) Select **Edit** next to each row record to make modifications, an **Edit Payment Month/Year Applied** pop-up will appear,
    a. Enter **PSLF Payment Status**
    b. Enter **PSLF Determination Type**

c. Enter **PSLF Ineligible Payment Reason**
d. Enter **PSLF Eligible to Qualifying Payment Conversion Date**
e. Enter **TEPSLF Payment Status**
f. Enter **TEPSLF Determination Type**
g. Enter **TEPSLF Ineligible Payment Reason**
h. Enter **TEPSLF Eligible to Qualifying Payment Conversion Date**
i. Select **Reset** to clear information entered into each field, **Cancel** to discard changes and return to the PSLF Loan Details page, or **Save** to keep changes and return to the PSLF Loan Details page.

3) Once the authorized user has saved their changes, an **Edited** action chip will display in the Action column. These changes will not be saved until the user **Submit** the changes in the bottom of the Payment Month/Year Applied accordion section. The user can select **Cancel** to remove all changes made during this editing session.

To Delete Payment Month/Year Applied records, follow these steps:

1) Select **Delete** checkbox in the Delete column
2) Once the authorized user has saved their changes, a **Delete** action chip will display in the Action column. These changes will not be saved until the user **Submit** the changes in the bottom of the Payment Month/Year Applied accordion section. The user can select **Cancel** to remove all changes made during this editing session.

PUBLIC SERVICE LOAN FOREGIVENESS BY FISCAL YEAR

Upon opening a Public Service Loan Forgiveness by Fiscal Year accordion, the following information will display:

- **Fiscal Year** – The fiscal year in which qualifying payments were made
- **Number of Matched Months** – The total number of months in which qualifying payments were made

Last updated information displays in the bottom of each section.

- **Last Updated** - Date the information was last updated.
- **Method** - Latest Method used to submit the loan details information.
- **Source** - The entity that reports specified data.

PSLF BY FISCAL YEAR (AUTHORIZED USER)

Authorized users will have the capability to update, add or delete Public Service Loan Forgiveness by Fiscal year record information.

To Add Public Service Loan Forgiveness by Fiscal Year records, follow these steps:

1) Select **Update** in the bottom right corner of the accordion section
   a. Select **Add Service Loan Forgiveness**, an Add Public Service Loan Forgiveness by Fiscal Year pop-up will appear
   b. Enter **Fiscal Year**
   c. Enter **Number of Matched Months**
   d. Select **Save** to keep the changes and return to the PSLF Loan Details page or **Cancel** to discard the changes
2) Once the authorized user has saved their changes, an **New** action chip will display in the Action column. These changes will not be saved until the user **Submit** the changes in the bottom of the Public Service Loan Forgiveness by Fiscal Year accordion section. The user can select **Cancel** to remove all changes made during this editing session.

To Update Public Service Loan Forgiveness by Fiscal Year records, follow these steps:

1) Select **Update** in the bottom right corner of the accordion section
    a. Select **Edit** next to the record row to make changes, an Edit Public Service Loan Forgiveness by Fiscal Year pop-up will appear
    b. Enter **Fiscal Year**
    c. Enter **Number of Matched Months**
    d. Select **Save** to keep the changes and return to the PSLF Loan Details page, **Cancel** to discard the changes, or **Reset** to clear the changes made to the fields
2) Once the authorized user has saved their changes, an **Edited** action chip will display in the Action column. These changes will not be saved until the user **Submit** the changes in the bottom of the Public Service Loan Forgiveness by Fiscal Year accordion section. The user can select **Cancel** to remove all changes made during this editing session.

Last updated information displays in the bottom of each section and is automatically updated once a change has been successfully implemented.

- **Last Updated** - Date the information was last updated.
- **Method** - Latest Method used to submit the loan details information.
- **Source** - The entity that reports specified data.

SCHOOL

The School tab at the top of the NSLDS page is used to view school information and perform school processes. Within the School tab at the top of the NSLDS page, the navigation menu consists of the following pages.

- School Profile
- Spreadsheet Submittals
- Cohort Default Rate
- Transfer Student Monitoring
- Delinquent Borrowers
- Repayment Information

SEARCH ORGANIZATION (SCHOOL)

When a user is on the School tab, the user can use the Search Organization option to select a School. Users have the option to search for previously retrieved schools or use the search fields to locate a school. Schools can be searched by OPEID or School Name. If the user chooses to search by OPEID, NSLDS requires users to enter either a 6-digit Group Code or 8-digit OPEID Code. If the user searches for a school using the 6-digit OPEID Code, NSLDS returns a list of all Schools within that School group family. If the user chooses to search by School Name, the user must enter three characters for School Name.

Upon completing a successful search, the results displays below the Search option. Users can filter the results by City, State or Status. If only one school is returned based on the search criteria, NSLDS automatically displays that School's information. Once a School successful search is completed and selected, NSLDS displays a banner at the top of each page within the School tab. Users can click **Clear Org**, to clear all School information that is currently being displayed on the page.

RETRIEVE ASSOCIATED SCHOOL LOCATION

Use the Retrieve School Location Search field dropdown and select the additional location. NSLDS displays the last 40 school records previously retrieved by the user. Once a school has been chosen, select the **Retrieve** button to access the associated branch school's profile.

SCHOOL PROFILE

Users can visit the School Profile tab to view school information and associated branches. School information includes view schedule for Perkins, list of batch services, contacts, profile, and program status. Once a School has been selected, the user can view the School Profile which contains the school's additional branch locations (if applicable), Perkins Loan Schedule, Batch Services and Contact information.

To view a School, users must use the **Search Organization** option in the top right corner of the screen (See Search Organization) to locate a School using School Identifiers.

Note: If a user is logged in as a School user, NSLDS automatically populates all sub-navigation tabs within the School tab for the School associated with the user's current login.

Once a School is located, NSLDS displays that School's information across all the pages within the School tab. Users are able to click the **Clear Org** button to clear all School information that is currently being displayed on the page within the School Tab.

PERKINS LOAN REPORTING SCHEDULE

The Perkins Loan Reporting Schedule section is accessed by selecting **View Schedule** to view past and future Perkins Loan Profile Schedules. This option appears for Schools that participate in Perkins Loan Program. Upon arriving at the Perkins Loan Schedule, users can see the following fields:

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

Loan Errors and Submittal Pass Rate (%) can only be seen by School Users that are in the OPEID family of the selected school.

BATCH SERVICES

A list of batch services the school is signed up for and the associated mailboxes are presented in the Batch Services table. Foreign and Domestic School Users associated with the School's OPEID and Authorized users can view the Batch Services Section. NSLDS displays the following information for all batch services:

- **Service Name** – The batch service for which the School signed up.

    - **Note**: Batch services are established on the SAIG website
- **SAIG Mailbox** – The SAIG mailbox associated with the NSLDS Batch service.
- **NSLDS Outbound Mailbox** – The SAIG Mailbox used by NSLDS for the outgoing batch service.

Note: If the school is not enrolled in a particular Batch Service, NSLDS displays Not Enrolled in the SAIG Mailbox and NSLDS Outbound Mailbox columns.

NSLDS displays the Service Name as links, which allows users to navigate to the appropriate Profile Page for that Batch Service. Below is a list of the batch services:

- **Cohort Default Rate (CDR) Notification Package** – Receive detailed default rate information about their institution
- **Financial Aid History Request** – School submits financial aid history requests and NSLDS provides a response with financial aid transcript data. Selecting the Service Name link directs the user to the Transfer Student Monitoring Profile page.
- **NSLDS Enrollment Reporting** – Submit and receive enrollment data to/from NSLDS. Selecting the Service Name link directs the user to the Enrollment Reporting Profile page.
- **NSLDS Loan Data Reporting** – Submit Perkins, FFEL, and DL loan data via SAIG. Selecting the Service Name link directs the user to the Data Provider Schedule (Perkins Schedule).
- **NSLDS Perkins Enrollment Notification** – Receive NSLDS Perkins enrollment notification file via SAIG. Selecting the Service Name link directs the user to the Perkins Enrollment Profile page.
- **Transfer Student Monitoring Preference** – Submit Transfer Student Monitoring requests and received alert notifications. Selecting the Service Name link directs the user to the Transfer Student Monitoring page.

Additionally, users are able to click on the **More Information** link which appears above the table allowing users to view all message classes associated with each batch service. The Message Classes Pop up displays all the inbound/outbound message classes used to submit/receive the data for each of the possible batch services in which a School is enrolled.

SCHOOL INFORMATION

This School Information section of the School Profile page consists of three tabs: **Contacts**, **School Profile (ECAR)**, and **Program Status (ECAR)**.

CONTACTS

The School Information section of the School Profile page displays a **Contact** tab to allow users to view School Contact information for the selected School as reported on the NSLDS Professional Access Website. In the **Contact** tab, NSLDSONLY displays School Contact information added via the NSLDS Professional Access Website and does not display School Contact information reported by PEPS. All NSLDS Users can view the **Contacts**, however, only authorized users have access to add, update, and delete Contacts.

Users can **Filter** the above details by function, or type of contact. The **Contacts** tab contains the following details:

- OPEID
- School Name
- Function(s)
- Type
- Name
- Phone
- Email
- View Details

To see more details for a specific contact, select **View Details** and the full Contact Details open in another page. Authorized users can edit the contact information or delete the contact from this page.

CONTACTS (AUTHORIZED USER)

Authorized users have the option to select **Add New Contact** to add additional contacts to the School's Profile. Upon selecting **Add New Contact**, the user completes the following steps to submit a new contact.

1) Select **Function** from the dropdown
2) Select **Type of Contact**, either organization or individual using the radio button. Organization contacts allow users to add group or office contact information for a single function.
    a) Organization
        i. Enter Organization name
        ii. Enter Phone number, phone extension and fax number
        iii. Enter Email Address
        iv. Enter School URL
        v. Enter Street Address
        vi. Enter Country and City
        vii. Enter State or Province
        viii. Enter Postal Code
        ix. Select **Submit** after all the desired fields have been filled
    b) Individual
        i. Enter First Name, Last Name and Job Title
        ii. Enter Phone Number, phone extension and fax number
        iii. Enter email address
        iv. Enter School URL
        v. Enter Street Address
        vi. Enter Country and City
        vii. Enter State or Province
        viii. Enter Postal Code
        ix. Select **Submit Contact** after all the desired fields have been filled. The user can select Cancel to return to the School Profile page without any of the changes being saved.
3) Once the user has selected **Submit Contact**, they is directed to the Contact list where a successful submission can be reviewed.

PROFILE (ECAR)

The **Profile (ECAR)** section allows users to view School Profile information for the selected School. All NSLDS users can view Profile (ECAR) information. The Profile (ECAR) tab, consists of three subsections:

- General
- Eligibility & Approval
- Loan Deferment & Location
- ECAR Contacts

The information included in the ECAR Contacts section is ONLY School Contact Record information that was reported via PEPS and does not include any School Contacts added via the Web Contacts tab. Only Main Campus schools have ECAR Contacts section. ECAR Contacts are not reported by PEPS for branch locations.

- General
    - **School Type** – The identifier of the ownership control type of the institution.
    - **Status** – An indication of whether the location is open, closed or merged.
    - **Change of Affiliation Effective Date** – The date the school changed affiliation.
    - **Program Length** – The length of the longest program offered by the institution.
    - **Ethnic Code –** The ethnic affiliation of the institution.
    - **Change of Affiliation Code** – The code designating change of affiliation.
    - **Academic Calendar** – The Academic calendar of the institution.

- **Congressional District** – The congressional district(s) of the main institution.
- **Web Address –** The school's official web address.
- **Branch Indicator** – The indication of whether the location is a branch.
- **Region Code** – The main institution's ED region code.

- Eligibility & Approval
  - **Eligibility Status –** The indication of whether the institution is eligible to participate in Title IV programs.
  - **Approval Indicator –** The indication of whether the location is approved for eligibility and/or certification.
  - **PPA Approval Date –** The date that the Program Participation Agreement as approved.
  - **Certification Type –** The certification status of the institution.
  - **Initial Approval Date –** The date the main/location was approved for the Title IV eligibility.
  - **PPA Expiration Date –** The date that the Program Participation agreement is set to expire.
- Loan Deferment & Location
  - **Loan Deferment Only –** The indication that the school is not eligible to disburse Title IV aid, but is eligible to certify loan deferments.
  - **Action Reason Code –** The overall eligibility reason code for the Main Institution and any underlying locations.
  - **Main/Location Reason Code –** The main/location reason for loss of Title IV eligibility.
  - **Action Code –** The overall eligibility action code for the Main Institution and any underlying locations.
  - **Action/Reason Date –** The overall eligibility action date for the Main Institution and any underlying locations.
  - **Main/Location Code Date –** The date the main/location was disapproved for Title IV eligibility.
- ECAR Contacts
  - **Function –** The function associated with the contact.
  - **Title –** The title associate with the contact.
  - **Name –** The first and last name of the function's contact.
  - **Phone Number –** The phone number of the function's contact.
  - **Fax Number –** The fax number of the contact associated with the function.
  - **Email –** The email address of the function's contact.
  - **School Contact URL –** The URL Address of the School Associated with the contact.
  - **Street Address –** The street address of the contact associated with the function.

PROGRAM STATUS (ECAR)

The School Information section of the School Profile page displays a **Program Status (ECAR**) tab. This tab allows users to view School Program Status information for the selected School. The School participates in the federal financial aid programs listed under Type. NSLDS displays a row in the table for each type of program and include the corresponding start and end date.

List of Types:

- Pell
- FFEL Stafford Subsidized
- FFEL Stafford Unsubsidized
- FFEL PLUS
- FFEL SLS
- FDSLP Stafford Subsidized
- FDSLP Stafford Unsubsidized
- FDSLP PLUS
- SEOG
- Perkins

SPREADSHEET SUBMITTAL

The Spreadsheet Submittal page allows users to upload any applicable spreadsheet submittals via the website. Users can **Validate** their file to ensure the formatting is correct on their spreadsheet and fix any errors before submitting. Users can also **Validate and Submit** their spreadsheet submittal. The system accepts all rows that are successfully submitted. If any rows have errors, a banner appears allowing the user to download the spreadsheet and fix the errors to re-submit. This page is broken down into three sections:

- **Upload Submittal Files** – This section allows users to submit spreadsheets via the website to allow users to report Perkins Loan, Enrollment, and Exit Counseling data to NSLDS.
- **Recently Uploaded Files** – This section allows users to view the 15 most recently validated and submitted data spreadsheets.
- **Submittal Templates** – Spreadsheet submittal templates that are available for download.

UPLOAD SUBMITTAL FILES

The Upload Submittal Files section allows users to submit spreadsheets via the website providing them the ability to report Perkins Loan, Enrollment, and Exit Counseling data to NSLDS. The spreadsheet files have a size limit of up to 5 MB of data per file. Any file over this size limit causes the spreadsheet to be rejected. Access to this page is limited to domestic School and ED users.

To submit a spreadsheet:

1) The user must put the data into a spreadsheet utilizing the Submittal Templates.
2) Select **Submittal Type** from the dropdown menu
3) Click **Upload File** option to choose the file location/name.
4) Click the **Validate** button to validate the data without uploading the data from the spreadsheet to the database.
a) Upon clicking Validate, the user can **Download** a file containing validated data and errors submitted
5) Click the **Validate and Submit** button to validate the data and upload the data from the spreadsheet to the database.

Please reference the appropriate NSLDS Documentation for the error codes and possible reasons for error for the template being uploaded.

RECENTLY UPLOADED FILES

The Recently Uploaded Files section allows users to view information about the 15 most recently validated and submitted data spreadsheets. In this section, users can view the following details:

- **Submittal Type** – The different types of submittals that authorized users have uploaded.
- **File Name** – The name of the file that the user has given the file that was submitted to NSLDS.
- **Processed Date** – The date the time the Submittal File was processed.
- **Uploaded By** – The name of the user who uploaded the file, as well as the date the file was uploaded.
- **Total No. of Records** – The number of records that were uploaded in the File.
- **No. of Records Processed** – The number of records that were processed as part of the Submittal File.
- **No. of Records with Errors** – The number of record-level errors in the Submittal File that was uploaded.
- **Download Errors** – Allows the user to download a file that contains the errors that were found on the Submittal File. Not all users can download all files. Only the user that originally uploaded the file be able to download the file.

The user can also **View Upload History** to search for any spreadsheet submissions beyond the most recently submitted.

To use Submittal History Search:

1. Select **Submittal Type** from the dropdown menu
2. Select **Upload Date From**
3. Select **Upload Date To**
4. Click **Search**

The search results displays up to 100 records per page. If the search does not yield any results or if the user does not have access to the school that was searched, a message is displayed for the user.

SUBMITTAL TEMPLATES

In the Spreadsheet Template section, downloadable spreadsheet submittal templates that can be used to submit data to NSLDS are available. The available spreadsheet templates for a school user are:

1) Exit Counseling Template
2) Enrollment Template
3) Perkins Spreadsheet

Users may download the template by selecting the blue hyperlinked text. Upon selecting the template, the download process should automatically begin. Prior to downloading, check with your IT department for proper download and storage procedures.

COHORT DEFAULT RATE CENTER

The Cohort Default Rate Center under the School tab allows users to view associated Cohort Default Rate information. The Cohort Default Rate Center consists of two sections: Cohort Default Rate and Cohort Default Rate History.

A user can view a school's CDR information. To initiate the search, select **Search Organization** and follow the search prompts. Reference the Search Organization section for detailed search functionalities.

COHORT DEFAULT RATE

The Cohort Default Rate section displays the Official and Draft Rate cards. The card displaying Draft Rates may not be visible based on the user viewing the information. The following information is displayed:

- **Cohort Fiscal Year** - The Federal Fiscal Year for which a Cohort Default Rate is calculated. Federal Fiscal Years begin October 1 of the preceding calendar year and end September 30. For example, the 2021 Cohort Fiscal Year begins October 1, 2020 and ends September 30, 2021.
- **Rate** - The Cohort Default Rate for the organization, which is calculated as a percentage of the Numerator to Denominator and truncated to one decimal place.
- **Rate Type** - The status of the organizations Cohort Default Rate Calculation. Starting in 2009 CDR transitioned to a 3 Year Cohort Default Period.
    - **3 YR Official** –Official Rate are available to the public.
    - **3 YR Draft** –Draft rates are only viewable by the rated organization and the Default Management Division within the Department of Education.
- **Numerator** – The total number of borrowers that entered repayment during the Cohort Fiscal Year and defaulted during the Cohort Default Period.
    - *Cohort Default Period* – starts at the beginning of the Cohort Fiscal Year and ends September 30 three years later. Example: the 2021 Cohort Default Period begins October 1, 2020 and ends September 30, 2023.
- **Denominator** – The total number of borrowers that entered repayment during the Cohort Fiscal Year.

COHORT DEFAULT RATE HISTORY

The Cohort Default Rate History section displays a table with the most recent Cohort Default Rates at the selected school. For a complete CDR History, the user can select **View All CDR History**. The tables are displayed in an accordion format separated by Cohort Fiscal Year. The table displays the following information:

- **Rate Type** - The status of the organizations Cohort Default Rate Calculation. Starting in Cohort Fiscal Year 2009 CDR transitioned to a 3 Year Cohort Default Period calculation, the 2 Year calculation ended with the completion of the 2010 CDR.
    - **3 YR Official** – Official Rate are available to the public.
    - **3 YR Draft** –Draft rates are only viewable by the rated organization and the Default Management Division within the Department of Education.
    - **2 YR Official** – Historical Calculation. Official Rate are available to the public.
    - **2 YR Draft** –Historical Calculation. Draft rates are only viewable by the rated organization and the Default Management Division within the Department of Education.
- **Rate Sub Type** - An indication of the Sub Type calculation applied to the Cohort Default Rate. The available sub types are:
    - **Actual** – The "raw" rate calculated using the actual list of borrowers of a school prior to any adjustments.
    - **Average** – The Rate used for a school with 29 or fewer borrowers entering repayment during a fiscal year that had a CDR calculated for the two prior fiscal years.
    - **Lead School (LS) Combo** – Rates calculated after the date of a Change of Affiliation. Within a given Change of Affiliation, the rate is taken from a lead school in a group of schools. NSLDS assigns the non-Lead School with a Lead School Combination Rate of 0 and does NOT assign this as the Final Rate.
    - **Substituted** – Rates associated with certain Change of Affiliations where the calculated rate was replaced by a rate that was derived through other means.
- **Numerator** – The total number of borrowers that entered repayment during the Cohort Fiscal Year and defaulted during the Cohort Default Period.
    - *3 YR Cohort Default Period* – starts at the beginning of the Cohort Fiscal Year and ends September 30 three years later. Example: the 2021 Cohort Default Period begins October 1, 2020 and ends September 30, 2023.
    - *2 YR Cohort Default Period* – starts at the beginning of the Cohort Fiscal Year and ends September 30 two years later. Example: the 2021 Cohort Default Period begins October 1, 2020 and ends September 30, 2022.
- **Denominator** - The number of borrowers that entered repayment during the Cohort Fiscal year.
- **Rate** - The Cohort Default Rate for the organization, which is calculated as a percentage of the Numerator to Denominator and truncated to one decimal place.
- **Process Date** - The date that the CDR calculation was completed.
- **Notification Letter (If available)** – Letters sent to schools notifying them of their Draft and Official Cohort Default Rates. Select **View**, to open a copy of the letter.

Within the Cohort Default Rate History table, users can view Change of Affiliation (COA) History and Adjustment History by selecting the **COA History** and **View History** options within the Rate Column, if available. Users may also see any approved appeals, indicated by a 'lightning bolt' symbol which, if applicable, will be displayed next to the Cohort Fiscal Year.

If the selected school has Change of Affiliation History, the user may view Change of Affiliation History by following the steps listed below:

1. In the Cohort Default Rate History section in the Rate column, click on **COA History**
2. The user is directed to the Change of Affiliation (COA) History landing page, and can view the fields listed below:
    - Rate Sub Type
    - Cohort Default Data Card
3. Additionally, Schools can view Other School(s) Affecting This Rate section. A user can view the fields listed below:
    - OPEID

- Cohort Year
- Rate Type
- Rate Sub Type
- Numerator
- Denominator
- Rate
- Processed Date

If the selected school has Rate Adjustment History, the School user can view the rate adjustment history by following the steps listed below:

1. In the Cohort Default Rate History section in the Rate field click on **View History**
2. The user arrives to the View Rate Adjustment History landing page. This page is organized by descending Rate Adjustment History Number and contains the fields listed below:
   - No.
   - Rate Type
   - Rate Sub Type
   - Numerator
   - Denominator
   - Rate
   - Process Date
   - Appeal Reason

TRANSFER STUDENT MONITORING

The Transfer Student Monitoring page displays detailed transfer student monitoring information that can be updated or ended. The Transfer Monitoring page consists of:

- TSM Profile Settings
- Add New Student to Transfer Monitoring List
- Monitoring List
- Alert List

Before a user is able to add a student to the Transfer Student Monitoring List, the user must set up their Transfer Student Monitoring Profile Preferences. If a user has not set up their preferences, upon arriving at the Transfer Student Monitoring page, the user sees the following error, "The OPEID's Transfer Monitoring School Profile location has not been set up. Before adding a student to a monitoring list, a TSM School Profile needs to be established. Click the "Set Up Profile" below to establish it." Upon selecting **Set Up Profile**, the user is directed to the School Transfer Monitoring Profile Preference Set up page.

To set up the Transfer Monitoring School Profile Preferences:

1. In the Point of Contact Information section,
   a. Enter **Title**
   b. Enter **First Name** (Mandatory)
   c. Enter **Last Name** (Mandatory)
   d. Enter **Phone Number** (Mandatory)
   e. Enter **Phone extension**
2. In the TSM Inform Preferences section, use the **Search for SAIG Mailbox** option to connect SAIG mailbox to the TSM Profile Preferences.
   a. Upon selecting **Search for SAIG Mailbox** a pop-up appears. Enter the **SAIG Mailbox** identifiers and select **Search**

   b. Once a successful search has been completed, select the desired SAIG Mailbox by using the **Select** option.
   c. To confirm the SAIG Mailbox, click **Select**. The user can select **Cancel** to return to the Preferences page without any of the information saved.
3. In the Enrollment Roster Preferences, select the options that apply to the TSM Profile
   a. Select the checkbox to Add students submitted for TSM to Enrollment Roster
   b. Select the checkbox to Add students submitted for FAH to Enrollment Roster
   c. If the user has additional locations, the Add to Roster for all additional locations (TSM)? And Add to Roster for all additional locations (TSM) options is selectable.
4. In the Monitoring & Alerts references section, enter the following information:
   a. Enter **Number of Days to Monitor**
   b. Enter **Notification Email Address**
   c. Select the Alert Method, either **Web & Batch** or **Web Only**
   d. **Search for SAIG Mailbox** to connect SAIG mailbox to the Monitoring & Alert Preferences
   e. Select the **Batch Format** from the dropdown
5. Once the settings have been selected, the user can select **Create** to save their changes or **Cancel** to return to the Transfer Student Monitoring page without their TSM Profile Preferences set up.

TSM PROFILE SETTINGS

The TSM Profile Settings section contains the current alert details:

- **Alert Method** - Indicates how the school requested its TSM Alerts to be displayed (Web Only) or displayed and sent over SAIG (Web and Batch).
- **# Days to Monitor** - The number of days, designated by the school that applies to every TSM Inform record added to a school's monitoring list. This is used by NSLDS to monitor beyond a transfer student's enrollment begin date.
- **Latest Alert Generation Date** - The latest date on which NSLDS alerted the school of the change to the student's record.

Users can navigate to the **View TSM and FAH Profile** that contains Transfer Student Monitoring Profile Preferences (TSM) and Financial Aid History Profile Preferences (FAH) sections.

The TSM section is split into five additional sections containing the following details:

- TSM Point of Contact Info
  - Title
  - First Name
  - Last Name
  - Phone Number
  - Phone Extension
- TSM Inform Preferences
  - Destination SAIG Mailbox
  - Do You Utilize a Servicer?
  - Servicer Name (Only appears if the answer to the previous question is yes)
- Enrollment Roster Preferences
  - Add student submitted for RSM to Enrollment Roster
  - Add students submitted for FAH to Enrollment Roster
  - Add to Roster for all additional location (TSM)?
  - Add to Roster for all additional location (FAH)?
- Monitoring & Alert Preferences
  - Number. of days to Monitor
  - Notification Email Address
  - Alert Method

        - Web & Batch or Batch Only
    - Destination SAIG Mailbox
    - Do You Utilize a Servicer?
    - Servicer Name
    - Batch Format
        - Extract or Report
- Last Updated On
- Last Updated By

The FAH section is split into two additional sections containing the following details:

- FAH Inform Preferences (Users cannot make updates to FAH mailboxes or if they use a servicer. This information can be modified on SAIG.)
    - SAIG Mailbox
    - Servicer Name
- FAH Enrollment Roster Preferences
    - Add students submitted for FAH to Enrollment Roster?
    - Add to Roster for all Branches (FAH)?

Users can make updates to the TSM and FAH Profile information above, by clicking **Edit Preferences**.

The Update School Transfer Monitoring Profile Preferences allows users to make edits to the following:

- TSM Point of Contact Info
    - Title (optional)
    - First Name
    - Last Name
    - Phone Number
    - Phone Extension (optional)
- TSM Inform Preferences
    - Destination SAIG Mailbox
- Enrollment Roster Preferences
    - Add students submitted for TSM to Enrollment Roster
    - Add to Roster for all Branches (TSM)
    - Add students submitted for FAH to Enrollment Roster
    - Add to Roster for all Branches (FAH)
- Monitoring & Alert Preferences
    - Number of days to Monitor
    - Notification Email Address
    - Alert Method
    - Destination SAIG Mailbox
    - Batch Format

ADD NEW STUDENT TO TRANSFER STUDENT MONITORING LIST

Users can **Add New Student** to the Transfer Monitoring List, they are redirected to the Add Student to Monitoring page to complete adding a student.

To Add Student to Transfer Student Monitoring List:

1. Click **Add New Student**
2. On the Add Student to Monitoring page, to Search for a Student

    a. Enter the SSN
    b. Enter the First Name
    c. Enter the Last Name
    d. Select the **Date of Birth**
    e. Click **Search**
3. Click **Add Student to TSM** List next to student record
4. Select the **Enrollment Begin Date**
5. Select the **Monitor Begin Date**
6. Click **Add Student**

MONITORING LIST

The Monitoring List displays up to 30 students at a time and is sorted by most recent monitor begin date for the school's monitoring list. The following is displayed for each student:

- **SSN** – The student's social security number.
- **Name** – The student's first and last name.
- **Date of Birth** – The student's date of birth.
- **Enrollment Begin Date** - The date on which the student was reported to begin classes at the school.
- **Monitor Begin Date** - The date on which NSLDS began monitoring the student.
- **Added By** – The user who added the student information.
- **Alert History** – Hyperlink to allow the user to navigate to the View Alert History page.
- **Edit** – Hyperlink to open a pop-up window to modify the student's information on the Transfer Student Monitoring List.
- **End Monitoring** – This option ends monitoring for the selected student.

The above details can be filtered by:

- SSN
- Last Name
- Added By
- Enrollment Begin Date
- Monitoring Begin Date

A user can **View** (Alert History), **Edit**, or **End** (End Monitoring) within the Monitoring List details. **Note**: Reference the Edit Student Information section if the students record needs to be modified.

If the user clicks on **View**, they are redirected to the View Alert History page for the selected student. Reference the View Alert History section of this Help Text for additional details.

If the user clicks on **Edit**, a pop up displays for users to update fields.

Steps to Edit Student Information:

1) Click **Edit** in Monitoring or Alert List
2) Make any changes to the following:
    a. First Name
    b. Last Name
    c. Date of Birth
    d. Enrollment Begin Date
    e. Monitor Begin Date
3) Click **Save Student Information**

A warning message displays if the updated identifiers created for that student no longer match in NSLDS. Users are asked if they want to proceed with the changes or not. If the user continues with the change, NSLDS adds the unmatched student to the school TSM list as well as keep the original student in the school TSM list.

If the user clicks **End**, an End Student Monitoring Student Confirmation pop up appears with the selected borrower details:

- Borrower (First and Last Name)
- SSN
- Date of Birth

The user selecting **End Monitoring** ends the current monitoring of the selected aid recipient. This action adds the aid recipient to the previously monitored student list.

ALERT LIST

The Alert List displays up to 30 students at a time and is sorted by the most recent monitor begin date for the school's monitoring list.

The following is displayed for each student:

- **Reviewed?** – Reviewed awards are marked with a green check mark
- **SSN** – The student's Social Security Number.
- **Name** – The student's first and last name.
- **Date of Birth** – The student's date of birth.
- **Enrollment Begin Date** - The date on which the student was reported to begin classes at the school.
- **Monitor Begin Date** - The date on which the NSLDS began monitoring the student.
- **Added By** – The user who added the student information.
- **Alert History** – Hyperlink to allow the user to navigate to the View Alert History page.
- **Edit** – Hyperlink to open a pop-up window to modify the student's information on the Transfer Student Monitoring List.
- **End Monitoring** – This option ends monitoring for the selected student.

The user can mark unreviewed alerts as **Reviewed** by selecting the check box and clicking **Submit Reviews**, this indicates the change that triggered the alert was reviewed.

The above details can be filtered by:

- SSN
- Last Name
- Added By
- Enrollment Begin Date
- Monitoring Begin Date

If the user selects **Reset**, all of the selected Filter selections are cleared.

VIEW PREVIOUSLY MONITORED STUDENTS

Upon selecting **View Previously Monitored Students**, the user is directed to the Previously Monitored Students page. Users can retrieve students who were previously submitted for monitoring, but are no longer displayed on their Transfer Monitoring List, for additional monitoring. The following details are displayed for those previously monitored:

- **Repopulate Student?** – Checkbox for the selected students to be repopulated into the Transfer Monitoring List.
- **SSN** – The student's Social Security Number.

- **Name** – The student's first and last name.
- **Date of Birth** - The student's date of birth.
- **Enrollment Begin Date** - The date on which the student was reported to begin classes at the school.
- **Monitor Begin Date** - The date on which the NSLDS began monitoring the student.
- **Added By** – The user who added the student information.
- **Last Updated By** - User that last updated the information.
- **Alert History** – Hyperlink to allow the user to navigate to the View Alert History page.

A user can select the check box for **Repopulate Student?** to add the selected student(s) back to the Monitoring List.

Once the user has checked all the students to be added, the **Repopulate Students** button can be clicked and a Repopulate Transfer Monitoring List pop up appears, allowing the selected student(s) to be added back to the Transfer Monitoring List.

To Re-Populate Transfer Student Monitoring:

1) Select Student(s) from the list of Previously Monitored by clicking on the **check box** next to their Name
2) Click the **Repopulate Students** button
3) From the Repopulate Transfer Monitoring List pop up:
    a. Input the Monitor Begin Date
    b. Input the Enrollment Begin Date

Note: The Monitor Duration and Number of Students Selected are prepopulated. The Monitor Duration is determined by the School's profile settings. The Number of Students selected is determined by how many students the user selected to repopulate.

4) Click **Repopulate Students**

A user can click on **View** and be navigated to the View Alert History page. **Note**: Reference the View Alert History section within the Help Text for details.

VIEW ALERT HISTORY

The View Alert History page allows users to review the selected Aid Recipient awards to mark as reviewed. Marking an award as reviewed indicates that the user has reviewed the change which triggered the alert. The student information and Latest Alert Generation Date is located at the top of the View Alert History page. Users can toggle through the list of student's with alerts by selecting **Next.** Authorized users can filter the table of awards by Enrollment Begin Date, Alert Date or types of aid (loans & grants, loans only, grants only). The View Alert History table contains the following information:

- **Reviewed?** – Reviewed awards are marked with a green check mark
- **Award Type** – The student's Title IV award, either loan or grants.
- **Enrollment Begin Date** - The date on which the student was reported to begin classes at the school.
- **Monitor Begin Date** - The date on which the NSLDS began monitoring the student.
- **Alert Date** - The date on which the NSLDS alerted the school of the change to the student's record.
- **Reviewed By** – The name of the user who reviewed the award and the date the award was reviewed.

The user can mark unreviewed alerts as **Reviewed** for the student by selecting the check box and clicking **Submit Reviews** at the bottom of the page. This indicates the change that triggered the alert was reviewed.

DELINQUENT BORROWERS

The Delinquent Borrowers page allows users to search for Aid Recipients with current delinquent loans as reported by a Federal Loan Servicer(s).

The **Retrieve Location** dropdown populates based on the school selected. All schools within the selected school's OPEID family are displayed. **Note**: NSLDS only allows School Users to select a school within their OPEID Family.

To complete a Delinquent Borrowers Search:

1) The Retrieve Location is prepopulated with all Schools associated with the school user's OPEID
    a. **Note**: Non-School Users have all schools associated with the OPEID family used in the Organization Search
2) Select the **School(s)** from the dropdown menu for Retrieve Location
3) Select **Number of Days Delinquent** (must select one)
4) Select the **FLS Code** (optional)
5) Enter the Cohort Year (optional)
6) Click **Search**

The returned search results displays up to 15 individual cards with details for each delinquent borrower. Each Delinquent Borrower information card is broken down into Student Information, Student Identifier Information and Delinquent Loans information.

Student Information:

- **Name** – The borrower's first and last name.
- **SSN** – The borrower's Social Security Number.
- **Date of Birth** – The borrower's date of birth.

Student Identifier Information:

- **Address** – The borrower's reported address.
- **Phone** - Home/Work/Cell/Fax/Other
- **Source** – only displays if value was reported for Phone
- **Email Address** – The borrower's reported e-mail address.

Delinquent Loans

- **Loan Type** – The type of loan that is delinquent.
- **Cohort Year –** The fiscal year that the CDR calculation is run for. Set as 10/01/Prior Year to 09/30/Cohort Fiscal Year.
- **Days Delinquent** – Number of days since the borrower last made a full payment.
- **Federal Loan Servicer** – Name and Code of the Federal Loan servicer reporting the delinquent loan.
- **OPB** – Outstanding Principal Balance of the delinquent loan.

The user can click on **View Loan Summary** in each individual delinquent borrowers' card and is redirected to the Loan Summary page for the associated Aid Recipient. **Note:** Refer to the Loan Summary section within the Help Text for more details.

REPAYMENT INFORMATION

The Repayment Information page reflects the current repayment status of borrowers in FFEL and Direct Loan programs who attended the selected school. This information has no relationship to the calculation of draft or official cohort default rates for a school. The information is reported by Guaranty Agency that guaranteed the loan or by the Direct Loan Servicer. The Repayment Information table contains the following information:

- **Numerator Range** – 12 month moving date range that increments every month.
- **Denominator Range** – 12 month moving date range that increments every month.
- **Numerator** – The number of borrowers in the organization that entered during the Cohort Fiscal year and defaulted within the Cohort Period.

- **Denominator** – The number of borrowers in the organization that entered Repayment during the Cohort Fiscal year.
- **Rate** – Numerator divided by Denominator) multiplied by 100.
- **Date Processed** – Date the information was processed.

PERKINS ENROLLMENT NOTIFICATION PROFILE

Loan holders and schools that hold Perkins loans can receive Enrollment Notification files. The Perkins Enrollment Notification Profile page contains the enrollment information for students with Perkins loans that are currently being serviced at the selected School location. This page allows School users to view the organization's Notification file preferences and future schedule. The Enrollment Reporting Profile has two sections that users can view:

- **Future Schedule –** Upcoming enrollment reporting schedule for schools up to one year in the future.
- **Past Schedule** - Enrollment reporting schedule for schools for the past one year of previously generated rosters.

Users can edit and update the Perkins Enrollment Notification Profile preferences by clicking **Edit Preferences.**

On the Edit Preference pop up, users can update the following fields:

- **Destination SAIG Mailbox** – The user can enter a valid SAIG mailbox that is associated with the organization. The SAIG mailbox is validated upon saving the updated preferences. The SAIG mailbox must be an active TG mailbox associated to the user's organization.
- **File Format** – Format is a display-only field and populated as Fixed Length.
- **Type of Notification** – Changes Only or All Records are the available options.
    - **Changes Only** sends Notification files with only records with changes to enrollment information that have been certified since the last generation of the notification file.
    - **All Records** sends Notification files consisting of all records for the organization.
- **Sort Order** – The user can select two sort orders, Student SSN or Student Last Name.
    - **Student SSN** orders the information based on ascending SSN.
    - **Student Last Name** orders the information based on ascending alphabetical order of the student's last name.

Once selected, the preferences may either be cancelled or saved using the appropriate button. If the user selects Cancel, NSLDS does not save the selected preferences, and returns the user to the Notification Profile page. If the user selects Save, NSLDS saves the selected preferences, as well as the User ID of the preference editor, and the current date as the date of last update. NSLDS displays the updated Notification file Preferences on the respective Notification Profile page and applies the selected preferences to all future Notification file generations.

PERKINS ENROLLMENT NOTIFICATION PROFILE (AUTHORIZED USER)

To Create New Schedule:

1) Click **Create New Schedule**
2) Enter **Schedule Start Date**
3) Select the **Frequency** from the dropdown
4) Click **Create Schedule**

Note: Creating a new schedule replaces the current schedule.

The Future Schedule section contains the following information:

- **Date** – The date of Notification file is to be generated.
- **Purpose** – This is an optional user defined field that can be used to define the purpose of this notification.
- **Created By** – The name of the user who created the Notification schedule.
- **Created On** – The date on which Notification schedule was created.
- **Edit** - Action button that allows an existing Notification Date and Purpose to be updated by the user.
- **Delete** – Action button that allows a scheduled Notification file to be removed.

A user can **Add to Schedule**, **Edit**, and **Delete** any future schedules.

To Add to Schedule:

1) Click **Add to Schedule**
2) Select the **Date**
3) Enter the **Purpose**
4) Click **Submit** to record changes or **Cancel** to dismiss changes made

To Edit Schedule:

1) Click **Edit** next to schedule row to be updated
2) Make updates to fields:
    a. Date
    b. Purpose
3) Click **Save** to record changes or **Cancel** to dismiss changes made

To Delete Schedule:

1) Click **Delete** next to schedule row to be removed
2) A banner displays at the top of the page indicating a successful deletion

NSLDS validates that the entered date is no more than one year in the future and is not a past date. NSLDS validates that the time gap between consecutive scheduled items is no more than 7 days long and that 7 days does not elapse between the date on which the system generated the last Perkins Notification File and the listed date of the first Notification File in the Future Schedule.

The Past Schedule section contains the following information:

- **Date** – The date of Notification file was scheduled to be generated.
- **Purpose** – This is an optional user defined field that can be used to define the purpose of this notification.
- **Created By** – The name of the user who created the Notification schedule.
- **Created On** – The date on which Notification schedule was created.

ENROLLMENT

ENROLLMENT DASHBOARD

Located within the Enrollment tab, the Enrollment Dashboard allows school users to see information related to enrollment statistics at the selected school/location. The Enrollment Dashboard displays the following information for the selected school location:

- School Name
- OPEID

- Status
    - Open
    - Closed
    - Merged
    - Temporarily Open

ENROLLMENT ALERTS

Below the Enrollment Dashboard School Information section, alerts related to the location's portfolio display in the Enrollment Alerts section. The possible alerts include:

- Enrollment Profile has not been set up for this location
- Students with Certification >65 Days Late
- You have Late Roster Notifications
- You have Compliance Notifications
- Percent Certified Beneath Threshold

If the School Location does not have any alerts, the user sees 'No Current Enrollment Alerts to Display'.

ENROLLMENT FAST FIGURES

The Enrollment Fast Figures section allows the user to view a glimpse of the location's Enrollment Reporting Statistics, as calculated in the last evaluation period. Users are able to select the **Go to Enrollment Reporting Statistics** page to view Enrollment Reporting Statistics. Note: Reference the Enrollment Reporting Statistics section of the Help Text for more information.

The Enrollment Fast Figures statistics are calculated for a specific evaluation period. At the top of the Enrollment Fast Figures section are the Start and End Dates for the Evaluation Period used to calculate the Enrollment Reporting Statistics. The Enrollment Fast Figures section displays the following metrics:

- **Students in Portfolio** - The number of students in the school's portfolio on the Start Date of the evaluation.
- **Percent Students Certified in Portfolio** - The percentage of students in the school or school location's portfolio certified during the evaluation period.
- **Students Certified with Program Enrollment** – The number of students in the school or school location's portfolio at the Start Date of the evaluation who were certified at least once with program enrollment during the evaluation period.
- **Percent Students Certified with Program Enrollment** - The percentage of students in the school or school location's portfolio successfully certified with program enrollment during the evaluation period.

The Percent Students Certified with Program Enrollment statistic displays an 'alert' icon if the school is below the compliance threshold or display a green 'checkmark' icon if the school is above the compliance threshold.

ENROLLMENT ROSTER AND SUBMITTAL OVERVIEW

The Enrollment Roster and Submittal Overview section displays information regarding the latest roster sent to NSLDS. Users have the option to select a link to the Submittal Tracking page. The Enrollment Roster and Submittal Overview section displays the following:

Roster Information

- **Roster Date** - The date on which NSLDS sent a new enrollment roster to the school.
- **Number of Students included in Roster** – Count of students found on the roster sent to the school.
- **Destination TG Mailbox** – The Student Aid Internet Gateway (SAIG) TG mailbox established to send and receive enrollment files for that particular submission.
- **Total Records** - The total number of records contained in the file, including headers and footers.

NSLDS displays the following information from the submission:

Submittal Overview Information

- **Number of Students** – Count of students included in the submission.
- **Submission Method**– Method used to submit the enrollment roster. (Batch, Web, Spreadsheet)
- **Date Submitted** – Date of the submission.
- **Total Records** – Total count of records submitted in submission.

ENROLLMENT ADMINISTRATOR AND SERVICER

At the bottom of the Enrollment Dashboard, the name of the Administrator or an Enrollment Reporting Servicer is displayed for the selected location. If the school does not have an Administrator or an Enrollment Reporting Servicer, the fields are populated with 'N/A'. This section may appear 'N/A' if the school has not set up their School Enrollment Profile.

Authorized users have the option to select a link that directs the user to the Enrollment Reporting Profile.

ENROLLMENT REPORTING PROFILE

The Enrollment Reporting Profile is located in the Enrollment Administrator and Servicer section of the Enrollment Dashboard. It allows School users to access administration and roster file preferences. Within the Preferences section users can view the following fields:

- **SAIG Mailbox** - Mailbox assigned for NSLDS to retrieve the inbound data from the School batch service.
- **File Format** – File format the user has selected to receive their roster. Either fixed width or comma delimited.
- **Merge Locations** - File organization preference for a school to receive rosters for multiple locations.
- **Sort Order** - The school selected order the enrollment records are sorted in the file that is generated by NSLDS.
- **Administrator** - The name of the designated administrator, if one has been established, for the retrieved location. Schools may report enrollment for their own location or set up another location to be the Administrator of their Enrollment Reporting process.
- **Enrollment Reporting Servicer** –The name of the servicer, as provided by SAIG, that a school has designated as their third party servicer for Enrollment Reporting roster files.
- **Last Updated On** – Date the information was last updated.
- **Last Updated By** – User that last updated the information.

Users can edit and update the Enrollment Reporting Profile Preferences by clicking **Edit Preferences.**

On the Edit Preference pop up users can view the following fields:

- **SAIG Mailbox** - Mailbox assigned for the organization that is providing enrollment data to NSLDS.
- **Administrator -** The name of the designated Administrator, if one has been established, for the retrieved location. Schools may report enrollment for their own location or set up another location to be the Administrator of their Enrollment Reporting process.
- **Enrollment Reporting Servicer** – The name of the servicer, as provided by SAIG, that a school has designated as their third-party servicer for Enrollment Reporting roster files.

Users can make changes to the Enrollment Reporting Profile Preferences fields listed below:

- **Merge Locations** - File organization preference for a school to receive rosters for multiple locations. Options available are Yes, Everything in 1 File, or No, Multiple Files. See the Enrollment Reporting Guide for specifications for receiving files for multiple locations.
- **File Format** – The File Format in which NSLDS generates the Enrollment Roster file. Options available are Fixed Width and CSV.
- **Sort Order** – The Sort Order in which NSLDS generates the Enrollment Roster file. Options available are:
    - **Student SSN** orders the information based on ascending SSN.

    - **Last Name** orders the file alphabetically by Student Last Name.
- Once the user has made the desired changes, the user can select **Save** to record changes or **Cancel** to return to the previous screen without the changes being saved.

If the user updated the Enrollment Reporting Profile Preferences, the updates display within the Preference section. The name of the user that updated the information is also displayed.

The Enrollment Reporting Profile has two sections that users can view:

- **Future Schedule –** Upcoming enrollment reporting schedule for schools up to one year in the future.
- **Past Schedule** - Enrollment reporting schedule for schools for the past one year of previously generated rosters.
- **Administration** – The list of school locations and what location is currently assigned as the Administrator for Enrollment Reporting.

The Future Schedule section contains a table displaying the following details:

- **Scheduled Date** – The date the next submission date is expected.
- **Purpose** - This is an optional user defined field that can be used to define the purpose of this notification.
- **Modified By** – The name of the user that modified the future schedule.
- **Modified On** – the date on which the future schedule was modified.
- **Edit** - Action button that allows an existing Future Schedule Date and Purpose to be updated by the user.
- **Delete** – Action button that allows the Future Schedule record to be removed.

Authorized users can **Add to Schedule**, **Create New Schedule**, **Edit**, and **Delete** any future schedules.

To Create New Schedule:

1) Click **Create New Schedule**
2) Enter **Schedule Start Date**
3) Select the **Frequency** from the dropdown
4) Click **Create Schedule**

Note: Creating a new schedule replaces the current schedule.

To Add to Schedule:

1) Click **Add to Schedule**
2) Select the **Date**
3) Enter the Purpose
4) Click **Submit**

To Edit Schedule:

1) Click **Edit** next to schedule
2) Make any updates to fields:
    a. Date
    b. Purpose
3) Click **Save**

To Delete Schedule:

1) Click **Delete** next to schedule
2) A banner displays at the top of the page indicating a successful deletion

The Ad-Hoc Request section contains a table displaying the following details:

- **OPEID -** The eight-digit Office of Postsecondary Education ID of the school location.

- **School Name** - The name of the organization that disbursed the loan.
- **Date** – Date that the Ad-hoc request was submitted.
- **Purpose** – Reason provided for the Ad-hoc request.
- **Modified By** – User that requested the ad-hoc request.
- **Modified On** – Date that the user made the ad-hoc request.
- **Edit** – Option to edit the Ad-Hoc Request.
- **Delete** – Option to delete the Ad-Hoc request.

Within the Ad-Hoc Request section, Users can also select the **View Requests for All Locations**, this triggers a pop-up to appear displaying all locations within this admin's administration. In this pop up, users can also Add, Edit, and Delete an ad-hoc request.

To Add New Ad-Hoc Request:

1) Click **Add New Ad-Hoc Request**
2) Enter **School OPEID** or **Name** to search and select from the dropdown
3) Enter the **Purpose** of the Ad-Hoc Request
4) Click **Submit**

To Edit Ad-Hoc Request:

1) Click **Edit** next to schedule
2) Make any updates to fields:
    a. Purpose
3) Click **Save**

To Delete Ad-Hoc Request:

1) Click **Delete** next to schedule
2) A banner displays at the top of the page indicating a successful deletion

ENROLLMENT MAINTENANCE

The Enrollment Maintenance page is located under the Enrollment tab in the top navigation menu. School users can use this page to search multiple enrollment records at their school. The school can modify the program or campus enrollment information. School Users can also certify multiple students on this page. In the Retrieve Enrollment Roster search, users can search the roster and retrieve enrollment information for students attending the school. The user can select Search and all enrollment records at the school (up to 15 per page) are returned. The user also has the option of using the following four data retrieval fields within the Search section:

- **SSN** – The student's Social Security Number. (Default)
- **Last Name** – The student's last name.
- **Student Designator** – Identification number for the student at the school, if it has been reported to NSLDS.
- **Certification Date** - The date a school certified that a student's enrollment information was accurate.

Note: A user can complete an exact match for any of the four fields above when conducting a search by selecting the check box Only Return Exact Matches. If not selected, a partial match is used.

Once **Search** is selected, if records were located matching the search criteria, the enrollment information is generated. If no records matched the search criteria, the search results section displays the following message, "Search Returned (0) students."

The following view only fields displays:

- **First and Last name** – The name of the aid recipient included on the roster.
- **SSN** – The aid recipient's Social Security Number.
- **DOB** – The student's Date of Birth.
- **Student Designator** – The optional identifier for the aid recipient, as utilized by the school location.
- **Certification Date** - The date the school certified that a student's enrollment information to be accurate.
- **Location** - The eight-digit Office of Postsecondary Education Identification number for the school at which enrollment was reported.
- **Most Recent Status** - The status most recently reported for the student at that school. Users wanting to view the full history of a student's status at one or more schools should navigate to the Program Enrollment Details page.
- **Effective Date** - The date when the most recently reported status took effect. The following special rules apply:
    - 'NSLDS sets the Effective Date to be equal to the Certification Date for the Enrollment Status 'X' (Never Attended) and 'Z' (No Record Found) when the date is not reported by the school.
    - NSLDS sets Effective Date equal to 12/31/9999 when it is not supplied by the school for records with an Enrollment Status of 'D' (Deceased).
- **Anticipated Completion Date** - The date the student completed, or was expected to complete, his or her studies.
- **Term Begin Date** – The date on which school term begins.
- **Term End Date** – The date on which school term ends.
- **CIP Year** – Calendar Year that refers to the decade edition of the Classification of Instructional Programs (CIP) catalog (2010, 2020, etc.).
- **CIP Code –** Identifier for program in the catalog of the Classification of Instructional Programs (CIP).
- **CIP Description** – Official title of the program in the catalog of the Classification of Instructional Programs (CIP).
- **Credential Level** – Degree of qualification accredited with the completion of the program.
- **Reported Program Length** – Duration of program, as submitted by certified enrollment source.
- **Weeks in Title IV Academic Year** – Number of instructional weeks in the calendar year offered at the school location.
- **Published Program Length in Years** – Calculated duration of the program in units of academic years.
- **Program Begin Date** – First day of program instruction for the student.
- **Special Program Indicator** – Designation that the instructional program that is outside standard accreditation.
- **Program Status –** Effective status of the student's level of attendance.
- **Status Effective Date -** The Program Effective Date, which is the date when the student's current program status first took effect.

The fields listed below are editable for authorized users to add or update data fields. Once the user has completed all necessary updates, the user can submit their changes by clicking **Add Program**:

1) Select the **CIP Year** from the dropdown
2) Enter the **CIP Code**
3) Select the **Credential Level** from the dropdown
4) Enter the **Reported Program Length**
5) Select the **Years, Months or Weeks** from the dropdown
6) Enter the **Weeks in Title IV Academic Year**
7) Enter the **Program Begin Date**
8) Select the **Special Program Indicator** from the dropdown
9) Select the **Program Status** from the dropdown
10) Enter the Status Effective Date

Once all data fields are verified as correct, click **Add Program to Student**

ADVANCED SEARCH

If the user would like to complete an Advanced Search by Program or Campus Enrollment details, the user can navigate to the Advanced Search tab:

1) Retrieve:
    a) **SSN**
    b) **Last Name**
    c) **Student Designator**
    d) **Certification Date**
2) In the Campus Enrollment Section:
    a) Search and select the campus location from the **School Location** dropdown
    b) Select all the **Enrollment Codes** desired
    c) Certification Date Range
        i. Enter the **Begin Date**
        ii. Enter the **End Date**
    d) Anticipated Completion Date Range
        i. Enter the **Begin Date**
        ii. Enter the **End Date**
    e) Term Date Range
        i. Enter the **Begin Date**
        ii. Enter the **End Date**
    f) In the Student Search Criteria
        i. **Last Name(s) Range**
            1. Enter letters to define the beginning of the search range, and Enter letters to define the end of the search range
        ii. **SSN(s) Range**
            1. Enter a numerical range to define the beginning of the search range and Enter a numerical range to define the end the search range.
        iii. **Student Designator(s) Range**
            1. Enter the Designator from field and enter the Designator to define the end of the search range.
3) In the Program Enrollment Section:
    a) Enter the **CIP Code**
    b) Select the **CIP Year** from the dropdown
    c) Check the box **Exclude Students with Certified Programs**
    d) Check all **Credential Levels** that apply from dropdown
    e) Check the **Special Program Indicator**(s) that apply from dropdown
    f) Reported Program Length
        i. Enter the Reported Program Length Range in decimals to define the beginning of the search range and Enter the Reported Program Length Range in decimals to define the end of the search range.
        ii. Select the Reported Program Length Range Dropdown (Years, Months, Weeks). This field is mandatory to complete a search on Reported Program Length.
        iii. Enter the Program Begin Date Range to define the beginning of the search range, and Enter the Program Begin Date Range to define the end of the search range.
4) Click **Search,** or select **Reset** to clear all of the entered search criteria.

After a successful search has been completed, the Search criteria is listed at the top of the Search Results page. Users can filter and modify the search criteria entered.

Within the Enrollment Maintenance section authorized users can add a new student to their roster by clicking **Add New Student**.

1) In the Student Information section
    a. Enter SSN
    b. Enter Last Name
    c. Enter First Name
    d. Enter Middle Name (optional field)

    e. Enter Date of Birth
2) In the Campus Enrollment Information section
    a. Search and Select the Campus location in the Location Selection field
    b. Select the **Status** from the dropdown
    c. Enter the Effective Date
    d. Enter the Anticipated Completion Date
    e. Enter the Term Begin Date to Term End Date (optional fields)
    f. Enter the Student Designator (optional field)
3) In the Certification Information section
    a. Enter the Certification Date
4) After reviewing all the fields are correct click **Add New Student**

Within the Search Returned results authorized users can edit an aid recipients contact information by clicking **Edit Contact Information**.

1) Enter or Update Street Address- Line 1
2) Enter or Update Street Address- Line 2 (optional)
3) Enter or Update the City
4) Enter or Update State or Province (optional)
   Note: Only optional if USA is not selected as Country
5) Enter or Update the Country
6) Enter or Update the Postal Code (optional)
   Note: Only optional if USA is not selected as Country
7) Enter or Update the "Phone Number" (optional)
8) Enter or Update the Email Address (optional)
9) Enter or Update the Effective Date
10) Check the box **Is this address validated?** if applicable
11) After reviewing all the fields are correct click **Save**

ENROLLMENT REPORTING STATISTICS

The Enrollment Reporting Statics page displays detailed information about the extent and quality of the enrollment reporting provided by schools participating in the federal student aid programs. Users can view the previous year's enrollment reporting statistics for their school as a whole or for any of their school's locations. Listed below are the three main sections within the Enrollment Reporting Statistics page:

- Certification Statistics
- Compliance Notification History
- Late Roster Notifications

Above these sections is an Enrollment Alerts section. These alerts are Enrollment specific and notify the user of Enrollment actions that need to be completed to remain compliant. Users are able to alternate between schools associated with their OPEID Enrollment Reporting Statistics by utilizing the Retrieve School Location dropdown and clicking **Retrieve**.

Users can also access the **Certification by Quarter** pages link located at the bottom of the Enrollment Reporting Statistics page.

On the Enrollment Reporting Statistics page under the Certification Statistics section, a user can view the following fields:

- **Start Date** - The begin date for the evaluation period that produced the row of data.
- **Evaluation Date** - The date on which the period under evaluation ended and the evaluation itself was performed.

- **OPEID** (clickable to view the school profile) - The eight-digit Office of Postsecondary Education ID of the school location.
- **Students in Portfolio** - The number of students participating in the school or school location's portfolio on the Start Date.
- **Students Certified** - The number of students participating in the school or school location's portfolio at the Start Date who were certified at least once by the Evaluation Date.
- **Students Certified with Program Enrollment** - The number of students participating in the school or school location's portfolio at the Start Date who were certified at least once with program enrollment by the Evaluation Date.
- **Percent of Students Certified** - The percentage of students in the school or school location's portfolio successfully certified during the evaluation period.
- **Percent of Students Certified with Program Enrollment** - The percentage of students in the school or school location's portfolio successfully certified with program enrollment during the evaluation period.
- **Programs Certified with Active Enrollment** - The number of programs certified with active Program Enrollment Status of 'F', 'Q', 'H', 'L', and 'A' for the evaluation period, regardless of CIP Year.

User can expand the certification statistics results by clicking the arrow located next to the start date, and the following fields display:

Roster Information

- **Roster Records Returned** - The number of records that were processed by NSLDS for a specific school or school location's portfolio between the Start Date and Evaluation Date.
- **Roster Records in Error Returned** - The number of records containing errors that were processed by NSLDS for a specific school or school location's portfolio between the Start Date and Evaluation Date.
- **Roster Error Percent** - The ratio of records in error to records returned expressed as a percentage.

2020 CIP Information

- **Programs Certified with 2020 CIP Year** - The number of programs certified with active Program Enrollment in CIP Year 2020 for the evaluation period.
- **Percent of Programs Certified with 2020 CIP Year** - The percentage of programs certified with active enrollment for the evaluation period that have a 2020 CIP Year.

In the Compliance Notification History section, a user can view the following fields:

- **Date Letter Sent** - The date on which NSLDS sent a compliance letter to the school.
- **Letter Type** - The name of the compliance letter sent to the school.
- **OPEID** - The eight-digit Office of Postsecondary Education ID of the school location.
- **Start Date** - The begin date for the evaluation period that produced the row of data.
- **Evaluation Date** - The date on which the period under evaluation ended and the evaluation itself was performed.
- **Percent of Students Cert. with Program Enrollment -** The percentage of students in the school or school location's portfolio successfully certified with program enrollment during the evaluation period.
- **Percent of Programs Cert. with 2020 CIP Year** - The percentage of programs certified with active enrollment for the evaluation period that have a 2020 CIP Year.
- **Roster Error Percent** - The ratio of records in error to records returned expressed as a percentage.
- **View PDF** – Hyperlink to view the Enrollment Reporting Compliance Notification letter in its entirety.

In the Later Roster Notification section, a user can view the following fields:

- **Email Date** – Date that the Late Roster Notification was sent out from NSLDS.
- **Roster Date** - The date on which NSLDS sent a new enrollment roster to the school.
- **OPEID** - The eight-digit Office of Postsecondary Education ID of the school location.
- **Recipient Type** – Administrator role at the school that received the Late Roster Notification.

- **Recipient Name** – Administrator that received the Late Roster Notification.
- **Email** – The e-mail address designated by the school to receive enrollment reporting statistics email reminder messages.
- **Status** – Status of the Late Roster Notification. The status could be Returned, Not Sent or Sent.
- **View PDF** – Hyperlink to view the Late Roster Notification in PDF format.

Located at the bottom of the Enrollment Reporting Statistics page users can also view recent quarterly certification data by clicking on the **Certification by Quarter** link. On the Enrollment Certification by Quarter page, it displays the number of certified records in each enrollment status received by NSLDS.

CERTIFICATION BY QUARTER

NSLDS displays the number of certified records in each enrollment status evaluated during the four most recent fiscal quarters. Users can filter the Certifications by Quarter table by school locations. The Certification by Quarter table is broken down by Enrollment Status and the four most recent fiscal quarters.

ENROLLMENT SUBMITTAL TRACKING

Enrollment Submittal Tracking shows file-level and school-level information on submittals (batch and spreadsheet), supplemental files, web enrollment updates, and roster files sent to school locations within an enrollment administration. Users are able to track when and how enrollment information is returned after a roster file is sent.

When viewing the Enrollment Submittal Tracking, the user can filter the information utilizing the selection criteria from the list below:

- School Location
- Date Processed Begin
- Date Processed End Date
- Submission Method
    - Roster
    - Submittal
    - Supplemental
    - Web
    - Spreadsheet

The results of the filter displays in the Submittal Details History. Each result contains file-level and school-level information. The results can be sorted by using the arrows at the top of each column. The Submittal Details history table consists of the following data elements:

- **OPEID** - The eight-digit Office of Postsecondary Education ID of the school location.
- **Date Sent/Received** – For batch files, the date NSLDS sent an outgoing file or received an incoming file. For Web submittals, the date NSLDS received the submittal.
- **Date Processed** - The date on which NSLDS completely processed the batch file or web submittal.
- **Type** – The enrollment roster or submittal type.
- **Total Records** - The total number of records contained in the file, including headers and footers.
- **Total Bundles** - The total number of record bundles for that school location included in the file. A bundle is a set of records (Campus, Program(s) and Email) for one individual student.
- **View the File Detail-** If available, the user can click on **View** and see the file.

Additionally, each row can be expanded to display school-level information for each record. Upon selecting the dropdown option, the user sees the following data points:

- **School Name** – The name of the organization the student is enrolled.

- **Total Bundles** - Total count of bundles processed by NSLDS on the associated date under that associated OPEID
- **Valid Bundles** - Total count of bundles containing zero Bundle Rejected Flags on the associated date under the associated OPEID
- **Bundles in Error** - Total number of bundles minus the number of Valid Bundles processed by NSLDS on the associated date under the associated OPEID
- **Campus Records** - Total count of Campus-level Records received on the associated date under the associated OPEID
- **Program Records** - Total count of Program-level Records received on the associated date under the associated OPEID
- **Percent Valid** - Value of Valid Bundles divided by Total Bundles, multiplied by 100%
- **Email Records** - Total count of Email Address-level Records received on the associated date under the associated OPEID
- **Unique Students** - Total count of borrowers in the file received on the associated date under the associated OPEID
- **SAIG Mailbox** – Mailbox assigned for NSLDS to retrieve the inbound data from the SAIG batch service.
- **Program Identifier Change records** – The number of records in the file used to report a new set of unique fields for a current program.

All results can be exported into a CSV file by using the **Export to CSV** option.

ENROLLMENT NOTIFICATION OVERRIDES

The Enrollment Notification Overrides page displays a history of active overrides for specific students or schools. The page is divided into the following sections:

- Enrollment Notification Override List
- Active Student Overrides
- Active School Overrides

In the Enrollment Notification Over List page, a user can search for a school and student to begin a new override. To initiate a new override, follow the steps listed below:

1) Select the **Student Override** or **School Override** radio button
    a. If **Student Override** is selected, enter the SSN in the Student SSN field
        i. Click **Search**
        ii. Click **Begin Override**
    b. If **School Override**, enter the OPEID in the School OPEID field
        i. Click **School Search**
        ii. A School Search pop up window displays
        iii. Select the **Type** from the dropdown
        iv. Type either the OPEID or School Name in the Search field
        v. From the search results select the **School** from the Select field
        vi. Click on the **Select** link
        vii. Click **Begin Override**

Once an Override is initiated successfully, the Student or School is added to the active overrides list. The fields below display for each section. If a student cannot be added, an error message appears at the top of the page stating, “The student submitted cannot be found. Student must be in NSLDS in order to be added.”

In the Active Student Overrides section, a user can view the following fields:

- **Student SSN** - Social Security Number for a student specific notification override request.
- **Name** – The student’s first and last name.

- **Date of Birth** – The student's date of birth.
- **Override Begin Date** - The date the enrollment notification override was created.
- **Requested By** - The user that created the enrollment notification override.

In the Active School Override table, a user can view the following fields

- **School OPEID** - The eight-digit Office of Postsecondary Education ID of the school location.
- **School Name** - The name of the organization that the student is enrolled.
- **Override Begin Date** - The date the enrollment notification override was created.
- **Requested By** - The user that created the enrollment notification override.

Users can also click **View All Inactive Overrides**. The Inactive Enrollment Notification Overrides page contains two sections: Inactive Student Overrides and Inactive School Overrides.

The Inactive Student Overrides section contains the following details:

- **SSN** – The student's Social Security Number.
- **Name** – The student's first and last name.
- **Date of Birth** – The student's date of birth.
- **Override Begin Date** - The date the enrollment notification override was created.
- **Override End Date** – The date the enrollment notification override ended.
- **Requested By** - The user that created the enrollment notification override.

The Inactive School Overrides table contains the following details:

- **OPEID** - The eight-digit Office of Postsecondary Education ID of the school location.
- **School Name** - The name of the organization that the student is enrolled.
- **Override Begin Date** - The date the enrollment notification override was created.
- **Override End Date** – The date the enrollment notification override ended.
- **Requested By** - The user that created the enrollment notification override.

DATA PROVIDERS

The Data Providers tab at the top of the NSLDS page is used to view profiles, information on submittals, Cohort Default Rates and other information of importance to those agencies that provide data to NSLDS. Within the Data Providers tab, the navigation menu consists of the following:

- Provider Profile
- Spreadsheet Submittals
- Cohort Default Rate
- FLS Submittal Statistics
- Update IDR Application
- IDP/HFP Interest Reduction Benefit
- Loan Unlock Maintenance (Authorized User)

ORGANIZATION SEARCH

At the top of the pages under Data Providers menu, users have the option to search for previously retrieved organizations or use the search fields to locate an organization. Organizations can be searched by organization code, organization name, or all. Additionally, Data Providers can filter their search by using the Organization Type dropdown:

- ED Region
- Federal Loan Servicer
- Guaranty Agency
- Lender
- Lender Servicer
- State Agency

PROVIDER PROFILE

On the Data Provider Profile page, users can see the following sections: Data Provider information, Schedule, Batch Services, and Contact List. Some sections of the Data Provider Profile page can be user specific. The Date Provider Profile page consists of the following information:

- **Data Provider Information** –information that identifies the organization, such as Name, Code, Status and Type.
- **View Schedule** – Selecting "View Schedule" takes the user to the Data Provider Schedule page. The Data Provider Schedule page provides detailed information on the scheduled submittals that organization. (Only available for Federal Loan Servicer and Guaranty Agencies)
- **Batch Services** – The Batch services for which the organization is signed up. **Note**: Services are established on the SAIG Site.
- **Contact List** – Displays contact information for an organization. (Only available for Federal Loan Servicer and Guaranty Agencies)
- **Contacts and Relationships** - Displays relationship information for an organization. This is used when determining if a user at one organization is associated with another organization and thus allowed access to view borrower's financial aid data without being prompted to enter valid lookup reason(s). (Only available for Lender and Lender Servicers)

DATA PROVIDER INFORMATION

At the top of each Provider Profile page is an organization information section with the following details:

- **Code** – The code that identifies the organization.
- **Status** - An indication that the organization has been reported as Open or Closed.
- **Type** – The Type of Organization.
- **Tax Exempt Eligible** – Lenders that hold loans issued with eligible tax-exempt bonds. (Only available to Lenders)
- **Trustee** – Lender that uses an Eligible Lender Trustee (ELT) (only available to Lenders)
- **Not-For-Profit** – Lender that has indicated that they are not-for-profit under the College Cost Reduction Act (CCRAA) definition. (Only available to Lenders)
- **Third Party Service** – Third-party servicer/or lender that meets the definition of a third party-servicer. (Only available to Lenders)

VIEW SCHEDULE

A user can select **View Schedule** to access past Data Provider Schedules. This function is only available to Federal Loan Servicers and Guaranty Agencies. Data Provider Schedule displays up to 100 of the current, past, and future scheduled data provider submittals for the organization.

The Current Data Provider Profile section displays the following information:

- **Primary E-Mail Address** - Displays the e-mail address provided to receive late submission alert notification messages. **Note**: Guaranty Agencies can set up a group email address to have multiple users to receive the alert notifications.
- **Last Updated By** – User that last updated the information.
- **SAIG Mailbox** – Mailbox assigned for NSLDS to retrieve the inbound data from the SAIG batch service.
- **Last Updated On** – Date the information was last updated.
- **Submittal Frequency** – Displays the reporting pattern for loan batch submittals.

The Past Submission Details section displays details of the history of passed submittals:

- **Received Date** – The date NSLDS received the incoming submittal.
- **Received Time** – The time NSLDS received the incoming submittal
- **Processed Date** – The date on which NSLDS completed processing the submittal.
- **Processed Time** – The time at which NSLDS completed processing the submittal.
- **Loan Records Submitted** – The total number of detail records on the submittal file transmitted to NSLDS. This number may include records that were in error and did not update the NSLDS database.
- **Loan Records Extracted** – The total number of detail records extracted from the data provider database for this submission. This number may include records that were in error and did not update the NSLDS database.
- **Loan Records with Errors** – The total number of detail records extracted from the data provider database that included errors and did not update the NSLDS database.
- **Submittal Pass Rate (%)** – The percentage of detail records extracted from the data provider database that contained no errors and updated the NSLDS database.

To view the history of the Profile for a Data Provider, users can select **View Profile History**. A Profile History pop up appears containing a table with the following information:

- **End Date** – The date the reporting schedule was altered.
- **Frequency** – An indication of the timing a Data Provider reports.
- **Date Provider Primary Email Address** – Displays the e-mail address provided to receive late submission alert notification messages. **Note**: Guaranty Agencies can set up a group email address to have multiple users to receive the alert notifications.
- **Updated By** – User that updated the information.

EDIT PROFILE (AUTHORIZED USER)

Users can modify the submittal frequency for loan batch submittals and the primary email address that receives late submission notifications by clicking **Edit Profile.**

To modify current Data Provider Profile:

1) Click **Edit Profile**
2) Select the **Frequency**, from the options
3) Enter the **Primary Email Address**
4) Click **Save Profile**

BATCH SERVICES

In the **Batch Services** section Data Providers users can select the **More Information** link to view a full list of the batch services and messages classes. The section also contains a table with the following fields:

- **Service** - The batch service the organization is signed up for and established on NSLDS. These services are established on the SAIG Enrollment Site.
- **SAIG Mailbox** - Mailbox assigned for NSLDS to retrieve the inbound data from the Servicer batch service.
- **NSLDS Outbound Mailbox** – The mailbox assigned to NSLDS and from which it is sending data to the servicer.

CONTACT LIST

The Contact List section contains contact information by function. Users can filter the contact list by function or type. Users can view the following fields:

- **Function** – The function associated with the contact.
- **Type** – The type of Contact.
- **Name** – The contact's first and last name.
- **Phone** – The contact's phone number.
- **Email** – The contact's email address.
- **View Details** – Hyperlink to view the Contact Details.

Users can view more details for a contact by selecting **View Details** and the full contact detail opens in another page.

CONTACT LIST

Users associated with the organization can edit and delete contacts from this page. To edit the contact details the user must click **Edit** located in the upper left corner of the contact details section. To delete the contact details the user must click **Delete** located in the right corner of the contact details section.

1) Prior to the contact being deleted a Delete Contact Confirmation window pops up stating "Are you sure you want to delete this contact?" to confirm the contact deletion click **Delete Contact**.

ADD NEW CONTACT

Users associated with the organization can add new contacts by selecting **Add New Contact.** The user is navigated to the Add Contact Information page, where the Contact Details can be added.

To Add Contact Information:

1) Select the users **Function** from the dropdown
2) Select **Type of Contact** (data entry fields vary based on type of contact selected)
3) Enter the following information:
    a. First Name
    b. Last Name (optional)
    c. Job Title (optional)
    d. Phone Number (optional)
    e. Phone Extension (optional)
    f. Fax Number (optional)
    g. Email Address (optional)

h. Data Provider URL (optional)
i. Street Address – Line 1 (optional)
j. Street Address – Line 2 (optional)
k. City (optional)
l. State or Province (optional)
m. Postal Code (optional)

4) Click **Submit Contact**

CONTACTS AND RELATIONSHIPS

The Contacts and Relationships section is available for Lender and Lender Servicers. The Contacts and Relationships section contains two tabs: Contacts and Relationships. In the Contacts section, contact details can be filtered by function and type. The Contact List table displays the following information:

- **Function** – The function that is associated with the contact
- **Type** – The type of Contact.
- **Name** – The contact's first and last name.
- **Phone** – The contact's phone number.
- **Email** – The contact's email address.
- **View Details** – Hyperlink to be navigated to the contact details.

If the user clicks **View Details**, the user is navigated to the Contact Details page, where the user can **Edit** or **Delete Contact**.

In the Relationships tab, the table displays a list of which organizations the Lender or Lender Servicer has indicated they have relationships. These organizations are listed with the following information:

- **Code** – The code assigned to the organization by the Office of Postsecondary Education.
- **Organization Name** – The name of the organization as reported to the Department of Education.
- **Location** – The city and state where the organization is located.

CONTACTS AND RELATIONSHIPS (AUTHORIZED USER)

Authorized users can select **Add New Contact.** The user is navigated to the Add Contact Information page, where the user can create a new contact.

Add Contact Information:

1) Select the users **Function** from the dropdown
2) Select **Type of Contact** (data entry fields vary based on type of contact selected)
3) Enter the following information:
    a. First Name
    b. Last Name (optional)
    c. Job Title (optional)
    d. Phone Number (optional)
    e. Phone Extension (optional)
    f. Fax Number (optional)
    g. Email Address (optional)
    h. Data Provider URL (optional)
    i. Street Address – Line 1 (optional)
    j. Street Address – Line 2 (optional)

k. City (optional)
l. State or Province (optional)
m. Postal Code (optional)

4) Click **Submit Contact**

SPREADSHEET SUBMITTALS

The Spreadsheet submittal page allows users to upload any applicable spreadsheet submittals via the website. Users can Validate their file to ensure the formatting is correct on their spreadsheet and fix any errors prior to submitting. Users can also Validate and Submit their spreadsheet submittal, without first selecting Validate. The system accepts all rows that are successfully submitted. If any rows have errors, a banner appears allowing the user to download the spreadsheet and fix the errors to re-submit.

The Spreadsheet Submittal sections include:

- Teacher Loan Forgiveness
- Upload Submittal Files
- Recently Uploaded Files
- Submittal Templates

TEACHER LOAN FORGIVENESS

Authorized users can add students individually for Teacher Loan Forgiveness. If they click **Teacher Loan Forgiveness**, the user is directed to the Teacher Loan Forgiveness page.

Users can add a new record by filling out the required information.

Add New TLF Record:

1) Enter the SSN
2) Enter the **Date of Birth**
3) Enter the First Name
4) Select **Eligible Institution Type** from the dropdown
5) Select **Full Time Teacher Of** from the dropdown
6) Select the **State** from the dropdown
7) Enter **Lender Code**
8) Enter **Forgiveness Amount**
9) Select the **Paid Date**
10) Indicate a selection for the **Previously Applied** radio button
11) Click **Add New Record**

When successfully added, the record appears in the **Recently Added** section immediately below.

In the **Recently Added Section**, the detail of each added borrower appears at the top of each Teacher Loan Forgiveness card including Name, SSN and DOB. Each Teacher Loan Forgiveness card contains the following information:

- Eligible Institution Type
- Full Time Teacher Of
- State
- Guaranty Agency
- Forgiveness Amount
- Previously Applied

- Lender
- Paid Date
- Create Date and Time

UPLOAD SUBMITTAL FILES

In the Upload Submittal Files section, the user can upload previously completed submittal templates to NSLDS. To validate and submit a Spreadsheet Submittal template:

1) Select the **Submittal Type** from the dropdown menu
2) Click on the **Upload Submittal** to locate the file on your local network.
    a. Select the file to upload
3) Click on **Validate** to ensure there are no file errors prior to submitting (Optional)
4) Click on **Validate and Submit** to run a scan for file errors and submit the file

Note: if any rows have errors, a banner appears at the top of the page allowing the user to download an excel spreadsheet, fix the errors, and re-submit.

A user can view previous spreadsheet submittal uploads by clicking on the **View Upload History** link, and following the steps listed below:

1) Select the **Submittal Type** from the dropdown
2) Enter the start date in the Uploaded From field
3) Enter the end date in the Uploaded To field
4) Click **Search**

After initiating the search for upload history, a table populates in the section with the following fields:

- **Submittal Type** – The type of file that was submitted.
- **File Name** – The name of the file that was submitted.
- **Processed Date** – The date on which NSLDS processed the data displayed on that row.
- **Uploaded By** – The name of the user who uploaded the file, as well as the date the file was uploaded.
- **Total No. of Records** – The number of records that were uploaded in the submittal file.
- **No. of Records Processed** – The number of records that were processed as part of the submittal file.
- **No. of Records with Errors** – The number of record-level errors in the submittal file that was uploaded.
- **Download Errors** – Hyperlink to downloadable Error File in excel format that displays the records in error.

Users can download the error file if a submittal record has an error by clicking **Download Errors**. Only the most recently uploaded Submittal per Submittal Type has this option.

RECENTLY UPLOADED FILES

The **Recently Uploaded Files** section displays all attempted submission details. If the submittal file has records in error, the error file is available for download. The Recently Uploaded Files table can be sorted by Submittal Type and Processed Date. The table displays the following information:

- **Submittal Type** – The type of spreadsheet submittal file that was submitted.
- **File Name** – Name of the file uploaded.
- **Processed Date** – The date on which NSLDS processed the data displayed on that row.
- **Uploaded By** – The name of the user who uploaded the file, as well as the date the file was uploaded.
- **Total No. of Records** – The number of records that were uploaded in the submittal file.
- **No. of Records Processed** – The number of records that were processed as part of the submittal file.
- **No. of Records with Errors** – The number of records with errors in the submittal file.

- **Download Errors** – Hyperlink to downloadable Error File in excel format that displays the records in error.

Users can download the error file if a submittal record has an error by clicking **Download Errors**. Only the most recently uploaded Submittal per Submittal Type has this option.

SEARCH UPLOAD HISTORY

A user can view the spreadsheet submittal uploads by click on the **View Upload History** link. Users can use the Search Upload History page to view any file that has been submitted within their entity. To complete a search, users can follow the steps listed below:

1) Select the **Submittal Type** from the dropdown
2) Enter the **Uploaded Date From**
3) Enter the **Uploaded Date To**
4) Click **Search**

Once a successful search has been completed, an upload history table populates with the following fields:

- **Submittal Type** – The type of file that was submitted.
- **File Name** – The name of the file that was submitted.
- **Processed Date** – The date on which NSLDS processed the data displayed on that row.
- **Uploaded By** – The name of the user who uploaded the file, as well as the date the file was uploaded.
- **Total No. of Records** – The number of records that were uploaded in the submittal file.
- **No. of Records Processed** – The number of records that were processed as part of the submittal file.
- **No. of Records with Errors** – The number of record-level errors in the submittal file that was uploaded.
- **Download Errors** – Hyperlink to downloadable Error File in excel format that displays the records in error.

SUBMITTAL TEMPLATES

Spreadsheet submittal templates that can be used to submit data to NSLDS. The available spreadsheet templates are:

1) Reaffirmation Spreadsheet Submittal Template
2) IDR Application Spreadsheet Submittal
3) FLS Spreadsheet Submittal Template
4) Loan Discharge Spreadsheet Submittal
5) Loan Forgiveness Spreadsheet Submittal

Users can download the template by selecting the blue hyperlinked text. Upon selecting the template, the download process automatically begins. If it does not, consult with your local IT department to assist in resolving the issue.

COHORT DEFAULT RATE CENTER

The Cohort Default Rate Center under the Data Provider tab allows users to view associated Cohort Default Rate information. The Cohort Default Rate Center consists of two sections: Cohort Default Rate and Cohort Default Rate History.

A user can view a Data Provider's CDR information. To initiate the search, select **Search Organization** and follow the search prompts. Reference the Search Organization section for detailed search functionalities.

COHORT DEFAULT RATE

The Cohort Default Rate section displays the Official and Draft Rate cards. The card displaying Draft Rates may not be visible based on the user viewing the information. The following information is provided in the cards:

- **Cohort Fiscal Year** – The Federal Fiscal Year for which a Cohort Default Rate is calculated. Federal Fiscal Years begin October 1 of the preceding calendar year and end September 30. For example, the 2021 Cohort Fiscal Year begins October 1, 2020 and ends September 30, 2021.
- **Rate** - The Default Rate for the organization, which is calculated as a percentage of the Numerator to Denominator and truncated to one decimal place.
- **Rate Type** – The status of the organizations Cohort Default Rate Calculation. Starting in 2009 CDR transitioned to a 3 Year Cohort Default Period.
    - **3 YR Official** – Official Rate are available to the public.
    - **3 YR Draft** – Draft rates are only viewable by the rated organization and the Default Management Division within the Department of Education.

- **Numerator** – The total number of borrowers that entered repayment during the Cohort Fiscal Year and defaulted during the Cohort Default Period.
    - *Cohort Default Period* – starts at the beginning of the Cohort Fiscal Year and ends September 30 three years later. Example: the 2021 Cohort Default Period begins October 1, 2020 and ends September 30, 2023.
- **Denominator** - The total number of borrowers that entered repayment during the Cohort Fiscal Year.

COHORT DEFAULT RATE HISTORY

The Cohort Default Rate History section displays a table with Cohort Default Rates at the selected data provider. For a complete CDR History, the user can select **View All CDR History**. The tables are displayed in an accordion format separated by Cohort Fiscal Year. The table displays the following information:

- **Rate Type** - The status of the organizations Cohort Default Rate Calculation. Starting in Cohort Fiscal Year 2009 CDR transitioned to a 3 Year Cohort Default Period calculation, the 2 Year calculation ended with the completion of the 2010 CDR.
    - **3 YR Official** – Official Rate are available to the public.
    - **3 YR Draft** –Draft rates are only viewable by the rated organization and the Default Management Division within the Department of Education.
    - **2 YR Official** – Historical Calculation. Official Rate are available to the public.
    - **2 YR Draft** –Historical Calculation. Draft rates are only viewable by the rated organization and the Default Management Division within the Department of Education.
- **Rate Sub Type** - An indication of the Sub Type calculation applied to the Cohort Default Rate. The available sub types are:
    - **Actual** – The "raw" rate calculated using the actual list of borrowers of a school prior to any adjustments.
    - **Average** – The Rate used for a school with 29 or fewer borrowers entering repayment during a fiscal year that had a CDR calculated for the two prior fiscal years.
    - **Lead School (LS) Combo** – Rates calculated after the date of a Change of Affiliation. Within a given Change of Affiliation, the rate is taken from a lead school in a group of schools. NSLDS assigns the non-Lead School with a Lead School Combination Rate of 0 and does NOT assign this as the Final Rate.
    - **Substituted** – Rates associated with certain Change of Affiliations where the calculated rate was replaced by a rate that was derived through other means.
- **Numerator** – The total number of borrowers that entered repayment during the Cohort Fiscal Year and defaulted during the Cohort Default Period.
    - *3 YR Cohort Default Period* – starts at the beginning of the Cohort Fiscal Year and ends September 30 three years later. Example: the 2021 Cohort Default Period begins October 1, 2020 and ends September 30, 2023.
    - *2 YR Cohort Default Period* – starts at the beginning of the Cohort Fiscal Year and ends September 30 two years later. Example: the 2021 Cohort Default Period begins October 1, 2020 and ends September 30, 2022.
- **Denominator** - The number of borrowers that entered repayment during the Cohort Fiscal year.
- **Rate** - The Cohort Default Rate for the organization, which is calculated as a percentage of the Numerator to Denominator and truncated to one decimal place.
- **Process Date** - The date that the CDR calculation was completed.

- **Notification Letter (If available)** – Letters sent to schools notifying them of their Draft and Official Cohort Default Rates. Select **View**, to open a copy of the letter.

FLS SUBMITTAL STATISTICS

The Federal Loan Servicer Submittal Statistics Page displays a history of data from FLS submittals for Federal Loan Servicer users. In the submission details a user can view the fields listed below:

- **Received Date** - The date NSLDS received the incoming submittal from the Student Aid Internet Gateway (SAIG).
- **Received Time** - The time NSLDS received the incoming submittal from the Student Aid Internet Gateway (SAIG). (Central Time zone).
- **Processed Date** - The date on which NSLDS completely processed the submittal.
- **Processed Time** - The time NSLDS finished processing the submittal (Central Time zone).
- **Processing Deadline Date** - The date on which NSLDS completely processed the submittal.
- **Processing Deadline Time** - The time NSLDS finished processing the submittal (Central Time zone).
- **Loan Records Submitted** - The total number of detail records on the submittal file transmitted to NSLDS. This number may include records that were in error and did not update the NSLDS database.
- **Loans with Errors** - The total number of detail records extracted from the data provider database that included errors and did not update the NSLDS database.
- **% Loan Records in Error** - The percentage of detail loan records extracted from the submittal file that included errors and did not update the NSLDS database.
- **Award ID Count** - The total number of unique Award IDs on the submittal file transmitted to NSLDS. This number may include IDs that had at least one record type in error and did not update the NSLDS database
- **Award ID Error Count** - The total number of unique Award IDs extracted from the submittal file for which at least one record type was in error and did not update the NSLDS database.
- **% Award ID in Error** - The percentage of Award IDs extracted from the submittal file that included errors and did not update the NSLDS database
-

See View Schedule functionality found under Provider Profile.

UPDATE IDR APPLICATION (AUTHORIZED USER)

On the Update IDR Application page, a Federal Loan Servicer user can search for an Aid Recipient's IDR Application Record. On the Update Income-Driven Repayment (IDR) Application landing page, follow the steps listed below for the Search IDR Application section:

Note: If using the IDR Application Received Date Range Search, please select a date range of 30 days or less.

1) In the Select search criteria dropdown, select the criteria that is the most applicable, enter any additional information required and then click **Search**
    a. If the search criteria **Application ID or ID Range** is selected, enter data in the following fields listed below:
        i. Enter the application ID in the IDR Application ID field
        ii. Enter the application ID range in the IDR Application ID Range
    b. If the search criteria **Borrower** is selected, enter data in the following fields listed below:
        i. Enter First Name
        ii. Enter Last Name
        iii. Enter SSN
        iv. Enter Date of Birth
    c. If the search criteria **Received Date Range** is selected, enter data in the following fields listed below:

i. Enter the Application Received Begin Date
ii. Enter the Application Received End Date

2) Once the data fields have been entered for the search criteria, click **Search**

After clicking **Search,** the following fields listed below are displayed:

- **IDR Application ID** – Unique identification number for the application.
- **SSN** – The student's Social Security Number.
- **First Name** – The student's first name.
- **Last Name** – The student's last name.
- **Date of Birth** – The student's date of birth.
- **Application Received Date** – Date the application was received.
- **IDR Application Details** – Action field that allows the user to either **View** IDR Application Details or **Update** for authorized users to update an IDR application information.

FLS Users can also update the application by selecting **Update,** which takes the user to the Update Income-Driven Repayment (IDR) Application. If the user would like to transfer the IDR Application, verify the application ID in the Application ID field, and then follow the steps listed below:

1) In the **Transfer to Servicer ID** field select the Servicer ID to which application should be transferred from the dropdown
2) Click **Transfer**

In the Repayment Application, Spouse Information, and Repayment Application Status sections, the user can view and update the fields listed below:

1) In the Repayment Application section:
   a. View Borrower Name
   b. View Borrower SSN
   c. View Borrower DOB
   d. Enter the **Received Date** (optional)
   e. Select the **Repayment Plan Request Reason** from the dropdown
   f. Select the **Loans at Other Servicers?** from the dropdown (optional)
   g. Select the **Joint Repayment Plan Request** from the dropdown (optional)
   h. Enter the **Tax Year** (optional)
   i. Enter the **Filling Status** (optional)
   j. Enter the **Adjusted Gross Income** (optional)
   k. Enter the **AGI Reflects Current Income** (optional)
   l. Select the **Supporting Documentation Required** from the dropdown
   m. Select the **Plan with Lowest Monthly** from the dropdown
   n. Enter the **Applicant Income** (optional)
   o. Select a response for **Taxes Filed** from the dropdown
   p. Select the **Taxable Income** from the dropdown (optional)
   q. Select the **Applicant Supporting Document Required** from the dropdown
   r. Select the **Applicant Supporting Documentation Received Date** (optional)
   s. Select the **Public Service Employment** from the dropdown (optional)
   t. Enter the **Reduced Payment Forbearance** (optional)
   u. Select the **Current Deferment/ Forbearance Option** from the dropdown (optional)
   v. Select the **Marital Status** from the dropdown (optional)
   w. Select the **Spouse information provided?** from the dropdown
   x. Enter the **Number of Children** (optional)
   y. Enter **Number of Dependents** (optional)

2) In the Spouse Information section

a. View Spouse Name
b. View Spouse SSN
c. View Spouse DOB
d. Select the **Separated from Spouse** from the dropdown
e. Select the **Access to Spouse's Income Information** from the dropdown
f. Select the **Spouse Supporting Doc. Received Date**
g. Enter the **Spouse Tax Year**
h. Enter the **Spouse Income**
i. Select the **Spouse Income Document Required** from the dropdown
j. Select the **Spouse Filing Status** from the dropdown
k. Select the **Spouse Taxes** Filed from the dropdown
l. Select the **Spouse AGI Reflects Current Income** from the dropdown
m. Enter the **Spouse Adjusted Gross Income**

3) In the Repayment Application Status section, users can view the fields listed below:
   a. Repayment Type - the repayment plan type requested on the Income Driven Repayment application.
   b. Requested by Borrower – specifies if the repayment plan type was requested by the applicant on the Income Driven Repayment application.
   c. Status - the status for repayment plan type reported.
   d. Status Date - the date of the status for repayment plan type reported.
   e. Total Income - the income, including applicant and spouse data, used to determine the applicant's payment amount under an income-driven repayment plan.
   f. Family - the family size from Income Driven Repayment application.

4) The Award Cross Reference section displays details of the different dates associated with the award:
   a. Award ID - Unique alphanumeric identifier for loan.
   b. Date Entered Repayment - the most current Repayment Plan Date Entered reported.

If a user would like to update the borrower's repayment plan, select **Update** and follow the steps below:

1) Click **Update** next to the Repayment Plan
2) In the Update Repayment plan pop up, the user can make changes to the following fields:
   a. **Requested by Borrower**
   b. **Status Date**
   c. **Status**
   d. **Family Size** (optional)
   e. **Total Income** (optional)
3) Click **Update Repayment Plan**

If an IDR Application has a repayment plan that does not have a status, the user is required to status the repayment plan to save any changes to the IDR Application.

A user can also Add a New Repayment Plan for a borrower by clicking **Add New**.

1) Click **Add New**
2) Select the **Repayment Plan Type**
3) Select the **Requested by Borrower**
4) Enter the **Status Date**
5) Select the repayment plan status from the **Status** dropdown
6) Enter the Family Size (optional)
7) Enter the Total Income (optional)
8) Click **Add Repayment Plan**

IDP/HFP INTEREST REDUCTION BENEFIT (AUTHORIZED USER)

The IDP/HFP Interest Reduction Benefit Confirmation List displays information about notifications of possible eligibility for the Imminent Danger Pay (IDP)/ Hostile Fire Pay (HFP) Interest Reduction. This information is sent by NSLDS to authorized Federal Loan Servicers (FLS) and the confirmation actions are reported back to NSLDS by those organizations. On the IDP/HFP Confirmation List landing page, a Federal Loan Servicer user is able to enter information in the fields listed below:

Select the data fields from the dropdown to filter for borrowers on the list:

1) Sort By
2) Confirmed
3) Action
4) Borrower Type

In the Advanced Student Information Search Criteria section, a user can enter data in the fields listed below:

1) If the search criteria Last Name(s) Range is selected, enter data in the following fields listed below:
    a. Enter the beginning letters for range
    b. Enter the ending letters for range
2) If the search criteria SSN(s) Range is selected, enter data in the following fields listed below:
    a. Enter the beginning numerical range
    b. Enter the ending numerical range
3) If the search criteria Date Begin Range is selected, enter data in the following fields listed below:
    a. Enter the beginning Created Date
    b. Enter the ending Created Date
4) If the search criteria Effective Date Range is selected, enter data in the following fields listed below:
    a. Enter the beginning Effective Date
    b. Enter the ending Effective Date
5) Click **Filter** to initiate the search

Additionally, users can view the fields listed below:

- **SSN** – The student's Social Security Number.
- **First Name** – The student's first name.
- **Last Name** – The student's last name.
- **Date of Birth** – The student's date of birth.
- **IDP/HFP Begin** - The begin date of the IDP and HFP Interest Reduction Benefit period for the loan.
- **IDP/HFP End** - The end date of the IDP and HFP Interest Reduction Benefit period for the loan.
- **Create Date** - The date the record was created on NSLDS.
- **Action** - The confirmation action applied by the servicer.
- **Action Effective Date** - The date on which the confirmation action specified in the servicer response took effect.
- **Response Received** - The date NSLDS received a confirmation action from the servicer

A user can view or update a borrower's confirmation list by clicking **View History and Update** and following the steps below:

1) Click **View History and Update** next to the record
2) In the IDP/HFP Interest Reduction Benefit Confirmation History and Update pop up
    a. The user can view the following:
        i. SSN

ii. DOB
iii. IDP/HFP Begin
iv. IDP/HFP End
v. Create Date

b. The user can make edits to the following:
i. Action Effective Date
ii. Action

3) Click **Submit Update**

LOAN UNLOCK MAINTENANCE (AUTHORIZED USER)

On the Loan Unlock landing page a user can view and unlock loans for their organization. A user can search locked loans by following the steps listed below:

1) Enter the SSN numerical range,
   a. From initial SSN numerical range
   b. To ending SSN numerical range
2) Enter the date in the Locked Start Date field
3) Enter the date in the Locked End Date field
4) Enter the Last Name letter range by alphabetical order
   a. From initial Last Name
   b. To ending Last Name
5) Select the **Sort By** field by,
   a. Lock Loan Date
   b. SSN
   c. Last Name
6) Select Search to complete the search or Reset to clear the entered values in each field

Once a search has been successfully executed, results display in the table beneath the Search card. If no results are found, the user sees "No Results Found". The results contain the following details:

- Unlock Checkbox – Authorized users can select this option to Unlock the selected loan.
- **SSN** - The student's Social Security Number.
- **Name** - The student's first and last name.
- **Date of Birth** – The student's date of birth.
- **Loan Date** - For FFEL loans, the date the loan was originally guaranteed. For Direct Loans and Perkins loans, the date the loan was originally disbursed.
- **Loan Type** - The type of Title IV award made with a formal agreement for repayment with interest.
- **Loan Amount** – For FFEL loans, the original amount, before any cancellations.
- **Guaranty Agency Code** - Three digit code that identifies the GA.
- **Original School Code** - The six-digit Office of Postsecondary Education ID (OPEID) for the school.
- **Ind Sep Loan** - The Indicator of Separate Loan for the loan record.
- **Date Locked** – The date that batch lock began.

The user would select the loans to unlock, by following the steps listed below:

1) In the **Unlock** field check the boxes of all loans to unlock
2) Click **Unlock Selected Loan(s)**

At the top of the Loan Unlock Maintenance page a pop-up confirmation message displays stating the number of selected loans that are successfully unlocked.

ENROLLMENT REPORTING PROFILE

The Enrollment Reporting Profile page view for Guaranty Agencies contains three sections:

- Preferences
- Future Schedule
- Past Schedule

The Preferences section users can view the following fields listed below:

- **SAIG Mailbox** - Mailbox assigned for NSLDS to retrieve the inbound data from the guaranty agency's batch service.
- **File Format** - File format the user has selected to receive their roster. Either fixed width or comma delimited.
- **Last Updated By** – User that last updated the information.
- **Records Received** - An option that allows non-schools to receive either all the enrollment records for students in their portfolios or only those records that contain a change to Enrollment Status/Code, Effective Date, or Anticipated Completion Date.
- **Sort Order** – The selected order of enrollment records by either Student SSN or Student Last Name.
- **Last Updated On** – Date the information was last updated.

ENROLLMENT REPORTING PROFILE (AUTHORIZED USER)

Authorized users can edit and update the Enrollment Reporting Profile preferences by clicking **Edit Preference.** On the Edit Preference page, users can view the following fields listed below:

- SAIG Mailbox - Mailbox assigned for NSLDS to retrieve the inbound data from the School batch service.
- **Administrator** - The name of the designated administrator, if one has been established, for the retrieved location. Schools may report enrollment for their own location or set up another location to be the Administrator of their Enrollment Reporting process.
- **Enrollment Reporting Servicer** –The name of the servicer, as provided by SAIG, that a school has designated as their third party servicer for Enrollment Reporting roster files.
- Modifiable fields:

1) In the Merge Locations options, users can select either:
    a. Yes, Everything in 1 file
    b. No, Multiple Files
2) In the **Sort Order** options, users can filter by either:
    a. Student SSN
    b. Student Last Name
3) In the **File Format options,** users can filter the format by either:
    c. Fixed Width
    d. CSV
4) Click **Save**

Updated preferences are displayed within the Preference section as soon as they are processed by the system.

The Future Schedule section contains a table displaying the following details:

- **Date** – The date NSLDS expects to process the submittal.
- **Purpose** - User may enter a description to support the reason for a specific roster file in their schedule.

- **Modified By** – Name of the user that created the schedule that included this scheduled roster.
- **Modified On** – The date on which the roster file was modified.
- **Edit** - Hyperlink to edit the record
- **Delete** - Hyperlink to delete the record

A user can **Add to Schedule**, **Create New Schedule**, **Edit**, and **Delete** any future schedules.

To Create New Schedule:

1) Click **Create New Schedule**
2) Enter Schedule Start Date
3) Click **Create Schedule**

Note: Creating a new schedule replaces the current schedule.

To Add to Schedule:

1) Click **Add to Schedule**
2) Select the **Date**
3) Enter the Purpose
4) Click **Submit**
5) **A banner displays at the top of the page indicating a successful addition**

To Edit Schedule:

1) Click **Edit** next to schedule
2) Make any updates to fields:
    a. Date
    b. Purpose
3) Click **Save**
4) **A banner displays at the top of the page indicating a successful update**

To Delete Schedule:

1) Click **Delete** next to schedule
2) A banner displays at the top of the page indicating a successful deletion

The Past Schedule section contains a table displaying the following details:

- **Date –** Date the Roster was sent from NSLDS.
- **Purpose –** User entered a description to support the reason for a specific roster file in their schedule.
- **Modified By –** Name of the user who last updated the roster schedule item.
- **Modified On** – Date of the last time the roster schedule item was updated.

ICON LIBRARY

Icon	Action

	Allows user to view all information (hidden elements of text shown) View
	Allows user to hide information from page Hide
	Alert: Success
	To view the aid history of an Aid Recipient
	Indicates that the program listed is being used to calculate the Maximum Eligibility Program value Stopwatch
	Tooltip hovered over displays information about a changed data element Alert: Information
	Symbol displays next to the Cohort Fiscal year for School Users
	External Link navigates user to another page outside of NSLDS External Link
	Indicates a pop up appears if clicked on Pop up
	Indicates a zip file Zip File
	User
	School
*	Required Asterisk
	PDF
	Logout
	Excel
	Filter
	History
	Edit

	Download
	Delete
	Close
	Calendar

There are two types of alerts a user may encounter while navigating through the website.

Table 3: Types of Alerts

Alert Type	Visual
Warning	
Information	

GLOSSARY

1st Disbursement Date

The date the loan disbursement was made.

Academic Competitiveness (AC) Grant

A federal grant available to first- and second-year college students who are eligible for the Pell Grant and have successfully completed a rigorous secondary school program. Second-year students must also have earned at least a 3.0 GPA in their first year.

Academic Level

Student's academic level at the time the loan was provided. See the table below for codes and definitions.

Code	Definition
0	1st year undergraduate/never attended college (Grants)
1	Freshman/First Year (including proprietary institution programs that are less than 1 year in duration)
2	Sophomore/Second Year
3	Junior/Third Year
4	Senior/Fourth Year

5	Fifth/Other Undergraduate (may include sixth year undergraduate and continuing education students)
A	First Year Graduate/Professional
B	Second Year Graduate/Professional
C	Third Year Graduate/Professional
D	Beyond Third Year Graduate/Professional
G	Graduate/Professional, year of study unknown
N	Not available (to be used only if the date of the first disbursement is prior to July 23, 1992, and data provider does not have required attribute)

Acad. Yr Level

Student's grade level submitted by the school (ACG, SMART and TEACH only).

Active

A flag identifying whether a record reflects the NSLDS's current understanding of a student's enrollment history. Active records reflect that history. Inactive records reflect enrollment data previously submitted to the NSLDS but corrected by a later submission.

Active Duty Status Begin Date

The date on which the service member entered Active Duty military status.

Active Duty Status End Date

The date on which the service member’s Active Duty military status ended.

Ad Hoc

A file type indicating that the file is generated for some special reason and not as part of the organization's regular schedule. When the NSLDS sends an organization an ad hoc file, it does not automatically schedule another such file for one year in the future.

Additional Eligibility

From the 2009-2010 award year through the 2010-2011 award year, eligible students could receive up to two Federal Pell Grants within a single award year. Additional eligibility indicates a student was eligible for two Pell Grants in a single award year (Pell Grant only).

Aggregate Loan Types

See Subsidized Loans, Combined Loans, FFEL Consolidation Loans and Federal Perkins Loans.

Aggregate Outstanding Principal Balance

The cumulative dollar value due for the given aggregate loan type. The Loan History page also provides the amount per loan that contributes to the Aggregate OPB.

Aggregate Pending Disbursements

The cumulative net loan amount that is awaiting disbursement to a borrower for the given aggregate loan type.

Aggregate Total

The amount of Outstanding Principal Balance plus Pending Disbursements for the given aggregate loan type. Amount used when considering whether a borrower is "Close or Equal to" or "Exceeding" aggregate limits.

Aggregate Undergraduate Subsidized Exceeded Amount

The dollar amount, as determined by the loan servicer, to be in excess of the borrower's aggregate undergraduate subsidized loan limit.

Aggregate Undergraduate Combined Exceeded Amount

The dollar amount, as determined by the loan servicer, to be in excess of the borrower's aggregate undergraduate combined loan limit.

Aggregate Graduate Subsidized Exceeded Amount

The dollar amount, as determined by the loan servicer, to be in excess of the borrower's aggregate graduate subsidized loan limit.

Aggregate Graduate Combined Exceeded Amount

The dollar amount, as determined by the loan servicer, to be in excess of the borrower's aggregate graduate combined loan limit.

Alert

See Transfer Monitoring Alert.

Amount Forgiven

The dollar amount that a student/borrower received in Teacher Loan Forgiveness or Loan Discharge.

Amount of Disbursement

See Disbursement Amount.

Amount of Loan

See Loan Amount.

Amount of Outstanding Interest

See Outstanding Interest Amount.

Amount of Outstanding Principal Balance

See Outstanding Principal Balance Amount.

Annual Exceeded Amount

The amount that exceeds the annual loan limit.

Anticipated Completion Date

The date the student completed, or was expected to complete, his or her studies.

Appeal Reason

The type of Appeal filed on the Rate.

Type of Appeal
Average Rate Appeal

Thirty or Fewer Borrowers Appeal
Erroneous Data
Loan Servicing
Economically Disadvantaged
Participation Rate Index
Uncorrected Data Adjustment
New Data Adjustment

Approved Loan Amount

For Direct Loans and Perkins Loans, the original amount, before any cancellations.

Award Amount

The amount of the Grant the school expects to pay the student based on the student's enrollment and school's cost of attendance.

Award ID

A unique identifier for a financial award across programs and systems, and across academic years.

Award Year (Grants page)

The school year that the student received a Common Origination and Disbursement (COD) grant, as reported by the school. The Award Year runs from July 1 through the following June 30.

Award Year (Loan History page)

The award year used in the student's undergraduate or graduate loan limits determination.

Batch File

Data file submitted or received via a Student Aid Internet Gateway mailbox. See Student Aid Internet Gateway.

Begin Effective Date

Allows you to display on the Enrollment Detail page only records with an Effective Date later than or equal to the date you enter.

Begin Value

Allows you to set a lower limit for retrieving records from the Enrollment Update page. If you leave Exact Match Only unchecked, Enrollment Update retrieves any student records that match the Begin Value you type or come after it in ascending alphanumeric order.

Begin Program Enrollment Reporting

Date School would like to start receiving rosters with program-level enrollment data.

Borrowed Amount

The cumulative net amount of the loan disbursed to a borrower.

Borrowed at Name

The name of the school where the student was enrolled or accepted at the time the loan was guaranteed or originated.

Borrowed at OPEID

The eight-digit Office of Postsecondary Education ID (OPEID) for the school where the student was enrolled or accepted for enrollment at the time the loan was guaranteed or originated.

Canceled Amount

The cumulative amount of the Title IV loan that was canceled.

Canceled Date

The latest date that all or part of the Title IV loan was canceled.

Capitalized Interest

The cumulative amount of unpaid accrued interest that has been added to the outstanding principal balance.

Cert. Date

See Certification Date.

Cert. Method

See Certification Method.

Certification Date

The date as of which a school certifies that a student's enrollment information is accurate and up-to-date.

Certification Method

The method a school uses to certify enrollment information. Schools can certify enrollment information using either the batch enrollment reporting process or the Enrollment Maintenance page on this site.

Children of Fallen Heroes

Indicator for a student receiving the maximum Pell Grant eligibility because their parent or guardian died in the line of duty as a police officer, firefighter, or other public safety officer. The student, at the time of the parent or guardian's death, was enrolled at an institution of higher education or was less than 24 years old (Pell Grant only).

CIP Code

Allows you to view program information reported for all Classification of Instructional Programs (CIP) codes or choose a specific CIP code from the drop down box.

CIP Year

Calendar Year that refers to the decade edition of the Classification of Instructional Programs (CIP) catalog (2010, 2020, etc.). **Classification of Instructional Programs (CIP) Code**

The six-digit Classification of Instructional Programs (CIP) code, without period, identifying a program's academic content.

Combined Loans

Includes both subsidized and unsubsidized Stafford Direct loans.

Credential Level (Cred. Lvl)

The Credential Level of the program. Valid values are:

Code	Credential Level
01	Undergraduate Certificate or Diploma Program
02	Associate's Degree
03	Bachelor's Degree
04	Post Baccalaureate Certificate
05	Master's Degree
06	Doctoral Degree
07	First Professional Degree
08	Graduate / Professional Certificate
99	Non-Credential Program [Preparatory Coursework / Teacher Certification]

CSC

NSLDS Customer Support Center.

Data Provider Loan ID

A code used by a data provider (Guaranty Agency, Direct Loan Servicer, Debt Collection Service or Perkins school) for internal loan identification.

Date Entered Repayment

The date the loan entered repayment.

Date of Anticipated Completion

See Anticipated Completion Date.

Date of Disbursement

See Disbursement Date.

Date of Loan

See Loan Date.

Date of Outstanding Interest

See Outstanding Interest Date.

Date of Outstanding Principal Balance

See Outstanding Principal Balance Date.

DCS

Department of Education's Debt Collection Service.

Default School for Consolidated Loan

Listed as school name when the loan is a FFEL Consolidation Loan. This is in accordance with reporting requirements and has no bearing on the status of the loan. These loans may be entered into after a student completes his/her program of study at a particular school and consolidates loans received while in school.

Denominator

Number of loans that entered repayment during a particular Cohort fiscal year (October 1-September 30).

Dependency Indicator

The dependency status (dependent or independent) used in the student's undergraduate or graduate loan limits determination.

Direct Loan

A federal student loan, made through the William D. Ford Direct Loan Program, for which eligible students and parents borrow directly from the U.S. Department of Education at participating schools. Direct Subsidized Loans, Direct Unsubsidized Loans, Direct PLUS Loans and Direct Consolidation Loans are types of Direct Loans.

Disbursed Amount

The amount of the grant the school has disbursed to the student.

Disbursement Amount

The cumulative amount of funds released to a borrower.

Disbursement Date

The date the loan disbursement was made.

Discharge Date

The date of the Loan Discharge.

Discharge Type

The discharge reason codes for discharging all or part of a loan.

Distribution Medium

How enrollment information is sent to an organization. Valid values are SAIG or Tape.

Distribution SAIG User ID

For organizations that receive enrollment information by the Student Aid Internet Gateway, the address of the mailbox to which that information is sent.

DL

Federal Direct Student Loan.

DOB

Date of Birth.

DP

Data Provider.

Earliest Certification Date

Earliest Date on which NSLDS received certification of the status.

ED

U.S. Department of Education.

ED Servicer

ED Servicers aid in the administration of FFELP loans that have been sold to the Department as well as FDLP loans and TEACH grants originated and distributed from Common Origination and Disbursement (COD).

ED Region

A Department of Education Student Financial Assistance Program's Regional Offices.

EFC

See Expected Family Contribution.

Eff. Date

See Effective Date.

Effective Date

The date when a student's enrollment status first took effect. Used for Campus-Level and Program-level enrollment status.

End Effective Date

Allows you to display on the Enrollment Detail page only records with an Effective Date earlier than or equal to the date you enter on certain Enrollment pages.

Enroll. Code

See Enrollment Status/Code.

Enrollment Reporting Servicer

Name of the third-party servicer, if used.

Enrollment Status/Code

An alphabetic character that represents a student's current or past enrollment status. Used for Campus-Level and Program level enrollment.

Code	Status
A	Approved leave of absence
D	Deceased
F	Full time
G	Graduated
H	Half time
L	Less than half time
M	Moved
Q	Three-quarter time
W	Withdrawn

X	Never Attended
Z	No record found

Exact Match Only

On the Enrollment Update page, allows you to retrieve only records that match exactly with the Begin Value you typed. This option must be used in combination with a Begin Value.

Expected Family Contribution

An index produced by Congressional Methodology (CM) that assesses an applicant's financial need.

Extract Format

Batch file format in which the information is sent as a "string" of data. User then downloads data into a format on site. (See also Report Format).

FAQ

Frequently Asked Questions.

FDLP

Federal-Direct Loan Program. See Direct Loan.

FFEL

Federal Family Education Loan.

Federal Perkins Loans

Campus based loans that are reported to NSLDS. This family of loans includes the National Defense Loan (DU), the Perkins Expanded Lending (EU), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).

FFEL Consolidation Loans

Loans consolidated under the Federal Family Education Loans program.

First Time (1st Time Pell)

For purposes of the Federal Pell Grant Program, this indicates if a student received a Pell Grant for the first-time during a period of enrollment between the 2008-2009 award year and ending with the 2011-2012 award year.

Full Time Teacher Of

The type of qualifications for Teacher Loan Forgiveness, detailed below:

Full Time Teacher Of	Amount up to
Elementary	Up to $5,000
Secondary	Up to $5,000
Highly Qualified	Up to $5,000
Secondary Mathematics	Up to $17,500
Secondary Science	Up to $17,500

Elementary Special Education.	Up to $17,500
Secondary Special Education	Up to $17,500

GA

See Guaranty Agency.

GA Code

Three-digit code that identifies the GA.

Guaranteed Loan Amount

For FFEL loans, the original amount, before any cancellations.

Guaranty Agency

A state agency or private, nonprofit institution or organization that administers the financial aid programs within the Federal Family Education Loans (FFEL) Program.

Historically Correct Loan Status

The yes or no indicator signifies whether the loan status reported in the "Status Code/Date Of" column is considered to be correct when a subsequent Loan Status update is made. If a Data Provider reports a new loan status with a date prior to a previously reported status code date, this indicator is changed to "No."

HS Program

School submitted High School program code (ACG only).

IASG

Iraq and Afghanistan Service Grant - A federal grant for students who are not eligible for Pell grants due to their EFC and who had a parent or guardian die as a result of military service in Iraq or Afghanistan after September 11, 2001.

Inform

See Transfer Monitoring Inform.

Interest Rate

See Loan Interest Rate.

Last Anticipated Comp. Date

The Anticipated Completion Date most recently reported to NSLDS for a given enrollment status.

Last Disbursed Amt

The dollar amount of the most recent disbursement to the borrower for a specific loan.

Last Disbursed Date

The date of the most recent disbursement to the borrower for a specific loan.

Latest Certification Date

Latest Date on which NSLDS received certification of the status.

Latest Certification Method

Latest Method used to certify the enrollment record.

Latest Disb

Latest disbursement date Common Origination and Disbursement (COD) processed the payment record.

Lender

An eligible party that provides an FFEL loan to a student, whether it is a bank, a college, the government or another organization.

Lender Branch Servicer

An agency that services a lender's loans.

Pell Lifetime Eligibility Used (LEU)

The Lifetime Eligibility Used (LEU) is the sum of all Pell Grant % Scheduled Award Used by Award Year for all award years, beginning with students that receive their first Pell disbursement on or after July 1, 2008. The LEU displays in the range value between 0 percent and 900 percent. Common Origination and Disbursement (COD) calculates this for students flagged as 1st Time Pell Grant recipients, based on having received their first Pell Grant award disbursement in the 2008-2009 Award Year or thereafter. NSLDS displays the most recently reported value from Common Origination and Disbursement (COD).

Iraq and Afghanistan Service Grant (IASG) Lifetime Eligibility Used (LEU)

The Iraq and Afghanistan Service Grant (IASG) Lifetime Eligibility Used (LEU) is the sum of all IASG Grant % Scheduled Award Used by Award Year for all award years, beginning with students that receive their first IASG disbursement on or after July 1,2009. The LEU displays in the range value between 0 percent and 900 percent. Common Origination and Disbursement (COD) calculates this for students flagged as 1st Time IASG Grant recipients based on having received their first IASG Grant award disbursement in the 2010-2011 Award Year or thereafter. NSLDS displays the most recently reported value from Common Origination and Disbursement (COD).

Loan Amount

The original loan amount, before any cancellations.

Loan Date

For FFEL loans, the date the loan was originally guaranteed. For Direct Loans and Perkins loans, the date the loan was originally disbursed.

Loan Discharge

An entitlement to students, under the Federal Family Education Loan (FFEL) programs, to discharge their debt based on conditions outlined in the Higher Education Act, as amended.

Loan Holder

The Lender or GA who holds the loan.

Loan Interest Rate

The interest rate that is applied to the loan. A variable interest rate is indicated by the abbreviation VAR.

Loan Period

The period of study for which the loan was originally taken out.

Loan Period Begin

The date classes are (or were) to begin for the period covered by the loan.

Loan Period End

The date classes ended (or were to end) for the period covered by the loan.

Loan Records Extracted

The total number of detail records extracted from the data provider database for this submission. This number may include records that were in error and did not update the NSLDS database.

Loan Status

The two-character code that indicates the status of a loan.

Loan Status Code	Definition
AL	Abandoned Loan
BC	Bankruptcy Claim, Discharged
BK	Bankruptcy Claim, Active
CA	Canceled
CS	Closed School Discharge
DA	Deferred
DB	Defaulted, Then Bankrupt, Active, Chapter 13
DC	Defaulted, Compromise
DD	Defaulted, Then Died
DE	Death
DF	Defaulted, Unresolved
DI	Disability
DK	Defaulted, Then Bankrupt, Discharged, Chapter 13
DL	Defaulted, In Litigation
DN	Defaulted, Paid in Full Through Consolidation Loan
DO	Defaulted, Then Bankrupt, Active, other
DP	Defaulted, Paid in Full
DR	Defaulted, Loan in Roll-Up Loan
DS	Defaulted, Then Disabled
DT	Defaulted, Collection Terminated
DU	Defaulted, Unresolved
DW	Defaulted, Write-off
DX	Defaulted, Six Consecutive Payments
DZ	Defaulted, Six Consecutive Payments, then missed payment
FB	Forbearance

FC	False Certification Discharge
FR	Fraud
FX	Fraud Satisfied
IA	Loan Originated
ID	In School or Grace Period
IG	In Grace Period
IM	In Military Grace
IP	In post-deferment grace (Perkins only)
OD	Defaulted, Then Bankrupt, Discharged, Other
PC	Paid in Full Through Consolidation Loan
PD	Permanent Disability
PF	Paid in Full
PM	Presumed Paid in Full
PN	Non-defaulted, Paid in Full Through Consolidation Loan
PZ	PLUS Child Death
RF	Refinanced
RP	In Repayment
UA	Temporarily Uninsured - No Default Claim Requested
UB	Temporarily Uninsured - Default Claim Denied
UC	Permanently Uninsured-No Default Claim Requested
UD	Permanently Uninsured-Default Claim Denied
UI	Unreinsured
VA	Discharged, Veteran Permanently Disabled
XD	Defaulted, six consecutive payments

Loan Records Submitted

The total number of detail records on the submittal file transmitted to NSLDS. This number may include records that were in error and did not update the NSLDS database.

Loan Status Date

The date a Loan Status became effective.

Loan Type

The type of Title IV award made with a formal agreement for repayment with interest.

Code	Loan Type

CL	FFEL Consolidation Loan
D0	Direct Stafford Subsidized Loan (SULA Eligible)
D1	Direct Stafford Subsidized Loan
D2	Direct PLUS Loan for Graduate/Professional
D3	Direct PLUS Loan for Graduate/Professional
D4	Direct PLUS Loan
D5	Direct Consolidation Unsubsidized Loan
D6	Direct Consolidation Subsidized Loan
D7	Direct Consolidation PLUS Loan
D8	Direct Unsubsidized Loan (TEACH)
D9	Direct Consolidation Subsidized Loan (SULA Eligible)
DU	National Defense Loan
EU	Perkins Expanded Lending Loan
FI	Federally Insured Student Loan (FISL)
GB	FFEL PLUS Loan for Graduate/Professional
IC	Income-Contingent Loan (ICL)
NU	National Direct Student Loan (NDSL)
PL	FFEL PLUS Loan
PU	Federal Perkins Loan
RF	FFEL Refinanced Loan
SF	FFEL Stafford Subsidized Loan
SL	Supplemental Loan (SLS)
SU	FFEL Stafford Unsubsidized Loan

Loans with Errors

The total number of detail records extracted from the data provider database that included errors and did not update the NSLDS database.

Location

The Office of Postsecondary Education ID (OPEID) for the location where the student is attending or has attended. In Enrollment Maintenance, the school user can use this field to move a student from one location to another location within the same administration group. When a new location code is entered, NSLDS adds the student and the enrollment record to the new location and display 'Moved' as the enrollment status for the prior location.

Loss of Subsidy

This field indicates that a D0 or D9 loan has lost interest subsidy.

Major

Student's major course of study also known as Classification of Instructional Programs (CIP) (SMART only).

Maximum Eligibility Period

The Maximum Eligibility Period is a period of time that is equal to 150% of the published length of the student's academic program.

Monitor Begin Date

Date school requests the NSLDS to start monitoring a transfer student's record for change(s).

Most Recent Status

The Enrollment Status most recently reported for a student at a school.

National SMART Grant

National Science and Mathematics Access to Retain Talent Grant. A federal grant available to third and fourth year college students who are eligible for the Pell Grant and are pursuing a degree in designated majors (physical, life, or computer sciences; math, technology, or engineering; or in a foreign language determined critical to national security). Student must have earned at least a 3.0 GPA.

Navigation

The traversal of the Financial Aid Professionals System. See Navigation page.

Navigation Legend

Legend of icons and symbols used in the FAP Web site.

Next Gen NSLDS Label

Unique identifier for the loan record assigned by NSLDS. This replaces the NSLDS Label, starting in 2022.

No Progs. (No Programs)

Indicates that a student is not enrolled in at least one program. If this field is checked the school is not required to report the program-level enrollment data. If this field is not checked the school is required to report the student's program-level enrollment data. Program-level enrollment data must be reported regardless of whether the program is eligible for Title IV aid.

Non-Subsidized Loans

Subsidized loans with no subsidy provided. Pre-date Unsubsidized loan program.

Not-For-Profit

Indicates if the organization is a Not-For-Profit.

NSLDS

National Student Loan Data System.

NSLDS Label

Unique identifier for a loan on NSLDS. When loans are consolidated, the NSLDS label is used to link underlying loans to the Consolidation Loan.

NSLDS Web

As a Certification Method, indicates that the school certified the enrollment information using the Enrollment Maintenance page on this site.

Numerator

Number of borrowers entering repayment in the cohort fiscal year who defaulted in the cohort default period. (Two year period that begins on October 1 of the fiscal year the borrower enters repayment and ends on September 30 of the following fiscal year.)

OPB

Outstanding Principal Balance.

OPEID

The eight-digit Office of Postsecondary Education ID of the school location.

Original Disbursed Amount

The amount of the grant the school has disbursed to the student prior to any discharges.

Original Schedule

Enrollment Reporting Schedule items generated by the schedule that was assigned to an organization when it first signed up with the NSLDS.

Other Fees

The accumulated fees added to late or defaulted loans. Examples of other fees are late fees, collection costs, or court costs.

Output Medium

The output format the user selected for the report. Options are Report, which results in an organized, easily readable document, and Extract, which results in a raw data document. Reports generated in Extract are usually imported into a spreadsheet software program.

Outstanding Interest Amount

The cumulative accrued outstanding interest balance on the loan.

Outstanding Interest Balance

The cumulative accrued interest balance on the loan, as reported by the data provider.

Outstanding Interest Date

The date that the outstanding interest balance was updated.

Outstanding Principal Balance Amount

The cumulative dollar value due on a loan. If the field is preceded by an exclamation mark, the amount may include capitalized interest and/or other fees.

Outstanding Principal Balance Date

The date the outstanding principal balance was updated.

Overpayment

A Title IV overpayment is the amount of any Title IV student assistance funds received by a student that exceeds the amount the student is eligible to receive.

Overpayment Create Date

The date the overpayment was entered into the NSLDS.

Overpayment Indicator

The code identifying the status of the overpayment.

Overpayment Status	Definition
Overpayment	This is the value that a school uses when first entering an active overpayment into the system. It means that the student owes the overpayment, has not made satisfactory arrangements to repay, and should be considered ineligible for additional Title IV aid until the overpayment is repaid or otherwise resolved.
Repaid	This value means that a previously reported overpayment that was in either Overpayment or Satisfactory Arrangement Made status has been fully repaid by the student. Schools should update NSLDS when the final payment has been made. The date that the final payment of the overpayment was made should be entered at that time. A value of Repaid does not produce the overpayment flags and messages on SARs and ISIRs.
Satisfactory Arrangement Made	This value means that while the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. A status of Satisfactory Arrangement Made reported to other schools on a SAR or ISIR (or in the FAT process of NSLDS) provides documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made with the school for the arrangements to repay, the school should immediately reset the overpayment Indicator field to Overpayment.
Fraud	This value indicates that a student has been convicted of fraud. This means that the student has been convicted of fraud, still owes the fraudulently obtained funds, and should be considered ineligible for additional Title IV aid until the funds are repaid.

Overpayment Repayment Date

The date the overpayment was paid in full.

Overpayment Source

The code identifying where the overpayment exists.

Overpayment Source	Definition
Transfer	When a school has transferred an overpayment to the U.S. Department of Education's Debt Collection Service (DCS), the school should update the previously reported overpayment information in NSLDS by changing the Source field from School to Transfer. This change does not invalidate the overpayment, but it does inform any user of the system that the debt is in the process of being transferred from the school to DCS.
School	Whenever a school is attempting to add a new, or update an existing overpayment record; this field is automatically updated with SCH.
ED Region	The debt is now held by one of the U.S. Department of Education's Debt Collection Service regional offices.

Overpayment Type

The Title IV student assistance funds type (Perkins, SEOG, Pell, Academic Competitiveness Grant, National SMART Grant, TEACH Grant or Iraq and Afghanistan Service Grant) for which the student has received an amount more than what the student is eligible to receive.

Paid Date

The date the GA pays the holder; if the GA is the holder, the date applied to the borrower's account.

PDPA

Primary Destination Point Administrator. Person at an organization who is responsible for enrolling new, modifying existing or deactivating NSLDS online user IDs. PDPAs should work closely with those at their organization to ensure the appropriate access is established for NSLDS batch services. The PDPA manages NSLDS access by using the fsawebenroll.ed.gov website.

Pell Grant

A Title IV grant program for undergraduate students who have not completed a first baccalaureate degree.

Pending Disbursement Amount

The cumulative net loan amount that is awaiting disbursement to a borrower.

Percent (%) Scheduled Award Used by Award Year

Percent of Pell Grant or Iraq and Afghanistan Service Grant (IASG) eligibility the student has used for the specified Award Year.

Percent (%) Eligibility Used Scheduled Award

Percent of eligibility the student has used (ACG and SMART Grants only).

Percent of Students Certified

The value of Students Certified divided by the value of Students in Portfolio, expressed as a percentage.

Percent of Students Certified with Program Enrollment

The value of Students Certified with Program Enrollment divided by the value of Students in Portfolio, expressed as a percentage.

Alert displays next to the percentage if the school did not meet the compliance threshold.

Perkins

See Federal Perkins Loans.

PLUS

Parent Loan for Undergraduate Student.

PLUS Graduate/Professional

PLUS Loan for Graduate and Professional Students.

Portfolio

Every organization involved in the Enrollment Reporting process has a portfolio that contains all the students for whom the organization reports or receives enrollment information. A student who belongs to an organization's portfolio is said to

participate in that portfolio. Schools report enrollment information to the NSLDS for the students in their portfolios. All other organizations receive enrollment information from the NSLDS for the students in their portfolios.

Portfolio Participation

A student participates in the portfolio of an organization involved in the Enrollment Reporting process when that organization reports or receives enrollment information about the student. Participation is based on the organizational interest that is created when the student receives a Direct Loan or FFELP loan.

Post 9/11 Deceased Veteran Dependent

Indicator for a student receiving the maximum Pell Grant eligibility because their parent or guardian was a member of the Armed Forces and has passed away as a result of military service in Iraq or Afghanistan after 9/11/2001 (Pell Grant only).

Posted by COD

The date when the grant is listed as disbursed on the Common Origination and Disbursement (COD) system.

Previously Applied

Indicates whether a student has previously applied for Teacher Loan Forgiveness.

Process Date

This date is the date that the CDR calculation was completed.

Processed Date

The date on which NSLDS completely processed the submittal.

Program Begin Date

The date on which the student began attending the program.

Program Length

The Published Program Length and unit of measure for the length of the instructional program in years, months, or weeks as published by the school.

Program Status

The Program Enrollment Code identifying a student's current program enrollment status. Valid values are:

Program Enrollment Code	Program Enrollment Status
A	Approved Leave of Absence
D	Deceased
F	Full Time
G	Graduated
H	Half Time
L	Less Than Half Time
Q	Three-Quarter Time
W	Withdrawn
X	Never Attended

Z	No Record Found

Protected Subsidy

This field indicates that a D0 or D9 loan has protected interest subsidy.

Rate Subtype

This is an indication of the Sub Type calculation applied to the Cohort Default Rate. By default, this displays as Actual for Appeals.

Rate Type

This is an indication of the Type of Cohort Default Rate that is calculated.

Reaffirmation Begin Date

The date the reaffirmation was entered into NSLDS.

Reaffirmation Date

The date on which the signed reaffirmation agreement was received by the servicer.

Reaffirmation End Date

The date the reaffirmation was ended on NSLDS.

Received Date

The date the NSLDS received the incoming submittal.

Record Format (Non-Schools Only)

The format in which a guaranty agency, lender, or lender servicer receives batch enrollment information from the NSLDS.

Records Received (Non-Schools Only)

An option that allows non-schools to receive either all the enrollment records for students in their portfolios or only those records that contain a change to Enrollment Status/Code, Effective Date, or Anticipated Completion Date.

Regular

A file type indicating that the file is a regularly scheduled Enrollment Reporting file. When the NSLDS sends an organization a regular file, it automatically schedules another such file for one year in the future.

Remaining Eligibility Period

The Remaining Eligibility Period is a student's remaining period of time for which the borrower may receive Direct Subsidized Loans under the 150% limit.

Report Format

File format in which the information looks and reads as a report. (See also Extract Format).

Reported By

Indicates the type of organization that reported information displayed on Enrollment pages. Current sources are schools, Guaranty Agencies (GAs), and Direct Loans.

Reported By ID

The identification number of the organization that reported information displayed on Enrollment pages. For schools, this number is their OPEID; for guaranty agencies, it is their guaranty agency number.

Return of Funds

The amount of funds returned to a lender for a loan disbursed to a student who is no longer eligible due to withdrawing from courses, or never attending class for which the loan was intended.

Return of Funds Date

The date a lender receives a return of funds disbursed for a student from the school.

SAIG

See Student Aid Internet Gateway.

Scheduled Amount

Scheduled amount of the Pell Grant award (Pell Grant only).

Scheduled Award

Scheduled amount of the ACG and SMART Grant award. For TEACH Grants every grant displays the maximum scheduled award ($4,000).

Scheduled Submittal Date

The date that the NSLDS expects to process or has processed a data provider input.

School

A postsecondary educational institution.

School Reason

School submitted eligibility/payment reason (ACG only).

School Batch

As a Certification Method, indicates that the school certified enrollment information through the batch enrollment reporting process.

SEOG

See Supplemental Education Opportunity Grant.

Indicator of Separate Loan

An indicator used to differentiate among multiple loans with the same loan date for the same borrower and student attending the same school.

Service Component

The service member's assigned branch of Military Service.

Servicer Name (Schools Only)

For schools that use a third-party servicer to send enrollment information to NSLDS, the name of the servicer.

SMART

See National SMART Grant

Source

The entity (i.e. GA code) that reports specified data.

Special Program Indicator

The Indicates that the program belongs to one of the following groups:

Special Program Indicator	Special Program
A	Special Admission Associated Degree Program
B	Bachelor's Degree Completion Program
N	Not Applicable
P	Preparatory Coursework Graduate Professional Program
T	Non-Credential Teacher Certification Program
U	Preparatory Coursework Undergraduate Program

Split Files Indicator (Schools Only)

For schools that use a third-party servicer, a Yes or No option indicating whether the servicer submits enrollment information for all the schools it services as a single file (No) or as a series of separate files (Yes).

SSCR

Student Status Confirmation Report.

SSN

Social Security Number.

State Code

The state the student/borrower applied for the TLF.

Status

The enrollment status indicated by a student's Enrollment Status/Code.

Status Effective Date

The Program Effective Date, which is the date when the student's current program status first took effect.

Statuses in Effect

On the Enrollment Timeline page, the dates during which a set of enrollment statuses were in effect.

Student Aid Internet Gateway (SAIG)

The virtual network used to send and receive student aid data files over the Internet.

Student Designator (Student Desig.)

The student identifier used by a school on its own internal database or tracking system.

Students Certified with Program Enrollment

The total count of students participating in the school or school location's portfolio at the Start Date who were certified at least once with program enrollment by the Evaluation Date

Students in Portfolio

The total count of students participating in school or school location's portfolio on the start date

Submittal File

The validated, snapshot image of a data provider's database file that is transmitted to and updates the NSLDS database.

Submittal Pass Rate (%)

The percentage of detail records extracted from the data provider database that contained no errors and updated the NSLDS database.

Submittal Processed Date

The date that the NSLDS completely processed the submittal file.

Submittal Received Date

The date that the NSLDS received the incoming submittal file.

Subsidized Loans

A loan for which the federal government pays the interest during in-school, grace and deferment periods.

Subsidy Status

The status of the interest subsidy on the loan.

Subsidized Usage Period

The Subsidized Usage Period is the period of time, expressed in years or portions of years, for which the borrower received a Direct Subsidized Loan.

SULA

Subsidized Usage Limit Applies

Supplemental Education Opportunity Grant

A Title IV campus-based grant program for undergraduate students of exceptional financial need who have not completed their first baccalaureate degree.

System Effective Begin Date/End Date

The date range during with an OPB, OIB, and/or a Loan Status Code was in effect.

Tax Exempt Eligible

Identifies if the lender holds loans issued with eligible tax-exempt bonds.

TEACH Grant

Teacher Education Assistance for College and Higher Education (TEACH) Grant Program. TEACH Grant is a non-need-based grant program that provides up to $4,000 per year to students who are enrolled in an eligible program and who agree to teach in a high-need field, at a low-income elementary or secondary school for at least four years within eight years of completing the program for which the TEACH Grant was awarded. If the grant recipient fails to complete the required teaching service, the TEACH grant is treated as a Federal Direct Unsubsidized Loan (D8)

Teacher Loan Forgiveness (TLF)

The Teacher Loan Forgiveness program allows borrowers to apply for forgiveness of their Title IV loans for a maximum of $17,500.

Term Begin

The beginning date of the academic term of the student's current (or most recent) enrollment.

Term End

The end date of the academic term of the student's current (or most recent) enrollment.

TG Number

The number assigned to a user's SAIG mailbox. This is the mailbox to which all Reports are sent.

Third Party Servicer

Indicator if the organization is a Third Party Servicer.

Times Certified

Number of certifications included in the range between the Earliest Certification Date and the Latest Certification Date for a program enrollment status.

Total % Elig. Used by Academic Yr Level

The student's total percent of eligibility used by academic year level (ACG and SMART Grants only).

Total Forgiven

This amount is the total forgiven amount for a student/borrower.

Total Records Extracted

The total number of detail records extracted from the data provider database for submission to the NSLDS. This number may include records that were in error and did not update the NSLDS database.

Tran

Transaction number on the SAR or ISIR for the payment accepted by the school.

Transfer Student Monitoring Alert

Information generated by the NSLDS as a result of the Transfer Monitoring process. The Alert tells a school that new information has been reported that may affect eligibility for Title IV Financial Aid on one or more students on that school's Transfer Monitoring List.

Transfer Student Monitoring/Financial Aid History Inform File

Information provided to the NSLDS by a school or servicer. The Inform consists of identifiers and Enrollment Begin dates for one or more students that the school has identified as Transfer students. The Inform tells the NSLDS to monitor those student records for information being reported that may affect eligibility for Title IV Financial Aid.

Transfer Student Monitoring List

List of students a school has identified as Transfer Students and requested the NSLDS to monitor for reported record changes.

Transfer Student Monitoring Process

Process though which schools/third party servicers submit students to be added to the Transfer Student Monitoring List, NSLDS monitors changes to the student’s financial aid history information from the date requested. NSLDS checks to see if there have been any changes in the student’s financial aid history that may be relevant to the student’s eligibility for aid at the new school.

Trustee

Identifies a lender that uses an Eligible Lender Trustee (ELT).

Type

Indicates what form of Enrollment Reporting file NSLDS sends an organization. Files can be either Ad Hoc or Regular.

Update date

The date when the update was performed.

Update username

The name of the person that performed the update.

URL

Uniform Resource Locator. A URL consists of an access method (http, ftp, etc.), an internet address, and a page or file name.

Ver. Flag

Result of verification by school.

Web Report List

List of reports that can be viewed directly from the NSLDS Web site as Portable Document Format (PDF) files. Selected report may also be transmitted to the requestor's SAIG mailbox.

Weeks in Acad. Yr.

The Weeks in Title IV Academic Year, the total number of weeks of instruction in the program's academic year. Only report when Published Program Length Measurement is W or M.