Grant History

Purpose of this page

The Grant History page allows you to view Pell Grants, Academic Competitiveness Grants (ACG), National Science Mathematics Access to Retain Talent (SMART) Grants and Teacher Education Assistance for College and Higher Education (TEACH) Grants that a student has been awarded. If you have any questions about a grant, please call the Common Origination and Disbursement (COD) School Relations Center at 1-800-474-7268.

Navigation

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

How to interpret Warning Symbols and Information Icons

The warning and informational icons at the top of the Loan, Grant, Overpayment Lists pages and the Student Access Interface page reflect the status of loans and other aid for which the borrower is personally responsible. Users wishing to check the status of PLUS borrowers who have taken out loans on behalf of students should view the Loan List page for the PLUS borrower and not rely on the student's page to verify the eligibility of the PLUS borrower for further aid.

- **Bankruptcy** - The borrower has one or more loans in active bankruptcy status.
- **Defaulted** - The borrower has one or more loans in default status.
- **Overpayments** - The student has one or more active overpayments in the NSLDS database.
- **Discharged** - The borrower has one or more loans with a discharge code. Discharges are identified according to the following order of precedence.
  - Death
  - Permanent
- **Additional Unsub** - The borrower has a Direct Stafford Unsubsidized (D2) or FFEL Stafford Unsubsidized (SU) loan with Additional Health Profession or PLUS Denial indicators.
- **Close or Equal to Undergrad Sub. Limit** - The borrower is close or equal to the undergraduate aggregate limit for subsidized loans.
- **Exceeds Undergrad Sub. Limit** - The borrower exceeds the undergraduate aggregate limit for subsidized loans.
- **Close or Equal to Undergrad Comb. Limit** - The borrower is close or equal to the undergraduate aggregate limit for subsidized and unsubsidized loans combined.
- **Exceeds Undergrad Comb. Limit** - The borrower exceeds the undergraduate aggregate limit for subsidized and unsubsidized loans combined.
- **Close or Equal to Graduate Sub. Limit** - The borrower is close or equal to the graduate aggregate limit for subsidized loans.
- **Exceeds Graduate Sub. Limit** - The borrower exceeds the graduate aggregate limit for subsidized loans.
- **Close or Equal to Graduate Comb. Limit** - The borrower is close or equal to the graduate aggregate limit for subsidized and unsubsidized loans combined.
- **Exceeds Graduate Comb. Limit** - The borrower exceeds the graduate aggregate limit for subsidized and unsubsidized loans combined.
Close to Pell Grant LEU Limit - The student is close to the Pell Grant Lifetime Eligibility Used (LEU) limit.

Meets or Exceeds Pell Grant LEU Limit - The student meets or exceeds the Pell Grant Lifetime Eligibility Used (LEU) limit.

Close to Iraq and Afghanistan Service Grant (IASG) LEU Limit - The student is close to the Iraq and Afghanistan Service Grant (IASG) Lifetime Eligibility Used (LEU) limit.

Meets or Exceeds the Iraq and Afghanistan Service Grant (IASG) LEU Limit - The student meets or exceeds the Iraq and Afghanistan Service Grant (IASG) Lifetime Eligibility Used (LEU) limit.

Grants - The borrower has received one or more Pell Grants, Iraq and Afghanistan Service Grants, Academic Competitiveness Grants, National Science Mathematics Access to Retain Talent Grants, or Teacher Education Assistance for College and Higher Education Grants.

Fraud - The borrower has been convicted of fraud.

Teacher Loan Forgiveness - The student/borrower has one or more loans eligible for Teacher Loan Forgiveness (TLF).

Loan Discharge - The student/borrower has one or more loans discharged.

Subsidized Usage Limit Applies (SULA) - The borrower is subject to the 150% Direct Subsidized Loan Limit provision.

Loss of Subsidy - The borrower has one or more Direct Stafford Subsidized (SULA Eligible) (D0) and/or Direct Consolidation Subsidized (SULA Eligible) (D9) loans that have lost interest subsidy.

How to add and view the Transfer Monitoring information

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

To add a student to the Transfer Monitoring List:

- Click Add Student to Monitoring List.

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

- Click Student Monitoring Detail.

How to interpret the Aggregate TEACH Grant Information

The Aggregate TEACH Information table displays the Academic Levels, Total Disbursements, Percent (%) Eligibility Used, and Eligible Remaining Amounts. Only TEACH Grants that the borrower has received affects the aggregate totals and dynamically displays it at the top of the Grants page.

- **Academic Level Aggregates** - Aggregate disbursed amounts displayed for the following Academic Levels:
  - Undergraduate/Post Baccalaureate - Undergraduate/Post Baccalaureate TEACH Grants for 1st year undergraduate/never attended college (0), 1st year undergraduate/attended college before (1), 2nd year undergraduate/sophomore (2), 3rd year undergraduate/junior (3), 4th year undergraduate/senior (4), and 5th year/other undergraduate (5).
  - Graduate - Graduate TEACH Grants for 1st year graduate/professional (6) and continuing graduate/professional or beyond (7).

- **Total Disbursements** - Sums the Disbursed Amounts for all TEACH grants received by the borrower.

- **% Eligibility Used** - The percent used by Academic Levels:
- Undergraduate/Post Baccalaureate - Percentage of the cumulative disbursed amounts to the total aggregate limit of $16,000.

- Graduate - Percentage of the cumulative disbursed amounts to the total aggregate limit of $8,000

- Eligible Remaining Amount - The remaining eligible amount by Academic Levels:
  - Undergraduate/Post Baccalaureate - Of the $16,000 total aggregate limit, the remaining amount the student is eligible to receive.
  - Graduate - Of the $8,000 total aggregate limit, the remaining amount the student is eligible to receive.

### How to interpret Grant History

The Grant History table displays:

- **Lifetime Eligibility Used-(Pell Grant only)** - The Lifetime Eligibility Used (LEU) 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 will display 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 COD.

- **Lifetime Eligibility Used-(IASG only)** - The Lifetime Eligibility Used (LEU) is based on a 12 semester or 6 year regulation, which is calculated based on the percentage of Iraq and Afghanistan Service Grant (IASG) disbursed versus the amount of IASG Scheduled. The LEU maximum has been set to 600 percent for the total of all IASG awards received. The LEU will display as a percent value in the range between 0 percent and 999.999 percent. For example, if a student received 100 percent of his IASG eligibility during the 2012-2013 award year, 100 percent in the 2013-2014 Award Year, and three quarters for 2015-2016, his LEU at that point in time during the 2015-2016 Award Year is 275 percent (100% + 100% + 75% = 275%). NSLDS displays the most recently reported value from COD.

- **Award Year** - The school year in which the student received a grant, as reported by the awarding campus.

- **Scheduled Amount** - Scheduled amount of the Pell Grant award and the Iraq and Afghanistan Service Grant (IASG) award.

- **Scheduled Award** - Scheduled amount of the 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.

- **Disbursed Amount** - The amount of the grant the school has disbursed to the student.

- **% Sched. Award Used by Award Yr-(Pell Grant and IASG only)** - Percent of eligibility the student has used for the specified Award Year. For example, if a student received three quarters of his scheduled Pell Grant or Iraq and Afghanistan Service Grant (IASG) eligibility for 2007-2008, his % Schedule Award Used by Award Year is 75 percent.

- **%Elig. Used by Sched. Award** - Percent of eligibility the student has used (ACG and SMART Grants only).

- **Latest Disb** - 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.

- **Posted by COD** - The date when the grant is listed as disbursed on the COD system.

- **Name and OPEID** - The name and OPEID of the school the student currently attends or attended. From this field, you can link to the Organization Contact List page.

- **EFC** - (Expected Family Contribution) Index produced by the Congressional Methodology (CM) program that assesses an applicant's financial needs.

- **Tran** - Transaction number on the SAR or ISIR for the payment accepted by the school.

- **1st Time (First Time Pell)** - 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.

- **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. This field indicates a student was eligible for two Pell Grants in a single award year.

- **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).

- **Children of Fallen Heroes Act**: 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).

- **Total % Elig. Used by Academic Yr Level**: The student's total percent of eligibility used by academic year level (ACG and SMART Grants only).

- **Award ID**: 21 character identifier that uniquely identifies a grant or a loan.

- **Acad. Yr Level**: Student's grade level submitted by the school (ACG, SMART and TEACH only).

- **School Reason**: School submitted eligibility/payment reason (ACG only).

- **HS Program**: School submitted High School program code (ACG only).

- **Major**: Student's major course of study also known as Classification of Instructional Programs (CIP) (SMART only).

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

<table>
<thead>
<tr>
<th>Flag</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blank</td>
<td>Not selected for Verification.</td>
</tr>
<tr>
<td>V</td>
<td>Selected for Verification.</td>
</tr>
<tr>
<td>W</td>
<td>Institution made first payment without documentation to complete application data verification.</td>
</tr>
<tr>
<td>S</td>
<td>Selected not verified.</td>
</tr>
</tbody>
</table>

- **For Ed Users**: The line numbers next to each grant will allow you to navigate to the Grant Update Page where you may update the LEU percentage.

- **Grant converted to loan**: A symbol (L) designates which grant has converted to a loan. Pass your cursor over the symbol for additional information (TEACH only).

Last updated: December 23, 2018
Loan History

Purpose of this page

The Loan History page displays the following:

- Icons warning or informing users that the student or PLUS borrower meets one or more conditions that may affect his or her eligibility for further aid.
- Aggregate information about all loans for which the student or PLUS borrower is personally responsible.
- Information about Master Promissory Notes on Direct Stafford or Direct PLUS loans taken out by the student or PLUS borrower, or on Direct PLUS loans taken out by a parent or guardian on behalf of the student.
- Summary information about all loans received by the student or PLUS borrower, as well as PLUS loan(s) taken out on behalf of the student.
- Summary information about Teacher Loan Forgiveness.

Navigation

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

How to access a student's Loan History

To access a student's loan history:

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

Previously Retrieved Borrower

Previously Retrieved Borrower allows users to select from a list of up to twenty (20) of their own previously successfully viewed unique borrowers. The dropdown list is in descending order, displaying the most recent borrower at the top. Once a unique borrower is selected from the list, the identifier(s) of the borrower selected will autofill on the student search.

To access the previously retrieved borrower activity:

1. Click the Previously Retrieved Borrower dropdown and select a borrower
2. Review the identifiers
3. Click Retrieve

How to access a student's Loan Detail

To access a student's loan detail:

1. Type Award ID.
2. Click Retrieve.

How to interpret Warning Symbols and Information Icons

The warning and informational icons at the top of the Loan, Grant, Overpayment Lists pages and the Student Access Interface page...
reflect the status of loans and other aid for which the borrower is personally responsible. Users wishing to check the status of PLUS borrowers who have taken out loans on behalf of students should view the Loan History page for the PLUS borrowers and not rely on the student's page to verify the eligibility of the PLUS borrower for further aid.

- **Bankruptcy** - The borrower has one or more loans in active bankruptcy status.

- **Defaulted** - The borrower has one or more loans in default status.

- **Overpayments** - The borrower has one or more active overpayments that have not been deferred, waived, or had satisfactory arrangements made for them.

- **Discharged** - The borrower has one or more loans with a discharge code. Discharges are identified according to the following order of precedence.
  - **Death**
  - **Permanent**

- **Additional Unsub** - The borrower has a Direct Stafford Unsubsidized (D2) or FFEL Stafford Unsubsidized (SU) loan with Additional Health Profession or PLUS Denial indicators.

- **Close or Equal to Undergrad Sub. Limit** - The borrower is close or equal to the undergraduate aggregate limit for subsidized loans.

- **Exceeds Undergrad Sub. Limit** - The borrower exceeds the undergraduate aggregate limit for subsidized loans. By clicking on this warning symbol, the Loan Summary will only display undergraduate subsidized loans or consolidated loans with underlying subsidized loans (using the "Exceeds Undergrad Sub Limit" filtering "Display Only" option).

- **Close or Equal to Undergrad Comb. Limit** - The borrower is close or equal to the undergraduate aggregate limit for subsidized and unsubsidized loans combined.

- **Exceeds Undergrad Comb. Limit** - The borrower exceeds the undergraduate aggregate limit for subsidized and unsubsidized loans combined. By clicking on this warning symbol, the Loan Summary will only display undergraduate combined loans (subsidized and unsubsidized loans) or consolidated loans with underlying subsidized and unsubsidized loans (using the "Exceeds Undergrad Comb Limit" filtering "Display Only" option).

- **Close or Equal to Graduate Sub. Limit** - The borrower is close or equal to the graduate aggregate limit for subsidized loans.

- **Exceeds Graduate Sub. Limit** - The borrower exceeds the graduate aggregate limit for subsidized loans. By clicking on this warning symbol, the Loan Summary will only display graduate subsidized loans or consolidated loans with underlying subsidized loans (using the "Exceeds Graduate Sub Limit" filtering "Display Only" option).

- **Close or Equal to Graduate Comb. Limit** - The borrower is close or equal to the graduate aggregate limit for subsidized and unsubsidized loans combined.

- **Exceeds Graduate Comb. Limit** - The borrower exceeds the graduate aggregate limit for subsidized and unsubsidized loans combined. By clicking on this warning symbol, the Loan Summary will only display graduate combined loans (subsidized and unsubsidized loans) or consolidated loans with underlying subsidized and unsubsidized loans (using the "Exceeds Graduate Comb Limit" filtering "Display Only" option).

- **Close to Pell Grant LEU Limit** - The student is close to the Pell Grant Lifetime Eligibility Used (LEU) limit.

- **Meets or Exceeds Pell Grant LEU Limit** - The student meets or exceeds the Pell Grant Lifetime Eligibility Used (LEU) limit.

- **Close to Iraq and Afghanistan Service Grant (IASG) LEU Limit** - The student is close to the Iraq and Afghanistan Service Grant (IASG) Lifetime Eligibility Used (LEU) limit.

- **Meets or Exceeds the Iraq and Afghanistan Service Grant (IASG) LEU Limit** - The student meets or exceeds the Iraq and Afghanistan Service Grant (IASG) Lifetime Eligibility Used (LEU) limit.

- **Grants** - The borrower has received one or more Pell Grants, Iraq and Afghanistan Service Grants, Academic Competitiveness Grants, National Science Mathematics Access to Retain Talent (SMART) Grants, or Teacher Education Assistance for College and Higher Education (TEACH) Grants.
- **Fraud** - The borrower has been convicted of fraud.
- **Teacher Loan Forgiveness** - The student/borrower has one or more loans eligible for Teacher Loan Forgiveness (TLF).
- **Loan Discharge** - The student/borrower has one or more loans discharged. Note: A blue "D" symbol located to the left of the Loan Period label will indicate those loans having a discharge.
- **Subsidized Usage Limit Applies (SULA)** - The borrower is subject to the 150% Direct Subsidized Loan Limit provision.
- **Loss of Subsidy** - The borrower has one or more Direct Stafford Subsidized (SULA Eligible) (D0) and/or Direct Consolidation Subsidized (SULA Eligible) (D9) loans that have lost interest subsidy.
- **Reaffirmation(s)** - The borrower has an active reaffirmation on one or more loans. Note: A blue "R" symbol located to the left of the Loan Detail button in the Loan Summary indicates the loan has reaffirmation data associated with it.

### How to add information to Transfer Monitoring List

Directly below the warning icons, if any appear, school users will see a message that states whether the borrower is on their school's Transfer Monitoring list and a button that will allow them either to add the borrower to their Student Monitoring list or to view the borrower's status if he or she is already on their Transfer Monitoring list.

To add a student to Transfer Monitoring List:

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

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

- Click **Student Monitoring Detail**.

### How to interpret the Aggregate Loan Information

The Aggregate Loan Information table displays the Loan Type, Outstanding Principal Balance, Pending Disbursements, and Total for various aggregates separated out into corresponding undergraduate and graduate portions dynamically displayed. Award Year and Dependency Indicator used for undergraduate and graduate aggregate loan limit determination are also included. Only loans for which the borrower is directly responsible affect the aggregate totals. PLUS loans taken out by a parent on behalf of a student do not figure into the student's aggregate totals. Direct Unsubsidized Loans (TEACH) do not figure into a student's aggregate totals so it is itemized separately.

- **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).

- **PLU/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.

- **Direct Unsubsidized Loans (TEACH)**- 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.

- **Outstanding Principal Balance**- Sums the Aggregate Outstanding Principal Balance for all loans held by the borrower, separated out by Undergraduate and Graduate and Total (sum of Undergraduate and Graduate) portions.

  **Note:** For a PLUS loan borrower's PLUS Loans [FFEL PLUS Loan (PL), Direct PLUS (D4), FFEL PLUS Graduate (GB), Direct PLUS Graduate (D3) and Direct PLUS Consolidated (D7)] it sums the Outstanding Principal Balance (OPB).

  **Note:** For a student/borrower's Direct Unsubsidized Loan (D8 - TEACH Grant converted to a loan), it sums the Outstanding Principal Balance (OPB).

- **Pending Disbursements**- Sums 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.

- **Total**- 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.

- **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 Indicator**- 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).

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

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### How to interpret Master Promissory Notes

The Master Promissory Note (MPN) table displays codes to indicate whether the student or PLUS borrower whose information is displayed on the Loan History page has any MPNs on Direct Stafford or Direct PLUS loans. In addition, it displays an MPN code for any PLUS borrowers who have taken out Direct PLUS loans on behalf of the student displayed on the page. The codes are defined as follows:

- A-Active Status
- C-Closed Status
- I-Inactive Status
- E-Inactive, Endorsed Status (applies only to PLUS and Graduate PLUS MPNs)
- N-No MPN

**Note:** For the student or PLUS borrower displayed on the Loan History page, a code of "N" can mean either that the student or PLUS borrower has not taken out any Direct Stafford or Direct PLUS loans at all, or that the student or PLUS borrower has taken out such loans but that they do not have MPNs associated with them.

For PLUS borrowers who have taken out loans on behalf of the student displayed on the Loan History page, a code of "N" can only mean that the PLUS borrower has taken out one or more Direct PLUS loans on behalf of the student but there aren't any MPNs associated with those loans.

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### Teacher Loan Forgiveness

Authorized GA users can add new Teacher Loan Forgiveness information.
The Teacher Loan Forgiveness information, displays the total amount of Teacher Loan Forgiveness dollars.

- **Total Forgiven** - This amount is the total forgiven amount for a student/borrower.

To view this student/borrower's Teacher Loan Forgiveness detail:

- Click **TLF List**

**Note**: The TLF totals dynamically displays only when the student/borrower displayed on the page has any TLF amounts.

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**Award ID Bypass**

Authorized users can associate an Award ID to an existing borrower. The Award ID Bypass page displays the Award ID activity for the borrower.

To view the Award ID activity of an existing borrower:

- Click **Award ID Bypass**

**Note**: After an Award ID has been associated to an existing borrower the Federal Loan Servicer will be able to successfully report the loan with the same Award ID to NSLDS. The Award ID Bypass functionality will not resolve Social Security Number (SSN) conflicts.

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

The default setting for the Loan Summary displays data for every loan taken out by the student, or taken out by a PLUS borrower on behalf of a student, sorted by Loan Date.

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

To use Sort by:

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

To use Display Only:

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

The sorting and filtering options that are currently in use display below the box containing the sort and filter options. Please remember that the filtering options you select will affect which of the borrower's loans display on the page. If you don't see a loan you are looking for, check the filter option to make sure that it hasn't excluded from display the loan you seek.

If undergraduate and/or graduate loan totals exceed loan limits and the following options are selected from the **Display Only** dropdown selection box or by clicking the exceed loan limits icon(s), the **Award Year** and **Dependency Indicator** display below the current sorting and filtering options: **Exceeds Undergrad Sub. Limit**, **Exceeds Undergrad Comb. Limit**, **Exceeds Graduate Sub. Limit**, and **Exceeds Graduate Comb. Limit**.

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

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**How to interpret Loan Summary**

Using the default filter, Loan Summary displays information about every loan taken out by the student or PLUS borrower. If a student's parent borrowed PLUS loans on behalf of the student, those loans are also in the student's Loan Summary, and they do not affect the student's warning icons or aggregate totals. The name of the parent taking out a PLUS loan on behalf of the student displays on the
Loan Detail page for that loan.

The Loan Summary information displays the following:

- **Loan Type** - The type of Title IV award made with a formal agreement for repayment with interest. The Loan Types are defined as follows:

<table>
<thead>
<tr>
<th>Program</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FFEL</td>
<td>CL</td>
<td>FFEL Consolidation</td>
</tr>
<tr>
<td></td>
<td>GB</td>
<td>FFEL PLUS Graduate/Professional</td>
</tr>
<tr>
<td></td>
<td>PL</td>
<td>FFEL PLUS</td>
</tr>
<tr>
<td></td>
<td>RF</td>
<td>FFEL Refinanced</td>
</tr>
<tr>
<td></td>
<td>SF</td>
<td>FFEL Stafford Sub or FFEL Stafford Non-Sub</td>
</tr>
<tr>
<td></td>
<td>SL</td>
<td>Supplemental Loan (SLS)</td>
</tr>
<tr>
<td></td>
<td>SU</td>
<td>FFEL Stafford Unsubsidized</td>
</tr>
<tr>
<td>FDLP</td>
<td>D0</td>
<td>Direct Stafford Subsidized (SULA Eligible)</td>
</tr>
<tr>
<td></td>
<td>D1</td>
<td>Direct Stafford Subsidized</td>
</tr>
<tr>
<td></td>
<td>D2</td>
<td>Direct Stafford Unsubsidized</td>
</tr>
<tr>
<td></td>
<td>D3</td>
<td>Direct PLUS Graduate/Professional</td>
</tr>
<tr>
<td></td>
<td>D4</td>
<td>Direct PLUS</td>
</tr>
<tr>
<td></td>
<td>D5</td>
<td>Direct Consolidation Unsubsidized</td>
</tr>
<tr>
<td></td>
<td>D6</td>
<td>Direct Consolidation Subsidized</td>
</tr>
<tr>
<td></td>
<td>D7</td>
<td>Direct PLUS Consolidation</td>
</tr>
<tr>
<td></td>
<td>D8</td>
<td>Direct Unsubsidized (TEACH)</td>
</tr>
<tr>
<td></td>
<td>D9</td>
<td>Direct Consolidation Subsidized (SULA Eligible)</td>
</tr>
<tr>
<td>FISL</td>
<td>FI</td>
<td>Federally Insured (FISL)</td>
</tr>
<tr>
<td>Perkins</td>
<td>DU</td>
<td>National Defense Loan</td>
</tr>
<tr>
<td></td>
<td>EU</td>
<td>Perkins Expanded Lending</td>
</tr>
<tr>
<td></td>
<td>IC</td>
<td>Income Contingent (ICL)</td>
</tr>
<tr>
<td></td>
<td>NU</td>
<td>NDSL</td>
</tr>
<tr>
<td></td>
<td>PU</td>
<td>Federal Perkins</td>
</tr>
</tbody>
</table>

- **Status** - A two-character code and description indicating the status of a loan.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AE</td>
<td>Loan Transferred to New Holder</td>
</tr>
<tr>
<td>AL</td>
<td>Abandoned Loan</td>
</tr>
<tr>
<td>BC</td>
<td>Bankruptcy Claim, Discharged</td>
</tr>
<tr>
<td>BK</td>
<td>Bankruptcy Claim, Active</td>
</tr>
<tr>
<td>CA</td>
<td>Cancelled</td>
</tr>
<tr>
<td>CS</td>
<td>Closed School Discharge</td>
</tr>
<tr>
<td>DA</td>
<td>Deferred</td>
</tr>
<tr>
<td>DB</td>
<td>Defaulted, Then Bankrupt, Active, Chapter 13</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>DC</td>
<td>Defaulted, Compromise</td>
</tr>
<tr>
<td>DD</td>
<td>Defaulted, Then Died</td>
</tr>
<tr>
<td>DE</td>
<td>Death</td>
</tr>
<tr>
<td>DF</td>
<td>Defaulted, Unresolved</td>
</tr>
<tr>
<td>DI</td>
<td>Disability</td>
</tr>
<tr>
<td>DK</td>
<td>Defaulted, Then Bankrupt, Discharged, Chapter 13</td>
</tr>
<tr>
<td>DL</td>
<td>Defaulted, In Litigation</td>
</tr>
<tr>
<td>DN</td>
<td>Defaulted, Paid in Full Through Consolidation Loan</td>
</tr>
<tr>
<td>DO</td>
<td>Defaulted, Then Bankrupt, Active, Other</td>
</tr>
<tr>
<td>DP</td>
<td>Defaulted, Paid in Full</td>
</tr>
<tr>
<td>DR</td>
<td>Defaulted Loan Included in a Rolled-Up Loan</td>
</tr>
<tr>
<td>DS</td>
<td>Defaulted, Then Disabled</td>
</tr>
<tr>
<td>DT</td>
<td>Defaulted, Collection Terminated</td>
</tr>
<tr>
<td>DU</td>
<td>Defaulted, Unresolved</td>
</tr>
<tr>
<td>DW</td>
<td>Defaulted, Write-off</td>
</tr>
<tr>
<td>DX</td>
<td>Defaulted, Six Consecutive Payments</td>
</tr>
<tr>
<td>DZ</td>
<td>Defaulted, Six Consecutive Payments, Then Missed Payment(s)</td>
</tr>
<tr>
<td>FB</td>
<td>Forbearance</td>
</tr>
<tr>
<td>FC</td>
<td>False Certification Discharge</td>
</tr>
<tr>
<td>FR</td>
<td>Fraud</td>
</tr>
<tr>
<td>FX</td>
<td>Fraud Satisfied</td>
</tr>
<tr>
<td>IA</td>
<td>Loan Originated</td>
</tr>
<tr>
<td>ID</td>
<td>In School or Grace Period</td>
</tr>
<tr>
<td>IG</td>
<td>In Grace Period</td>
</tr>
<tr>
<td>IM</td>
<td>In Military Grace</td>
</tr>
<tr>
<td>IP</td>
<td>In Post-Deferment Grace Period</td>
</tr>
<tr>
<td>IT</td>
<td>Loan Transferred by DCS</td>
</tr>
<tr>
<td>OD</td>
<td>Defaulted, Then Bankrupt, Discharged, Other</td>
</tr>
<tr>
<td>PC</td>
<td>Paid in Full Through Consolidation Loan</td>
</tr>
<tr>
<td>PD</td>
<td>Permanent Disability</td>
</tr>
<tr>
<td>PF</td>
<td>Paid in Full</td>
</tr>
<tr>
<td>PM</td>
<td>Presumed Paid in Full</td>
</tr>
<tr>
<td>PN</td>
<td>Non-Defaulted, Paid in Full Through Consolidation Loan</td>
</tr>
<tr>
<td>PZ</td>
<td>PLUS Child Death</td>
</tr>
<tr>
<td>RF</td>
<td>Refinanced</td>
</tr>
<tr>
<td>RH</td>
<td>Loan Transferred by DCS to Sallie Mae</td>
</tr>
<tr>
<td>RP</td>
<td>In Repayment</td>
</tr>
<tr>
<td>TG</td>
<td>Loan Transferred by DCS to GA927</td>
</tr>
<tr>
<td>UA</td>
<td>Temporarily Uninsured-No Default Claim Requested</td>
</tr>
<tr>
<td>UB</td>
<td>Temporarily Uninsured-Default Claim Denied</td>
</tr>
<tr>
<td>UC</td>
<td>Permanently Uninsured/Unreinsured-No Default Claim Requested</td>
</tr>
<tr>
<td>----</td>
<td>------------------------------------------------------------</td>
</tr>
<tr>
<td>UD</td>
<td>Permanently Uninsured/Unreinsured-Default Claim Denied</td>
</tr>
<tr>
<td>UI</td>
<td>Uninsured</td>
</tr>
<tr>
<td>VA</td>
<td>Discharged, Veteran Permanently Disabled</td>
</tr>
<tr>
<td>XD</td>
<td>Defaulted, six consecutive payments</td>
</tr>
</tbody>
</table>

The loan status code is blue and underlined if the student is not in default, yellow and underlined if the student is in default. The loan status codes are hyperlinks back to the Loan Status Code list above.

- A blue "R" to the left of the Loan Detail button indicates reaffirmation data exists for a specific loan. Pass your cursor over the symbol for an explanation. The explanation will also display as a note at the bottom of the page.

- **School Name and OPEID**-The school that the student currently attends or attended when the loan was obtained. School Name and OPEID are not displayed for Consolidation Loans (CL, D5, D6, D7, and D9) or Refinanced Loans (RF).

- **Guaranteed Amt** (for FFEL)-The original loan amount, before any cancellations.

- **Approved Amt** (for Direct Loans and Perkins Loans)-The original loan amount, before any cancellations.

- **Disbursed Amt**-The cumulative net amount of the loan actually disbursed to a borrower.

- **OPB (Outstanding Principal Balance)**-The cumulative dollar amount due on a loan, as reported by the data provider.

A red ‘C’ to the left of the label indicates capitalized interest. This icon will appear on open loans when capitalized interest has been reported by the data provider or when the reported OPB is greater than the amount disbursed. If no capitalized interest has been reported by the data provider or if the OPB is less than the amount disbursed, the red ‘C’ icon will not appear.

If there is no dollar value in this field, but the loan is still in an open status, an informational icon will display in this field. Pass your cursor over the icon for an explanation. The explanation and capitalized interest will also display as a note at the bottom of the page.

- **Agg. OPB**-The calculated loan level amount that is added to the student's Aggregate Loan Information Outstanding Principal Balance, and is the amount, plus pending disbursements, that counts against the student's overall loan limits. How this value is calculated depends on the loan type and when the loan was issued.

**Note:** Additional considerations for FFEL Consolidation loan (CL) Agg OPB: For a FFEL Consolidation loan, any underlying Perkins and/or PLUS loans are factored out of the unallocated amount(s). Results of this adjustment will be displayed in the Agg OPB field on the Loan Summary page.

**Note:** Additional considerations for Direct Consolidation Sub loan (D6) Agg OPB: For a Direct Consolidation Sub loan, any underlying Perkins loans are factored out. Results of this adjustment will be displayed in the Agg OPB field on the Loan Summary page.

**Note:** Additional considerations for PLUS Graduate/Professional loan Agg. OPB: FFEL PLUS Graduate/Professional (GB) and Direct PLUS Graduate/Professional (D3) loans taken out by the Graduate/Professional student will not have calculated amounts.

**Note:** Additional considerations for Direct Unsubsidized (TEACH) loan Agg. OPB: Direct Unsubsidized Loans (D8) taken out by the student/borrower will not have calculated amounts.

- **Loan Date**-For FFEL, the date the loan was originally guaranteed; for Direct Loan and Perkins loans, the date the loan was originally approved.

- **Sep. Loan Ind (Separate Loan Indicator)**-An indicator used to differentiate among multiple FFEL loans awarded on the same loan date to the same borrower attending the same school. This field is used mostly by Guaranty Agencies.

- **Loan Period**-The period of study for which the loan was originally taken out.

A blue "D" to the left of the label indicates discharge(s) exist for the loan. Pass your cursor over the symbol for an explanation. The explanation will also display as a note at the bottom of the page.
● Last Disbursement Date - The date of the most recent disbursement to the borrower for a specific loan.

● Last Disbursement Amt. - The dollar amount of the most recent disbursement to the borrower for a specific loan.

● Acad. Lv (Academic Level) - The student's academic level at the time the loan was provided. The codes are defined as follows:

<table>
<thead>
<tr>
<th>Code</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Freshman/First Year (including proprietary institution programs that are less than 1 year in duration)</td>
</tr>
<tr>
<td>2</td>
<td>Sophomore/Second Year</td>
</tr>
<tr>
<td>3</td>
<td>Junior/Third Year</td>
</tr>
<tr>
<td>4</td>
<td>Senior/Fourth Year</td>
</tr>
<tr>
<td>5</td>
<td>Fifth/Other Undergraduate (may include sixth year undergraduate and continuing education students)</td>
</tr>
<tr>
<td>A</td>
<td>First Year Graduate/Professional</td>
</tr>
<tr>
<td>B</td>
<td>Second Year Graduate/Professional</td>
</tr>
<tr>
<td>C</td>
<td>Third Year Graduate/Professional</td>
</tr>
<tr>
<td>D</td>
<td>Beyond Third Year Graduate/Professional</td>
</tr>
<tr>
<td>G</td>
<td>Graduate/Professional, year of study unknown</td>
</tr>
<tr>
<td>N</td>
<td>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)</td>
</tr>
</tbody>
</table>

● Additional Unsubsidized Code - Indicates that a Direct Stafford Unsubsidized (D2) or an FFEL Stafford Unsubsidized (SU) loan was awarded as an Additional Unsubsidized loan. Additional Unsubsidized loans are identified by the following codes:
  ○ P-PLUS loan denial
  ○ H-Enrollment in eligible Health Profession programs
  ○ B-Both

● Discharge Code - Indicates that the loan has been discharged. Discharges are identified by the following codes:
  ○ D-Death
  ○ P-Permanent

● Loss of Sub - Indicates that a Direct Stafford Subsidized (SULA Eligible) (D0) or Direct Consolidation Subsidized (SULA Eligible) (D9) loan has lost interest subsidy. When populated this field will contain a 'Y'. All other times, this field will not appear.

● GA (Guaranty Agency) or ED Servicer - The name and code of the Guaranty Agency or ED Servicer associated with the loan.

● Lender - The name and code of the lender associated with the loan.

● Servicer - The name and code of the lender servicer associated with the loan.

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

● If a lock icon appears to the left of the Loan Type, the loan is batch locked.

● PLUS Loans - FFEL PLUS (PL), Direct PLUS (D4), and Direct Consolidation PLUS (D7) taken out on behalf of a student appear in the student's Loan Summary information but do not figure into the student's Aggregate totals. Such loans are added to the Aggregate totals on the PLUS borrower's Loan History.

● Direct Unsubsidized Loans (D8) taken out by the student/borrower appear in the student's Loan Summary information but do not figure into the student's Aggregate totals.

To obtain detailed information about each loan, click the number to the left of the loan header or click the Loan Detail button to the right of the header to view the Loan Detail page for that loan. The numbering of the list is for display purposes only. Sorting or filtering the list renumbers it.
At the bottom of the page, links are provided to view the next page of the student's record, to view the previous page or the top of the current page or to view the Privacy Act page. There is also a legend defining the various icons that may appear within the Loan Summary section of this page.

Last updated: January 20, 2019
Loan Detail

Purpose of this page

The Loan Detail page displays historical information for a loan: loan details; loan amounts; loan activities; loan status changes; loan claim details; loan collection details; and Guaranty Agency/Lender/Servicer Agent History. If you have authorized access, you can update or add reaffirmation information from this page.

Navigation

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

How to interpret Information for Loan Detail

The Loan Last Updated date is the date on which the loan was last modified.

If reaffirmation data for the loan is present, the Reaffirmation History button will be available.

How to view ADS List page

Directly below the Loan Last Updated date users will see a button (ADS List) that will allow them to view Active Duty Status information for a Student, PLUS borrower or a Co-Borrower.

How to interpret Details for Loan

The Details for Loan table displays the following information:

- **Loan Type**: The type of Title IV award made with a formal agreement for repayment with interest. The loan types are defined as follows:

<table>
<thead>
<tr>
<th>Program</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FFEL</td>
<td>CL</td>
<td>FFEL Consolidation</td>
</tr>
<tr>
<td></td>
<td>GB</td>
<td>FFEL PLUS Graduate/Professional</td>
</tr>
<tr>
<td></td>
<td>PL</td>
<td>FFEL PLUS</td>
</tr>
<tr>
<td></td>
<td>RF</td>
<td>FFEL Refinanced</td>
</tr>
<tr>
<td></td>
<td>SF</td>
<td>FFEL Stafford Sub or FFEL Stafford Non-Sub</td>
</tr>
<tr>
<td></td>
<td>SL</td>
<td>Supplemental Loan (SLS)</td>
</tr>
<tr>
<td></td>
<td>SU</td>
<td>FFEL Stafford Unsub</td>
</tr>
<tr>
<td>FDLP</td>
<td>D0</td>
<td>Direct Stafford Subsidized (SULA Eligible)</td>
</tr>
<tr>
<td></td>
<td>D1</td>
<td>Direct Stafford Subsidized</td>
</tr>
<tr>
<td></td>
<td>D2</td>
<td>Direct Stafford Unsubsidized</td>
</tr>
<tr>
<td></td>
<td>D3</td>
<td>Direct PLUS Graduate/Professional</td>
</tr>
<tr>
<td></td>
<td>D4</td>
<td>Direct PLUS</td>
</tr>
<tr>
<td></td>
<td>D5</td>
<td>Direct Consolidation Unsub</td>
</tr>
<tr>
<td></td>
<td>D6</td>
<td>Direct Consolidation Sub</td>
</tr>
<tr>
<td></td>
<td>D7</td>
<td>Direct PLUS Consolidation</td>
</tr>
<tr>
<td></td>
<td>D8</td>
<td>Direct Unsubsidized (TEACH)</td>
</tr>
</tbody>
</table>
- **Loan Period Start** - The beginning date of when classes are (or were) to begin for the period covered by the loan.
- **Loan Period End** - The ending date of when classes ended (or were to end) for the period covered by the loan.
- **Sched. Repayment Date** - The date the student entered or is scheduled to enter repayment.
- **Date of Default for CDR** - The date on which the loan defaulted used for cohort default rate calculation.
- **Next Payment Due Date** - The date of the earliest unpaid installment as of reporting.
- **Academic Year Begin Date** - The date when the student's academic year begins (or has begun) for the period covered by the loan.
- **Academic Year End Date** - The date when the student's academic year ended (or will end) for the period covered by the loan.
- **Borrowed at OPEID** - The eight-digit ED code for the school where the student was enrolled or accepted for enrollment at the time the loan was originated. "N/A" displays as the Borrowed at OPEID for consolidation loans (CL, D5, D6, D7, D9) and FFEL refinanced loans (RF).
- **Borrowed at Name** - The name of the school where the student was enrolled or accepted for enrollment at the time the loan was originated. Click the name of the organization to link to its Organization Contact list.

"N/A" displays as the school name for consolidation loans (CL, D5, D6, D7, D9) and FFEL refinanced loans (RF). This is in accordance with reporting requirements and has no bearing on the status of the loan. Consolidation loans may be entered into when a student completes his/her program of study at a particular school and wants to consolidate loans received from different schools.

- **NSLDS Label** - A unique code used by NSLDS to identify a loan and used for reporting a link between a Consolidation Loan and its underlying loans.
- **Academic Level** - The student’s academic level at the time the loan was provided. The codes are defined as follows:

<table>
<thead>
<tr>
<th>Code</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1 Freshman/First Year (including proprietary institution programs that are less than 1 year in duration)</td>
</tr>
<tr>
<td>2</td>
<td>Sophomore/Second Year</td>
</tr>
<tr>
<td>3</td>
<td>Junior/Third Year</td>
</tr>
<tr>
<td>4</td>
<td>Senior/Fourth Year</td>
</tr>
<tr>
<td>5</td>
<td>Fifth/Other Undergraduate (may include sixth year undergraduate and continuing education students)</td>
</tr>
<tr>
<td>A</td>
<td>First Year Graduate/Professional</td>
</tr>
<tr>
<td>B</td>
<td>Second Year Graduate/Professional</td>
</tr>
<tr>
<td>C</td>
<td>Third Year Graduate/Professional</td>
</tr>
<tr>
<td>D</td>
<td>Beyond Third Year Graduate/Professional</td>
</tr>
<tr>
<td>Award ID</td>
<td>21 character identifier that uniquely identifies a grant or a loan.</td>
</tr>
<tr>
<td>----------</td>
<td>--------------------------------------------------------------------</td>
</tr>
<tr>
<td>Separate Loan Ind</td>
<td>An indicator used to differentiate among multiple loans of the same loan date for the same borrower or student attending the same school. This field is used mostly by Guaranty Agencies.</td>
</tr>
<tr>
<td>Delinquency Begin Date</td>
<td>The date reported on which a loan became delinquent.</td>
</tr>
<tr>
<td>Interest Rate</td>
<td>The interest rate that is applied to the loan. A variable interest rate is indicated by the abbreviation VAR.</td>
</tr>
</tbody>
</table>

### How to interpret Amounts for Loan

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

- **Date**
  - **Loan**: The date the loan was originated.
  - **Outstanding Principal Balance**: The date the outstanding principal balance was updated.
  - **Outstanding Interest Balance**: The date the outstanding interest balance was updated.
  
  **Note**: If the history icon displays next to the Outstanding Interest Balance, click the icon to navigate to the [Outstanding Amount Balance History](#) page.

- **Amount**
  - **Loan**: The original loan amount before any cancellations.
  - **Capitalized Interest**: The cumulative amount of unpaid accrued interest that has been added to the outstanding principal balance.
  - **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.
  - **Calculated Subsidized Agg. OPB**: For Consolidation loans, the amount of the loan, calculated by NSLDS on the basis of the underlying loans, that counts toward a student's aggregate subsidized outstanding principal balance.
  - **Calculated Unsubsidized Agg. OPB**: For Consolidation loans, the amount of the loan, calculated by NSLDS on the basis of the underlying loans, that counts toward a student's aggregate unsubsidized outstanding principal balance.
  - **Calculated Combined Agg. OPB**: For Consolidation loans, the amount of the loan, calculated by NSLDS on the basis of the underlying loans, that counts toward a student's aggregate combined outstanding principal balance.
  - **Consolidation, Unallocated Agg. OPB**: For Consolidation loans, the amount of the loan, calculated by NSLDS on the basis of the underlying loans, that does not count toward subsidized or unsubsidized aggregate outstanding principal balance.
  - **Other Fees**: The accumulated fees added to late or defaulted loans. Examples of other fees are late fees, collection costs, or court costs.

### How to interpret Activities for Loan

The Activities for Loan table displays the disbursement, cancellation, refund, deferment, discharge and forgiveness activities for each loan. The table shows the date and amount for each activity. If the loan has no event activity, the table displays N/A (not available) for the disbursements. If a loan was discharged, a cumulative discharge dollar amount will be displayed.
- **Disbursements**
  - **Date**: The date that the latest loan disbursement was made.
  - **Amount**: The amount of disbursements released to a borrower.

- **Cancellation**
  - **Date**: The date when all or part of the Title IV loan was canceled
  - **Amount**: The cumulative amount of the Title IV loan that was canceled.
  - **Perkins Cancellation Type**: The reason a Federal Perkins Loan (National Defense Loan (DU), Perkins Expanded Lending (EU), Income-Contingent Loan (IC), National Direct Student Loan (NU), or Federal Perkins Loan (PU)) was cancelled.

<table>
<thead>
<tr>
<th>Perkins Cancellation Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>DT</td>
<td>Defense Teacher/Military Prior To 1972</td>
</tr>
<tr>
<td>FF</td>
<td>Firefighter</td>
</tr>
<tr>
<td>LB</td>
<td>Librarian</td>
</tr>
<tr>
<td>PB</td>
<td>Perkins Bankruptcy</td>
</tr>
<tr>
<td>PD</td>
<td>Perkins Death</td>
</tr>
<tr>
<td>PE</td>
<td>Perkins Early Intervention</td>
</tr>
<tr>
<td>PI</td>
<td>Perkins Disability</td>
</tr>
<tr>
<td>PL</td>
<td>Perkins Law Enforcement</td>
</tr>
<tr>
<td>PM</td>
<td>Perkins Military Service</td>
</tr>
<tr>
<td>PN</td>
<td>Perkins Nurse/Medical Technician</td>
</tr>
<tr>
<td>PS</td>
<td>Perkins Subject Matter Area</td>
</tr>
<tr>
<td>PT</td>
<td>Perkins Teacher Service</td>
</tr>
<tr>
<td>PV</td>
<td>Perkins Volunteer Service</td>
</tr>
<tr>
<td>SP</td>
<td>Speech Language Pathologist</td>
</tr>
<tr>
<td>TB</td>
<td>Faculty Member at Tribal College or University</td>
</tr>
</tbody>
</table>

- **Refunds**
  - **Date**: The date that a lender received a refund from a school.
  - **Amount**: The amount of refund paid to a lender on a loan.

- **Deferments**
  - **Start Date**: The date when a deferment actually begins.
  - **End Date**: The date when a deferment is projected to end or actually ends. Includes post-deferment grace period if applicable.
  - **Type**: One of the deferment reasons for postponing repayment of loan principal and interest. The codes for the deferment types are defined as follows:

<table>
<thead>
<tr>
<th>Deferment Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>AC</td>
<td>Action Programs</td>
</tr>
<tr>
<td>AP</td>
<td>Armed Forces or PHS</td>
</tr>
<tr>
<td>CD</td>
<td>Cancer Treatment</td>
</tr>
<tr>
<td>EH</td>
<td>Economic Hardship</td>
</tr>
<tr>
<td>EP</td>
<td>Full-Time Family Service to High Risk</td>
</tr>
<tr>
<td>FM</td>
<td>Full-Time Teacher of Math</td>
</tr>
<tr>
<td>FN</td>
<td>Full-Time Nurse/Medical Tech</td>
</tr>
<tr>
<td>FP</td>
<td>Full-Time Provider</td>
</tr>
<tr>
<td>FS</td>
<td>Full-Time Special Ed Teacher</td>
</tr>
<tr>
<td>FT</td>
<td>Full-Time Student</td>
</tr>
<tr>
<td>GF</td>
<td>Graduate Fellowship Program</td>
</tr>
<tr>
<td>HD</td>
<td>Head Start</td>
</tr>
<tr>
<td>HS</td>
<td>Hardship</td>
</tr>
<tr>
<td>HT</td>
<td>Half-Time Student</td>
</tr>
<tr>
<td>IR</td>
<td>Internship/Residency</td>
</tr>
<tr>
<td>LE</td>
<td>Law Enforcement</td>
</tr>
<tr>
<td>LF</td>
<td>Deferred Pending Loan Forgiveness Cancellation</td>
</tr>
<tr>
<td>MO</td>
<td>Active Duty Military/Military Operation</td>
</tr>
<tr>
<td>MR</td>
<td>National Guard, Reservist or Retired Military</td>
</tr>
<tr>
<td>NO</td>
<td>National Oceanic and Atmospheric Administration Corps</td>
</tr>
<tr>
<td>PC</td>
<td>Peace Corps</td>
</tr>
<tr>
<td>PD</td>
<td>Parent Plus In-School Deferment Type Code</td>
</tr>
<tr>
<td>PE</td>
<td>Six Month Post-Enrollment Period Deferment Type Code</td>
</tr>
<tr>
<td>PL</td>
<td>Parental Leave</td>
</tr>
<tr>
<td>PP</td>
<td>Parental PLUS Borrower</td>
</tr>
<tr>
<td>RT</td>
<td>Rehabilitation Training</td>
</tr>
<tr>
<td>TD</td>
<td>Temporary Disability</td>
</tr>
<tr>
<td>TE</td>
<td>Tax-Exempt Organizations</td>
</tr>
<tr>
<td>TL</td>
<td>Teacher Low-Income Institution</td>
</tr>
<tr>
<td>TS</td>
<td>Teacher Shortage</td>
</tr>
<tr>
<td>UE</td>
<td>Unemployment less than 3 years</td>
</tr>
<tr>
<td>UN</td>
<td>Unemployment less than 2 years</td>
</tr>
<tr>
<td>WM</td>
<td>Working Mother</td>
</tr>
</tbody>
</table>

- **Repayment Plan**
  - **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.
  - **IDR Plan Anniv. Date (MMDDCCYY)** - The date on which the income-driven payment amount resets based on a borrower's recertification. (For ED Servicers, this is record type AM, field code 017, as described in Appendix A of the NSLDS Data Provider Instructions.)
- **Type** - A code indicating the type of current repayment plan for a loan that has entered repayment.

  The Repayment Plan Type codes are defined as:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1</td>
<td>Income-Contingent Repayment Plan - Formula Amount (Pre-HERA/CCRAA)</td>
</tr>
<tr>
<td>C2</td>
<td>Income-Contingent Repayment Plan - Capped Amount (Pre-HERA/CCRAA)</td>
</tr>
<tr>
<td>C3</td>
<td>Income-Contingent Repayment Plan (Post-HERA/CCRAA)</td>
</tr>
<tr>
<td>CG</td>
<td>Consolidation Graduated Repayment</td>
</tr>
<tr>
<td>CS</td>
<td>Consolidation Standard Repayment</td>
</tr>
<tr>
<td>EF</td>
<td>Extended Fixed Repayment</td>
</tr>
<tr>
<td>EG</td>
<td>Extended Graduated Repayment</td>
</tr>
<tr>
<td>FE</td>
<td>Fixed Payment, Extended Term</td>
</tr>
<tr>
<td>FF</td>
<td>Fixed Payment, Fixed Term</td>
</tr>
<tr>
<td>GR</td>
<td>Graduated Repayment</td>
</tr>
<tr>
<td>I3</td>
<td>Income-Based Repayment Plan 2014 With Financial Hardship</td>
</tr>
<tr>
<td>I4</td>
<td>Income-Based Repayment Plan 2014 Without Financial Hardship</td>
</tr>
<tr>
<td>I5</td>
<td>Revised Pay as You Earn (REPAYE) Repayment Plan</td>
</tr>
<tr>
<td>IB</td>
<td>Income-Based Repayment - Partial Financial Hardship</td>
</tr>
<tr>
<td>IC</td>
<td>Income-Contingent</td>
</tr>
<tr>
<td>IL</td>
<td>Income-Based Repayment Plan - No Partial Financial Hardship</td>
</tr>
<tr>
<td>IS</td>
<td>Income-Sensitive Repayment Plan</td>
</tr>
<tr>
<td>J1</td>
<td>Alternative Fixed Payment Repayment Plan</td>
</tr>
<tr>
<td>J2</td>
<td>Alternative Fixed Term Repayment Plan</td>
</tr>
<tr>
<td>J3</td>
<td>Alternative Graduated Payment Repayment Plan</td>
</tr>
<tr>
<td>J4</td>
<td>Alternative Negative Amortization Repayment</td>
</tr>
<tr>
<td>J5</td>
<td>Alternative Fixed Post REPAYE Repayment Plan</td>
</tr>
<tr>
<td>P1</td>
<td>Pay as You Earn - No Partial Financial Hardship</td>
</tr>
<tr>
<td>PA</td>
<td>Pay as You Earn - Partial Financial Hardship</td>
</tr>
<tr>
<td>SF</td>
<td>Standard Repayment</td>
</tr>
<tr>
<td>SG</td>
<td>Graduated 10-Year Repayment</td>
</tr>
<tr>
<td>SK</td>
<td>Perkins Standard Repayment</td>
</tr>
<tr>
<td>SP</td>
<td>Special Plan/Secretary's Option</td>
</tr>
</tbody>
</table>

- **Term** - The term or length of the repayment period in months for the current repayment plan.

- **Discharge**

  - **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.

  - **Amount** - The discharge amount, displayed by type, for the Title IV loan displayed.
• **Type** - One of the discharge reason codes for discharging all or part of a loan. The codes for the discharge types are defined as follows:

<table>
<thead>
<tr>
<th>Identifying Discharge Code</th>
<th>Assigned Discharge Code/Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BC</td>
<td>BC01</td>
<td>Bankruptcy, Chapter 13</td>
</tr>
<tr>
<td>BD</td>
<td>BD01</td>
<td>Borrower Defense Discharges</td>
</tr>
<tr>
<td>BO</td>
<td>BO01</td>
<td>Bankruptcy, Other</td>
</tr>
<tr>
<td>BR</td>
<td>BR01</td>
<td>Borrower Payment Returns</td>
</tr>
<tr>
<td>CB</td>
<td>CB01</td>
<td>Co-Borrower partial discharges</td>
</tr>
<tr>
<td>CS</td>
<td>CS01</td>
<td>Closed School</td>
</tr>
<tr>
<td></td>
<td>CS02</td>
<td>Automatic Closed School</td>
</tr>
<tr>
<td>DE</td>
<td>DE01</td>
<td>Death</td>
</tr>
<tr>
<td>DI</td>
<td>DI01</td>
<td>Disability</td>
</tr>
<tr>
<td>FC</td>
<td>FC01</td>
<td>False Certification</td>
</tr>
<tr>
<td>HC</td>
<td>HC01</td>
<td>Designated for hurricanes Rita and Katrina</td>
</tr>
<tr>
<td></td>
<td>HC02</td>
<td>Designated for hurricanes Harvey, Irma and Maria</td>
</tr>
<tr>
<td>ID</td>
<td>ID01</td>
<td>Identity Theft</td>
</tr>
<tr>
<td>UR</td>
<td>UR01</td>
<td>Unpaid Refund Discharges</td>
</tr>
<tr>
<td>VA</td>
<td>VA01</td>
<td>VA Discharge Traditional</td>
</tr>
<tr>
<td></td>
<td>VA02</td>
<td>VA Discharge Match Process</td>
</tr>
<tr>
<td>SC</td>
<td>SC11</td>
<td>9-11 Limited Special Circumstances</td>
</tr>
</tbody>
</table>

• **OPEID** - The eight-digit Office of Postsecondary Education Identification number for the school that awarded the loan receiving a discharge.

  ■ **Note:** - Consolidation loans (CL) only

• **Source** - The Guaranty Agency code or ED Region code that reported the loan discharge.

• **Partial or Full Discharge Indicator** - Indicates if the loan discharge reported is a partial or full discharge.

• **Forgiveness**

  • **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.

  • **Amount** - The discharge amount, displayed by type, for the Title IV loan displayed.

  • **Type** - The type of forgiveness applied to the loan account. The code for the forgiveness types are defined as follows:

<table>
<thead>
<tr>
<th>Loan Forgiveness Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>EE</td>
<td>Teacher Loan Forgiveness - Elementary Special</td>
</tr>
<tr>
<td>ES</td>
<td>Teacher Loan Forgiveness - Elementary School</td>
</tr>
<tr>
<td>Prev. Applied</td>
<td>Specifies if the borrower has previously applied for Teacher Loan Forgiveness.</td>
</tr>
<tr>
<td>---------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>State</td>
<td>The state in the US where a person applied for Teacher Loan Forgiveness.</td>
</tr>
<tr>
<td>Eligible Institution Type</td>
<td>The institution type where the borrower/student taught during the period that qualifies for loan forgiveness.</td>
</tr>
<tr>
<td>Partial or Full Forgiveness Indicator</td>
<td>Indicates if the loan forgiveness reported is a partial or full forgiveness.</td>
</tr>
</tbody>
</table>

### Forbearance

- **Start Date** - The date when forbearance actually 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. The code for forbearance types are as follows:

<table>
<thead>
<tr>
<th>Forbearance Types</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DC</td>
<td>Discretionary</td>
</tr>
<tr>
<td>MN</td>
<td>Mandatory</td>
</tr>
</tbody>
</table>
How to link loans to Special Consolidation

Above the Public Service Loan Forgiveness table, an authorized user will see a Special Consolidation button.

To link a loan to a Special Consolidation: Click Special Consolidation (this will redirect users to the Special Direct Consolidation Loan page).

How to Interpret Payment

The Payment table displays the most recent Payment data for the loan. The table will display when the loan is serviced by an ED Servicer unless the loan has been transferred to Debt Management and Collection System (DMCS) or Total and Permanent Disability (TPD).

**Most Recent Payment Date** - The date when the latest payment was received by the loan holder.

**Cumulative Amount Paid** - The total amount paid on the loan as of the Most Recent Payment Effective Date.

How to Interpret Public Service Loan Forgiveness

The Public Service Loan Forgiveness table displays the **Cumulative Matched Months** which is the total number of qualifying payments made on the loan while employed in a qualifying public service. Matched months are reported to NSLDS by fiscal year (e.g., FY2012 is from October 1, 2011-September 30, 2012).

How to Interpret Status Changes for Loan

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

- **Date Changed** - The date a loan status first became effective, with no interruptions. (This date is not necessarily the date the status was reported to the NSLDS. A loan status may have changed but not updated in NSLDS for various reasons until months or years thereafter.)

- **Status** - The two-character code and description indicating the status of a loan. The loan status codes are defined as follows:

  **Note**: If the history icon displays next to the Status column, click the icon to navigate to the Outstanding Amount Balance History page.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AE</td>
<td>Loan Transferred to New Holder</td>
</tr>
<tr>
<td>AL</td>
<td>Abandoned Loan</td>
</tr>
<tr>
<td>BC</td>
<td>Bankruptcy Claim, Discharged</td>
</tr>
<tr>
<td>BK</td>
<td>Bankruptcy Claim, Active</td>
</tr>
<tr>
<td>CA</td>
<td>Cancelled</td>
</tr>
<tr>
<td>CS</td>
<td>Closed School Discharge</td>
</tr>
<tr>
<td>DA</td>
<td>Deferred</td>
</tr>
<tr>
<td>DB</td>
<td>Defaulted, Then Bankrupt, Active, Chapter 13</td>
</tr>
<tr>
<td>DC</td>
<td>Defaulted, Compromise</td>
</tr>
<tr>
<td>DD</td>
<td>Defaulted, Then Died</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td>DE</td>
<td>Death</td>
</tr>
<tr>
<td>DF</td>
<td>Defaulted, Unresolved</td>
</tr>
<tr>
<td>DI</td>
<td>Disability</td>
</tr>
<tr>
<td>DK</td>
<td>Defaulted, Then Bankrupt, Discharged, Chapter 13</td>
</tr>
<tr>
<td>DL</td>
<td>Defaulted, In Litigation</td>
</tr>
<tr>
<td>DN</td>
<td>Defaulted, Paid in Full Through Consolidation Loan</td>
</tr>
<tr>
<td>DO</td>
<td>Defaulted, Then Bankrupt, Active, Other</td>
</tr>
<tr>
<td>DP</td>
<td>Defaulted, Paid in Full</td>
</tr>
<tr>
<td>DR</td>
<td>Defaulted Loan Included in a Rolled-Up Loan</td>
</tr>
<tr>
<td>DS</td>
<td>Defaulted, Then Disabled</td>
</tr>
<tr>
<td>DT</td>
<td>Defaulted, Collection Terminated</td>
</tr>
<tr>
<td>DU</td>
<td>Defaulted, Unresolved</td>
</tr>
<tr>
<td>DW</td>
<td>Defaulted, Write-off</td>
</tr>
<tr>
<td>DX</td>
<td>Defaulted, Six Consecutive Payments</td>
</tr>
<tr>
<td>DZ</td>
<td>Defaulted, Six Consecutive Payments, Then Missed Payment(s)</td>
</tr>
<tr>
<td>FB</td>
<td>Forbearance</td>
</tr>
<tr>
<td>FC</td>
<td>False Certification Discharge</td>
</tr>
<tr>
<td>FR</td>
<td>Fraud</td>
</tr>
<tr>
<td>FX</td>
<td>Fraud Satisfied</td>
</tr>
<tr>
<td>IA</td>
<td>Loan Originated</td>
</tr>
<tr>
<td>ID</td>
<td>In School or Grace Period</td>
</tr>
<tr>
<td>IG</td>
<td>In Grace Period</td>
</tr>
<tr>
<td>IM</td>
<td>In Military Grace</td>
</tr>
<tr>
<td>IP</td>
<td>In Post-Deferment Grace Period</td>
</tr>
<tr>
<td>IT</td>
<td>Loan Transferred by DCS</td>
</tr>
<tr>
<td>OD</td>
<td>Defaulted, Then Bankrupt, Discharged, Other</td>
</tr>
<tr>
<td>PC</td>
<td>Paid in Full Through Consolidation Loan</td>
</tr>
<tr>
<td>PD</td>
<td>Permanent Disability</td>
</tr>
<tr>
<td>PF</td>
<td>Paid in Full</td>
</tr>
<tr>
<td>PM</td>
<td>Presumed Paid in Full</td>
</tr>
<tr>
<td>PN</td>
<td>Non-Defaulted, Paid in Full Through Consolidation Loan</td>
</tr>
<tr>
<td>PZ</td>
<td>PLUS Child Death</td>
</tr>
<tr>
<td>RF</td>
<td>Refinanced</td>
</tr>
<tr>
<td>RH</td>
<td>Loan Transferred by DCS to Navient</td>
</tr>
<tr>
<td>RP</td>
<td>In Repayment</td>
</tr>
<tr>
<td>TG</td>
<td>Loan Transferred by DCS to GA927</td>
</tr>
<tr>
<td>UA</td>
<td>Temporarily Uninsured-No Default Claim Requested</td>
</tr>
<tr>
<td>UB</td>
<td>Temporarily Uninsured-Default Claim Denied</td>
</tr>
<tr>
<td>UC</td>
<td>Permanently Uninsured/Unreinsured-No Default Claim Requested</td>
</tr>
<tr>
<td>UD</td>
<td>Permanently Uninsured/Unreinsured-Default Claim Denied</td>
</tr>
</tbody>
</table>
### How to interpret Claim Details for Loan

The Claim Details for Loan table displays the following information:

- **Date**
  - **Insurance Claim Payment**: The date when a Guaranty Agency paid an insurance claim or supplemental claim to a lender. [The Loan Record Detail Report (LRDR) may show an insurance claim payment date that is different than the one that displays here.]
  - **Insurance Claim Refund**: The date when a Guaranty Agency received an insurance claim refund from a lender.
  - **Reinsurance Claim Payment**: The date when a Guaranty Agency requested reinsurance.
  - **Bankruptcy Claim Refund**: The date when a bankruptcy claim (previously paid as a reinsurance claim) was refunded to ED by a Guaranty Agency.
  - **Supplemental Reinsurance Payment Request**: The date when a supplemental reinsurance claim request is submitted to ED by a Guaranty Agency.
  - **Repurchase**: The date when a loan previously paid by a claim is repurchased by a lender (reasons may include loan rehabilitation).

- **Cumulative Amount**
  - **Insurance Claim Payment**: The cumulative amount of principal and interest including supplemental claims paid to a lender by a Guaranty Agency for an insurance claim on an FFELP loan. Amount does not include claims that were made prior to repurchase.
  - **Insurance Claim Refund**: The cumulative dollar amount of refund(s) from a lender to a Guaranty Agency. Refunds may occur because of an overpayment of a claim, late refunds from the institution to the lender, or borrower payments to the lender after default and prior to the request for reinsurance. If reinsurance has been requested from ED, report the amount as a collection. Amount does not include refunds that were made prior to repurchase.
  - **Reinsurance Claim Payment**: The dollar amount of a reinsurance claim requested of ED by a Guaranty Agency. Amount does not include claims that were made prior to repurchase.
  - **Bankruptcy Claim Refund**: The cumulative amount remitted to ED for bankruptcy claim refund(s) on a loan. A guarantor refunds reinsurance to ED after the following sequence of events: the guarantor pays a bankruptcy claim to a lender before the bankruptcy court decides whether the loan is discharged; the guarantor collects reinsurance from ED; and the loan is not discharged by bankruptcy court. Amount does not include refunds that were made prior to repurchase.
  - **Supplemental Reinsurance Payment Request**: The cumulative dollar amount of supplemental reinsurance claim request(s) of ED by a Guaranty Agency. Amount does not include requests that were made prior to repurchase.
  - **Repurchase**: The principal dollar amount of repurchased claims (including repurchases of bankruptcy claims).

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

The reason codes include the following:

<table>
<thead>
<tr>
<th>Reason Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UI</td>
<td>Uninsured</td>
</tr>
<tr>
<td>VA</td>
<td>Discharged, Veteran Permanently Disabled</td>
</tr>
<tr>
<td>XD</td>
<td>Defaulted, six consecutive payments</td>
</tr>
</tbody>
</table>
The Recovery for Loan table displays the following:

- **Date**
  - **TOP**—The date when the Guaranty Agency/TIVAS last applied TOP (formerly IRS) offset principal and/or interest collections to a loan.
  - **GA/TIVAS**—The date when the Guaranty Agency/TIVAS last applied default collections (excluding TOP [formerly IRS] offset) or bankruptcy recovery to the loan principal and/or interest.
  - **DCS**—The date when the ED Servicer last applied DCS principal and/or interest collections to a loan.
  - **Wage Garnishment**—The date when the ED Servicer last applied Wage Garnishment principal and/or interest collections to a loan.
  - **Department of Justice**—The date when the ED Servicer last applied Department of Justice principal and/or interest collections to a loan.

- **Cumulative Principal Amount**
  - **TOP**—The cumulative amount collected and applied to principal through TOP (formerly IRS) offset. Amount does not include collections that were made prior to repurchase.
  - **GA/TIVAS**—The cumulative amount of Guaranty Agency/TIVAS default collections (excluding TOP [formerly IRS] collections) or bankruptcy recovery applied to loan principal. Amount does not include collections that were made prior to repurchase.
  - **DCS**—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.
Wage Garnishment- 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.

Department of Justice- 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
- TOP- The cumulative amount collected and applied to interest through TOP (formerly IRS) offset. Amount does not include collections that were made prior to repurchase.
- GA/TIVAS- The cumulative amount of Guaranty Agency default collections (excluding TOP [formerly IRS] collections) or bankruptcy recovery applied to loan interest. Amount does not include collections that were made prior to repurchase.
- DCS- 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.
- Wage Garnishment- 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.
- Department of Justice- 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.

How to interpret Guaranty Agency/Lender/Servicer Agent History

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

- Start
  - Guaranty Agency- The date the agency started overseeing the loan.
  - Lender- The date the lender started holding the loan.
  - Servicer Agent- The date the agent started servicing the loan.

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

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

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

- PLUS Loan information may appear at the top of this page below the Identifier information. It displays either the PLUS borrower's or the student's Name, SSN, and DOB (that is, you can view information on this loan by either typing the PLUS borrower's SSN or by typing the child's SSN when accessing Loan History).

- A PLUS Loan is a loan whereby the borrower is a parent who borrows on behalf of a student. Any PLUS loans appear on the student's Loan History. They are not added into the student's aggregate amounts, nor does a default status on any PLUS loans prevent a student from borrowing for himself or herself.

How to interpret IDR Progress Toward Forgiveness for Loan

The IDR Progress toward Forgiveness for Loan table displays the following information:

- Submission Date- The date the IDR Progress toward Forgiveness update was submitted.
- Income Based Repayment
- **Max. 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).

- **Pay As You Earn**
  - **Max. Repayment Term**: The total qualifying months of payments or deferments required for forgiveness under the PAYE plan.
  
  - **Progress Earned**: The accumulated count of earned qualifying months of payments or deferments required for forgiveness under the PAYE 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 PAYE plan made to a prior servicer(s).

- **Revised Pay As You Earn**
  - **Max. Repayment Term**: The total qualifying months of payments or deferments required for forgiveness under the REPAYE 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 REPAYE 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 REPAYE plan made to a prior servicer(s).

- **Income Contingent Repayment**
  - **Max. Repayment Term**: The total qualifying months of payments or deferments required for forgiveness under the ICR plan.
  
  - **Progress Earned**: The accumulated count of earned qualifying months of payments or deferments required for forgiveness under the ICR 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 ICR plan made to a prior servicer(s).

Note: This is only applicable to Federal Loan Servicers.

Last updated: August 23, 2020
Perkins Spreadsheet Submittal

Purpose of this page

The Perkins Spreadsheet Submittal allows school users the ability to report Perkins Loan data to NSLDS. The page allows for a size limit of the spreadsheet file up to 1,000 KB (1 MB) of data to be loaded at a time. Any file size over this limit will cause the spreadsheet to be rejected. File size varies depending on the version of spreadsheet software used. Access to this page is limited to domestic School and ED users.

Navigation

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

How to submit loan records using the Perkins Spreadsheet Submittal

To submit loan records via spreadsheet:

1. The user must put the data into a spreadsheet utilizing the file layout found in the NSLDS Perkins Spreadsheet Submittal Instruction Guide. It will give the user instructions regarding data formats and permitted values for each field.

   Note: This process accepts spreadsheets in Excel 97-2003 Workbook (*.XLS) or Excel Workbook (*.XLSX) format.

2. After the data has been entered into the spreadsheet provide the File Name where the Perkins Spreadsheet Submittal File is located.
   - Click the Browse button to choose the file location/name.
   - Click the Rows in Result File radio button which indicates how the Result file will be presented after the spreadsheet has been uploaded:
     - Result File contains all rows submitted
     - Result File contains only input rows with errors
   - Click the Background color for cells with error in Result File radio button which indicates how errors within the Result file will be colored after the spreadsheet has been uploaded:
     - Yellow background for errors
     - Grey background for errors
     - White background for errors
   - Click the Mouseover comment for cells with error in Result File radio button which indicates how the comments for errors will be presented after the spreadsheet has been uploaded:
     - Add comment to error cell
     - Do not add comment to error cell
   - Click the Validate button within the Perkins Spreadsheet Submittal box to validate the data without uploading the data from the spreadsheet to the database.
   - Click the Validate and Submit button within the Perkins Spreadsheet Submittal box to validate the data and upload the data from the spreadsheet to the database.

   Note: The Validate and Submit button is only visible to School and authorized ED users.

How to identify errors

If any row has data which fails edit, the name of the field in error is placed in the next available column at the right hand side of the spreadsheet. An error code and associated error message will appear in the adjacent column to the right.

If the radio button Add comment to error cell is selected, the cell containing an error displays a red triangle. To see the error message for a field, run your cursor over the field and the error message displays as a ToolTip.

Note: A maximum of fifteen errors per record will be returned. If more than fifteen errors exist in a single record the next fifteen errors will be returned when the initial fifteen errors are corrected and the record is resubmitted.
How to correct errors

Only records which have passed all of the edits will be loaded to NSLDS. Records which contain errors must be corrected in the spreadsheet and re-submitted. The spreadsheet displaying the errors may be used to re-submit the records in error. Be sure to save this spreadsheet in a secure manner, and with a unique name for future reference.

Please reference the NSLDS Perkins Data Provider Instructions Appendix A for field definitions, error codes and possible reasons for error.

Last updated: April 17, 2016
Borrower Name History

Purpose of this page

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

Navigation

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

How to interpret the Borrower Name History

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

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

Last updated: July 1, 2001

close
Borrower SSN History

Purpose of this page

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

Navigation

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

How to interpret the Borrower SSN History

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

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

Last updated: November 15, 2001

close
Student Contact Information

Purpose of this page

The Student Contact Information page displays postal addresses, email addresses, and phone numbers that have been reported to NSLDS for a student. Users can view historical (all) and valid (good) information based on effective dates and the source of the reported information. Schools that reported contact information for a student can use this page to update a contact records. Online users with Enrollment Update capabilities can use the Add Postal Address, Add Email Address, and Add/Update Phone Number buttons to report or update new information for the student.

Navigation

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

How to access student contact information

To display student contact information:

1. Type SSN
2. Type First Name
3. Type DOB (date of birth)
4. Click Retrieve

Previously Retrieved Borrower

Previously Retrieved Borrower allows users to select from a list of up to twenty (20) of their own previously successfully viewed unique borrowers. The dropdown list is in descending order, displaying the most recent borrower at the top. Once a unique borrower is selected from the list, the identifier(s) of the borrower selected will autofill on the student search.

To access the previously retrieved borrower activity:

1. Click the Previously Retrieved Borrower dropdown and select a borrower
2. Review the identifiers
3. Click Retrieve

How to interpret Student Contact Information page

The Student Contact Information page displays the following information:

- **Display Only** option: allows users to filter address records by 'All' or 'Good'
- **Sort By** option: allows users to filter address records by 'Effective Date' or 'Source'
- **Add Postal Address** button: navigates users to the Address Add page to report a new postal address for student.
- **Postal Address** table: displays student borrower's postal addresses by Street, City, State, Country, and Postal Code.
- **Add Email Address** button: navigates users to the Email Address Add page to report a new email address for student.
- **Email Address** table: displays student borrower's email addresses.
- **Add/Update Phone Number** button: navigates users to the Phone Number Add/Update page to update or report a new Phone Number for student.
- **Phone Number** table: displays student borrower's phone numbers.
- **Good** column: when checked, indicates that the source believes the address to be valid; when unchecked, indicates historical data (Postal Address and Email only)
- **Preferred** column: when checked, indicates that the phone number listed is the student borrower's preferred contact number; when unchecked, another phone number is preferred. (Phone Number only)
- **Effective Date** column: displays the effective date provided by the source. (Postal Address and Email only)
Type column: displays the phone number type provided by the source.
- **Country Code** column: displays the country code provided by the source.
- **Source** column: identifies the reporting organization or student that provided the address to NSLDS. Valid values are:
  - 'COD' for Income-Driven Repayment (IDR)
  - 'CPS' from the Central Processing System's (CPS) resulting FAFSA/ISIR
  - 'DLORGN' for Direct Loan (DL) Origination
  - 'EXITCNS' for Exit Counseling
  - GA/ED Servicer Code when provided by agency
  - OPEID when provided by a school
  - 'STUDENT' from NSLDS Student Access Web site

**Update** button: allows the original reporting school to change the 'Good' button checkmark. (Postal Address and Email only)

### How to filter student contact data

1. To filter data by 'All' or 'Good/Preferred', select an option from the **Display Only** drop-down menu and click Submit.
2. To sort by 'Effective Date' (descending) or 'Source' (ascending), select a sort option from the **Sort By** drop-down menu and click Submit.

### How to change the status of a record

School users from the original reporting school will see checkboxes in the 'Good' and 'Preferred' columns.

1. To change the status of a record that was previously known to be Good/Preferred, uncheck the box and click **Update Contact Information**.
2. To change the status of a historical record, check the box and click **Update Contact Information**

Last updated: January 20, 2019
The Address Add Page allows school users who have Enrollment access to create new address records for students at their schools.

**Navigation**

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

**How to add a new address record**

To add a new address record:

1. Indicate if the Address is valid by checking or leaving blank the 'Good' check box.
2. Type the Effective Date of the address. This date may be current or a future date.
3. Type the Street Address using both lines if necessary.
4. Type City.
5. Select State from drop down menu.
6. Select County from drop down menu.
7. Type Postal Code.
8. Click Submit button to submit new record.

Last updated: June 24, 2012
Phone Number Add/Update

Purpose of this page

The Phone Number Add/Update Page allows school users to update or create phone number records for students at their schools.

Navigation

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

How to add a new phone number record

To add or update a student phone number:

1. Indicate that the Phone Number is valid by checking the 'Good' check box.
2. Select Type from the drop down menu. Types are H-Home, C-Cell, W-Work, O-Other.
3. Enter Country Code. For U.S. phone numbers, leave blank
4. Enter Phone Number.
5. Click Submit to submit the new record.

Note: Updating a phone number will override the existing phone number data provided by the source for the type selected.

Last updated: April 13, 2014

close
Email Address Add

Purpose of this page

The Email Address Add Page allows school users to update or create new email address records for students at their schools.

Navigation

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

How to add a new email address record

To add a student email address:

1. Indicate that the Email Address is valid by checking the 'Good' check box.
2. Type the Effective Date of the email address. This date may be a current or future date.
3. Type the Email Address.
4. Click the Submit button to submit the new record.

Last updated: April 13, 2014
The Student/Borrower Selection page displays the names of student borrowers or PLUS borrowers that are identified or have been identified with a particular Social Security Number. It will allow you to identify borrowers in the NSLDS database who have shared the same Social Security Number. For example, one person may have borrowed as a student, and then taken out a PLUS loan for their dependent child. This page allows you to select the record you wish to view - the borrower as a student or as a PLUS borrower.

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

Student/Borrower Selection table

**Student**-Person who enrolled in an accredited institution and received Title IV aid.

- **Name**-name of Title IV Aid recipient.
- **Date of Birth**-date when a Title IV aid recipient was born.
- **SSN**-Social Security Number of a Title IV aid recipient.

**PLUS Borrower**-parent borrowing from an education loan program for their dependent child.

- **Name**-name of PLUS Borrower.
- **Date of Birth**-date when PLUS borrower was born.
- **SSN**-Social Security Number of PLUS Borrower.

To access the Loan History of the student or PLUS borrower, click on the numbered bullet next to the name of the borrower.

Last updated: July 1, 2001
Outstanding Amount Balance History

Purpose of this page

The Outstanding Amount Balance History Page displays loan balance information in chronological order. It displays the NSLDS System Effective Dates in descending order, the Outstanding Principal Balances (OPB), the Outstanding Interest Balances (OIB), and Loan Status Code changes. Each row represents a change in one or more of the following: OPB, OIB, or Loan Status Code. OPB, OIB, and Loan Status Code columns display values as reported by the Data Provider. A fifth column indicates whether the reported Loan Status Code is still considered historically correct. If a cell is shaded and marked N/A (not available), there is no data that pertains to the NSLDS System Effective Dates, OPB or OIB.

Navigation

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

How to filter the Outstanding Amount Balance History

The default setting for the Outstanding Amount Balance History page displays information in chronological order by NSLDS System Effective Dates.

You may choose which entries to display by filtering data using the Display Only options.

To use Display Only:

- In the Display Only list, select an option for one or multiple selection criteria.
- Click Retrieve.

Please remember that the filtering options you select will affect which line of information display on the page. If you do not see a specific line, check the filter option to make sure that it has not been excluded from display. Alternatively, change all selection criteria options to "All" and click Retrieve to remove filtering.

How to interpret Details for Outstanding Amount Balance History

The Details for the Outstanding Amount Balance History table displays the following information:

- **NSLDS System Effective Begin Date/End Date** - The date range during which an OPB, OIB, and/or a Loan Status Code was in effect.

- **Outstanding Principal Balance/Date Of** - The amount of Outstanding Principal Balance and the date of the Outstanding Principal Balance as reported to NSLDS.

- **Outstanding Interest Balance/Date Of** - The amount of Outstanding Interest Balance and the date of the Outstanding Interest Balance as reported to NSLDS.

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

- **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."

Example

Because documentation was not received on time, a Subsidized Stafford Loan moved into Repayment Status even though the
student was still in attendance at least half time. When the documentation was received, the reporting Data Provider updated the current loan status. Based upon this loan status change from the reporting Data Provider, NSLDS changed the value in the "Historically Correct Loan Status" field to "No" for the period that the loan had been reported in Repayment status.

Note: If the Information Icon (①) is displayed next to a value, it indicates changed data.

<table>
<thead>
<tr>
<th>NSLDS System Effective Begin Date/End Date</th>
<th>Outstanding Principal Balance/ Date Of</th>
<th>Outstanding Interest Balance/ Date Of</th>
<th>Status Code/ Date Of</th>
<th>Historically Correct Loan Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/02/2005</td>
<td>Current</td>
<td>$2,750</td>
<td>① IG</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>01/05/2004</td>
<td>01/05/2004</td>
<td>08/02/2005</td>
<td></td>
</tr>
<tr>
<td>12/02/2004</td>
<td>08/01/2005</td>
<td>$2,750</td>
<td>① $0</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>01/05/2004</td>
<td>01/05/2004</td>
<td>01/05/2004</td>
<td></td>
</tr>
<tr>
<td>11/02/2004</td>
<td>12/01/2004</td>
<td>$2,750</td>
<td>① $35</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>01/05/2004</td>
<td>05/01/2004</td>
<td>11/01/2004</td>
<td></td>
</tr>
<tr>
<td>05/02/2004</td>
<td>11/01/2004</td>
<td>$2,750</td>
<td>① $0</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>01/05/2004</td>
<td>01/05/2004</td>
<td>05/01/2004</td>
<td></td>
</tr>
<tr>
<td>01/05/2004</td>
<td>05/01/2004</td>
<td>① $2,750</td>
<td>① $0</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>01/05/2004</td>
<td>01/05/2004</td>
<td>01/05/2004</td>
<td></td>
</tr>
</tbody>
</table>

Last updated: January 22, 2012
Overpayment List

Purpose of this page

The Overpayment List page displays the most current Pell Grant, Perkins Loan, Supplemental Educational Opportunity Grant (SEOG), Academic Competitiveness Grant, National Science and Mathematics Access to Retain Talent (SMART) Grant, Teacher Education Assistance for College and Higher Education (TEACH) Grant and Iraq and Afghanistan Service Grant overpayments for students. To view a detailed history of a student's overpayment status, use the Overpayment History page. You can add an overpayment if you have authorized access.

Navigation

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

How to interpret Warning Symbols and Information Icons

The warning and informational icons at the top of the Loan, Grant, Overpayment Lists pages and the Student Access Interface page reflect the status of loans and other aid for which the borrower is personally responsible. Users wishing to check the status of PLUS borrowers who have taken out loans on behalf of students should view the Loan List page for the PLUS borrower and not rely on the student's page to verify the eligibility of the PLUS borrower for further aid.

- **Bankruptcy** - The borrower has one or more loans in active bankruptcy status.
- **Defaulted** - The borrower has one or more loans in default status.
- **Overpayments** - The student has one or more active overpayments in the NSLDS database.
- **Discharged** - The borrower has one or more loans with a discharge code. Discharges are identified according to the following order of precedence.
  - **Death**
  - **Permanent**
- **Additional Unsub** - The borrower has a Direct Stafford Unsubsidized (D2) or FFEL Stafford Unsubsidized (SU) loan with Additional Health Profession or PLUS Denial indicators.
- **Close or Equal to Undergrad Sub. Limit** - The borrower is close or equal to the undergraduate aggregate limit for subsidized loans.
- **Exceeds Undergrad Sub. Limit** - The borrower exceeds the undergraduate aggregate limit for subsidized loans.
- **Close or Equal to Undergrad Comb. Limit** - The borrower is close or equal to the undergraduate aggregate limit for subsidized and unsubsidized loans combined.
- **Exceeds Undergrad Comb. Limit** - The borrower exceeds the undergraduate aggregate limit for subsidized and unsubsidized loans combined.
- **Close or Equal to Graduate Sub. Limit** - The borrower is close or equal to the graduate aggregate limit for subsidized loans.
- **Exceeds Graduate Sub. Limit** - The borrower exceeds the graduate aggregate limit for subsidized loans.
- **Close or Equal to Graduate Comb. Limit** - The borrower is close or equal to the graduate aggregate limit for subsidized and unsubsidized loans combined.
- **Exceeds Graduate Comb. Limit** - The borrower exceeds the graduate aggregate limit for subsidized and unsubsidized loans combined.
- **Close to Pell Grant LEU Limit** - The student is close to the Pell Grant Lifetime Eligibility Used (LEU) limit.

- **Meets or Exceeds Pell Grant LEU Limit** - The student meets or exceeds the Pell Grant Lifetime Eligibility Used (LEU) limit.

- **Close to Iraq and Afghanistan Service Grant (IASG) LEU Limit** - The student is close to the Iraq and Afghanistan Service Grant (IASG) Lifetime Eligibility Used (LEU) limit.

- **Meets or Exceeds the Iraq and Afghanistan Service Grant (IASG) LEU Limit** - The student meets or exceeds the Iraq and Afghanistan Service Grant (IASG) Lifetime Eligibility Used (LEU) limit.

- **Grants** - The borrower has received one or more Pell Grants, Iraq and Afghanistan Service Grants, Academic Competitiveness Grants, National Science Mathematics Access to Retain Talent Grants, or Teacher Education Assistance for College and Higher Education Grants.

- **Fraud** - The borrower has been convicted of fraud.

- **Teacher Loan Forgiveness** - The student/borrower has one or more loans eligible for Teacher Loan Forgiveness (TLF).

- **Loan Discharge** - The student/borrower has one or more loans discharged.

- **Subsidized Usage Limit Applies (SULA)** - The borrower is subject to the 150% Direct Subsidized Loan Limit provision.

- **Loss of Subsidy** - The borrower has one or more Direct Stafford Subsidized (SULA Eligible) (D0) and/or Direct Consolidation Subsidized (SULA Eligible) (D9) loans that have lost interest subsidy.

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### How to add, update, and view Overpayment Information

- To add an overpayment, click **Add Overpayment**.
- To display an overpayment, click the number (i.e., 1) to the left of the Overpayment Type on the Overpayment Display; if you have authorized access, you can update or delete the overpayment.
- To view the detailed history of an overpayment, click the History Icon ( ) to access the Overpayment History page.
- To access the Organization Contact page, click the school name.

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### How to interpret the Overpayment List

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

- **Type** - The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. Five types are maintained in NSLDS:
  - **FEDERAL PELL GRANT** - A federal grant to help undergraduates pay for their education after high school.
  - **PERKINS LOAN** - Campus-based federal loans include the National Defense Loan (DU), the Perkins Expanded Lending (EU), the Income Contingent Loan (IC), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).
  - **SUPPLEMENTAL EDUCATION OPPORTUNITY GRANT** - A federal campus-based grant for undergraduate students of exceptional financial need who have not completed their first baccalaureate degree.
  - **ACADEMIC COMPETITIVENESS 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.
  - **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.
TEACH GRANT—Teacher Education Assistance for College and Higher Education 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).

IRAQ AND AFGHANISTAN SERVICE GRANT—A federal grant for students who had a parent or guardian die as a result of military service in Iraq or Afghanistan after September 11, 2001 and are not eligible for Pell grants due to their EFC.

- **Ind (Indicator Code)**—One of four identifiers that indicate the most recent status of the overpayment.
  - **OVERPAYMENT**—The value that a school uses when 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.
  - **SATISFACTORY ARRANGEMENT MADE**—This value indicates that while the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. This status, when reported on a SAR or ISIR (or in the FAT process of the NSLDS), will provide documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made for the arrangements to repay, the Indicator field is reset to OVERPAYMENT. A status of SATISFACTORY ARRANGEMENT MADE will not produce the Overpayment flags and messages on SARs and ISIRs.
  - **REPAID**—This value indicates that a previously reported overpayment that was in an active OVERPAYMENT, FRAUD or SATISFACTORY ARRANGEMENT MADE status has been fully repaid by the student. Schools and the Department of Education’s (ED) Debt Collection Service (DCS) update NSLDS to REPAID and enter the date when the final payment was made. A status of REPAID will not produce the Overpayment flags and messages on SARs and ISIRs.
  - **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.

- **Disbursement Date**—The date the student was issued the aid.

- **Indicator Date**—the effective date corresponding to the overpayment indicator that was set.

- **Outstanding Principal Balance**—the amount of the grant or the principal amount of a Perkins loan currently owed on the aid overpayment.

- **Outstanding Interest Balance**—the outstanding interest balance on a Perkins loan since the last time interest was satisfied either through a borrower payment, capitalization or government subsidy.

- **Repayment Date**—The date the overpayment was satisfied or N/A if repayment has not occurred.

- **Create Date**—The date the overpayment was entered into NSLDS. This is automatically updated with the system date.

- **Source**—The Codes identifying where the overpayment exists:
  - **School**—The school currently holds the overpayment record.
  - **Transfer**—When a school has transferred an overpayment to the DCS, the school updates the previously reported overpayment information in NSLDS by changing the Source field from School to Transfer. This change will not invalidate the overpayment, but it will indicate the debt is in the process of being transferred from the school to DCS.
  - **EDR**—ED Regional office that holds the overpayment record.
  - **Updated**—The date the overpayment was last updated and the person performing the update is shown under the Source. This information is automatically updated by the system.

Last updated: December 23, 2018
Overpayment History

Purpose of this page

The Overpayment History page displays a detailed history of the selected overpayment from the Overpayment List.

Navigation

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

How to interpret Warning Symbols and Information Icons

The warning and informational icons at the top of the Loan, Grant, Overpayment Lists pages and the Student Access Interface page reflect the status of loans and other aid for which the borrower is personally responsible. Users wishing to check the status of PLUS borrowers who have taken out loans on behalf of students should view the Loan List page for the PLUS borrower and not rely on the student's page to verify the eligibility of the PLUS borrower for further aid.

- **Bankruptcy** - The borrower has one or more loans in active bankruptcy status.
- **Defaulted** - The borrower has one or more loans in default status.
- **Overpayments** - The borrower has one or more active overpayments in the NSLDS database.
- **Discharged** - The borrower has one or more loans with a discharge code. Discharges are identified according to the following order of precedence.
  - Death
  - Permanent
- **Additional Unsub** - The borrower has a Direct Stafford Unsubsidized (D2) or FFEL Stafford Unsubsidized (SU) loan with Additional Health Profession or PLUS Denial indicators.
- **Close or Equal to Undergrad Sub. Limit** - The borrower is close or equal to the undergraduate aggregate limit for subsidized loans.
- **Exceeds Undergrad Sub. Limit** - The borrower exceeds the undergraduate aggregate limit for subsidized loans.
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- **Close to Pell Grant LEU Limit** - The student is close to the Pell Grant Lifetime Eligibility Used (LEU) limit.
- **Meets or Exceeds Pell Grant LEU Limit** - The student meets or exceeds the Pell Grant Lifetime Eligibility Used (LEU) limit.
- **Close to Iraq and Afghanistan Service Grant (IASG) LEU Limit** - The student is close to the Iraq and Afghanistan Service Grant (IASG) Lifetime Eligibility Used (LEU) limit.

- **Meets or Exceeds the Iraq and Afghanistan Service Grant (IASG) LEU Limit** - The student meets or exceeds the Iraq and Afghanistan Service Grant (IASG) Lifetime Eligibility Used (LEU) limit.

- **Grants** - The borrower has received one or more Pell Grants, Iraq and Afghanistan Service Grants, Academic Competitiveness Grants, National Science Mathematics Access to Retain Talent Grants, or Teacher Education Assistance for College and Higher Education Grants.

- **Fraud** - The borrower has been convicted of fraud.

- **Teacher Loan Forgiveness** - The student/borrower has one or more loans eligible for Teacher Loan Forgiveness (TLF).

- **Loan Discharge** - The student/borrower has one or more loans discharged.

- **Subsidized Usage Limit Applies (SULA)** - The borrower is subject to the 150% Direct Subsidized Loan Limit provision.

- **Loss of Subsidy** - The borrower has one or more Direct Stafford Subsidized (SULA Eligible) (D0) and/or Direct Consolidation Subsidized (SULA Eligible) (D9) loans that have lost interest subsidy.

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### How to interpret the Overpayment History Information

The Overpayment History displays the data reported to NSLDS on an overpayment including the following information:

- **Type** - The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. Five types are maintained in NSLDS:
  - **FEDERAL PELL GRANT** - A federal grant to help undergraduates pay for their education after high school.
  - **PERKINS LOAN** - Campus-based federal loans include the National Defense Loan (DU), the Perkins Expanded Lending (EU), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).
  - **SUPPLEMENTAL EDUCATION OPPORTUNITY GRANT** - A federal campus-based grant for undergraduate students of exceptional financial need who have not completed their first baccalaureate degree.
  - **ACADEMIC COMPETITIVENESS 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.
  - **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.
  - **TEACH GRANT** - Teacher Education Assistance for College and Higher Education 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).
  - **IRAQ AND AFGHANISTAN SERVICE GRANT** - A federal grant for students who had a parent or guardian die as a result of military service in Iraq or Afghanistan after September 11, 2001 and are not eligible for Pell grants due to their EFC.

- **Borrowed At** - The school the student was attending when the overpayment occurred.

- **Disbursement Date** - The date the student was issued the aid.

- **Create Date** - The date the overpayment was entered into NSLDS. This is automatically updated with the system date.
Ind (Indicator Code)-One of four identifiers that indicate the status of the overpayment:

- **OVERPAYMENT**-The value that a school uses when 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.

- **SATISFACTORY ARRANGEMENT MADE**-This value indicates that while the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. This status, when reported on a SAR or ISIR (or in the FAT process of the NSLDS), will provide documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made for the arrangements to repay, the Indicator field is reset to OVERPAYMENT. A status of SATISFACTORY ARRANGEMENT MADE will not produce the Overpayment flags and messages on SARs and ISIRs.

- **REPAID**-This value indicates that a previously reported overpayment that was in an active OVERPAYMENT, FRAUD or SATISFACTORY ARRANGEMENT MADE status has been fully repaid by the student. Schools and the Department of Education's (ED) Debt Collection Service (DCS) update NSLDS to REPAID and enter the date when the final payment was made. A status of REPAID will not produce the Overpayment flags and messages on SARs and ISIRs.

- **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.

- **Indicator Date** - the effective date corresponding to the overpayment indicator that was set.

- **Outstanding Principal Balance** - the amount of the grant or the principal amount of a Perkins loan currently owed on the aid overpayment.

- **Outstanding Interest Balance** - the outstanding interest balance on a Perkins loan since the last time interest was satisfied either through a borrower payment, capitalization or government subsidy.

- **Repayment Date**-The date the overpayment was satisfied or N/A if repayment has not occurred.

- **Source**-The Codes that identify where the overpayment exists:
  - **School**-The school that reported the Indicator status for the overpayment record.
  - **TRF**-When a school has transferred an overpayment to the DCS, the school updates the previously reported overpayment information in NSLDS by changing the Source field from School to Transfer. This change will not invalidate the overpayment, but it will indicate the debt is in the process of being transferred from the school to DCS.
  - **EDR**-ED Regional office (ED Region Code and ED Regional office's city and state) that holds the overpayment record.

- **Update Date**-The date of the status update.

- **Update By**-The name of the person who made the status update.

Last updated: December 23, 2018
Overpayment Add

Purpose of this page

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

Navigation

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

How to add Overpayment information

To add overpayment information:

1. In the School OPEID box, type the school code.
2. In the Type list, click an option. (See list of definitions below)
3. In the Disbursement Date box, type the Disbursement Date.
4. In the Indicator list, click an option. (See list of definitions below)
5. In the Indicator Date box, type the effective date the indicator was set.
6. In the Outstanding Principal Balance box, type the amount of grant or the principal amount of a Perkins loan currently owed.
7. In the Outstanding Interest Balance box, type the outstanding interest balance on a Perkins loan.
8. In the Repayment Date box, type the Repayment Date, if applicable.
9. In the Source list, click an option. (See list of definitions below)
10. Click Submit.

Notes:

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

How to interpret Overpayment Add information

The Overpayment Add page displays the following information:

- School OPEID-An eight-digit ED OPE code used to identify the school and school branch.

- Type-The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. Five types are maintained in NSLDS:
  - **FEDERAL PELL GRANT**-A Federal grant to help undergraduates pay for their education after high school.
  - **PERKINS LOAN**-Campus-based federal Loans include the National Defense Loan (DU), the Perkins Expanded Lending (EU), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).
  - **SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANT**-Federal campus-based grants to undergraduate students of exceptional financial need who have not completed their first baccalaureate degree.
  - **ACADEMIC COMPETITIVENESS 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.
  - **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
 TEACH GRANT - Teacher Education Assistance for College and Higher Education 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).

 IRAQ AND AFGHANISTAN SERVICE GRANT - A federal grant for students who had a parent or guardian die as a result of military service in Iraq or Afghanistan after September 11, 2001 and are not eligible for Pell grants due to their EFC.

 Disbursement Date - The date the student was issued the aid.

 Note: It is important to note that the Disbursement Date the school uses must be the same date that the school used on the letters and forms assigning the obligation to the Department of Education's (ED) Debt Collection Service (DCS).

 Ind (Indicator Code) - One of four code identifiers that indicate the status of the overpayment:

 - OVERPAYMENT - The value that a school uses when 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.

  Note: When OVERPAYMENT is selected and submitted, the Ind box on the Overpayment List page will display OVERPAYMENT in red shading.

 - SATISFACTORY ARRANGEMENT MADE - This value indicates that while the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. This status, when reported on a SAR or ISIR (or in the FAT process of the NSLDS), will provide documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made for the arrangements to repay, the Indicator field is reset to OVERPAYMENT. A status of SATISFACTORY ARRANGEMENT MADE will not produce the Overpayment flags and messages on SARs and ISIRs.

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

 - REPAID - This value indicates that a previously reported overpayment that was in an active OVERPAYMENT, FRAUD or SATISFACTORY ARRANGEMENT MADE status has been fully repaid by the student. Schools and the Department of Education's (ED) Debt Collection Service (DCS) update NSLDS to REPAID and enter the date when the final payment was made. A REPAID status will not produce the Overpayment flags and messages on SARs and ISIRs.

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

 - 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.

  Note: When FRAUD is selected and submitted, the Ind box on the Overpayment List page will display FRAUD in red shading.

 Indicator Date - the effective date corresponding to the overpayment indicator that was set.

 Outstanding Principal Balance - the amount of the grant or the principal amount of a Perkins loan currently owed on the aid overpayment.

 Outstanding Interest Balance - the outstanding interest balance on a Perkins loan since the last time interest was satisfied either through a borrower payment, capitalization or government subsidy.

 Repayment Date - The date the overpayment was paid in full or N/A if repayment has not occurred.
**Source** - The Codes identifying where the overpayment exists:

- **EDR - ED REGION** - ED Regional office that holds the overpayment record.

- **TRF - TRANSFER** - When a school has transferred an overpayment to the DCS, the school updates the previously reported overpayment information in NSLDS by changing the Source from School to Transfer. This change will not invalidate the overpayment, but it will indicate that the debt is in the process of being transferred from the school to DCS.

- **SCH - SCHOOL** - The school currently holds the overpayment record.

Last updated: February 20, 2011
Overpayment Add and Student Add

Purpose of this page

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

Navigation

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

How to add Student Details and Overpayment Details

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

To add Student Details and Overpayment Details:

1. In the **First Name** box, type student's first name.
2. In the **Middle Name** box, type student's middle name.
3. In the **Last Name** box, type student's last name.
4. In the **Date of Birth** box, type student's date of birth.
5. In the **School OPEID** box, type the school code.
6. In the **Type** list, click an option. (See list of definitions below.)
7. In the **Disbursement Date** box, type the Disbursement Date.
8. In the **Indicator** list, click an option. (See list of definitions below.)
9. In the **Indicator Date** box, type the effective date the indicator was set.
10. In the **Outstanding Principal Balance** box, type the amount of grant or the principal amount of a Perkins loan currently owed.
11. In the **Outstanding Interest Balance** box, type the outstanding interest balance on a Perkins loan.
12. In the **Repayment Date** box, type the Repayment Date, if applicable.
13. In the **Source** list, click an option. (See list of definitions below.)
14. Click **Submit**.

Notes:

- The **First Name** field has been increased from 12 to 35 characters. The first name will continue to display as 12 characters.

- The **Middle Name** field has been increased from 12 to 35 characters. The middle name will only display as the middle initial containing only the 1st character.

- The **Social Security Number** appears in a display only field. If your original search found a PLUS borrower in the NSLDS database, the SSN that displays will be the current SSN of that PLUS borrower. Otherwise, it will be the SSN you entered for the search. If the SSN that displays is not the current SSN of the student you wish to add to the NSLDS database, please call the Customer Support Center at **1-800-999-8219**, Monday through Friday from 8 a.m. to 9 p.m. ET.

- The **Social Security Number** will automatically appear because the student's SSN was typed in previously.

- The **School OPEID** will automatically appear if you represent a school.

- **Org Search** allows ED users to search and select a **School OPEID**. Click **Org Search** and select a School OPEID by clicking the numbered bullet next to the school. Your selection will appear in the School OPEID box.

How to interpret the Overpayment Details
The text boxes in Overpayment Details are defined as follows:

- **School OPEID** - An eight-digit ED OPE code used to identify the school and school branch.

- **Type** - The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. Five types are maintained in the NSLDS:
  - **FEDERAL PELL GRANT** - A federal grant to help undergraduates pay for their education after high school.
  - **PERKINS LOAN** - Campus-based federal loans include the National Defense Loan (DU), the Perkins Expanded Lending (EU), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).
  - **SUPPLEMENTAL EDUCATIONAL OPPORTUNITY GRANT** - Federal campus-based grant for undergraduate students of exceptional financial need who have not completed their first baccalaureate degree.
  - **ACADEMIC COMPETITIVENESS 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.
  - **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.
  - **TEACH GRANT** - Teacher Education Assistance for College and Higher Education 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).
  - **IRAQ AND AFGHANISTAN SERVICE GRANT** - A federal grant for students who had a parent or guardian die as a result of military service in Iraq or Afghanistan after September 11, 2001 and are not eligible for Pell grants due to their EFC.

- **Disbursement Date** - The date the student was issued the aid.

  **Note:** It is important to note that the Disbursement Date the school uses must be the same date that the school used on the letters and forms assigning the obligation to the Department of Education's (ED) Debt Collection Service (DCS).

- **Indicator** - One of four options identifying the status of the overpayment:
  - **OVERPAYMENT** - The value that a school uses when 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.
    **Note:** When OVERPAYMENT is selected and submitted, the **Ind** box on the Overpayment List page will display OVERPAYMENT in red shading.
  - **SATISFACTORY ARRANGEMENT MADE** - This value indicates that while the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. This status, when reported on a SAR or ISIR (or in the FAT process of the NSLDS), will provide documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made for the arrangements to repay, the Indicator field is reset to OVERPAYMENT. A status of SATISFACTORY ARRANGEMENT MADE will not produce the Overpayment flags and messages on SARs and ISIRs.
    **Note:** When SATISFACTORY ARRANGEMENT MADE is selected and submitted, the **Ind** box on the Overpayment List page will display SATISFACTORY ARRANGEMENT MADE.
  - **REPAID** - This value indicates that a previously reported overpayment that was in an active OVERPAYMENT, FRAUD or SATISFACTORY ARRANGEMENT MADE status has been fully repaid by the student. Schools and the Department of Education’s (ED) Debt Collection Service (DCS) update NSLDS to REPAID and enter the date when the final payment was made. A REPAID status will not produce the Overpayment flags and messages on SARs and
ISIRs.

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

- **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.

Note: When FRAUD is selected and submitted, the Ind box on the Overpayment List page will display FRAUD in read shading.

- **Indicator Date**-the effective date corresponding to the overpayment indicator that was set.

- **Outstanding Principal Balance**-the amount of the grant or the principal amount of a Perkins loan currently owed on the aid overpayment.

- **Outstanding Interest Balance**-the outstanding interest balance on a Perkins loan since the last time interest was satisfied either through a borrower payment, capitalization or government subsidy.

- **Repayment Date**-The date the overpayment was paid in full or N/A if the repayment has not occurred.

- **Source**-The Codes identifying where the overpayment exists.
  - **EDR - ED REGION**-ED Regional office that holds the overpayment record.
  - **TRF - TRANSFER**-When a school has transferred an overpayment to the DCS, the school updates the previously reported overpayment information in NSLDS by changing the Source from School to Transfer. This change will not invalidate the overpayment, but it will indicate that the debt is in the process of being transferred from the school to DCS.
  - **SCH - SCHOOL**-The school currently holds the overpayment record.

- **Region Code**-ED Regional office Region Code that holds the overpayment record.

Last updated: March 20, 2011
Overpayment Display

Purpose of this page

The Overpayment Display page displays the selected overpayment from the Overpayment List page. If you have authorized access, you can update or delete the overpayment from this page.

Navigation

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

How to update and delete an Overpayment

To update an overpayment:

- Click **Update**.

To delete an overpayment:

- Click **Delete**.

How to interpret the Overpayment Display

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

- **School**-The school the student was attending when the overpayment occurred.
- **Type**-The Title IV student assistance funds type for which the student has received an amount in excess of what the student is eligible to receive. Five types are maintained in NSLDS:
  - **FEDERAL PELL GRANT**-A federal grant to help undergraduates pay for their education after high school.
  - **PERKINS LOAN**-Campus-based federal loans include the National Defense Loan (DU), the Perkins Expanded Lending (EU), the Income Contingent Loan (IC), the National Direct Student Loan (NU), and the Federal Perkins Loan (PU).
  - **SUPPLEMENTAL EDUCATION OPPORTUNITY GRANT**-A federal campus-based grant for undergraduate students of exceptional financial need who have not completed their first baccalaureate degree.
  - **ACADEMIC COMPETITIVENESS 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.
  - **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.
  - **TEACH GRANT**-Teacher Education Assistance for College and Higher Education 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).
  - **IRAQ AND AFGHANISTAN SERVICE GRANT**-A federal grant for students who had a parent or guardian die as a result of military service in Iraq or Afghanistan after September 11, 2001 and are not eligible for Pell grants due to
their EFC.

- **Disbursement Date** - The date the student was issued the aid.

- **Ind (Indicator Code)** - One of four identifiers that indicate the status of the overpayment:
  - **OVERPAYMENT** - The value that a school uses when 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.
  - **SATISFACTORY ARRANGEMENT MADE** - This value indicates that while the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. This status, when reported on a SAR or ISIR (or in the FAT process of the NSLDS), will provide documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made for the arrangements to repay, the Indicator field is reset to OVERPAYMENT. A status of SATISFACTORY ARRANGEMENT MADE will not produce the Overpayment flags and messages on SARs and ISIRs.
  - **REPAID** - This value indicates that a previously reported overpayment that was in an active OVERPAYMENT, FRAUD or SATISFACTORY ARRANGEMENT MADE status has been fully repaid by the student. Schools and the Department of Education's (ED) Debt Collection Service (DCS) update NSLDS to REPAID and enter the date when the final payment was made. A REPAID status will not produce the Overpayment flags and messages on SARs and ISIRs.
  - **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.

- **Indicator Date** - the effective date corresponding to the overpayment indicator that was set.

- **Outstanding Principal Balance** - the amount of the grant or the principal amount of a Perkins loan currently owed on the aid overpayment.

- **Outstanding Interest Balance** - the outstanding interest balance on a Perkins loan since the last time interest was satisfied either through a borrower payment, capitalization or government subsidy.

- **Repayment Date** - Date the overpayment was satisfied or N/A if repayment has not occurred.

- **Source** - The Codes that identify where the overpayment exists:
  - **School** - The school currently holds the overpayment record.
  - **Transfer** - When a school has transferred an overpayment to DCS, the school updates 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 will indicate the debt is in the process of being transferred from the school to DCS.
  - **EDR** - ED Regional office that holds the overpayment record.
  - **Region Code** - ED Regional office Region Code that holds the overpayment record. N/A if Source is not EDR.

Last updated: February 20, 2011
Overpayment Update

Purpose of this page

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

Navigation

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

How to update an overpayment

To update an overpayment:

1. In the **Indicator** list, click an overpayment status. (See list of definitions below.)
2. In the **Indicator Date** box, type the effective date the indicator was set.
3. In the **Outstanding Principal Balance** box, type the amount of grant or the principal amount of a Perkins loan currently owed.
4. In the **Outstanding Interest Balance** box, type the outstanding interest balance on a Perkins loan.
5. In the **Repayment Date** box, type the date the overpayment was repaid (if applicable).
6. In the **Source** list, click a source. (See list of definitions below.)
7. In the **Region Code** list, click a region code. (Only applicable to Department of Education users.)
8. Click **Submit**.

How to interpret the Indicator list

- **Indicator**-One of four options identifying the status of the overpayment:
  - **OVERPAYMENT**-The value that a school uses when 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.
  - **SATISFACTORY ARRANGEMENT MADE**-This value indicates that while the student still owes the overpayment, he or she has made arrangements that are satisfactory to the school to repay the overpayment. This status, when reported on a SAR or ISIR (or in the FAT process of NSLDS), will provide documentation that the student may continue to receive Title IV aid. In the event that the student fails to meet the commitment made for the arrangements to repay, the Indicator field is reset to Overpayment. A status of Satisfactory Arrangement Made will not produce the Overpayment flags and messages on SARs and ISIRs.
  - **REPAID**-This value means that a previously reported overpayment that was in either an active Overpayment or Satisfactory Arrangement Made status has been fully repaid by the student. Schools and the Department of Education's (ED) Debt Collection Service (DCS) update NSLDS to Repaid and enter the date the final payment was made. A status of Repaid will not produce the Overpayment flags and messages on SARs and ISIRs.
  - **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.

How to interpret the Source list

- **Source**-The Codes that identify where the overpayment exists:
  - **SCH - School**-The school currently holds the overpayment record.
  - **TRF - Transfer**-When a school has transferred an overpayment to the DCS, the school should update the
previously reported overpayment information in NSLDS by changing the Source field from School to Transfer. This change will not invalidate the overpayment, but it will inform any user of the system that the debt is in the process of being transferred from the school to DCS.

- **EDR (ED Region)**-ED Regional office that holds the overpayment record.

Last updated: February 20, 2011
The Overpayment Delete Confirmation page allows you to delete an Overpayment added in error.

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

How to Delete an overpayment

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

Last updated: July 1, 2001
Student Access Interface

Purpose of this page

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

Note: The MyStudentData Download button, located on the NSLDS Student Access Web site, is available for borrower access only. The borrower is provided with a downloadable copy of their loan, grant, and aid overpayment history. The data is available for download in a text version only.

Navigation

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

How to interpret Warning Symbols and Information Icons

The warning and informational icons at the top of the Loan, Grant, Overpayment Lists pages and the Student Access Interface page reflect the status of loans and other aid for which the borrower is personally responsible. Users wishing to check the status of PLUS borrowers who have taken out loans on behalf of students should view the Loan List page for the PLUS borrower and not rely on the student's page to verify the eligibility of the PLUS borrower for further aid.

- **Bankruptcy** - The borrower has one or more loans in active bankruptcy status.
- **Defaulted** - The borrower has one or more loans in default status.
- **Overpayments** - The student has one or more active overpayments in the NSLDS database.
- **Discharged** - The borrower has one or more loans with a discharge code. Discharges are identified according to the following order of precedence.
  - Death
  - Permanent
- **Additional Unsub** - The borrower has a Direct Stafford Unsubsidized (D2) or FFEL Stafford Unsubsidized (SU) loan with Additional Health Profession or PLUS Denial indicators.
- **Close or Equal to Undergrad Sub. Limit** - The borrower is close or equal to the undergraduate aggregate limit for subsidized loans.
- **Exceeds Undergrad Sub. Limit** - The borrower exceeds the undergraduate aggregate limit for subsidized loans.
- **Close or Equal to Undergrad Comb. Limit** - The borrower is close or equal to the undergraduate aggregate limit for subsidized and unsubsidized loans combined.
- **Exceeds Undergrad Comb. Limit** - The borrower exceeds the undergraduate aggregate limit for subsidized and unsubsidized loans combined.
- **Close or Equal to Graduate Sub. Limit** - The borrower is close or equal to the graduate aggregate limit for subsidized loans.
- **Exceeds Graduate Sub. Limit** - The borrower exceeds the graduate aggregate limit for subsidized loans.
- **Close or Equal to Graduate Comb. Limit** - The borrower is close or equal to the graduate aggregate limit for subsidized and unsubsidized loans combined.
- **Exceeds Graduate Comb. Limit** - The borrower exceeds the graduate aggregate limit for subsidized and unsubsidized loans.
- **Close to Pell Grant LEU Limit** - The student is close to the Pell Grant Lifetime Eligibility Used (LEU) limit.

- **Meets or Exceeds Pell Grant LEU Limit** - The student meets or exceeds the Pell Grant Lifetime Eligibility Used (LEU) limit.

- **Close to Iraq and Afghanistan Service Grant (IASG) LEU Limit** - The student is close to the Iraq and Afghanistan Service Grant (IASG) Lifetime Eligibility Used (LEU) limit.

- **Meets or Exceeds the Iraq and Afghanistan Service Grant (IASG) LEU Limit** - The student meets or exceeds the Iraq and Afghanistan Service Grant (IASG) Lifetime Eligibility Used (LEU) limit.

- **Grants** - The borrower has received one or more Pell Grants, Iraq and Afghanistan Service Grants, Academic Competitiveness Grants, National Science Mathematics Access to Retain Talent Grants, or Teacher Education Assistance for College and Higher Education Grants.

- **Fraud** - The borrower has been convicted of fraud.

- **Teacher Loan Forgiveness** - The student/borrower has one or more loans eligible for Teacher Loan Forgiveness (TLF).

- **Loan Discharge** - The student/borrower has one or more loans discharged.

- **Subsidized Usage Limit Applies (SULA)** - The borrower is subject to the 150% Direct Subsidized Loan Limit provision.

- **Loss of Subsidy** - The borrower has one or more Direct Stafford Subsidized (SULA Eligible) (D0) and/or Direct Consolidation Subsidized (SULA Eligible) (D9) loans that have lost interest subsidy.

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

1. Enter the **SSN**, **First Name**, and **DOB** at the top of the page.
2. Click the **Retrieve** button.
3. Once the desired borrower is found, click the **Link** button.
4. To return to the NSLDSFAP Web site, click **Return** on the NSLDS Student Access Web site menu bar.

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

### Previously Retrieved Borrower

Previously Retrieved Borrower allows users to select from a list of up to twenty (20) of their own previously successfully viewed unique borrowers. The dropdown list is in descending order, displaying the most recent borrower at the top. Once a unique borrower is selected from the list, the identifier(s) of the borrower selected will autofill on the student search.

To access the previously retrieved borrower activity:

1. Click the **Previously Retrieved Borrower** dropdown and select a borrower
2. Review the identifiers
3. Click **Retrieve**

Last updated: January 20, 2019
Teacher Loan Forgiveness List

Purpose of this page

The Teacher Loan Forgiveness (TLF) List page displays all active TLF records.

Navigation

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

How to interpret the Teacher Loan Forgiveness List

The Teacher Loan Forgiveness List information is defined as follows:

- **GA (Guaranty Agency)** - The name and code of the Guaranty Agency 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.
- **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.

How to add a new TLF for a borrower

Clicking on the **Add Teacher Loan Forgiveness** button will redirect the page to display the TLF Add page with pre-populated information from the student/borrower being displayed.

How to view, update and delete TLF detail information

- To display TLF detail information, click the blue active bullet number icon (i.e., ✂️) to the left of the TLF record.
- If you have authorized access, you can then update or delete the TFL record.
- To access the Organization Contact page, click the GA or Lender name(s).

Last updated: November 16, 2014
Teacher Loan Forgiveness Detail

Purpose of this page

The Teacher Loan Forgiveness (TLF) Detail page displays detailed TLF information for a student/borrower that can be updated or deleted. If you have authorized access, you can update or delete the TLF information from this page.

Navigation

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

How to interpret the Teacher Loan Forgiveness Detail

- **GA** - The name and code of the Guaranty Agency 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 student/borrower has applied for TLF.
- **Amount** - The amount of forgiveness applied to the student/borrower.
- **Paid Date** - The date the GA pays the holder; if GA is the holder, the date applied to the student/borrowers account.
- **Eligible Institution Type** - The institution type where the student/borrower taught during the period that qualifies for loan forgiveness: IE=Elementary School, IS=Secondary School, and IA=Educational Service Agency.

How to update or delete the Teacher Loan Forgiveness Detail

To update a TLF record:

- Click **Update**.

To delete a TLF record:

- Click **Delete**.

Last updated: January 01, 2013

close
Exit Counseling History

Purpose of this page

The Exit Counseling History page displays the following:

- Information about the Loan Exit Counseling session (Completion Date, Completion Time, Source and Media Type) and schools (Name and OPEID Code) that the student has selected to be notified regarding their completion of the session on NSLDS.

- Information about the TEACH Grant Exit Counseling session (Completion Date and Completion Time) and schools (Name and OPEID Code) that the student has selected to be notified regarding their completion of the session on NSLDS.

- Information about the Loan Exit Counseling session that schools have uploaded to NSLDS.

Navigation

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

How to interpret the Source

The Source of the Exit Counseling session describes from where NSLDS received the completion data.

- **NSLDS**-The student completed the Loan and/or TEACH Exit Counseling session on the NSLDS Student Access Web site.

- **SCHOOL**-The school used the Spreadsheet Submittal page on the NSLDS Financial Aid Professional Access Web site to upload the Loan Exit Counseling data.

- **STUDENTLOANS.GOV**-The student completed the Loan Exit Counseling session on the StudentLoans.gov Web site.

How to access a student's Exit Counseling History

To access a student's exit counseling history:

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

Previously Retrieved Borrower

Previously Retrieved Borrower allows users to select from a list of up to twenty (20) of their own previously successfully viewed unique borrowers. The dropdown list is in descending order, displaying the most recent borrower at the top. Once a unique borrower is selected from the list, the identifier(s) of the borrower selected will autofill on the student search.

To access the previously retrieved borrower activity:

1. Click the **Previously Retrieved Borrower** dropdown and select a borrower
2. Review the identifiers
3. Click **Retrieve**

Last updated: January 20, 2019
Delinquent Borrowers

Purpose of this page

The Delinquent Borrowers page displays borrowers who have been reported as delinquent in making loan payments to one of the federal loan servicers (ED servicers). The report does not include borrowers who have loans held by Guaranty Agencies.

Navigation

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

How to access the Delinquent Borrowers page

To access the Delinquent Borrowers page:

1. Select a Sort By option (SSN or Name). Borrowers with delinquent loans will be sorted by SSN or Last Name. Default is SSN.
2. Provide an eight-digit OPEID in the Branch Code field, which is associated with the School Code or leave * (default) for all branches.
3. Provide the Federal Loan Servicer three-digit code for a list of all delinquent loans reported by the selected servicer. Leave * (default) to select all ED servicers. Use the Org Search button next to this field for a list of all currently available servicers.
4. Provide a Cohort Year for a list of all delinquent loans falling under the specified Cohort Year. Leave * (default) to select all Cohort Years.
5. Select the Delinquency Period (in number of days) for a list of all delinquent loans falling under the specified period. A single Delinquency Period or a combination of periods may be selected. Periods that are not selected (not marked as Yes) will automatically default to No.
6. Click Retrieve.

How to interpret the Delinquent Borrowers page

The Delinquent Borrowers page, sorted in SSN or Last Name descending order, displays the following information:

- #-Delinquency page list number for the borrower. Selecting the borrower's # link displays the borrower's Loan History page.
- SSN-The SSN of the borrower who owns a delinquent loan for the specified School and Branch Codes.
- Name-The borrower's last name, first name, and middle initial.
- Address-The borrower's reported address.
- Phones-The borrower's phone numbers by type (Home, Cell, Work, Fax, and Other) and with the name of the ED servicer that reported the phone number. An asterisk at the start of the phone number indicates the preferred number reported by the servicer.
- E-mail-The borrower's reported e-mail address.
- Loan Type-The type of loan that is delinquent.
- Cohort Year-Cohort fiscal year (October 1-September 30) when the borrower entered repayment for the delinquent loan.
- Days Delq-Number of days since the borrower last made a full payment.
- Federal Loan Servicer-Name of the ED servicer reporting the delinquent loan.
- OPB-Outstanding Principal Balance of the delinquent loan.

Last updated: April 13, 2014
SSN Conflict

Purpose of this page

The SSN Conflict page allows school users to identify contact information for organizations that have previously reported on a SSN that conflicts with records the school may be trying to submit to NSLDS.

Navigation

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

How to access SSN Conflict

To access organizations reporting on a specific SSN:

1. Type SSN.
2. Click Submit.

How to interpret SSN Conflict

Once a SSN has been entered, the SSN Conflict page displays a list of organizations that have records in NSLDS for that SSN. You will not see the other identifiers of the data they have provided, but will have the names of organizations to contact. Any of the organizations can be contacted for information regarding this SSN.

- **Active Bullet Number** - Each record on the page is identified by an active number. Click the Number Icon to display the organization's contact information.
- **Organization** - The name of the school, ED Servicer or Guaranty Agency that previously reported on the SSN in conflict.
- **Type** - Indicates the type of organization that previously reported on the SSN in conflict.
  - School
  - ED Servicer
  - Guaranty Agency
- **Code** - An ED-assigned number for each school, ED Servicer, or GA that reported on the SSN in conflict.
- **Used As** - Identifies the SSN in conflict is associated with:
  - Student
  - Plus Borrower
  - Both

Last updated: August 28, 2011
Reaffirmation History

Purpose of this page

The Reaffirmation History page displays the history of reaffirmations related to one or more of a borrower's loans.

Navigation

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

How to access Reaffirmation History

To access Reaffirmation History:

1. Click on the Reaffirmation History link on the menu bar of the AID tab.
2. Type SSN, First Name, and DOB.
3. Click Retrieve.

This page can also be accessed directly from the Loan History page, by clicking on the 'R' icon appearing on the loan, or by clicking the Reaffirmation History button found on the Loan Detail page.

Previously Retrieved Borrower

Previously Retrieved Borrower allows users to select from a list of up to twenty (20) of their own previously successfully viewed unique borrowers. The dropdown list is in descending order, displaying the most recent borrower at the top. Once a unique borrower is selected from the list, the identifier(s) of the borrower selected will autofill on the student search.

To access the previously retrieved borrower activity:

1. Click the Previously Retrieved Borrower dropdown and select a borrower
2. Review the identifiers
3. Click Retrieve

How to interpret Reaffirmation History

The Reaffirmation History page displays the following information:

- **Loan Type**: The type of Title IV award made with a formal agreement for repayment with interest.

  The loan types for reaffirmation are defined as follows:

<table>
<thead>
<tr>
<th>Loan Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>D0</td>
<td>Direct Stafford Subsidized Loan (SULA Eligible)</td>
</tr>
<tr>
<td>D1</td>
<td>Direct Stafford Subsidized Loan</td>
</tr>
<tr>
<td>D2</td>
<td>Direct Stafford Unsubsidized Loan</td>
</tr>
<tr>
<td>D3</td>
<td>Direct PLUS Graduate/Professional Loan</td>
</tr>
<tr>
<td>D4</td>
<td>Direct PLUS Loan</td>
</tr>
<tr>
<td>D5</td>
<td>Direct Consolidation Unsubsidized Loan</td>
</tr>
<tr>
<td>D6</td>
<td>Direct Consolidation Subsidized Loan</td>
</tr>
<tr>
<td>D7</td>
<td>Direct Consolidation PLUS Loan</td>
</tr>
</tbody>
</table>
D8  Direct Unsubsidized Loan (TEACH)
D9  Direct Consolidation Subsidized Loan (SULA Eligible)
CL  FFELP Consolidation
GB  FFELP Graduate PLUS
PL  FFELP PLUS
RF  FFELP Refinanced
SF  FFELP Stafford Subsidized
SL  Supplemental Loan (SLS)
SU  FFELP Stafford Unsubsidized

- **Loan Date**: Date when a Direct loan was originally disbursed or a FFELP loan was originally guaranteed.
- **OPEID**: The eight-digit identifier for the school where the student was enrolled or accepted for enrollment at the time the loan was originated.
- **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.
- **Award ID**: A unique identifier for a financial award across programs and systems, and across academic years.
- **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.
- **Reaffirmation Date**: The date on which the signed reaffirmation agreement was received by the servicer.
- **Annual Exceeded Amount**: The amount that exceeds the annual loan limit.
- **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.
- **Source**: The code for the servicer which reported the reaffirmation.

Last updated: January 20, 2019
Active Duty Status List

Purpose of this page

The Active Duty Status List page allows users to view Active Duty Status information for a Student, PLUS borrower or a Co-Borrower.

Navigation

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

How to list Active Duty Status information

To list Active Duty Status information:

1. In the Award ID box, type an Award ID.
2. In the Person Role, click a selection from the list.
3. Click the List button.

Note: The Award ID will be populated if you navigated to this page from the Loan Detail Page.

How to interpret Active Duty Status List Information

The Active Duty Status List information is defined as follows:

- **Award ID** - A unique identifier for a financial award across programs and systems, and across academic years.
- **Person Role** - The type of borrower associated with the Award ID.
- **Student, PLUS Borrower, or Co-Borrower** - Name of the borrower of which the Award ID is associated with.
- **Action** - Indicates the action taken by the Federal Loan Servicer.
- **Role** - The type of borrower associated with the Award ID.
- **Begin Date (MMDDCCYY)** - The date on which the service member entered Active Duty military status.
- **End Date (MMDDCCYY)** - The date on which the service member’s Active Duty military status ended.
- **End Date Unk** - Identifies the Active Duty Status End Date as unknown by the servicer.
- **Service Component** - The service member’s assigned branch of Military Service.
- **Source** - Identifies the source that provided the Active Duty Status.

Last updated: March 17, 2019