Session #BC6

Bootcamp Hands-On NSLDS® (National Student Loan Data System)

Eric Hardy and Lisa Walker
U.S. Department of Education
2019 FSA Training Conference for Financial Aid Professionals
Agenda

• NSLDS Overview
• Loans and Grants
  • Aggregates
• Enrollment History
• Transfer Student Monitoring
• Reports
• Organization Information
• Tools and References
• Question and Answer Session
• NSLDS Contact Information
What is the National Student Loan Data System?

• NSLDS is the first comprehensive national database that houses federal loans and grants awarded under Title IV of the Higher Education Act of 1965

• Provides centralized view of financial aid history and assists in eligibility determinations
Grant and Loan Data on NSLDS

- FFELP Loans (Commercial/Purchase)
- William D. Ford Direct Loans
- Federal Perkins Loans
- Student Enrollment
- Federal Pell Grants
- Academic Competitiveness Grants (ACG)

- National SMART Grants
- Iraq and Afghanistan Service Grants (IASG)
- Overpayments
- Gainful Employment
- TEACH Grants
- TEACH Loans
Menu Tab

- System Messages
- Quick Links
- System Requirements
- NSLDS Contact Information
- Frequently Asked Questions
- Download Help
Loan and Grant History Display
Aid Tab

- Loan History
- Overpayment List
- Grants
- Delinquent Borrowers
- Exit Counseling History
- Student Contact Information
- Student Access Interface
- Reaffirmation History
- Perkins Submittal
- Social Security Number (SSN) Conflict
Aid Tab - Loan History

- Icons
- Aggregates
- Master Promissory Note
- Teacher Loan Forgiveness
- Loan Summary
• **Warning Icons**: Warns of critical information that is not in error

• **Information Icons**: Notifies user that additional facts are available
What is the NSLDS Aggregate Calculation?

- **Aggregate Loan Limits:**

<table>
<thead>
<tr>
<th>Federal Loans</th>
<th>Undergraduate</th>
<th>Graduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subsidized Limit</td>
<td>23,000</td>
<td>N/A</td>
</tr>
<tr>
<td>Total Subsidized and Unsubsidized (Combined) Limit</td>
<td>31,000</td>
<td>138,500</td>
</tr>
<tr>
<td>Total Subsidized and Unsubsidized (Combined) Limit for Dependent’s with a Parent PLUS Denial or an Independent Student</td>
<td>57,500</td>
<td>N/A</td>
</tr>
</tbody>
</table>

- When a student reaches their aggregate loan limit, they may no longer be eligible to receive additional loans or grants.

- Aggregate loan data is provided on the Institutional Student Information Record (ISIR) and the Aggregate Loan Information table on the NSLDSFAP website.
Why Calculate Aggregates?

- Helps schools determine the amount of Title IV aid the applicant is eligible to receive
- Helps schools identify students whose eligibility for aid may have changed since the last ISIR transaction
- Shows difference between Aggregate Balance vs. Outstanding Principal Balance
Aggregate Loan Information Table on NSLDS
**Aggregate Loan Information Table on NSLDS**

The image shows a screenshot of the NSLDS (National Student Loan Data System) interface, specifically displaying the aggregate loan information for a user named April Showers, whose ID is **SC1002**. The data includes details such as loan type, outstanding balance, and pending disbursements, categorized into different loan types for both undergraduate and graduate levels.

### Loan History

<table>
<thead>
<tr>
<th>Loan Type</th>
<th>Outstanding Balance</th>
<th>Pending Disbursements</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Undergraduate</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subsidized Loans</td>
<td>$31,710</td>
<td>$0</td>
<td>$31,710</td>
</tr>
<tr>
<td>Unsubsidized Loans</td>
<td>$16,810</td>
<td>$0</td>
<td>$16,810</td>
</tr>
<tr>
<td>Combined Loans</td>
<td>$30,417</td>
<td>$0</td>
<td>$30,417</td>
</tr>
<tr>
<td>Consolidation Loans, Unallocated</td>
<td>$7,573</td>
<td>$7,573</td>
<td></td>
</tr>
<tr>
<td><strong>Graduate</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subsidized Loans</td>
<td>$31,710</td>
<td>$0</td>
<td>$31,710</td>
</tr>
<tr>
<td>Unsubsidized Loans</td>
<td>$16,810</td>
<td>$0</td>
<td>$16,810</td>
</tr>
<tr>
<td>Combined Loans</td>
<td>$30,417</td>
<td>$0</td>
<td>$30,417</td>
</tr>
<tr>
<td>Consolidation Loans, Unallocated</td>
<td>$7,573</td>
<td>$7,573</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subsidized Loans</td>
<td>$63,420</td>
<td>$0</td>
<td>$63,420</td>
</tr>
<tr>
<td>Unsubsidized Loans</td>
<td>$33,620</td>
<td>$0</td>
<td>$33,620</td>
</tr>
<tr>
<td>Combined Loans</td>
<td>$60,834</td>
<td>$0</td>
<td>$60,834</td>
</tr>
<tr>
<td>Consolidation Loans, Unallocated</td>
<td>$15,146</td>
<td>$15,146</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Student is not on school's Transfer Monitoring List.
Aggregate Loan Information Table on NSLDS

- System flags when borrower:
  - Exceeds loan limit
  - Close to or equal to a loan limit

- Undergraduate Loan Limits:
  Subsidized / Combined

- Graduate Loan Limits:
  Subsidized / Combined

- Total Loan Limits:
  Subsidized / Combined
Aid Tab – Aggregate Loan Information

<table>
<thead>
<tr>
<th>Loan Type</th>
<th>Outstanding Principal Balance</th>
<th>Pending Disbursements</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subsidized Loans</td>
<td>$21,125</td>
<td>$0</td>
<td>$21,125</td>
</tr>
<tr>
<td>Unsubsidized Loans</td>
<td>$26,375</td>
<td>$0</td>
<td>$26,375</td>
</tr>
<tr>
<td>Combined Loans</td>
<td>$47,500</td>
<td>$0</td>
<td>$47,500</td>
</tr>
<tr>
<td></td>
<td>(Independent Undergraduate)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Dependency Indicator:**
  - Indicates the dependency used in the student’s loan limit determination
  - Based on data from CPS

- **Award Year:**
  - Based on the loan period begin date from the most recently reported loan

Loan Summary:

Sort by: --Select--
Display Only: ---ALL----
Currently Sorted by LOAN DATE, No Filtering

1. **D0 - DIRECT STAFFORD SUB (SULA ELIGIBLE)**
   - Status: IA as of 08/10/2018
   - Approved Amt: $3,750
   - Disbursed Amt: $1,875
   - OPB: $1,875
   - Agg. OPB: $1,875
   - Loan Date: 05/10/2018
   - Sep. Loan Ind: A
   - Loan Period: 06/20/2018 - 05/13/2019
   - Last Disb. Date: 08/10/2018
   - Last Disb. Amt: $1,875
   - Acad. Lvl: 4
   - ED Servicer: DEPT OF EDINELNET - 580

2. **D2 - DIRECT STAFFORD UNSUB**
   - Status: IA as of 08/10/2018
   - Approved Amt: $8,750
   - Disbursed Amt: $4,375
   - OPB: $4,375
   - Agg. OPB: $4,375
   - Loan Date: 05/10/2018
   - Sep. Loan Ind: A
   - Loan Period: 06/20/2018 - 05/13/2019
   - Last Disb. Date: 08/10/2018
   - Last Disb. Amt: $4,375
   - Acad. Lvl: 4
   - ED Servicer: DEPT OF EDINELNET - 580
Aggregate Loan Data on the ISIR

Located under the “NSLDS Financial Aid History” section:

<table>
<thead>
<tr>
<th>Category</th>
<th>Outstanding</th>
<th>Pending</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>FFEL/Direct Loans</td>
<td>$10,000</td>
<td>$0</td>
<td>$10,000</td>
</tr>
<tr>
<td>Subsidized Loans</td>
<td>$102,124</td>
<td>$0</td>
<td>$102,124</td>
</tr>
<tr>
<td>Unsubsidized Loans</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>TEACH Loans</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Combined Loans</td>
<td>$112,124</td>
<td>$0</td>
<td>$112,124</td>
</tr>
<tr>
<td>Unallocated Consolidation Loans</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Perkins Loans</td>
<td>$1,000</td>
<td>$0</td>
<td>$1,000</td>
</tr>
<tr>
<td>Outstanding Principal Bal.</td>
<td>$112,124</td>
<td>Current Year Loan Amount: $999,999</td>
<td></td>
</tr>
<tr>
<td>Grad Disbursement Amount:</td>
<td>$13,423</td>
<td>Grad Disbursement Amount: $98,701</td>
<td></td>
</tr>
</tbody>
</table>
Aggregate Demonstration
Aid Tab - Loan Summary

- The Loan Summary displays information about every loan taken out by a student and/or PLUS borrower.

- Parent PLUS Loans taken on behalf of the undergraduate student do not affect the student’s aggregate totals.
Aid Tab - Loan Statuses

<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>C</td>
<td>Canceled</td>
</tr>
<tr>
<td>PZ</td>
<td>Death/Pension</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/Unreimbursed-No Default Claim Requested</td>
</tr>
<tr>
<td>UD</td>
<td>Permanently Uninsured/Unreimbursed-Default Claim Denied</td>
</tr>
<tr>
<td>UI</td>
<td>Unreimbursed</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>

- Click the 🔄 in the top right corner of the page or the status icon to access the descriptions of loan statuses.
The Loan Detail page displays the following historical information for a loan:

- Loan amounts
- Loan activities
- Loan status changes
- Guaranty Agency/Lender/Servicer Agent History
Loan Display Demonstration
Aid Tab - Grants

- Displays the following Grants that have been disbursed to a student:
  - Pell Grants
  - Academic Competitiveness Grants (ACG)
  - National Science Mathematics Access to Retain Talent (SMART) Grants
  - Teach Education Assistance for College and Higher Education (TEACH) Grants
  - Iraq and Afghanistan Service Grants (IASG)
## TEACH Grant History

<table>
<thead>
<tr>
<th>Award Year</th>
<th>Scheduled Award</th>
<th>Award Amount</th>
<th>Disbursed Amount</th>
<th>Acad. Yr Level</th>
<th>Latest Disb</th>
<th>Posted by COI</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008 - 2009</td>
<td>$4,000</td>
<td>$4,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009 - 2010</td>
<td>$4,000</td>
<td>$3,000</td>
<td></td>
<td>5</td>
<td>01/25/2010</td>
<td>04/22/2009</td>
</tr>
</tbody>
</table>

### Loan Detail

- **Loan Last Updated:** 08/08/2016
- **Loan Type:** D8 - DIRECT UNSUBSIDIZED (TEACH)
- **Loan Period Start:** 12/22/2009
- **Loan Period End:** 01/25/2011
- **Scheduled Repayment Date:** 01/23/2014
- **Separate Loan Ind:** A
- **Academic Year Begin:** 12/22/2009
- **Academic Year End:** 01/25/2010
- **Interest Rate:** 6.80% FIXED
- **Date of Default for CDR:** N/A
- **Next Payment Due Date:** 06/30/2014
- **Borrowed at OPEID:** 00138500
- **Borrowed at Name:** YODER TECHNICAL UNIVERSITY 00202200

### Notes
- **TEACH Grants that are converted into TEACH Loans become Direct Unsubsidized Loans (D8)**
  - Not included in a student's aggregate totals
Aid Tab - Overpayment List

- The Overpayment List page displays:
  - Overpayment Type
  - Overpayment Status
  - Disbursement Date
  - Repayment Date
  - Create Date
  - Source
    - School
    - ED Regional Office (EDR)
    - Transfer
Aid Tab - Student Contact Info

- The Student Contact Info page displays the following information reported to NSLDS for a student:
  - Postal Address
  - Email Address
  - Phone Numbers
  - Source Provider
Grant and Overpayment Display Demonstration
Enrollment Reporting
Enrollment Reporting Process

- The NSLDS Enrollment Reporting Process is a “roster and respond” process
  - NSLDS sends rosters of aid recipients to institutions
    - Rosters must be distributed no less frequently than every 60 days
    - Most institutions receive their roster every 30 days
  - Institutions respond to NSLDS with the current enrollment status of each aid recipient listed on the roster and includes aid recipients that NSLDS did not place on the roster
    - Institutions are expected to respond to their roster within 15 days of receipt
    - Institutions are also expected to respond to their errors within 10 days of receipt
  - Batch (SAIG) Reporting, Online Reporting or Spreadsheet Upload
Enrollment Reporting Cycle

NSLDS sends roster to the school based on the school’s schedule

School updates students on roster and adds new students

School sends roster to NSLDS

NSLDS sends error acknowledgement file to school

School corrects errors and submits updated records

NSLDS creates the Enrollment roster
Response to the Roster

Campus Level

- Student Identifiers
- 8-digit OPEID
- Certification Date
- Enrollment Status Effective Date
- Enrollment Status
- Anticipated Completion Date (ACD)
- Term Begin and End Dates (optional)
- Student Permanent Address (optional)
- Student Phone Number (optional)

Program Level

- Classification of Instructional Programs (CIP) Code
- CIP Year
- Program Credential Level
- Published Program Length
- Weeks in Title IV Academic Year
- Program Begin Date
- Special Program Indicator
- Program Enrollment Status
- Program Enrollment Effective Date
Enrollment Statuses

• Institutions report the current enrollment status and the earliest date on which that status is effective.

• The enrollment status values are:
  - ‘F’ (full-time)
  - ‘Q’ (three-quarter time)
  - ‘H’ (half-time)
  - ‘L’ (less than half-time)
  - ‘A’ (leave of absence)
  - ‘G’ (graduated)
  - ‘W’ (withdrawn)
  - ‘D’ (deceased)
  - ‘X’ (never attended)
  - ‘Z’ (record not found)
Enrollment Demonstration
## Enroll Tab

### Menu
- Enrollment Summary
- Enrollment Update
- Enrollment History Update
- Enrollment Reporting Profile
- Enrollment Submittal
- Enrollment Notification Override List
- Exit Counseling Submittal
- GE List
- GE Mass Update/Deactivate
- GE Submittal

### Input Fields
- SSN:
- First Name:
- DOB:
- Previously Retrieved Borrower:
- FSA ID: NSLSC0T000

### Status Message
- No student currently selected.

### Privacy Act of 1974 (As Amended)

- **Enrollment Summary**
- **Enrollment Update**
- **Enrollment History Update**
- **Enrollment Profile**
- **Enrollment Preferences**
- **Enrollment Schedule**
- **Enrollment Statistics**
- **Enrollment Submittal Tracking**
- **Enrollment Submittal**
- **Exit Counseling Submittal**
Enroll Tab - Enrollment Summary

- The Enrollment Summary page provides an overview of a student's most recent status at every school where enrollment has been reported for that student.
Enroll Tab - Enrollment Detail

- The Enrollment Detail page displays a detailed history of a student's enrollment status at each school.
Enroll Tab - Program Enrollment Detail

- The Program Enrollment Detail page displays a detailed history of a student's enrollment status for each program the student has attended.

<table>
<thead>
<tr>
<th>School Name</th>
<th>OPEID</th>
<th>Most Recent Status</th>
<th>Eff. Date</th>
<th>ACD</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 COLLEGE OF TELEVISION</td>
<td>00198000</td>
<td>Three Quarter Time</td>
<td>03/08/2018</td>
<td>05/16/2019 0</td>
</tr>
<tr>
<td>2 YADON COMMUNITY AND TECHNICAL COLLEGE</td>
<td>00199600</td>
<td>Withdrawn</td>
<td>05/25/2017</td>
<td>N/A</td>
</tr>
<tr>
<td>3 YODER TECHNICAL UNIVERSITY</td>
<td>00200200</td>
<td>Full Time</td>
<td>08/14/2017</td>
<td>12/18/2021 1</td>
</tr>
</tbody>
</table>
Enroll Tab - Enrollment Update

• The Enrollment Update page retrieves enrollment information for students to be updated on the Enrollment Maintenance page.

• **Advanced Search Options**
  – Find students who need to be certified
    • Sort results by Certification Date (oldest first)
  – Find students without programs
    • Filter results to display students without program enrollment information by checking the box Exclude Students with Certified Programs
  – Refine search by Campus and Program Enrollment
Enroll Tab - Enrollment Maintenance

- The Enrollment Maintenance page allows updates to enrollment information for students.
  - Sort results by SSN, Last Name, Student Designator or Certification Date (oldest first)
  - Page displays the Total Students Matching Criteria
Enroll Tab - Enrollment Maintenance

- Update the current status at both Campus-level and Program-level

<table>
<thead>
<tr>
<th>CIP Code</th>
<th>Description</th>
<th>Credential Level</th>
<th>Special Program</th>
<th>Program Begin Date</th>
<th>Program Status</th>
<th>Status Effective Date</th>
<th>Program Length</th>
<th>Weeks in Acad. Yr.</th>
</tr>
</thead>
<tbody>
<tr>
<td>131202</td>
<td>Elementary Education and Teaching</td>
<td>03</td>
<td>N</td>
<td>08/27/2018</td>
<td>F</td>
<td>08/27/2018</td>
<td>4 + 0 Years</td>
<td>0 + 0</td>
</tr>
</tbody>
</table>
Enroll Tab - Enrollment History Update

- The Enrollment History Update page allows users to:
  - Update historical enrollment information
  - Update historical data from all locations in the administration group
Enroll Tab - Enrollment History Update/Confirm

Enrollment History Update

Location:
- Location: YODER TECHNICAL UNIVERSITY - 00200200

Campus Enrollment

<table>
<thead>
<tr>
<th>Delete</th>
<th>Certification Date</th>
<th>Anticipated Completion Date</th>
<th>Enrollment Status</th>
<th>Effective Date</th>
<th>New Row</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>05/12/2019</td>
<td>05/13/2021</td>
<td>GRADUATED</td>
<td>05/18/2019</td>
<td>Add Row Below</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Q - THREE QUARTER TIME</td>
<td>05/18/2019</td>
<td>Add Row Below</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>L - LESS THAN HALF TIME</td>
<td>05/15/2018</td>
<td>Add Row Below</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>H - HALF TIME</td>
<td>04/13/2017</td>
<td>Add Row Below</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>F - FULL TIME</td>
<td>02/21/2017</td>
<td>Add Row Below</td>
</tr>
</tbody>
</table>

Program Enrollment

<table>
<thead>
<tr>
<th>Delete</th>
<th>Effective Date</th>
<th>New Row</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>05/13/2019</td>
<td>Add Row Below</td>
</tr>
<tr>
<td></td>
<td>05/18/2019</td>
<td>Add Row Below</td>
</tr>
<tr>
<td></td>
<td>05/15/2018</td>
<td>Add Row Below</td>
</tr>
<tr>
<td></td>
<td>04/13/2017</td>
<td>Add Row Below</td>
</tr>
<tr>
<td></td>
<td>02/21/2017</td>
<td>Add Row Below</td>
</tr>
</tbody>
</table>

Enrollment History Update Confirm

Location:
- Location: YODER TECHNICAL UNIVERSITY - 00200200

Campus Enrollment

- Certification Date: 08/22/2019
- Student Designator: 
- Anticipated Completion Date: 05/15/2021

<table>
<thead>
<tr>
<th>Enrollment Status</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>F - FULL TIME</td>
<td>08/21/2017</td>
</tr>
</tbody>
</table>

Program Enrollment

- CIP Code: 510802 - Dental Hygiene/Hygienist
- Cred. Level: 02 - ASSOCIATE'S DEGREE
- Program Length in Yrs.: 2.0
- Program Begin Date: 08/21/2017

<table>
<thead>
<tr>
<th>Enrollment Status</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>L - LESS THAN HALF TIME</td>
<td>08/21/2017</td>
</tr>
</tbody>
</table>

Confirm
Enroll Tab – Enrollment History Updated
Enroll Tab - Enrollment Reporting Profile

- The Enrollment Reporting Profile page displays:
  - Roster Preferences
  - Enrollment Administration
  - Roster Schedule
Enroll Tab - Enrollment Reporting Statistics

- The Enrollment Reporting Statistics page displays information about the extent and quality of the enrollment reporting provided by schools participating in the federal student aid programs.

![Diagram showing Enrollment Reporting Statistics](image)
• The Enrollment Submittal Tracking page displays information about enrollment rosters and submittals.
Transfer Student Monitoring
What is Transfer Student Monitoring (TSM)?

• Through the TSM process, NSLDS provides financial aid history information for students who transfer from one school to another during the same award year.

• Schools can choose between 30 and 120 days to monitor a transfer student.

• The TSM Process:
  • Inform - School informs NSLDS of students to be monitored.
  • Monitor - NSLDS monitors data received and determines who to notify.
  • Alert - NSLDS alerts new school of relevant changes.
Transfer Student Monitoring (TSM)

- NSLDS will alert schools when a student has:
  - A new loan or grant
  - A loan or grant is cancelled
  - One of the following changes occur to a loan or grant:
    - Scheduled Amount
    - Award Amount
    - Amount Paid to Date
    - Latest Disbursement Date
    - Expected Family Contribution (EFC)

- Schools may add students for monitoring online (Student Monitoring Add page) and/or through batch (Transfer Monitoring Inform Batch File)
TSM Demonstration
Tran Tab

- Transfer Monitoring List
- Monitoring Alert Review
- Transfer Monitoring Re-Populate
- School Transfer Profile
Tran Tab - School Transfer Profile

- In order to monitor students, schools must have at least one authorized online NSLDS User.

- Schools must complete the School Transfer Profile before using the Transfer Student Monitoring (TSM) process.
The Transfer Monitoring List page displays detailed TSM information that can be updated or deleted.
Tran Tab - Monitoring Alert Review

- The Monitoring Alert Review page lists all students on a school’s TSM list to which changes have been reported.

<table>
<thead>
<tr>
<th>SSN</th>
<th>Name</th>
<th>DOB</th>
<th>Change</th>
<th>Reviewed</th>
<th>Date Alerted</th>
<th>Enrollment Begin Date</th>
<th>Monitor Begin Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>956-00-0004</td>
<td>YEHELMJP WIPHERPTM</td>
<td>09/02/1995</td>
<td>Grant IA</td>
<td>☑️</td>
<td>05/22/2019</td>
<td>06/03/2019</td>
<td>05/16/2019</td>
</tr>
</tbody>
</table>
The Transfer Monitoring Re- Populate page allows school users to:

- Retrieve those students previously submitted that no longer display on the TSM List page
- To add students back to the Inform list for additional monitoring
Scheduled and Adhoc Reports
The Report Tab displays a list of reports available for schools to retrieve NSLDS data.

Types:
- Report – Organized in an easily readable document
- Extract – Fixed-Width and Comma Separated Values (CSV)

Ways to request:
- Scheduled
- Ad Hoc
- Web Report (On Demand)

Output medium:
- PDF File (Web Reports Only)
- Microsoft Excel Spreadsheet (Web Reports Only)
- SAIG
Report Demonstration
Report Tab

- Report Names
- Report IDs
- Log Page
- PDF File
- Excel Spreadsheet
- Student Aid Internet Gateway (SAIG)
Report Tab - Reports
Report Tab – Web Reports (On Demand)
## Report Tab - SCHET1 Results

<table>
<thead>
<tr>
<th>Date Sent / Received</th>
<th>Date Processed</th>
<th>Type</th>
<th>Total Records</th>
<th>SAIG Mailbox</th>
<th>OPEID</th>
<th>Total Bundles</th>
<th>Valid Bundles</th>
<th>Bundles in Error</th>
<th>Percent Valid</th>
<th>Campus Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/12/2019</td>
<td>11/12/2019</td>
<td>WEB</td>
<td>2</td>
<td>N/A</td>
<td>0200200</td>
<td>2</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>11/08/2019</td>
<td>11/08/2019</td>
<td>WEB</td>
<td>4</td>
<td>N/A</td>
<td>0200200</td>
<td>4</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>10/24/2019</td>
<td>10/25/2018</td>
<td>SUBMITTAL</td>
<td>677,692</td>
<td>TG66398</td>
<td>0200200</td>
<td>3</td>
<td>0</td>
<td>3</td>
<td>0.00%</td>
<td>N/A</td>
</tr>
<tr>
<td>10/17/2019</td>
<td>10/18/2018</td>
<td>SUBMITTAL</td>
<td>1,777,088</td>
<td>TG66398</td>
<td>0200200</td>
<td>22</td>
<td>22</td>
<td>0</td>
<td>100.00%</td>
<td>N/A</td>
</tr>
<tr>
<td>10/17/2019</td>
<td>10/17/2018</td>
<td>WEB</td>
<td>1</td>
<td>N/A</td>
<td>0200200</td>
<td>1</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>10/15/2019</td>
<td>10/16/2018</td>
<td>SUBMITTAL</td>
<td>628,941</td>
<td>TG66398</td>
<td>0200200</td>
<td>3</td>
<td>0</td>
<td>3</td>
<td>0.00%</td>
<td>N/A</td>
</tr>
<tr>
<td>10/12/2019</td>
<td>10/15/2018</td>
<td>SUPPLEMENTAL</td>
<td>3,691,852</td>
<td>TG66398</td>
<td>0200200</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>10/12/2019</td>
<td>10/12/2018</td>
<td>SUBMITTAL</td>
<td>1</td>
<td>N/A</td>
<td>0200200</td>
<td>1</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>09/18/2018</td>
<td>09/18/2018</td>
<td>SUBMITTAL</td>
<td>648,595</td>
<td>TG66398</td>
<td>0200200</td>
<td>2</td>
<td>0</td>
<td>2</td>
<td>0.00%</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Organization Display
Org Demonstration
Org Tab

- Organization Contact List
- Organization Search
- Data Provider Schedule
- Repayment Information

- Cohort Default Rate
- School Profile
- Organization Profile
- GE Debt Measures
The Organization Contact List page displays contact information for an organization.

**Org Tab - Org Contact List**

![Organization Contact List](image-url)

**Organization Contact Add**

- Available Functions:
  - SSN/ID Issues
  - IS Technical Issues
  - Enrollment Reporting
  - FAT/SAR/ISIR Issues
  - Default Issues
  - Overpayment Issues
  - Perkins Issues
- First Name: [Input Field]
- Last Name: [Input Field]
- Title: [Input Field]
- Phone: [Input Field]
- Fax: [Input Field]
- E-Mail: [Input Field]
- Address: [Input Field]
- City: [Input Field]
- State: [Select Field]
- Zip Code: [Input Field]

**Function List**

1. PRIMARY CONTACT
   - CINDY RITSAFFA
   - (826) 290-0977
2. ENROLLMENT REPORTING
   - TIFFANY TERIOSCHES
   - (826) 290-0900
3. FFEL ISSUES
   - CINDY RITSAFFA
4. PELL GRANT ISSUES
   - CINDY RITSAFFA
5. PERKINS DATA PROV CONTACT
   - ASHLEY HAU
   - (826) 290-0082
6. DISABILITY PROCESSING
   - ASHLEY HAU
   - (826) 290-0082

*PRIVACY ACT OF 1974 (AS AMENDED)*
Org Tab - Org Contact List
Org Tab - Organization Search by Type

Optional filter criteria

Name: DEPT OF ED/FEDLOAN SERVICING (FHEAA)
Code: 579
Type: ED Servicer
Status: OPEN
Address: P.O. BOX 69184
HARRISBURG, PA 17109-184

Organization Contact List

<table>
<thead>
<tr>
<th>Function</th>
<th>First Name / Last Name</th>
<th>Phone / Ext.</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRIMARY CONTACT</td>
<td>SCHOOL CATZONAC</td>
<td>(366) 100-5346</td>
<td></td>
</tr>
<tr>
<td>COHORT DEBT RATE ISSUES</td>
<td>CHRIS CAYU</td>
<td>(366) 100-5345</td>
<td></td>
</tr>
<tr>
<td>LENDER NSLDS CONTACT</td>
<td>MICHAEL REUSFES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CUSTOMER SVC (BORROWERS)</td>
<td>BORROWER CATZONAC</td>
<td>(366) 177-8763</td>
<td></td>
</tr>
<tr>
<td>DISABILITY PROCESSING</td>
<td>BORROWER CATZONAC</td>
<td>(366) 177-8763</td>
<td></td>
</tr>
</tbody>
</table>

*PRIVACY ACT OF 1974 (AS AMENDED)*
The Data Provider Schedule displays a history of current, past, and future scheduled data provider submittals.
### Data Provider Schedule

**Submission Details**

<table>
<thead>
<tr>
<th>Scheduled Submittal Date</th>
<th>Received Date</th>
<th>Processed Date</th>
<th>Loan Records Submitted</th>
<th>Loan Records Extracted</th>
<th>Loans with Errors</th>
<th>Submittal Pass Rate (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>12/31/2018</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>11/28/2018</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>10/29/2018</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>10/01/2018</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>09/27/2018</td>
<td>09/06/2018</td>
<td>09/07/2018</td>
<td>1,367</td>
<td>1,367</td>
<td>3</td>
<td>100</td>
</tr>
<tr>
<td>07/30/2018</td>
<td>06/09/2018</td>
<td>06/09/2018</td>
<td>1,374</td>
<td>1,374</td>
<td>2</td>
<td>100</td>
</tr>
<tr>
<td>07/02/2018</td>
<td>06/06/2018</td>
<td>06/06/2018</td>
<td>1,384</td>
<td>1,384</td>
<td>2</td>
<td>100</td>
</tr>
<tr>
<td>05/28/2018</td>
<td>05/06/2018</td>
<td>05/06/2018</td>
<td>1,399</td>
<td>1,399</td>
<td>2</td>
<td>100</td>
</tr>
<tr>
<td>04/30/2018</td>
<td>04/09/2018</td>
<td>04/09/2018</td>
<td>1,417</td>
<td>1,417</td>
<td>2</td>
<td>100</td>
</tr>
<tr>
<td>04/02/2018</td>
<td>03/09/2018</td>
<td>03/09/2018</td>
<td>1,432</td>
<td>1,432</td>
<td>2</td>
<td>100</td>
</tr>
<tr>
<td>02/26/2018</td>
<td>02/09/2018</td>
<td>02/09/2018</td>
<td>1,441</td>
<td>1,441</td>
<td>2</td>
<td>100</td>
</tr>
<tr>
<td>01/29/2018</td>
<td>01/09/2018</td>
<td>01/09/2018</td>
<td>1,451</td>
<td>1,451</td>
<td>2</td>
<td>100</td>
</tr>
<tr>
<td>01/01/2018</td>
<td>01/01/2018</td>
<td>01/01/2018</td>
<td>1,457</td>
<td>1,457</td>
<td>2</td>
<td>100</td>
</tr>
<tr>
<td>12/26/2017</td>
<td>12/26/2017</td>
<td></td>
<td>1,465</td>
<td>1,465</td>
<td>2</td>
<td>100</td>
</tr>
</tbody>
</table>
Org Tab – Repayment Information

• The Repayment Information page displays the current repayment status of certain borrowers who attended a school during a specific period.
The School Profile page allows you to view a school's Title IV grant and loan program information, as well as the school's academic and program status information.
Org Tab - Organization Profile

- Allows authorized users:
  - View and/or update scheduled reports
  - View currently enrolled batch services
  - Add or update the school transfer profile
  - Add monitored students for TSM and/or FAH to the Enrollment Roster
1. When a student exceeds the undergraduate subsidized loan limits, what type of icon will you see?

2. Name five informational items you can get from NSLDS?

3. When updating enrollment status using enrollment maintenance, should you update at the campus-level or program-level?

4. What are the three ways to request a report?
Tools and References

- NSLDS Enrollment Reporting Guide
- NSLDS Record Layouts
- NSLDS Newsletters
- Transfer Student Monitoring & Financial Aid History User Guide & Record Layouts
Tools and References Continued

- The ISIR Guide 2020-2021
- Federal Student Aid Handbook
- SAR Comment Codes and Text 2020-2021
- EDE Technical References
Questions and Answers
NSLDS Contact Information

- Visit the NSLDS Customer Support Team in the Resource Center or contact the NSLDS Customer Support Center:
  - Phone: 1-800-999-8219
  - Toll: 785-838-2141
  - Fax: 785-840-9699
  - Web: https://nsldsfap.ed.gov
  - Email: nslds@ed.gov