

Male:

In the past, those of you that have been through these previously, we kind of take the approach for the hands on, kind of more of a how to navigate through the website. We basically had you log in, going through each tab. We go through each tab as it exists on the website and kind of show you information about it, and then have you do various exercises and things like that, just kind of from the navigational aspect. So but this year we're kind of taking a little bit of a different approach. What we're doing is trying to help design this to help you with your day to day activities as you go back to your shops.

And some of the things that we're going to kind of tailor this session to, as you're seeing here, is we're going to exercise. We're going to be talking about how to check your aggregates. So what we'll do is – Basically, how the flow will work is we'll have – we'll talk about various subjects at hand, go through a few slides, and then what we'll do is we'll release it back to you to then go over. Each one of you should have received each workstation should have received a green sheet. If you didn't, raise your hand, we'll get one to you. But essentially, then, exercises pertaining to the subject matter that we previously talked about, and then we'll kind of go through that methodology and going through this whole session.

So the first thing we're talking about is how to check the aggregate information as it relates to the website. And then, we'll have you do an exercise, and then we'll come back, take control, and then Judy will show you some information about the brand new spiffy enrollment reporting process, that those of you that were in the previous session in the update that Valerie kind of talked about, we'll have you go through and exercise and actually going through this middle process so you can kind of get a sense of how that process will be working with the new spreadsheets, the middle process.

And then I'll go ahead and I'll take back control, and then we'll talk a little bit about the transfer monitoring process, release it back to you for an exercise, and then, lastly, Judy will talk about the scheduled reports as they exist on **NSLDS**. Okay? So mainly, as you know, NSLDS is a huge depository, containing Title IV loans and grants, and that's constantly being updated by the various data providers that we have. Consist of the federal loan servicers, right, that are going to be submitting direct loans or any of the fellow loans that are department-held. As well as the guarantee agencies who continue to update their fellow loans. We've got those _ _

providers as well as schools or their services who report on their behalf, their **Perkins** portfolio, submitting to NSLDS.

So you'll have all the information being reported to NSLDS on a wide range of frequencies, and it can be as frequent as weekly, as Eric was saying in his session, that the federal loan servicers required to report is at least weekly, to some of the guarantee agencies that report then at least bi-monthly, or their requirement is to report at least monthly as well. So we have all this as well as the Perkins schools. At least monthly.

So with all the information coming into NSLDS, course the information can always be – it's always constantly being updated, okay? So with that information being updated, it's important to realize that when you bring up a student bar or you enter in their **sosh**, name, date of birth, and bring up the website, you're looking at information that's real time. It's as of the latest information that we've gotten about that student, at least you're looking at it and seeing then their aggregate information, the loan as well as the loan history information, as of that time that you're viewing it, versus if you're looking at an **ICER** that was processed maybe some time ago, depending on that process date that comes to you _ ICER, at that point in time, when the information was available to us, that we send that information on the ICER.

So the longer period of time that goes by between when you receive the ICER versus when you look on the website, there could be some differences. So the closer the timeframe that you have between the ICER and reviewing the information, the closer the information will be, and then what can help you then, is if it comes time for troubleshooting or looking at an individual case by case basis seeing where students are with their aggregates, the information will be more consistent displayed between the ICER and the website. What's the big difference being also that the NSLDS, the ICER piece, the financial aid history portion of it, you're only getting a fraction of the information that versus what you'd get on the website, which is the entire financial aid history, so you're getting a more comprehensive picture real time on the website, okay?

So then, with then, of course, all the data providers sending this information, NSLDS is a nice resource for you to then bring up and then track where a borrower is as it relates to their aggregate loan limits, okay? And that's that whole, okay, where are they, graduate, or undergraduate, with their subsidized limit of the \$23,000.00 or the combined total of the \$31,000.00, versus if

they're independent, so that \$23,000.00 with the higher combined total of the \$57,500.00, versus likewise with the graduate totals in there, and their loan limits, and that's important, cause those are the thresholds I guess we kind of look at when then displaying then how they relate to their loan limits, and then if we're going to flag them accordingly as we'll talk through here.

Okay. So one of the – So before we can even dive in to figure out, okay, where is this borrowing as it relates to their aggregate loan limits, there's two questions that we need to kind of answer and figure out. Is, okay are they graduate or undergraduate? And then, of course, what is their dependency status? So the things that we then look for to derive that information is kind of where – what I tried to drive home here on this slide, in that – is that for the graduate undergraduate piece, that's driven by the loan level information that's reported by the various data providers. So what we do is we look, then, to see what that most recent loan is, if it's either graduate and or undergraduate, we look to see what they are, and that's driven by the aid, as it's reported onto NSLDS by way of that loan information. It's not what the student files on the FAFSA, that self-reported value __ undergraduate or graduate. It's based on the information, on the aid that's reported to NSLDS by way of that loan.

So we look to see what their latest – their most recent loan is, graduate or undergraduate, and then we get then that **germination**, grad or undergrad. And so then, with that, then, we need to figure out where it is at that point in time, that they were dependency-wise, so what we'll do is on that most recent loan we find by way of that loan's loan period begin-date where it falls in that award year. Okay? So if it falls anywhere between June or July 1st through the following June 30th, then it's going to be designated in that award year time frame. So by way of that most recent loan, loan period begin-date, what award year is it in? Now we've got those pieces.

Then, we need to find out for that award year what dependency status were they, okay? So then that's when what we'll do for that piece that equation to try and figure out is we'll look at what **CPS** calculated that borrower to be, that student to be, for that award year timeframe, either independent or dependent. We'll treat a dependency status with a D or an X which is rejected dependent, the same value as being a dependent student. Likewise, if it's an independent or that rejected independent of Y, we still treat those as collectively as an independent student as well. So that's how we kind of go about trying to answer those two questions of what

are they, graduate or undergraduate, based on the loan, loan period begin-date, and the award year time frame, then going after the award, the corresponding dependency status that they were at that point in time. Okay?

So then, after we have that information, what we're going to do is just display for you in this aggregate loan information table that you're seeing here, you're going to be seeing those key elements that we found, hopefully I can get this to work. It's hard to drive. So you'll see then, here's where we're saying, all right, here's the award year, what we determined it to be. And then the corresponding dependency status. So if your mouse over that, it'll display for you what it is, saying dependent, undergraduate. And then, likewise, you've got these two different categories under the loan type. You've got the undergraduate, with the sub, un-sub, and the combined total of the undergraduate. And then you've also got the graduate piece, portion of it. The aggregate totals, which, again, is what is made up of the graduate sub, and then the graduate un-sub, and then the graduate combined total.

So we're breaking those out for you. And then that last – then you have the total section there, and that's simply nothing more than adding up the undergraduate sub, un-sub, and then adding it together with the graduate sub and un-sub, and you'll see, then, the totals being displayed there, okay?

So the other key pieces then that make up then how we determine the aggregate, the undergraduate portion, is if they've had any loans that have an undergraduate academic level, and those academic levels of one through five on the individual loans, or, the graduate, then, if it's any of the individual loans that have been reported with academic level of A through D or G, so then we'll collectively lump the information together at the top. So then what you'll have then is then you've got the other category, which is basically anything that doesn't count toward the borrower's aggregate loan limits. So you'll find, under that section, the Perkins loans, or **NDPlus, or any Plus Graduate or __ Teach.**

So then, basically, what you'll have, then, is you've got the different columns. The first column is that loan type. Sub and un-sub combined. And then you've got the outstanding principle balance. The outstanding principle balance then will be the addition, the summation, of all by the loan type grad or undergrad that aggregate **OPB** that we arrive at the individual loan level. That's the one cell that's the agg OPB. That's all driven by where a loan is in its life cycle that we come up with that value to then

add to the top. And you've got the pending disbursement, and that's nothing more than for those loans that are still in-school status that haven't been fully dispersed yet. You'll see the difference being displayed here, rolled up in their appropriate loan type sections, okay?

And then that far column on the right is the total, so it's nothing more than the OPB plus the pending disbursements gives us that total. So it's that total column is the one that we look at to see where they are, with these other two pieces of information that we're looking at, what are they, grad or undergrad, and what's their dependency status, to then see where they are when __ begins their aggregate loan limits. Is that last column, okay?

Previously, those of you who – before we do this enhancement, which we did, we made this enhancement to the website, breaking it out around January 2010. Unfortunately, we didn't do a very good job as far as rolling that out and communicating it to the community through our typical forum through the newsletters. It just didn't happen. So it's kind of trying to take this opportunity to kind of let you know kind of how it's working as well. But previously, we would just give you just that total, that total column. We never broke it out between undergraduate and graduate, the totals, where then that caused I think somewhat a little extra work for you, is if we would say that you know the bar was in exceeding their subsidized loan limit, and if they had undergraduate loans, you never really kind of knew which ones they were exceeding their limits on, so it would cause a little bit extra work, so that's why we were really – we heard what you – your frustrations, so that's why we broke that out, not only on this table here, by graduate and undergraduate, but then came up with the flags that you're seeing here.

So these separated out loan limit indicators, breaking them out by grad or undergrad, sub or combined, to help then make that determination, which one they're over. So what we did, then, as I'm not only give you the descriptor of value of which one they're exceeding, we've also – we also made these icons a little more interactive, so that way all you have to do is click on them, and if you click on them, then it automatically filters – excuse me. It automatically filters then the loan history webpage of all those loans that went in to causing that overage. So that way helps you to see what NSLDS then is using that went into causing these flags.

So then, basically all you're seeing here is any type of warning icon is at the top of the loan history webpage, and as we're saying, the exceeds icons, they're interactive, so all you have to do is click them, and then automatically then will filter the loan history webpage of those loans that went into, that were attributed to that overage indicator. We've only did it for the exceeding, thinking those are the ones that you want to focus in on. We didn't do it for the **closed two**, but that's if we did it to the closed too would you find that to be helpful as well? I've seen a few heads nod that, hey, if we were to do this like, we'd do the exceeds, causing an automatic click to be filtered for closed two, that'd be a good thing. Okay. All right. We'll take that, take that back.

So then after looking at this information, then hopefully you'll be able to then look at it and then look at the totals to see how they all add up. So then that's where we'll go ahead and release the control to you guys. Oh, yeah. So what you'll want to do is – Is the icon – I need to come down, take a look, see how you guys are set up. Jose is going to release it. Okay, so what you guys want to do is go launch your IE web browser, and then, from there, I believe there should be the link for the training, the NSLDS training database. We should have put a shortcut on the desktop, we'll make sure we take care of that for the next go round. Yeah, we're going to the website, the NSLDS.

Okay, so it's – For the URL, if you want to type with me, it's www.NSLDSTraining.ed.gov – all one string. Oh, we could? Oh, that's awesome. Oh, okay. So it's not the one that when you're back in your office and you going to that website and that URL, cause you try to login over there with your ID, and that – or the ID here, it's not going to work for you. This is the training database where we have fictitious information in there about our borrowers, so it's NSLDSTraining.ed.gov. Is everybody there? Sweet. So if you go in and click on 'proceed', click to continue. Yeah, click to continue, and then you should be able to see the FSA login box, and here, again, don't use yours that you use at home, but it's – no. So you want to use what's on the green sheet for the FSA User ID, starting with N-S-L-dot-S-C-zero-T-zero then a number, dot-FSA, and it's not case sensitive. The User ID is not case sensitive.

Okay, who said that? Okay, sweet. Oh, yeah. So go up here. Type. Here, I'll get it for you.

Female:

Yeah, it is a zero in the login, so it should follow the format. Yeah, they're not zeros, they're not letters, they're zeros. They're zeros, so you're going to type in the NSL-dot-SC-0-T-0-0 or 0-

whatever your number is, as is on your green sheet, and then the password is also on your green sheet. And that is – you know we have to have a symbol, so it's F-S-A with a '\$' for the 'S', O-R-L for 'Orlando', and then 'twelve' for this year. So that's the way that we did the password. If you raise your hand if you're having trouble with the log-on, we'll come around and help you. And then once you get in, you can go ahead and follow the exercise. We're doing exercise number one, which is an effort to show you how we're using the filtering technique.

You have a student on your sheet that has exceeded the un-sub, I mean the subsidized loan amount, and you're going to bring that student up. And the link is on the – well, you have to put in the student information and then go to 'Loan History'. Go to the loan history page and then you're going to see your warning icon there, and click on that icon, and then it's going to filter the loans if you scroll down on the page. It filters and just shows you the loans that make up that exceeds. You click on the link, and then you scroll down, and you'll see all the loans that are involved in that calculation. Questions, anyone? Just raise your hand, we've got people throughout the room who can come and help you. Mm-hmm.

Okay, and you know we didn't tell you that you're going to have to do all the sign in things of agreeing to the Privacy Act, which normally you should take the time to read before you say you agree, but we know you do that every morning, so you click agree, put in your verification, those funny little squiggly letters, put that in, then you have your rules of behavior, and then you finally get into the menu page, and on the menu page, you can put in that student identifiers under exercise one. Once you've gotten to the loan history page, you then have the icon that you can click on, and that's just going to filter the loans that you're looking at so that you can see just the ones that are involved in the aggregate.

Now, what we want to point out to you about this is the purpose of this exercise is to show you the loans that were used in the calculation, and this helps you, because you – if the student's done all their loans at your school, you may have better information than we have, because of information, all of our information is provided to us by data providers. So this gives you an opportunity to see that this is what was use in the calculation to determine the aggregates for the students. You have the option, then, at looking at these and trying to figure out if there is something like – there might be some capitalized interest that made up part of that calculation.

We're trying to work on that in the future, where our aggregates will take into consideration capitalized interest, but right now, we're showing you the data that we used, and then you, as the school professional, gets to take that information and determine what you can do for your student. We don't make the determination for what you can do for your student. We give you the information about what we've used for our calculations.

Male:

Okay, so hopefully you were able to log in. Once we got the URL for you, log in, look at your student, and then bring it up on the website. The student probably had more loans than what was being flagged for the overage for you, so they had sub and un-sub loans. While then clicking on that, the icon, for the overage, then that would have automatically filtered for you those loans that went in to then setting that flag. And then, able to – hopefully then you were able to then validate then the aggregate OPB, scroll down a little bit. Keep on going on. It's taking a look at these individual – that's fine. It's taking a look at these individual aggregate OPB amounts – that's calculated by NSLDS, that's calculated and it's depending on where the loan is in its loan life cycle, right?

And those of you who were in Eric's session, he kind of – he alluded to that and how we come up with that value for those older loans where the loan period end-date plus 90 days hasn't – has passed. Well, then, what we do in those cases, we try to take the lesser of the compared amounts, the lesser amount of the net loan amount, versus the total dispersment, compared to the outstanding principle balance. We take that lesser amount. So we're trying to factor out any capitalized interest, and that's how we're coming out with that aggregate OPB and that number. Well, we're then taking those individual numbers by loan type and then adding that up at the top. If it's an undergraduate loan, then that amount goes into that loan type in the undergraduate bucket. If it's a graduate, then it goes into that loan type. Okay? Okay. Question?

[Inaudible Question]

Yeah, when __ **reveal bar work** on the financial history page of the loan history page, there's a button there that if you should you want to add a borrower, if it's a transfer student, then you can review the information on that page, and then all you have to do is click on that button, and that will do is it will take that information, the borrower's identifiers, and it'll take you to the add to the transfer profile – add to the inform list that borrower. So then, that

way, all you have to do is enter in a few other key fields, such as the enrollment date, I think it is, so when the student's classes will be starting, just enter that in, and you save it, and then you just added that record to your inform list, to begin the transfer monitoring process. Okay? And we'll talk a little about the transfer monitoring process a little bit later on. Okay, at this time, I'm going to turn it over to Judy.

Judy:

We're actually going to grab a section on that in here. And we'll cover that for you, and although we're not doing a sort of log-on go here go there like we do we've done in the past, we're trying to focus more on your daily kinds of work. We are kind of going in the order of the tabs, so we will get to the transfer tab. That's exercise number four, right after enrollment. And I want to preface this enrollment section by asking you how many of you use a servicer for enrollment reporting? Okay. I'm sorry? Like a clearing house, okay. Oh, some of you didn't know the clearing house was a servicer? Okay, the clearing house is a third party servicer. They are not the department of education. Any servicer provides data to us, and then we report it out.

There was a dear colleague letter recently that focused on enrollment reporting, and the concerns the department has about accuracy, timeliness, and the integrity of the data, and they have had a lot of things outlined in there, of reminders, of what schools are supposed to do. And just because you use a third party servicer does not release you from the responsibility of monitoring your students' enrollment. Yes, you may have someone who is reporting enrollment on your behalf, but there's a lot of regulations and responsibilities around enrollment that you will be held accountable for, not necessarily your servicer.

So I do ask that even though you may feel like I can veg out on this, cause this is what my registrar does, we do ask that you get exposed to the new features that we're offering so that you have an understanding of what's out there in enrollment, and what information you can do, what you can do even though you may use a third party servicer. So we're going to talk about the enhancements that we made, and these enhancements were based on those concerns the department had, and us trying to provide a way at NSLDS to make it easier for you to provide timely, accurate data integrity information on enrollment reporting, cause enrollment reporting is so critical to the servicing of loans, making sure student gets their full grace period, and we learned in the session this morning that now there are going to be some loans that aren't going to get a grace period – I'm freaking out.

And there's going to be some that do and oh my gosh this is going to be so hard to keep up with, but that all of these things fit together and that's why enrollment reporting is so important, and why we've made these changes, to try to make it as easy for you as possible. What we've done is we've provided some new file formats for providing data, and this really comes out of listening to the schools and hearing the schools' concerns, how they would like to have things more flexible. We've created an enrollment profile that lets you tell us how you want to report your data, how you want to receive your data, and there's more information on what I'm going over in two newsletters that have been published on enrollment reporting, and if you bring up this presentation from the FSA conference slides, these are links to the actual newsletter.

If you're not familiar with using **IFAP**, you don't know that there's a section on NSLDS reference material, this link will take you directly to the NSLDS reference material. Our reference material is separated by data provider information, newsletters, record layouts, technical updates, and this is the link to the actual newsletter. So I'm talking about number 39 and 40.

All the changes will help you and there is also an enrollment reporting guide that was published November 20th. This is an updated enrollment reporting guide that includes all the new enhancements. It is actually announced in the newsletter number 40. This is – oh this slide just says 39. Okay. We need to update that. Cause this slide there's also a newsletter number 40, and that one talks about the new enrollment's middle process, and it talks about the release of the enrollment reporting guide, and we also have information on a new report for checking your certifications. As I mentioned you're responsible for what you report. We have two new reports to help you with that, and those are both explained in these two newsletters.

Okay, so let's go, first, to – oh, I have control? Okay. Oh, you want to do it for me? Thank you. We're going to talk first about the new file formats. We have had a fixed width file format. That basically means there's data, and it goes from this place in the field to this place in the field. We've enhanced that because we have new data fields.

We've also changed the way the data batch files work, where for each student, you report the school code and the location code on the record with the student. This allows you to use some of our other options, like enrollment administration, which we'll – which

Valerie actually covered in the update section today, and they'll be doing it three more times, so if you missed when Jim reported to – referred to Eric, what Eric said in his session, and what I'm saying about what Valerie said in her session, it's the NSLDS update section, so that's a good one to go and learn all of the new things that are being done.

We've also now added comma separated value. You're going to find this in a lot of the reports we're doing as well, but now, your data can just be separated by commas rather than going all the way out a certain field distance. And this allows you to use some features that might be easier, like Excel spreadsheets, Access databases, since the – we are no longer going to be supporting the **SSCR** 32-bit software. So these new formats allow you flexibility in how you put the data together and receive the data from us.

And then, there were some people that said they wanted XML, so we have – this is actually some servicers. So we did work with the post-secondary educational standards council, and came up with a schema for XML. The layout are all out in the NSLDS reference material area of file layouts, on IFAP, and the layouts were posted on April 6th of this year. The layouts are also in the enrollment reporting guide, so if you get to the guide, you get to most of this information.

We're asking that you transition to one of the new formats – no, we're not just asking. We're telling you that you will need to transition to one of the new formats by March 31st, 2013. You can certainly do it ahead of time. We have schools that are doing it. They are trying out the **CSV** and they're going, they're learning a lot in this process about how this all works. And some of them were quite excited about this is cool and I love it when somebody says this is cool (*laughter*). It is. It truly is.

So they – you need to tell us what your format is going to be. Now, if you use a servicer, your servicer will be telling us what your format needs to be. The servicer has to have the same format for all of its schools. So they will establish what they're going to send us, and they need to do that through us. The current format will be used until the new format is selected on the website, and if you don't select one by March 31st, 2013, we will select the enhanced fixed width for you. So the next roster file that you receive after that date, if you haven't told us what you do want, it will come in the enhanced fixed-width format.

Our next page shows the profile page. Now, a lot of the changes that we've made, you have the opportunity to – if you study this page, there's so much there. We're only going to go over a small part of it here just to give you a sense, because we have that deadline hanging over us of March 31st, 2013. Did I mention that already? That's looming over us, so we're going to show you how you can go out and update your profile, but this particular page, there's a couple of things I want to point out on it. Let's see, how did you get this pointer to work? Laser? Oh, yeah. Okay.

Here's some cool stuff on this page. This page goes on quite a while, I don't want to make you sick with my going up and down, but there are some areas right here, there are some buttons here, and one of those reports I talked about, this is a view certifications by quarter. We have a report that comes up, will pop up there, and show you what certifications by status were received by NSLDS over the past quarter. So when you have a chance, go out there. Might be interesting for you to see, especially if you're using a servicer, you may know that your students graduated in May, but all those graduations aren't reflected until the quarter that ends in October. It's kind of good to know when the data is getting to NSLDS.

Right here, we have a spot where you can request an ad hoc roster. It used to be – Oh, I should point out that there is on the – did we change this? Yeah, go back one. This used to be this little place on the menu bar used to be the enrollment reporting schedule. Basically all you had on there was the enrollment reporting schedule, and now we've got all this other information on here, including that you can request. It used to be you had to schedule your rosters, you had to schedule in the – oh, Valerie is saying I'm taking too long – you had to schedule in a roster but now you can just click a button and you will get your roster sent to you the next processing day.

And then we have a new feature for schools that have Perkins portfolios, where you can actually get notification files if you want to come up to me after I'll explain about that. But what we're going to right now is the preferences section, and we're going to turn this over for you to be able to give us the enrollment preference for your school for the new file format. Did I – Yes. Go to the next slide. You can see. One other thing I wanted to point out that – hop back one more, I'm sorry, Jose.

See where on this preferences section we have the little update button? Under preferences? When you log on, and you see that

you don't have that update button, you'll probably notice that there is a servicer listed in here, that means you can't do the update here, your servicer has to do it on your behalf, okay? But we want you to have the experience, so next slide, Jose. This is what happens when you click that update button. You get this little box here, and it has all these different options for you, and this is where you tell us how you want your roster to come.

You'll notice that there is a **TG** mailbox that's established through **SEIG**, and then but you can pick the various formats, and what we want to do here is we want you to have the experience of telling us that you would like to change your profile. You would like to change the file type. So we're going to have you – we're going to give you control, and you're going to go out there, and you are going to change from getting the current regular original fixed width, and you're going to select a **CSV** and submit that, and I want you to notice, on the profile page, what it looks like before, and then after you make that selection, and submit it, what it looks like after, and if you have any questions, raise your hand, we'll come help. You do have to go to the enroll tab to get to this, so click on the enroll tab, and then you'll see the enrollment reporting preferences menu option under the enroll tab. Scroll to the preferences. Click the update button. It's the profile page, and it's the preferences section on the profile page.

Make your choice and submit. If you'd rather do XML, that's okay. This is primarily a servicer option. It's also an administration option. A single file means that you get a single file that has all the students for that location that receives the TG number. So if you have – if you send all your location one two three and four to your zero zero main, they're going to – and you select single file, it's going to come in one file with all those students in there together, and social security order or name order, whichever way you pick. If you select multiple files, you're going to get a separate file for each of those location codes.

Once you've made your selection, hit submit, and you have to confirm that this is what you want to do, and then at NSLDS we always give you a chance to back out. But you make your choice, you confirm, and then you'll notice, now, that we have – oh, you're doing __ else. You can see now that we have CSV. Did that work for everybody? Okay, now we're going to get into – are you ready for us to take it back? And go onto the next thing? We want to get to that transfer monitoring stuff for sure. Okay.

Now, what I'm going to talk to you about is a functionality we're very excited about. And this is the enrollment spreadsheet submittal. And this is something that we're doing – there's a lot of people that have said why can't I just – I go online and I have to do each individual students. I have my spreadsheet here. Why can't I just upload my spreadsheet? Well, you can. We have added a new spreadsheet submittal process that allows you to take any file that is in a spreadsheet type format and upload the data to NSLDS.

The spreadsheet submittal information, there is – it is referenced in newsletter 40. There is information in the enrollment reporting guide. And we're also going to put out some directions in on FSA web enroll. I'm sorry. FSA download, where the software is, cause that's where you, if you were using the 32-bit software, that's where you went to get it, now our new submittal process is going to be out there, and this slide tells you that it's going to include the instructions. There's an instruction guide and there's also a submittal format. Basically, the format is using columns, and you can – let's go ahead and go to the next slide.

You can create a file by following the guide and seeing that okay in this column, in column A, I put SSN. In column B, I put student first name. This is off the top of my head, I don't really remember what order they're in, but you can create your own file or you can import the CSV you can put on just requested CSV files you can get the CSV file in. You can bring it in, put it into a spreadsheet, do your updates to that spreadsheet and then upload it to NSLDS and not have to send it back through SEIT. This is – you like this? You can just upload it right back to NSLDS any time you do an update on NSLDS it's instantaneous as soon as you confirm it.

That information is now in NSLDS and it's real and it's live and you don't have to wait for anybody to get the information. Yes?

Female:

But let's say I submit something and something's incorrect, like how gainful employment, that _ _ _ _ in there, would it be the same way as –

Judy:

Well, let me just show you, cause it is so cool. All right. So what you do to submit on NSLDS is you will go to the enrollment submittal page, am I skipping this over? Oh, I was just going to say about creating a file, you have to be sure it is an XLS or an XLSX file, and your very first tab, which is going to be the tab that NSLDS is going to go look for, must say 'upload file'. That's what that – you're...

Male: We'd update the slides. She's talking to –

Judy: Oh, they're not there. Okay, well, then, let's go in there. Let's just go into login and we'll do it live. All right. And what we're going to do is we're going to go to the enrollment submittal page, and we're going to show you how you would upload it. And you get to make choices about how you want to see your errors. Once you get – What we'll do is we will allow you to validate your information and it will bring back instantly on your PC a spreadsheet that shows you your errors. Your errors will be highlighted in the color of your choice, yellow, gray, or white, and they will have a mouse over feature, which you can turn on or off depending on whether you like the little mouse to tell you things directly.

The errors are also at the very end of the column, and you're going to get all the errors for that record all at once, so you're going to be able to go in, clean those things up, and resubmit. Now, there is the option of doing, if you're doing a huge spreadsheet and you don't want to go back through it, here's the other beauty. It's not just fifty, it's thousands that you can do it once. What is it, Kim, one meg? One meg. So you can provide us with one meg of data in a single spreadsheet. And those of you _ **GE** could only do 50 at a time, you're going oh, thank you. Cause it's so slick. It's so cool.

Okay, so here we are. He's showing you now that this is the page where we have the enrollment submittal. You get to first of all you will say you must be running on Windows to have this work. You will browse for the file that you have on your desktop. And you have these choices you can make about whether you want the results file to come back to you with all rows, so you want every row you submitted, and that will include all rows and it will have your errors, or do you just want to get back the rows with the errors?

I recommend if you're going to just get back the rows with errors that you do the validate and submit, because if you just do the – we have this validate button down here at the bottom. Validate looks at everything and doesn't send it to the database. So if you've got 1,500 records, you're pretty sure they're good, you might want to do validate and submit, and just get back your 50 that have a mistake. If you're doing like in our exercise we're going to be submitting 20, and I've asked you to do it with the plain validate as opposed to validate and submit so you get a sense of what it looks like, and then when you're actually working this out, you can

figure out the best selections for you, and that's what this little box allows you to do.

So we have the options of picking your background color for your errors, and then the – if you want the results all of everything or just the results of the errors, and then the mouse over, do you want it to pop over and tell you what's wrong in that particular field, or do you just want all your errors at the end? And do we have one that we can actually upload? I guess what we'll do is we'll have them – Yeah. Okay.

In your exercise, what we've done is we have a file on your PC, desktop, and the file – let me step over here. Hold, please. If you can let them see what that file's name is.

Male: There's a folder on your desktop called 'NSLDS'. Within that folder is this enrollment upload spreadsheet, so that's what you'll be drilling down to, to select on this browser button, to then __ update. Before doing that, however, you want to plug in your school code.

Judy: So you're going to open up before you actually try to submit this. You're going to open up your spreadsheet and you're going to see that the school code and the school location code is empty. See, Jose is showing you now. And what you do is you use the school code that is associated on your green page. And that's because you can only upload data for your own school, and since you're logged on as this school, you need to put your school code in that field. Now, you can do it, you can put it in, and you can copy it, and do all 22 pretty quickly.

And notice that, on the spreadsheet, it's not keeping the leading zeros. That's okay. With GE, that was not okay, but here, it's okay, because we're going to know what you mean, and we're going to fix it for you as we upload it. Okay, so Jose now has the school code and the location code in there. Oh, it incremented them, yeah, okay. Yeah, __ said wait a minute you don't have that authority (*laughter*). All those would have come back as errors. I did that a couple of times. Too helpful? (*laughter*)

Okay, so if you guys want to go ahead and do that, fix that part, while we're also doing it, then you'll be ready for the submittal process. It's on your green sheet. Right up at the top of your green sheet, it says OPE-ID. Oh, I'm sorry. I'm sorry.

Male: We need to release it to you.

Judy: Yeah, I'm sorry.

Male: We're so controlling at times.

[Laughter]

Judy: Okay, so Jose is trying to fill that in. Okay, now he's going to save it, and he's going to save it with – we don't want the next person to use yours, we want them to have this thrilling excitement, too, of doing it, plus the pages get mixed up from session to session, so save it as your initials and today's date. Today is the 27th, yeah. That's fine, that's enough. Okay. Now, go to your desktop and see that you file is there. Okay. So the file is there, and now he's going to submit it, and he's going to do it – he's going to validate and he's going to leave the everything – leave the default settings. So just hit 'validate'. And it's going to ask him that he is going to have a file that comes back with errors. Did you submit? Mm-hmm.

Waiting, waiting, this happens a lot. We've somehow – Yeah, go to the other page, then go back. There you go. Okay. Now, he's going to submit it. Uh-huh. Did you use one that you – okay. Well, isn't this a fine how do you do? And I'm so excited about this and I'm not sure you guys are going to get to try it! Since Jose is screwing up, why don't we just –

[Laughter]

Male: It's just so hard to find good help.

Judy: Yeah. Why don't we go ahead and turn it over and see if it's going to work on their PCs.

Male: Yeah, normally a secondary window would pop up that displays the Excel information for you to then see all these errors, if there are any, things like that.

Judy: Okay, you guys have control now. Are you finding the file and putting in your OPE-ID? Are you having this experience? Okay (*laughter*). Yes, you validate, mm-hmm. Oh, okay, okay, all right. Has anybody been able to submit? Okay, go to the enrollment submittal tab right next to the profile page right there, uh-huh. Well, you have to get your file in there. Did you update with your school code? You have to get the file and enter the school code.

It's on your desktop. So NSLDS, there you go. Then, open that one, then put your school code in, this number right up there.

Male: So to drive that home, entering the information on your spreadsheet. You've got the blank column for school code. You got the school branch code. The school code is the first six digit number on your green sheet, and then that next column over is followed by the last two digits, so it's six numbers in the one field, two in the other. They'll display as one for the branch campus, because that's how Excel treats that as a number. Okay, well don't know what's going on here. Sometimes bad things happen to good people. And we're all good people. So normally what would happen is a secondary window would pop up with the Excel information as you validate, and then you would see on there, as Judy was talking about, if there are any errors, then it would highlight that, and it would give you a descriptive value, what's going on with that, so then you can fix them right then and there as it's telling you the reason why it's erroring out, and you can update it, then turn around and upload it again.

So we apologize for it not kind of working like it should. It won't be doing this production, so the good news is it's a training database, so we're working through it there at your expense, unfortunately.

Judy: Yeah, I'm sorry that that didn't work for you. It is really cool and slick.

Male: It is pretty nifty. It really is.

Judy: We love it. We're going to have it ready so you can be sure and come down to the lab and we will show you how to do it, but for right now, we'll go ahead and move onto transfer monitoring, and if we can find the presentation that shows you some pictures, we'll try to go back to it for you. And we have it in the PC lab also. So come visit us, room 30, upstairs. Not this upstairs, but the other upstairs, resource room. Okay.

Male: If nothing else, we wanted people to come visit us up in the resource center, so that's why we do – get some foot traffic up there, keep our guys busy. No, again, sorry for that inconvenience. We really wanted to show it to you so you can see how it works. We'll have it up and running by the next time the session – so if you want to take a peek, then, we can. Or visit us up in the resource center. Okay. Okay, the transfer student monitoring process.

Basically, as I alluded to earlier, is that you're required to inform NSLDS of those midyear transfer students, and you can do that through the mechanism up on the website, right, where you'll have to first – it's basically a four part process for identifying – to set up the whole transfer monitoring process, you've got to first create a profile, right? Once you've got the profile created, then it's __ updating it and maintaining it to make sure it's current, right, and that's how we're going to be showing that through our next couple slides. So you got to maybe create a profile and keep it updated.

Then, secondly, is you gotta report information, report records into NSLDS, and there's a couple different methods you can do that. You can either do it by the website, such as the individual back there discovered on the webpage when you're viewing on that loan history page there's that button that you can just click that button and it automatically pre-populates the page of the information about that borrower with their identifiers. All you have to do is just enter in the data enrollment, okay, and then click save and it's captured. That's one way.

The other way you could do it is if you have an IT shop, that if you had said __ want to send mass records into NSLDS, you can do that. You just have to make sure that the file __ _ is constructed in the file that in the format that we're anticipating it to come in. And that's – you can follow that process through the transfer TSM process and file record layouts is available on IFAP. We update that every year with any updated changes.

It was just recently updated like last week. So you'll see that, and those changes will come into effect after the first of the year, so have your IT shop build the incoming file according to that file layout, and then you just submit it and send it in over SAIG, we'll process that, and we'll add those records to the database, okay? And that's the other way you can do it there.

So you've informed NSLDS, that's the second way, and then the third part of this process is NSLDS at that point in time once it's passed monitoring start period that you've identified on the records, we'll start to actively look for any changes for that borrower that are done by any other school, okay? We won't alert you about your own school, only ___ activity, it's those that any activities taking place at any other school then we'll then alert you to those and that's that other last step is that alert process, okay?

We'll then see that a change has taken place and we'll alert you to that information, okay? So with that all being said, talking a little bit about that profile update page, that's the main piece that you got to do first for this process to work, and basically, in that profile update page, it gives you the opportunity to identify a few key pieces of information. First of all is who is responsible – that's basically the person that's going to be fulfilling that active role as the lead coordinator for doing the transfer monitoring process information in there.

And also if you're going to be submitting the information by the SAIG batch method through that file structure I talked about, there's a place that you want to identify on that profile page what TG mailbox is coming from, so that way we'll see that okay for sure that's who is supposed to be coming from and then we'll process and we won't reject it. And then there's another key piece then is how long you want to monitor this information, and we'll talk a little bit about that, too. And then, likewise, on that, if we discovered there's a change and we want to alert you to it, there's a piece then you tell us how you want us to alert you, okay?

So on the next slide, _ _ _ _ _ okay so then basically we're looking at our profile page, it's under the trend tab. Under the school profile link. Takes us to what you are you currently have. And then there's update button, so we just click that update button, which is the next slide. Oh, well, okay. So then one of the key pieces that you'll be updating is that monitoring duration. Previously, we never – this was a default value. Was always 90 days for three months you could never change that. And some schools went you know what hey that's way too long, or that's long enough, or that's not long enough. So what we did a few years back is we customized that and we made it so that it's a little bit more flexible depending on how your term works.

You can customize that duration period. And it can go as minimum as 30 days or as long as 120 days. So whatever works best for your as your job, you can designate that time frame to then how long you want to monitor those students for, okay? Yes?

[Inaudible Question]

From in your transfer students? From in your transfer students, if they're coming into your school, you want to add them in, so but then the process itself, it looks to see there's any other changes for that student at some other institution, and it could very well be because of a __ record they got or a change loan that they would

have received, either one of those could cause the alert to happen. Okay, so then, after we put click the update, then it takes us to the update page, where then you can go ahead and make sure it's updated so it's current.

Another key takeaway here is that you need an email address. That email address can either be a single person at you shop or it can be a group email if you want it to, and that's a key field, because if you want to do a group, then what we do is when we run the alert jobs once a week, we'll then look at the email address that you've got entered in here and we'll send you emails as a reminder saying hey you've got some alerts if there are any for your school, your students, we'll send you an alert saying go ahead and review that information.

Then, you've got a place to do the duration, and then you've got a place to enter in the TG number to designate where it's coming in from as well as if you're going to do it by batch where you want the information to be sent to you, okay? So then there's a transfer repopulate page. What that is, it allows you to, if you've previously reported records to be informed and they've since dropped off your inform list because they went on that duration time period they're no longer on the inform list, but you want to re-engage them, to monitor them again, cause you may have students that you from term to term you want to look for to see if there's any changes, you can do that through this repopulate page, okay?

So that's the nice feature about this is that those data have previously been submitted that since dropped off you can use a repopulate page to re-engage them, okay? And that's essentially what we're doing here. And this is the page, you'll see it under that transfer monitoring repopulate page, where you then use the filters to then select the conditions of those records that you want to then retrieve back, and then you can go ahead and select those to update them to add them back to your list, and that's kind of the part of this exercise that we're going to have you do.

However, we're out of time.

Judy:

Yeah, and we apologize. There's so many good stuff we'd like to share with you, but like Jim told you at the beginning, we tried new things this time. We always have to learn and evaluate, so apologize that we couldn't get through anything. We do have people in the NSLDS resource room. Come and see us there, and we can cover anything else that we didn't get a chance to cover.

Male: Exactly, and thank you for your patience and working with us.

[Applause]

[End of Audio]