

# *Monthly Status Reports*

## *Chapter 3.3*

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# Monthly Status Reports

## How does a data manager keep the Department informed about its actions?

Data managers should send Default Management monthly reports listing the status of all cohort default rate related requests the data manager receives. The monthly status report is a cumulative list of requests that data managers receive from schools after the release of the draft cohort default rates and the official cohort default rates. These status reports will assist Default Management in monitoring the time frames associated with the cohort default rate process. The monthly status report should be sent to Default Management within five working days of the end of each month.

The report should include the following:

- ❖ OPE ID of the school making the request;
- ❖ school's name;
- ❖ date the school's request was postmarked;
- ❖ date the data manager sent a response to the school;
- ❖ type of delivery service used to mail the response to the school;
- ❖ tracking number associated with delivery of the response to the school;
- ❖ date the school received the response; and
- ❖ comments, if needed.

If the data manager does not receive any requests from schools, it should submit a blank monthly status report to Default Management indicating that it has not received any requests.

A data manager should not submit copies of its responses to schools to Default Management with its monthly report. Copies of these responses should be sent to Default Management at the same time the data manager sends the response to the school.

**Data managers  
should send  
Default  
Management  
monthly reports**

Once the data manager has responded to all of the challenges received and the data manager has not received any subsequent challenges, the data manager should send Default Management an updated status report marked "FINAL." After the data manager sends Default Management the final report, the data manager does not need to send any more monthly status reports until the official cohort default rates are released.

### Instructions for Creating a Data Manager Monthly Status Report

Figure 3.4.1 is a blank monthly status report; there is also a full-sized blank monthly status report at the end of this chapter. A data manager may photocopy and use the full-sized blank monthly status report or create its own monthly status report using the layout provided. The status report should be created in landscape format using a spreadsheet software application such as Excel or Lotus 1-2-3. The status report should contain the following:

- ❖ **Left-side Header:** In the left-side area of the header, enter the data manager identification information. On the first line of the header, enter the title "Data Manager Name:" followed by the data manager name. On the second line of the header, enter the title "Data Manager Code:" followed by the data manager code. The data manager's code number is the same as the guarantor/servicer code. On the third line of the header, enter the title "Number of Schools:" followed by the total number of different schools listed in Column A. The third line of the left-side header cannot be completed until all the schools are listed on the report.
- ❖ **Right-side Header:** In the right-side area of the header, enter this title: "FY [insert current year] Monthly Status Report." A data manager may wish to use bold on this title to make it stand out more.
- ❖ **Left-side Footer:** In the left-side area of the footer, enter the date the spreadsheet was prepared.
- ❖ **Right-side Footer:** In the right-side area of the footer, set up automatic pagination so that the specific page number and the total number of pages show on each page. For example, Page 1 of 10.

Data Manager Name:  
 Data Manager Code:  
 Number of Schools:

FY \_\_\_\_ Monthly Status Report

	A	B	C	D	E	F	G	H
1	School's OPE ID	School's Name	Date Request Submitted	Date Response Mailed	Service Type	Tracking Number	Date School Signed for Response	Comments
2								
3								
4								
5								
6								

Date \_\_/\_\_/\_\_\_\_

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- ❖ Column A: On Row 1, enter the title "School's OPE ID." Starting on Row 2, enter the OPE ID numbers of all the schools that have submitted incorrect data challenges to the data manager.
- ❖ Column B: On Row 1, enter the title "School's Name." Starting on Row 2, enter the names of the schools whose OPE IDs are listed in Column A.
- ❖ Column C: On Row 1, enter the title "Date Request Submitted." Starting on Row 2, enter the date the school submitted the incorrect data challenge. Enter the date in a MM/DD/CCYY format.
- ❖ Column D: On Row 1, enter the title "Date Response Mailed." Starting on Row 2, enter the date the data manager mailed a response to the school. Enter the date in a MM/DD/CCYY format.
- ❖ Column E: On Row 1, enter the title "Service Type." Starting on Row 2, enter the type of service delivery the data manager used to deliver a response to a school.
- ❖ Column F: On Row 1, enter the title "Tracking Number." Starting on Row 2, enter the tracking number the delivery service assigned to the response.
- ❖ Column G: On Row 1, enter the title "Date School Signed for Response." Starting on Row 2, enter the date the school signed for the response from the data manager. Enter the date in a MM/DD/CCYY format.
- ❖ Column H: On Row 1, enter the title "Comments." Starting on Row 2, enter any appropriate comments.

**Figure 3.4.1**  
 Blank Data Manager  
 Monthly Status Report

There are several things that can be done prior to printing the spreadsheet to make the spreadsheet easier to read. They include

- ❖ centering and bolding the column titles,
- ❖ making sure the columns are wide enough to fit all text,
- ❖ adding borders to the cells,
- ❖ repeating the information in the column headings at the top of each page (most software packages can do this automatically-- check the software package's help function for assistance),
- ❖ sorting the spreadsheet by Column A (School's OPE ID), and
- ❖ printing a test copy to review for readability (a data manager may need to insert several lines prior to Row 1 in order to create sufficient space between the header and the spreadsheet).

After the spreadsheet is created and completed, the spreadsheet should be printed on 8 1/2" x 11" paper in a landscape layout. The data manager should send the spreadsheet to Default Management each month via mail or electronic mail as notified by Default Management each cycle.

**Which Department addresses should a data manager use for submitting a monthly status report?**

The data manager should send monthly status reports to Default Management via commercial courier or the U.S. Postal Service. If sent by commercial overnight mail/courier delivery, the address is

U.S. Department of Education  
Default Management  
ATTN: Monthly Status Report  
Portals Building, Room 6300  
1250 Maryland Avenue, SW  
Washington, DC 20024

If sent by U.S. Postal Service, the address is

U.S. Department of Education  
Default Management  
ATTN: Monthly Status Report  
Portals Building, Room 6300  
400 Maryland Avenue, SW  
Washington, DC 20202-5353

A data manager should not send monthly status reports to any other addresses at the Department.

A data manager may be able to submit a monthly status report via electronic mail. Default Management will notify data managers each cycle if electronic mail will be accepted.

Default Management recommends that a data manager send all correspondence return receipt requested or via commercial overnight mail/courier delivery. This will be useful to a data manager if it is asked to authenticate the timeliness of its response. A data manager should maintain the documentation that verifies the receipt of the monthly status report as well as all documentation submitted as a part of the monthly status report process.

Data Manager Name:  
 Data Manager Code:  
 Number of Schools:

FY \_\_\_\_ Monthly Status Report

A	B	C	D	E	F	G	H
School's OPE ID	School's Name	Date Request Submitted	Date Response Mailed	Service Type	Tracking Number	Date School Signed for Response	Comments
1							
2							
3							
4							
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