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Chapter 6: Borrower Tracking

6.1 INTRODUCTION

Welcome to Borrower Tracking, one of the functions within NSLDS.

How Does the Borrower Tracking Function Benefit Schools?

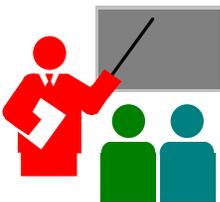
The Borrower Tracking function provides the following benefits to schools:

- Supports the collection activities on defaulted loans by identifying possible sources of correct address data, and
- Provides a complete history of Title IV loans received by the borrower.

The Borrower Tracking function will greatly facilitate your ability to locate a “missing” borrower for default aversion. It will also provide you with a reliable mechanism by which you can assist a borrower with locating the lender, servicer, or Guaranty Agency of his/her loan.

Note: For a detailed explanation of logging on and exiting this function, please see Chapter 2: Getting Started.

6.1.1 Conceptual Overview



This section describes when and how borrower tracking is used to support the user community, especially school users. This function of NSLDS is designed for easy access and navigation to help answer borrower inquiries.

NSLDS provides a comprehensive borrower search capability on all borrowers who have Title IV student loans. The speed and ease of providing key information on “missing” borrowers or “missing” lenders,

servicers, or guarantors will greatly benefit default aversion efforts.

Many of these screens were designed to meet the functional requirements of Guaranty Agencies, servicers, and Public Inquiry Contractor (PIC). However, you may find them to be helpful resources when counseling students that have loans from your school.

Type of Data Within Borrower Tracking

Beyond the borrower's first name, date of birth and social security number, data is available for all phases of the loan lifecycle. Examples follow.

- Detailed loan history, such as:
 - aid profiles (1 & 2)
 - loan detail
 - lender history
 - Guaranty Agency history
 - school branch servicer history,
- Name history,
- PLUS borrower information,
- Current Data Provider information, and
- School attendance history, such as:
 - school transition history, and
 - enrollment history.

**6.1.2
Purpose****Specific Purpose of Borrower Tracking**

The Borrower Tracking function accurately manages the large volume of data surrounding the loan lifecycle and makes this data available in a timely manner. For example:

- By tracking Student/Borrower loans from their origination to the current holder, Guaranty Agency, school, and servicer (including dates), key information on organizational responsibility is provided. This results directly in helping to prevent defaults.
- By tracking Student/Borrowers' and loan holders' names and other details, information on key people involved in collection activities is provided.
- By tracking all data associated with the loan lifecycle, a complete history of Title IV loans received by the borrower is provided.

How Does the System Search For Data?

When a search for a Student or a PLUS Borrower is conducted, the system follows these steps to locate borrowers and analyze associated loans:

Step 1:

It searches for Student/Borrower records based on specific selection criteria (i.e., data elements):

- Social Security Number,
- First Name,
- Date of Birth, and
- If the borrower is a "student" or a "PLUS borrower."

Step 2:

It displays the student or PLUS Borrower record from the database to research the following data, including: detailed loan history, name history, current data provider information, and school attendance history.

Step 3:

It displays results of the search, online.

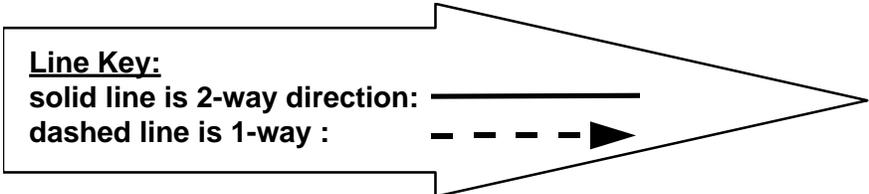
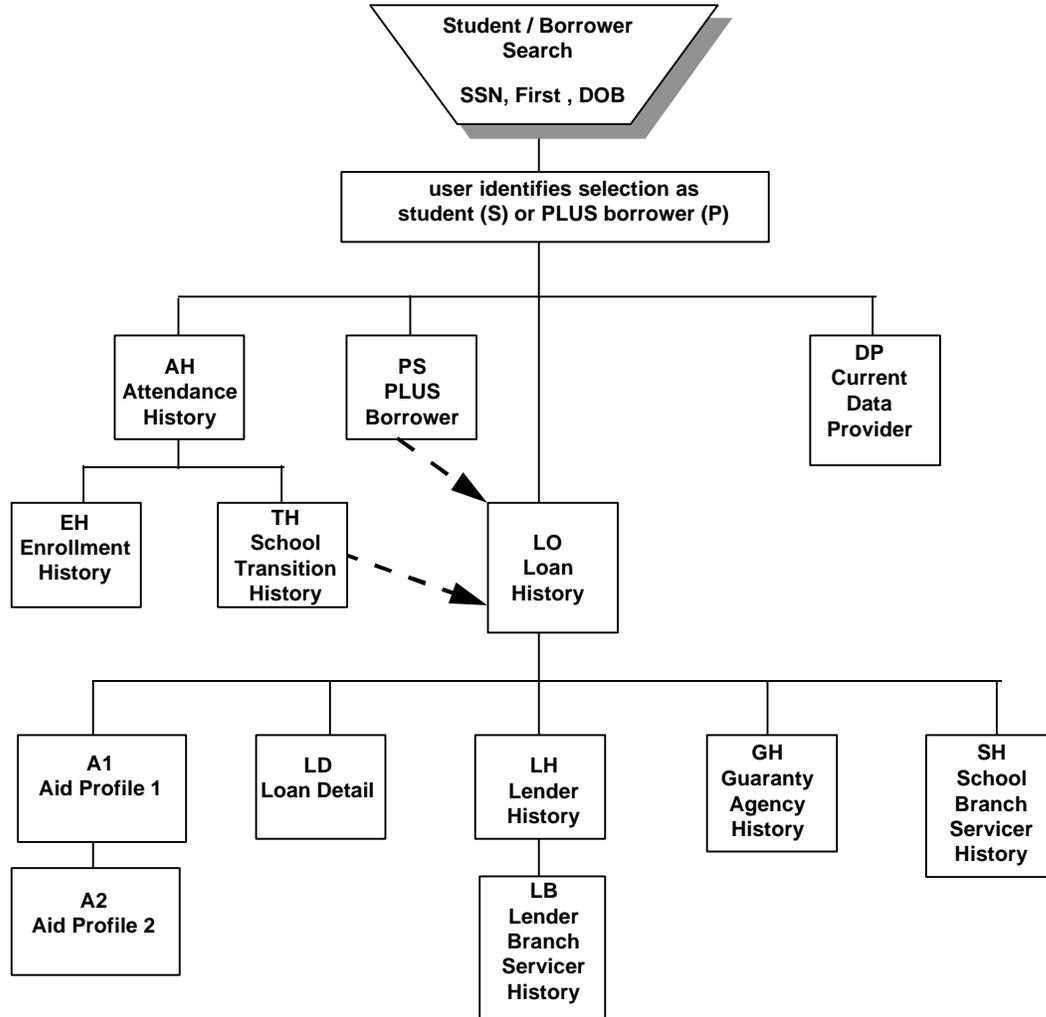
**Note:**

The SSN, first name, and date of birth must be specified. As a school user, you must enter this data into the system prior to any search. In other words, you must **populate the data screen**.

**6.1.3
Process Chart and
Description**

Borrower Tracking, using information provided by the user, conducts a search on individuals and/or loans, then responds with appropriate data. A process chart that shows what screens you can access is displayed on the following page.

BORROWER TRACKING PROCESS CHART



6.1.3
Process Chart and
Description
(continued)

**Note:**

This “cross navigational” process will become familiar as you begin to access the screens and learn to read the Action Codes at the top of each screen.

The screens have Action Codes that allow you to reach your desired destination. Borrower Tracking Action Codes are:

- PS = PLUS Borrower Information
- LO = Loan History
- AH = Attendance History
- TH = School Transition History
- EH = Enrollment History
- DP = Current Data Provider
- A1 = Aid Profile 1
- A2 = Aid Profile 2
- LD = Loan Detail
- LH = Lender History
- LB = Lender Branch Servicer History
- GH = Guaranty Agency History
- SH = School Branch Servicer History

The following tables are intended for reference. Throughout the chapter, screens are identified by screen numbers, titles, and action codes. We have included this list of individual screens to enhance your work with the Borrower Tracking function.

NSLDS Borrower Tracking Screen Identification		
Screen #	Screen Title	Related Action Codes
RC80	Student Borrower Search	DP, LO, AH, PS
RC82	PLUS Borrower Search Selection	LO, AH
RC83	Loan History Selection	A1, LD, LH, GH, AH, SH
RC91	School Attendance History	TH, PS, LO, EH
RC92	School Transition History	LO
RC94	Enrollment History	--
RC93	Current Data Provider	--
RC84	Aid Profile 1	A2, LD, GH, LH, SH, LO
RC85	Aid Profile 2	LD, LH, GH, LO
RC86	Loan Detail	A1, LH, GH, SH, LO
RC87	Lender History	A1, LD, LB, GH, LO
RC88	Lender Branch Servicer History	LO
RC89	Guaranty Agency History	A1, LD, LH, LO
RC90	School Branch Servicer History	A1, LD, LO



**6.2
BORROWER
TRACKING SCREENS**

This section contains the detailed instructions on how to access all portions of the Borrower Tracking function.

6.2.1**Student Borrower Search (RC80)
(Highest level screen within Borrower Tracking)****What Does the Student/Borrower Search Screen Do?**

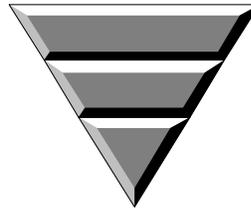
The “*Student/Borrower Search*” screen is the highest level screen. It allows you access to all other screens and data searches within Borrower Tracking. All searches begin on this screen, where three mandatory fields are entered: SSN, DOB, and first name. Whether a search is to be conducted on a student or on a PLUS borrower must be indicated.

**Notes:**

The **action bar** at the top of the screen will show you which actions are available. **Each has a 2-character action code.**

You are required to enter the action code into the field for every search.

Read on to learn about each data screen and the associated information available to you.



In the process of logging on, you will view the following screens leading up to Borrower Tracking.

```
01-08-1996
13:03:58

NSLDS
NSLDS Main Menu

Input the number of your choice and press ENTER.

 2 1. System Support Main Menu
   2. Reporting Capabilities Main Menu
   3. Exit NSLDS and LOGOFF

F3=EXIT
```

and ...

```
02-15-1996
07:22:43

NSLDS
Reporting Capabilities Main Menu

Input the number of your choice and press
ENTER.

 4 1. Aggregate Main Menu
   2. Default Main Menu
   3. Report Selection Menu
   4. Borrower Tracking
   5. Financial Aid Transcript
   6. Student Status Confirmation Menu
   7. Overpayments

F3=EXIT
```

<p>...To Borrower Tracking Student / Borrower Search (RC80)</p>		
STEP #	ACTION	RESULT
1	<p>From “NSLDS Main Menu,”</p> <p>Type 2 for “Reporting Capabilities Main Menu”</p> <p>Press ENTER</p>	<p>The following screen will display: “Reporting Capabilities Main Menu” (RC00).</p>
2	<p>From RC00,</p> <p>Type 4 for “Borrower Tracking”</p> <p>Press ENTER</p>	<p>The following screen will display: “Student/Borrower Search” (RC80).</p> <p>< This is the highest level screen for “Borrower Tracking.” It will be unpopulated - not filled in yet.></p>
3	<p>From RC80,</p> <p>Type in the mandatory fields:</p> <ul style="list-style-type: none"> • <SSN> • <First name> • <DOB> <p>Type S for student or P for PLUS borrower</p> <p>Do not press ENTER</p>	<p><No change in RC80.></p>
4	<p>Examine the Action Bar on the top of the screen.</p> <p>Choose an Action Code to match the task you want to accomplish.</p>	<p><No change in RC80.></p> <p>To continue, follow the procedure for that specific action, i.e. PS, or AH, or LO, etc.</p>



RC80 Student / Borrower Search

(populated)

```

RC80      <<  curr Data Provider info(DP)  L0an hist(LO)  Attendance Hist(AH)
           Plus borrower Student selection(PS)
-----
                        NSLDS                               10-13-1995
                        Student/Borrower Search            10:49:40

SSN.. 037000002  First Name.. CHRISTOPHER_  DOB.. 02 - 02 - 1958 (MM-DD-YYYY)
PLUS Borrower(P)/Student(S).. S

                                NAME HISTORY                                MORE:
Sel First          M Last          DOB          State Curr SSN
_  CHRISTOPHER    K LEE            02-02-1958  TX    037000002

                                PRIVACY ACT OF 1974(AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD

```

6.2.2

**PLUS Borrower Information (PS)****What Does the PLUS Borrower Student Selection (PS) Screen Do?**

The “*PLUS Borrower Student Selection*” (RC82) screen allows you to view all students associated with a PLUS borrower or all PLUS borrowers associated with a student.

You may use this function to determine which parent is assisting with the student’s financing or to determine the ability of the parent to assume a larger debt.

Access to the “*PLUS Borrower Student Selection*” (RC82) screen is controlled by the “*Student/Borrower Search*” (RC80).

There may be more than one PLUS borrower for a selected student. If so, you must select one from the list. There may also be more than one student for a selected PLUS borrower.

**Notes:**

The “*PLUS Borrower Student Selection*” (RC82) screen provides cross navigation to “*Loan History Selection*” (RC83) and “*Attendance History*” (RC91).

If no PLUS Borrower information matches the SSN entered, the system displays the following message:
“RC8021 E: Plus Borrower Social Security Number not found.”

<p style="text-align: center;">...To PLUS Borrower Information on One Student</p>		
STEP #	ACTION	RESULT
1	<p>From RC80 (or whenever PS is available from the Action Bar),</p> <p>Complete the mandatory fields, if needed:</p> <ul style="list-style-type: none"> • <SSN> • <First name> • <DOB> 	<p><No change in RC80.></p> <p><Hint: Steps 1 & 2 can be done in either order.></p>
2	Type PS for PLUS Borrower Student Selection in Action Code field	<No change in RC80.>
3	Type S for Student Press ENTER	RC82 will re-display with name history data that match the selection criteria entered.
3a	<p>If search yields more than one PLUS Borrower name</p> <p>Type S for Select next to your choice from the list</p>	<Skip this step if the search yields only one name -- the default will select the one name.>
4	Press ENTER	<p>The following screen will display: "Plus Borrower Search Selection" (RC82).</p> <p><Hint: the search yields all PLUS borrowers associated with a student.></p> <p><Hint: there are many more actions available from this screen - see the Action Bar for listing.></p>

...To PLUS Borrower Information on a PLUS Borrower		
STEP #	ACTION	RESULT
1	From RC80 (or whenever PS is available from the Action Bar), Complete the mandatory fields, if needed: <ul style="list-style-type: none"> • <SSN> • <First name> • <DOB> 	<No change in RC80.> <Hint: Steps 1 & 2 can be done in either order.>
2	Type PS for PLUS Borrower Student Selection in the Action Code field	<No change in RC80.>
3	Type P for PLUS borrower Press ENTER	RC82 is populated with name history data that match the selection criteria entered.
3a	If search yields more than one student for the PLUS borrower name Type S for Select next to your choice from the list	<Skip this step if the search yields only one name - the default will select the one name.>
4	Press ENTER	The following screen will display: <i>"Plus Borrower Search Selection"</i> (RC82). <Hint: the search yields all students associated with a PLUS borrower.> <Hint: there are many more actions available from this screen - see the Action Bar for listing.>

RC82 PLUS Borrower Search Selection (PS)

RC82	<<	Loan History(LO)	Attendance History(AH)
		NSLDS	10-16-1995
		PLUS Borrower Student Selection	10:37:57
PLUS Borrower			
First Name:	CHRISTINA	Middle Initial: L	SSN: 212000002 State:
Last Name.:	KENNEDY		DOB: 01-20-1944
Students Associated with PLUS Borrower			MORE:
Sel First	M Last	DOB	State SSN
_ CHARLES R	D KENNEDY	11-01-1973	VA 207003568
PRIVACY ACT OF 1974(AS AMENDED)			
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN			

6.2.3

**Loan History (LO)****What Does the Loan History (LO) Screen Do?**

The “*Loan History Selection*” screen (RC83) provides a summary of all the loans associated with a specific student or PLUS borrower. This screen is useful in verifying the student’s cumulative maximum amount in loans and for loan counseling. It will also identify any consolidated loans. Refer to the chart “Loan Type Codes” on the next page for specific definitions.

The “*Loan History Selection*” (RC83) screen displays the following information:

- Loan type,
- Certification/guaranty date,
- Loan period begin and end dates,
- Amount,
- Current loan status (see table for codes), and
- Originating school/branch.

Tables for “Loan Type Codes” and “Loan Status Codes” follow. These tables further describe the loan type codes and loan status codes.

6.2.3
Loan History
 (continued)

Loan Type Codes		
Loan Program	Loan Type Codes	Definition
FFEL	SF	Stafford
	SU	Stafford Unsubsidized
	SL	SLS
	PL	PLUS
	CL	Consolidation
FDLP	D1	Direct Stafford
	D2	Direct Stafford Unsubsidized
	D4	Direct PLUS
	D5	Direct Consolidation Unsubsidized
	D6	Direct Consolidation Subsidized
	D7	Direct Consolidation PLUS
FISL	F1	Federally Insured Student Loan
	FP	Refinanced
Perkins	DU	National Defense Student Loan
	EU	Perkins Expended Lending Option
	NU	National Direct Student Loan
	PU	Perkins Loan
	IC	Income Contingent Loan



Note:

The current school/branch loan type code, school name, and school address information is displayed **only if** the student is currently attending school either full-time, half-time, or less than half-time.

**6.2.3
Loan History
(continued)**

Loan Status Codes	
Codes	Definition
AE	ASSIGNED TO U.S. DEPARTMENT OF EDUCATION
BC	BANKRUPTCY CLAIM, DISCHARGED
BK	BANKRUPTCY CLAIM, ACTIVE
CA	CANCELED
DA	DEFERRED
DB	DEFAULTED, THEN BANKRUPT, ACTIVE, CHAPTER 13
DC	DEFAULTED, COMPROMISE
DD	DEFAULTED, THEN DIED
DE	DEATH
DI	DISABILITY
DK	DEFAULTED, THEN BANKRUPT, DISCHARGED, CHAPTER 13
DL	DEFAULTED, IN LITIGATION
DO	DEFAULTED, THEN BANKRUPT, ACTIVE, OTHER
DP	DEFAULTED, PAID IN FULL
DS	DEFAULTED, THEN DISABLED
DT	DEFAULTED, COLLECTION TERMINATED
DU	DEFAULTED, UNRESOLVED
DW	DEFAULTED, WRITE-OFF
DX	DEFAULTED, SIX CONSECUTIVE PAYMENTS
FB	FORBEARANCE
ID	IN SCHOOL OR GRACE PERIOD
OD	DEFAULTED, THEN BANKRUPT, DISCHARGED, OTHER
PC	PAID IN FULL THROUGH CONSOLIDATION LOAN
PF	PAID IN FULL
RF	REFINANCED
RP	IN REPAYMENT
UI	UNINSURED/UNREINSURED

...To Loan History (LO)		
STEP #	ACTION	RESULT
1	From RC80, (or whenever LO is available from the Action Bar), Complete the mandatory fields, if needed: <ul style="list-style-type: none"> • <SSN> • <First name> • <DOB> 	<No change in RC80.> <Hint: Steps 1 & 2 can be done in either order.>
2	Type LO for Loan History in the Action Code field	<No change in RC80.>
3	Type S for Student or P for PLUS borrower Press ENTER	RC80 is populated with loan history data that match the selection criteria entered.
3a	If the search yields more than one name Type S for Select next to your choice from the list	<Skip this step if the search yields only one name - the default will select the one name.>
4	Press ENTER	The following screen will display: "Loan History Selection" (RC83).

RC83 Loan History Selection (LO)

```
RC83      <<  Aid profile 1(A1)  Loan Detail(LD)  Lender History(LH)
           Guar agency Hist(GH) Attendance His(AH) School servicer His(SH)

           NSLDS 10-10-1995
           Loan History Selection 16:12:14

Student Name: CHRISTOPHER K LEE SSN: 037000002
PLUS Name...: SSN:
Current School/Branch Code:
Current School Name.....:
City.....: State:

      Loan Certification/      Period      Period      Curr      MORE:
Sel Type Guaranty Date Begin Date End Date Amount Status School/Branch
- SF 03-24-1983 01-01-1983 04-30-1983 1338 PF 00152600
- SF 10-08-1981 09-01-1981 04-30-1982 2500 PF 00152600
- SF 01-01-1980 09-01-1979 06-30-1980 1250 PF 00152600

           PRIVACY ACT OF 1974(AS AMENDED)

F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN
```

6.2.4**Attendance History (AH)****What Does the Attendance History (AH) Screen Do?**

The “*School Attendance History*” (RC91) screen displays a student’s school attendance history.

This screen is useful if you need to contact a school where the student has received aid. Additionally, if a school has sent NSLDS enrollment history via the SSCR process, that school’s data will be available on this screen.

**Notes:**

If there is no match on SSN, the following message is displayed on “*Student/Borrower Search*” (RC80):
“*RC8014 E: Student Social Security Number not found.*”

From the “Attendance History” screen, additional data screens are available:

- “*School Transition History,*”
- “*PLUS Borrower Student Selection,*”
- “*Loan History,*” and
- “*Enrollment History.*”

...To Attendance History (AH)		
STEP #	ACTION	RESULT
1	From RC80 (or whenever AH is available from the Action Bar), Complete the mandatory fields, if needed: <ul style="list-style-type: none"> • <SSN> • <First name> • <DOB> 	<No change in RC80.> <Hint: Steps 1 & 2 can be done in either order.>
2	Type AH for Attendance History in the Action Code field	<No change in RC80.>
3	Type S for Student or P for PLUS borrower Press ENTER	RC80 will be populated with data.
3a	If search yields more than 1 name, Type S for Select next to your choice from the list	<Skip this step if search yields only one name - the default will select the one item.>
4	Press ENTER	The following screen will display: "School Attendance History" (RC91). <Hint: there are many more actions available from this screen - see Action Bar for listing.>

RC91 School Attendance History (AH)

```
RC91      <<  Transition History(TH) Plus borrower Student selection(PS)
           LOan history(LO) Enrollment History(EH)

-----
                        NSLDS                               10-11-1995
                        School Attendance History           16:28:36

Student Name: CHARLES      D KENNEDY                      SSN: 002000001
PLUS Name...: CHRISTINA   L KENNEDY                      SSN: 001000001
Sel Make a Selection(S) for Transition History OR Enrollment History MORE:
_ School/Branch Code: 00273900 Type/Control: C School/Branch Status:
  Name: ITHACA COLLEGE
  Street Address: DANBY RD
  City: ITHACA          State: NY          Zip Code: 14850
  School/Branch Code:          Type/Control: School/Branch Status:
  Name:
  Street Address:
  City:                  State:          Zip Code:
  School/Branch Code:    Type/Control:  School/Branch Status:
  Name:
  Street Address:
  City:                  State:          Zip Code:
                                PRIVACY ACT OF 1974(AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
```

6.2.5

**School Transition History (TH)****What Does the School Transition History (TH) Screen Do?**

The “*School Transition History*” (RC92) screen displays a listing of a selected school’s name changes. You may use this screen to select a school name to see whether that school has operated under a different name.

Access to school transition history information is available from only one screen - “*School Attendance History*” (RC91) via the Action Code SH.

The “*School Transition History*” (RC92) screen displays the following information associated with current school transition history:

- Previous school/branch code,
- Previous school name, and
- Start date for each new school/branch code and name.

**Note:**

Navigation from this screen is limited to the “*Loan History Selection*” (RC83) screen or “*Attendance History*” (RC91).

...To School Transition History (TH)		
STEP #	ACTION	RESULT
1	Complete steps to access AH (RC91). Refer to the "Attendance History" screen for more details.	The following screen will display: "School Attendance History" (RC91).
2	From RC91, Type TH for Transition History in the Action Code field	<No change in RC91.>
2a	If list of schools contains more than one item, Type S for Select next to your choice from the list	<No change in RC91.>
3	Press ENTER	The following screen will display: "School Transition History" (RC92).



RC92 School Transition History (TH)

```
RC92      <<   L0an history(L0)
-----
                                NSLDS                                10-16-1995
                                School Transition History          10:26:42
Student Name: CHRIS              W LAMBART                        SSN: 037000002
PLUS Name...:                   SSN:
Old School/Branch Code: 00152600
Name: JOHNSTON COLLEGE OF COMPUTING
Please make a selection(S) for School Transition History and press ENTER
----- New School ----- MORE:  +
Sel Code   Name                                     Date
- 00148400 JOHNSTON COLLEGE OF ENGINEERING          12-04-1992
- 00147700 JOHNSTON COMPUTER INSTITUTE              05-07-1987
- 00146600 JOHNSTON TECHNICAL SCHOOL                 05-20-1982

                                PRIVACY ACT OF 1974(AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
```

6.2.6

**Enrollment History (EH)****What Does the Enrollment History (EH) Screen Do?**

The “*Enrollment History*” (RC94) screen displays a student’s enrollment history at a given school. This screen is best utilized to obtain specific enrollment information needed to calculate and process deferments.

Access to enrollment history information is controlled by the “*School Attendance History*” (RC91) screen by typing the Action Code EH for Enrollment History.

The “*Enrollment History*” (RC94) screen displays the following information:

- Enrollment codes,
- Description of enrollment codes,
- School/branch code,
- School name, and
- Effective dates.

**Note:**

From “*Enrollment History*,” the only action code available is “*School Attendance*” (SH), and then return to RC80.

<p>...To Enrollment History (EH)</p>		
STEP #	ACTION	RESULT
1	To access “ <i>Enrollment History</i> ,” you must first complete the steps to access “ <i>Attendance History</i> ” AH (RC91). See the AH procedure for more details.	The following screen will display: “ <i>School Attendance History</i> ” (RC91).
2	From RC91, Type EH for Enrollment History in the Action Code field	<No change in RC91.>
3	Press ENTER	The following screen will display: “ <i>Enrollment History</i> ” (RC94).



RC94 Enrollment History (EH)

```

RC94
-----
                        NSLDS                        10-16-1995
                        Enrollment History            10:30:08

Student Name: CHRIS          W LAMBART                SSN: 037000002
PLUS Name...:                               SSN:
School/Branch Code: 00152600
Name.....: JOHNSTON COLLEGE OF COMPUTING

Enrollment
Code  Description                               Effective Date
G    Graduated                                01-30-1985
F    Full Time                                06-01-1984
H    Half Time or More, But Less Than Full Time 01-01-1984
L    Less Than Half Time                       08-01-1983
F    Full Time                                06-01-1983
L    Less Than Half Time                       01-25-1983
W    Withdrawn                                03-01-1982
H    Half Time or More, But Less Than Full Time 08-01-1981

                                PRIVACY ACT OF 1974(AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN

```

6.2.7

**Current Data Provider (DP)****What Does the Current Data Provider (DP) Screen Do?**

The “*Current Data Provider Information*” (RC93) screen allows you to track the current servicer of a loan. It displays the current Guaranty Agency/school name and address. Guaranty Agency information is displayed first, followed by school information.

...To Current Data Provider (DP)		
STEP #	ACTION	RESULT
1	From RC80 (or whenever DP is available from the Action Bar), Complete the mandatory fields, if needed: <ul style="list-style-type: none"> • <SSN> • <First name> • <DOB> 	<No change in RC80.> <Hint: Steps 1 & 2 can be done in either order>
2	Type S for Student or P for PLUS borrower Press ENTER	RC80 is populated with name history data that match the selection criteria entered.
3	Type DP for Data Provider in the Action Code field Press ENTER	The following screen will display: <i>“Current Data Provider”</i> (RC93).



RC93 Current Data Provider (DP)

```
RC93
-----
                        NSLDS                        10-13-1995
                        Current Data Provider Information  10:12:01

Student/Borrower Name: CHRISTOPHER K LEE                SSN: 037000002
                                                MORE
GA Code.....: 748                Name: TEXAS GUARANTEED STUDENT LOAN CORP.
Street Address.....: TOWER OF THE HILL, 13809 N. HIGHWAY 189, SUITE 400
City.....: AUSTIN                State: TX Zip Code: 787501240
Resp Begin Date.....: 01-01-1980

                        Name:
Street Address.....:
City.....:                State:    Zip Code:

                        Name:
Street Address.....:
City.....:                State:    Zip Code:

                        PRIVACY ACT OF 1974(AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN
```

6.2.8

**Aid Profile 1 and Aid Profile 2 (A1, A2)****What Do the Aid Profile 1 and 2 (A1, A2) Screens Do?**

The “*Aid Profile 1*” screen (RC84) provides a quick summary of the student’s current loan status. Additionally, it provides the names of the student’s current servicer.

The “*Aid Profile 2*” screen identifies the originating lender and current and originating Guaranty Agency information. You can only access it from the “*Aid Profile 1*” screen. If additional aid profile information is available, the A2 Action Code for the “*Aid Profile 2*” option will be present in the Action Bar at the top of the “*Aid Profile 1*” screen.

If borrowers lose track of their originating lender or want to obtain another loan from the same lender, this screen will provide the necessary information to the borrower.

The system displays additional information for FFEL loans. The “*Aid Profile 2*” screen is an extension of the “*Aid Profile 1*” and displays originating and current Guaranty Agency and lender information.

The “*Aid Profile 1*” screen displays the following information for a selected loan:

- School branch,
- School branch servicer,
- Loan period begin and end dates,
- Outstanding principal balance and date,
- Outstanding interest balance and date, and
- Current lender branch and servicer.

Note: you must select loans individually to view aid profile data. Access to aid profile information is controlled by the “*Loan History Selection*” (LO) screen.

<p style="text-align: center;">...To Aid Profile 1 (A1) & Aid Profile 2 (A2)</p>		
STEP #	ACTION	RESULT
1	From RC83 " <i>Loan History Selection</i> " (or whenever A1 is available from the Action Bar), Type A1 for " <i>Aid Profile 1</i> " in the Action Code field	<No change in RC83.>
1a	If RC83 search contains more than one loan record Type S for Select next to your choice from the list	<Skip this step if search yields only one name - the default will select the one name.>
2	Press ENTER	The following screen will display: " <i>Aid Profile 1</i> " (RC84).
Additional information:		
3	From RC84 " <i>Aid Profile 1,</i> " Type A2 for " <i>Aid Profile 2</i> " in the Action Code field	<No change in RC83.>
4	Press ENTER	The following screen will display: " <i>Aid Profile 2</i> " (RC85).



RC84 Aid Profile 1 (A1)

```

RC84      <<  Aid profile 2(A2)  Loan Detail(LD)  Guaranty agency His(GH)
           Lender History(LH) School servicer His(SH) L0an history(LO)

           NSLDS                               10-11-1995
           Aid Profile 1                         16:00:27

Student Name: CHARLES      D KENNEDY           SSN: 002000001
PLUS Name...: CHRISTINA   L KENNEDY           SSN: 001000001
School/Branch Code: 00273900 School Status:
School Name..: ITHACA COLLEGE
Address.....: DANBY RD
              ITHACA                NY 14850
School Branch Servicer Code:
Loan Period Begin Date.....: 08-28-1991      Loan Period End Date...: 05-15-1992
Certification/Guaranty Date: 08-10-1991      Loan Amount: 4000      Loan Type: PL
Outstanding Principal Bal...: 0      Outstanding Principal Bal Date: 09-08-1993
Outstanding Interest Bal...: 0      Outstanding Interest Bal Date.: 09-08-1993
Current Lender/Br: 818260 0000      Name: FIRST HAWAIIAN BANK
Lender Branch Address: PO BOX 1693, 1110 UNIVERSITY
                      HONOLULU                HI 968260000      Phone: 8089434614
Current Lender Branch Servicer:
                      PRIVACY ACT OF 1974(AS AMENDED)

F3=EXIT  F12=RETURN

```

RC85 Aid Profile 2 (A2)

```

RC85      <<  Loan Detail(LD) Lender History(LH) Guaranty agency His(GH)
           L0an history(LO)

           NSLDS                               10-11-1995
           Aid Profile 2                         16:05:17

Student Name: CHARLES      D KENNEDY           SSN: 207003568
PLUS Name...: CHRISTINA   L KENNEDY           SSN: 212000002

Originating Lender: 818260      Name: FIRST HAWAIIAN BANK
Address.....: PO BOX 1693, 1110 UNIVERSITY
              HONOLULU                HI 968260000      Phone: 8089434614

Current Guaranty Agency : 800      Name: USA GROUP, INC.
Address.....: P.O. BOX 6180
              INDIANAPOLIS            IN 462066180

Originating Guar Agency : 800      Name: USA GROUP, INC.
Address.....: P.O. BOX 6180
              INDIANAPOLIS            IN 462066180

PRIVACY ACT OF 1974(AS AMENDED)

F3=EXIT  F12=RETURN

```

6.2.9

**Loan Detail (LD)****What Does the Loan Detail (LD) Screen Do?**

The “*Loan Detail*” screen (RC86) displays the current loan status as well as financial details. It is useful in determining the dates and amounts associated with loan disbursement, cancellation, and refund.

Access to loan detail information is controlled by the “*Loan History Selection*” (RC83) screen. If you type LD for Loan Detail AND select a specific loan record from the “*Loan History Selection*” (RC83) screen, the “*Loan Detail*” (RC86) screen is displayed.

Specific loan data is carried over from the previous screen - loan type, amount, period begin and end dates, and certification/ guaranty date.

The “*Loan Detail*” screen displays the following information (including date and amount), for the specific loan record selected in chronological order:

- Disbursement,
- Cancellation,
- Refund, and
- Loan Status information (see the table under “*Loan History*” section of this guide for a definition of loan status codes).

**Note:**

From the “*Loan Detail*” screen you may navigate to the following Borrower Tracking screens:

“*Aid Profile 1*,” “*Lender History*,” “*Guaranty Agency History*,” “*School Branch Servicer History*,” or “*Loan History*.”

...To Loan Detail (LD)		
STEP #	ACTION	RESULT
1	From RC83 " <i>Loan History Selection</i> " (or whenever LD is available from the Action Bar): Type LD for Loan Detail in the Action Code field	<No change in RC83.>
1a	If RC83 search contains more than one loan record, Type S for Select next to your choice from the list	<Skip this step if search yields only one name. The system default will automatically select it.>
2	Press ENTER	The following screen will display: " <i>Loan Detail</i> " (RC86).



RC86 Loan Detail (LD)

```

RC86      <<  Aid profile 1(AI) Lender History(LH) Guaranty agency History(GH)
           School servicer History(SH) L0an history(LO)
-----
                        NSLDS                        10-12-1995
                        Loan Detail                    09:46:27

Student Name: CHARLES      D KENNEDY                SSN: 207003568
PLUS Name...: CHRISTINA   L KENNEDY                SSN: 212000002
Loan Type: PL Amount:    4000          Certification/Guaranty Date: 08-10-1991
Period Begin Date...: 08-28-1991      Period End Date.....: 05-15-1992

Outstanding Principal Bal:      0      Outstanding Principal Bal Date: 09-08-93
Outstanding Interest Bal.:     0      Outstanding Interest Bal Date.: 09-08-93
                                     MORE:
-- Disbursement --      -- Cancellation --      ----- Refund -----      ---- Status ----
Date      Amount      Date      Amount      Date      Amount      Date      Code
09-23-1991      4000
                                     09-08-1993      RP

                                     PRIVACY ACT OF 1974(AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN

```

6.2.10

**Lender History (LH)****What Does the Lender History (LH) Screen Do?**

The “*Lender History*” screen (RC87) provides a summary of all the lenders associated with a specific loan. It provides information about the lender currently servicing the loan and the lender’s address.

Access to “*Lender History*” (LH) is controlled by the “*Loan History*” (LO) screen.

Specific loan data is carried over from the “*Loan History Selection*” (RC83) screen - loan type, amount, period begin and end dates, and certification/ guaranty date. The “*Lender History*” (RC87) screen displays the following lender information in chronological order for the specific loan record selected:

- Lender code,
- Lender branch code,
- Lender branch name,
- Address,
- Telephone number, and
- Responsible begin and end dates.

**Note:**

From the “*Lender History*” screen, you may navigate to the following other borrower tracking screens: “*Aid Profile 1*,” “*Loan Detail*,” “*Lender Branch Servicer History*,” “*Guaranty Agency History*,” or “*Loan History*.”

...To Lender History (LH)		
STEP #	ACTION	RESULT
1	From RC83 " <i>Loan History Selection</i> " (or whenever LH is available from the Action Bar), Type LH for Loan History in the Action Code field	<No change in RC83.>
1a	If RC83 search contains more than one loan record Type S for Select next to your choice from the list	<Skip this step if search yields only one name - the default will select the one name.>
2	Press ENTER	The following screen will display: " <i>Lender History</i> " (RC87).



RC87 Lender History (LH)

```

RC87    <<    Aid profile 1(A1)  Loan Detail(LD)  Lender Br serv his(LB)
          Guar agency His(GH) LOan history(LO)

          NSLDS                                10-16-1995
          Lender History                        14:43:01
Student Name: CHRISTOPHER K LEE                SSN: 037000002
PLUS Name....:                                SSN:

Loan Type.....: SF Amount: 1338  Certification/Guaranty Date: 12-01-1982
Period Begin Date: 01-01-1983  Period End Date.....: 04-30-1983
Sel
- Lender Code...: 899986  Lender Branch Code: 0000  Phone Number: 7037093844
  Lender Name...: SLMA/LOAN SERVICING CENTER/VIRGINIA
  Street Address: 365 HERNDON PKY STE 1200, GUAR RELA
  City.....: HERNDON  State: VA  Zip Code: 220700000
  Responsible Begin Date: 05-20-1983  Responsible End Date: 12-31-9999
  Lender Code...:  Lender Branch Code:  Phone Number:
  Lender Name...:
  Street Address:
  City.....:  State:  Zip Code:
  Responsible Begin Date:  Responsible End Date:
          PRIVACY ACT OF 1974(AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN

```

6.2.11

**Lender Branch Servicer History (LB)****What Does the Lender Branch Servicer History (LB) Screen Do?**

The “*Lender Branch Servicer History*” screen (RC88) allows you to view lender branch servicer history information for a specific lender. If you are trying to contact a specific lender and determine that they have another entity servicing their loan, the “*Lender Branch Servicer History*” screen provides the name and address of that servicer. Additionally, the responsibility begin/end dates are provided online to enable you to confirm the name of the servicer you need to contact.

You must select lenders individually to view their servicer’s history data.

The following lender branch servicer information is displayed in chronological order:

- School associated with loan,
- Lender/branch servicer code,
- Lender name,
- Responsible begin and end dates,
- Lender address, and
- Telephone number.

**Note:**

If there is no lender branch servicer history available, the following message is displayed: “*RC8701 I: No lender branch servicer history for the loan.*”

...To Lender Branch Servicer History (LB)		
STEP #	ACTION	RESULT
1	From RC83 " <i>Loan History Selection</i> " (or whenever LB is available from the Action Bar), Type LB for Lender Branch Servicer History in the Action Code field	<No change in RC83.>
1a	If RC83 search contains more than one loan record Type S for Select next to your choice from the list	<Skip this step if search yields only one name - the default will select the one name.>
2	Press ENTER	The following screen will display: " <i>Lender Branch Servicer History</i> " (RC88).



RC88 Lender Branch Servicer History (LB)

```

RC88      <<   L0an history(L0)
-----
                                NSLDS                                10-12-1995
                                Lender Branch Servicer History      09:27:11
Student Name: CHRIS              W LAMBART                          SSN: 037000002
PLUS Name....:
School Code.: 00152600 Name: JOHNSTON COLLEGE OF COMPUTING
City.....: ST. LEO              State: FL  Zip Code: 33574
Loan Type.....: SF Amount:    5000  Certification/Guaranty Date: 08-10-1982
Period Begin Date.: 08-20-1982  Period End Date.....: 05-16-1993
Lender/Branch Code: 8999860000 Len Name: SLMA/LOAN SERVICING CENTER/VIRGINIA
Lender Responsible Begin Date: 08-20-1982  Responsible End Date: 12-30-1992
                                                MORE:  +
Lender Servicer Code: 000000 Name: SERVICER FOR SLMA LENDER
Street Address: 19996 HERITAGE DRIVE
City: BURKE                      State: VA  Zip Code: 22031  Phone: 703-290-0875
Responsible Begin Date: 01-01-1995  Responsible End Date: 12-31-9999
Lender Servicer Code: 000001 Name: LENDER BRANCH SERVICER FOR STAFFORD LOAN
Street Address: 19066 ORCHARD DRIVE
City: ROSEMONT                   State: PA  Zip Code: 19010  Phone: 215-928-0060
Responsible Begin Date: 01-01-1993  Responsible End Date: 01-01-1995
                                PRIVACY ACT OF 1974(AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN

```

6.2.12

**Guaranty Agency History (GH)****What Does the Guaranty Agency History (GH) Screen Do?**

The “*Guaranty Agency History*” screen (RC89) provides a summary of the guaranty agencies that have serviced the loans, including the associated responsibility dates. This screen enables you to explain to students which servicers have worked on their loans. It is also helpful to the servicing industry when trying to reconstruct a loan history.

Access to Guaranty Agency history information is controlled by the “*Loan History Selection*” screen (RC83). If you type GH for Guaranty Agency History, and select a specific loan (FFEL) record from the “*Loan History Selection*” screen, the “*Guaranty Agency History*” screen is displayed.

Specific loan data is carried over from the previous screen - loan type, amount, period begin and end dates, and certification/guaranty date. The “*Guaranty Agency History*” (RC89) screen displays information in chronological order.

The following Guaranty Agency information for the specific loan record selected is displayed:

- Guaranty Agency name,
- Address, and
- Responsible begin date.

**Note:**

From the “*Guaranty Agency History*” screen, you may navigate to the following other Borrower Tracking screens: “*Aid Profile 1*”, “*Loan Detail*,” “*Lender History*,” or “*Loan History Selection*.”

<p style="text-align: center;">...To Guaranty Agency History (GH)</p>		
STEP #	ACTION	RESULT
1	<p>From RC83 <i>“Loan History Selection”</i> (or whenever GH is available from the Action Bar),</p> <p>Type GH for Guaranty Agency History in the Action Code field</p>	<No change in RC83.>
1a	<p>If RC83 search contains more than one loan record</p> <p>Type S for Select next to your choice from the list</p>	<Skip this step if search yields only one name. The system default will automatically select it.>
2	Press ENTER	The following screen will display: <i>“Guaranty Agency History”</i> (RC89).



RC89 Guaranty Agency History (GH)

```

RC89      <<  Aid profile 1(A1)  Loan Detail(LD)  Lender History(LH)
           Loan history(LO)
-----
                        NSLDS                        10-11-1995
                        Guaranty Agency History      16:14:58

Student Name: CHARLES      D KENNEDY                SSN: 207003568
PLUS Name...: CHRISTINA   L KENNEDY                SSN: 212000002

Loan Type.....: PL Amount:  4000  Certification/Guaranty Date: 08-10-1991
Period Begin Date: 08-28-1991      Period End Date.....: 05-15-1992
                                     MORE:

GA Code: 800  GA Name: USA GROUP, INC.
GA Street Address.....: P.O. BOX 6180
City.....: INDIANAPOLIS      State: IN Zip Code: 462066180
Responsible Begin Date: 08-10-1991

GA Code:      GA Name:
GA Street Address.....:
City.....:      State:  Zip Code:
Responsible Begin Date:
                PRIVACY ACT OF 1974(AS AMENDED)

F3=EXIT  F7=BACKWARD  F8=FORWARD  F12=RETURN

```

6.2.13

**School Branch Servicer History (SH)****What Does the School Branch Servicer History (SH) Screen Do?**

The “*School Branch Servicer History*” (RC90) screen displays school branch servicer history for a selected Perkins loan. If you need information from a school and you find that the school has another entity servicing the loan, this screen provides you the address of the servicer. Additionally, the responsibility begin/end dates are displayed to allow you to confirm which servicer you need to contact.

Access to school branch servicer history information is controlled by “*Loan History Selection*” (RC83) screen by typing SH for “*School Servicer History*.”

The following information for a specific Perkins loan is displayed in chronological order:

- School branch code and name,
- Loan type,
- Certification date,
- Period begin and end dates,
- School branch address,
- School branch servicer code and name,
- School branch servicer address, and
- Responsible begin and end dates.

**Note:**

The “*School Branch Servicer History*” (RC90) screen allows you to navigate to the following other borrower tracking screens: “*Aid Profile 1*” (RC84), “*Loan Detail*” (RC86), or “*Loan History Selection*” (RC93).

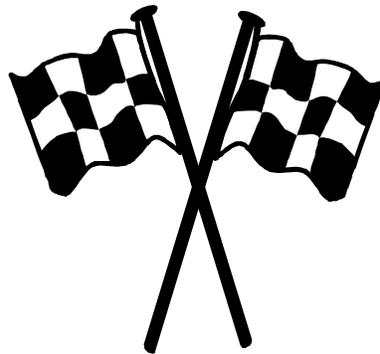
If this is not a valid Perkins loan, the system displays the following message: “*RC8302 I: No School Branch Servicer History for the loan.*”

<p>...To School Branch Servicer History (SH)</p>		
STEP #	ACTION	RESULT
1	<p>From RC83 "<i>Loan History Selection</i>" (or whenever SH is available from the Action Bar),</p> <p>Type SH for School Branch Servicer History in the Action Code field</p>	<No change in RC83.>
1a	<p>If RC83 search contains more than one loan record</p> <p>Type S for Select next to your choice from the list</p>	<Skip this step if search yields only one name - the default will select the one name.>
2	Press ENTER	The following screen will display: " <i>School Branch Servicer History</i> " (RC90).

RC90 School Branch Servicer History (SH)

RC90	<<	Aid profile 1(A1)	Loan Detail(LD)	LOan history(LO)
NSLDS				10-19-1995
School Branch Servicer History				15:21:39
Student Name:	CHRIS	W LAMBART	SSN:	037000002
PLUS Name....:				SSN:
Sch/Br Code.:	00165600	Name:	CHICAGO COLLEGE OF CHIROPODY	
City.....:	CHICAGO	State:	IL	Zip Code: 60600
Loan Type.....:	PU	Amount:	3500	Certification Date: 08-25-1992
Period Begin date:	09-01-1982	Period End date...:	05-31-1983	
				MORE: +
School Servicer Code:	001002	Name:	SCHOOL SERVICER OF FLORIDA COLLEGE AT TAMPA	
Street Address:	1906 ORCHARD WAY			
City:	TAMPA	State:	FL	Zip Code: 1900-0001
Responsibility Begin date..:	12-01-1995	Responsibility End date:	12-31-1999	
School Servicer Code:	001001	Name:	SERVICER FOR FLORIDA COLLEGES	
Street Address:	123 HICKERY STREET			
City:	MIAMI	State:	FL	Zip Code: 48096-001
Responsibility Begin date..:	09-05-1993	Responsibility End date:	12-01-1995	
PRIVACY ACT OF 1974(AS AMENDED)				
F3=EXIT F7=BACKWARD F8=FORWARD F12=RETURN				





The End of Chapter 6

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