Technical Update PK–2020-01

October 2020

Modifications to the Perkins Data Provider Instructions

This information is intended for the person in your organization who is responsible for working with the National Student Loan Data System (NSLDS®). Please ensure that the appropriate person receives this update.

We are pleased to announce the availability of the updated National Student Loan Data System (NSLDS®) Perkins Data Provider Instructions (DPI), Version 8.2 on the Information for Financial Aid Professionals (IFAP) website. This manual explains Perkins Loan reporting requirements and the processes used to add or update Perkins Loans on NSLDS, including how to use the Perkins DataPrep software. The updated manual, dated October 2020, replaces the June 2018 version.

In the following sections, we describe modifications made to the NSLDS Perkins submittal process that are included in this update to the DPI. We have retired or modified various restrictions which are described in Appendix A (Detail Record Layouts) and Appendix B (Tables B-9 and B-10) of the DPI.

We encourage schools and servicers to review this Technical Update as well as the updated DPI, to ensure all data providers have a complete and accurate knowledge of current reporting processes.

Note: Schools and servicers now access tools previously located on the FSAdownload website, such as the Perkins DataPrep software, on the Software and Other Tools page of the IFAP website (https://ifap.ed.gov/software-and-other-tools).

Retired Edits

The errors, listed in the table below, have been retired and will not be produced when reporting on the Date of First Disbursement, Amount of Loan, Date of Loan Status, Date of Enrollment Status Effective, and Amount of Outstanding Principle Balance. Loan records that would have previously received one of these errors will now successfully load into NSLDS as long as there are no other errors identified.

Field Code No.	Field Name	Error Code No.	Error Message Text
225	Date of First Disbursement	1373	Date of First Disbursement for DU loan must be >= 19580101
		1374	Date of First Disbursement for NU loan must be >= 19720701
		1375	Date of First Disbursement for PU loan must be >= 19870101
		1378	Date of First Disbursement for DU loan must be <= 19720630
261	Amount of Loan	1419	Amount of Loan must be <= 40000
		1439	Amount of Loan Amount <= 6,600
		1440	Amount of Loan must be <= 9,600
262	Date of Loan Status	1396	Loan Closed prior to 19891001 must be reported as cancelled
281	Date of Enrollment Status Effective	1412	Based on Enrol Stat, Dt must be >= Dt of 1st Disb - 60 days
284	Amount of Outstanding Principle Balance	1421	Amount of Outstanding Prin Bal must be <= 40000
		1441	Amount of Outstanding Prin Bal must be <= $6,600
		1442	Amount of Outstanding Prin Bal must be <= $9,600

Modified Edits

I. Student's Academic Level

If a borrower's Perkins Loan has been previously reported and successfully loaded on NSLDS or if subsequently reported on and now the Student's Academic Level is unknown, report the Academic Level as blank, which will bypass Error No. 1437.

Field Code No.	Field Name	Error Code No.	Error Message Text
270	Student's Academic Level	1437	Academic Level must be reported for loans on or after 20080701

II. Date of Student's Birth

Schools will not receive Date of Birth Error Code No. 1103, 1280, 1380, or 1381 when there is a successful match to a student that currently exists in NSLDS.

Field Code No.	Field Name	Error Code No.	Error Message Text
222	Date of Student's Birth	1103	19000101 invalid when Date of First Disb > Initial Load Date
		1280	Year of Date of Student's Birth must be < Submittal Date
		1380	Dt of Student's Birth must be >= Date of 1st Disb - 90 yrs.
		1381	Dt of Stu's Birth must be <= Dt of 1st Disb – 12 yrs.

III. Date Entered Repayment

1. When a school is attempting to report a Date Entered Repayment that is earlier than or equal to the Date of (First) Disbursement and the loan is already on NSLDS, Error 1394 (listed below) will be bypassed. The existing Date Entered Repayment in NSLDS will not be replaced.

   For loans which have yet to be successfully reported on NSLDS and the Date Entered Repayment that currently being reported is earlier than the Date of (First) Disbursement, the Date of (First) Disbursement will be used as a substitute for the Date Entered Repayment when both of the following conditions occur:

   a. The Date Entered Repayment is on or after the Date of First Disbursement.
   b. The Date Entered Repayment is more than 10 years in the past.

   If the Date Entered Repayment in the submittal file does not meet these conditions, the record will not be loaded and an Error 1394 will be returned to the school.

Field Code No.	Field Name	Error Code No.	Error Message Text
260	Date Entered Repayment	1394	Date Entered Repayment must be >= Date of Disbursement.

2. When a school is attempting to report a Date Entered Repayment that is greater than or equal to the Date of (First) Disbursement plus 15 years and the loan is already on NSLDS, Error 1395 (listed below) will no longer be produced. The existing Date Entered Repayment will not be replaced.

For loans which have yet to be successfully reported on NSLDS and the Date Entered Repayment that is greater than the Date of (First) Disbursement plus 15 years, Error 1395 will continue to be returned to the school.

Field Code No.	Field Name	Error Code No.	Error Message Text
260	Date Entered Repayment	1395	Dt Entered Repayment must be <= Dt of 1st Disb + 15 yrs

IV. Date of Loan Status

1. When a school is attempting to report a Date of Loan Status that is earlier than or equal to the Date Entered Repayment and the loan is already on NSLDS, Error 1397 (listed below) will be bypassed. The existing Date of Loan Status in NSLDS will not be replaced.

   For loans which have yet to be successfully reported on NSLDS and the Date of Loan Status that is earlier than or equal to the Date Entered Repayment, the Date of Loan Status in the submittal file will be accepted when either of the following conditions occur:

   a. The Loan Status is a closed or canceled status.
   b. The Date Entered Repayment is more than 10 years in the past.

   If the Date of Loan Status in the submittal file does not meet one of these conditions, the record will not be loaded and an Error 1397 will be returned to the school.

Field Code No.	Field Name	Error Code No.	Error Message Text
262	Date of Loan Status	1397	Based on Loan status, Date must be >= Date Entered Repayment.

2. When a school is attempting to report a Date of Loan Status that is earlier than the Date of (First) Disbursement and the loan is already on NSLDS, Error 1398 (listed below) will no longer be produced. The existing Date of Loan Status in NSLDS will not be replaced.

   For loans which have yet to be successfully reported on NSLDS and the Date of Loan Status that is earlier than the Date of (First) Disbursement, the Date of (First) Disbursement will be used as a substitute for the Date of Loan Status when the following condition occurs:

   a. The Date of (First) Disbursement is more than 10 years in the past.

If the Date of Loan Status reported in the submittal file does not meet this condition, the record will not be loaded and an Error 1398 will be returned to the school.

Field Code No.	Field Name	Error Code No.	Error Message Text
262	Date of Loan Status	1398	Based on Loan status, Date must be > Date of 1st Disb.

V. Date of Disbursement

The Date of Disbursement being reported by schools must now be earlier or equal to the Date Enrollment Period Ends plus 365 days, an increase from 90 days. If the Date of Disbursement reported does not meet this condition, the record will not be loaded and Error 1402 (listed below) will be returned to the school.

Field Code No.	Field Name	Error Code No.	Error Message Text
266	Date of Disbursement	1402	Date of Disb must be <= Dt Enroll Period Ends + ~~90~~ 365 days

VI. Date Enrollment Period Begins

Error 1392 (listed below), associated with the Date Enrollment Period Begins field, will be bypassed when the Date of First Disbursement in the school's submittal file is more than five years in the past.

Field Code No.	Field Name	Error Code No.	Error Message Text
273	Date Enrollment Period Begins	1392	Date Enrol Per Begin must be <= Dt of 1st Disb + 30 days

VII. Date Enrollment Period Ends

Errors 1106, 1125, 1199, and 1393 (listed below), associated with the Date Enrollment Period Ends field, will be bypassed when the loan record the school is reporting already exists on NSLDS.

Field Code No.	Field Name	Error Code No.	Error Message Text
274	Date Enrollment Period Ends	1106	19000101 is invalid when Date of First Disbursement > or = 19920723
		1125	Date must be later than Date Enrollment Period Begins

		1199	Date Enrollment Period Ends is required
		1393	Dt Enrol Per End must be <= Dt Enrol Per Begin + 15 yrs

VIII. Date Deferment Starts

Error 1239 (listed below), associated with the Date Deferment Starts field, will be bypassed when the Date Entered Repayment in the school's submittal file is more than 10 years in the past. The error will also be bypassed if the Date Entered Repayment is less than 10 years in the past and the loan is being reported with an AE or a closed Loan Status.

Field Code No.	Field Name	Error Code No.	Error Message Text
277	Date Deferment Starts	1239	Date must be > or = Date Entered Repayment

IX. Amount Outstanding Principal Balance

When a school is attempting to report zero for the Amount Outstanding Principal Balance and and 'AE' for Loan Status, if the loan already exists on NSLDS, Error 1427 (listed below) will be bypassed. The existing Amount Outstanding Principal Balance in NSLDS will not be replaced.

Field Code No.	Field Name	Error Code No.	Error Message Text
284	Amount Outstanding Principal Balance	1427	For open loans, Outstanding Principal Balance must be > zero

If you have any questions, please contact the NSLDS Customer Support Center at 1-800-999-8219 or by email at NSLDS@ed.gov.