

National Student Loan Data System

Perkins Spreadsheet Submittal Instruction Guide

Final

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1 Federal Perkins Loan Data Reporting

The National Student Loan Data System (NSLDS) has been enhanced to allow the reporting of Federal Perkins loan data to occur on the NSLDS Professional Access (FAP) Web site. Perkins loan data providers may use this new functionality to provide loans not previously reported to NSLDS, provide updates to loans currently found on NSLDS, or assist in closing loans in their portfolio.

This document will provide step-by-step detailed instructions on how to use the spreadsheet submittal tool, and in conjunction with the Perkins Loan Data Provider Instructions (DPI), how to provide specific data elements to NSLDS. The current version of the DPI can be found on the [NSLDS Reference Material Section of IFAP](#).

For more information regarding the Federal Perkins Loan Liquidation and Closeout Procedures, please refer to: <http://ifap.ed.gov/ifap/cbp.jsp>.

2 Perkins Loans on NSLDS

Every user of NSLDS must obtain their own FSA ID user id which can't be shared by any other person. The following section describes how to obtain an FSA ID for use with online activity.

2.1 How to Sign Up

Schools having awarded Perkins Loans are required to establish their service for Batch Perkins Loan data reporting to NSLDS through the FSAWebenroll website. Once designating the mailbox for SAIG batch submissions, schools can report Perkins loans through the SAIG method. Separately, Perkins loans may be reported to NSLDS online. As such, each user must have his or her own FSA User ID to access NSLDS Perkins Loan Submittal features. Additionally, a person from each location that is involved with students who have received financial aid may need access as well. To apply for batch and online reporting access, go to www.fsawebenroll.ed.gov.

The Primary Destination Point Administrator (PDPA) for the organization must complete the application request for NSLDS online default services, with additional services as appropriate. The PDPA must also enforce the security requirements as outlined in the SAIG User Statement including the completion and maintenance of this statement. Your President/Chief Executive Officer (CEO)/Chancellor/designee/equivalent person must approve each designated individual that applies for NSLDS online access.

After applying through www.fsawebenroll.ed.gov, you will be assigned an FSA User ID that is used for online access. Each person involved in reviewing student data must have their own FSA User ID. The ID must not be shared. The Rules of Behavior and Privacy Act statement presented at log on outlines the appropriate uses of all Federal Student Aid Systems including the [NSLDSFAP](http://www.nslDSFAP) website and the consequences of inappropriate actions.

For additional information or assistance with the sign up process, call CPS/SAIG Technical Support at 800/330-5947 (TDD/TTY 800/511-5806) or send an email to CPSSAIG@ed.gov.

For existing users of NSLDS with the appropriate level of access from a previous request, no change needs to be made to the FSA User ID in order to access the Perkins Loan Submittal features.

2.2 Using NSLDS Online

When you initiate your session on the NSLDSFAP website by logging on at the https://www.nslDSFAP.ed.gov/nslDS_FAP/default.jsp address, the **Click to Continue** page

displays. Click the button to connect to the FSA Login page and enter your FSA User ID and password. Once your identity is authenticated, you will be taken to the Organization selection page associated with your FSA User ID. If your ID is associated with multiple schools, select the location for which you want access for this session.



Figure 2-1: NSLDS Professional Access website after log on

After correctly entering the image on the User Access Verification page, you will reach the main Menu Page.

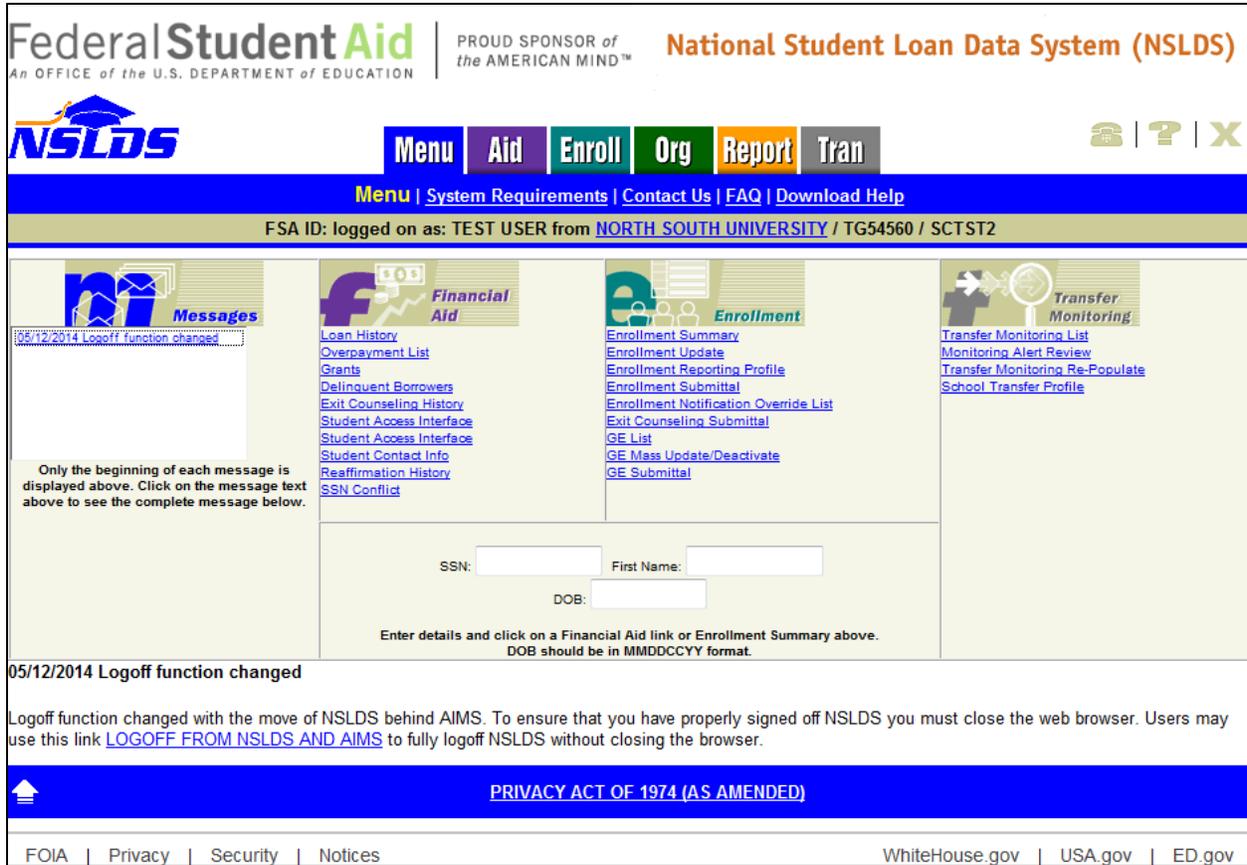


Figure 2-2: NSLDSFAP Menu

Note: If you are having trouble getting started, remember that this site works best when you use the Microsoft Internet Explorer (version 7.x or higher) browser. You can call the Customer Support Center at 1-800-999-8219 if you have any problems.

2.2.1 Menu

The main Menu provides an overview of the functions available to you by way of the **Navigation Tabs** which are located across the top of every page. Each tab provides a link to the main page of each corresponding section. When clicked, these tabs allow you to navigate to a specific section within the tab without having to return to the Menu page. The Navigation Bar is directly below the Navigation Tabs and includes links to the other pages within that section.

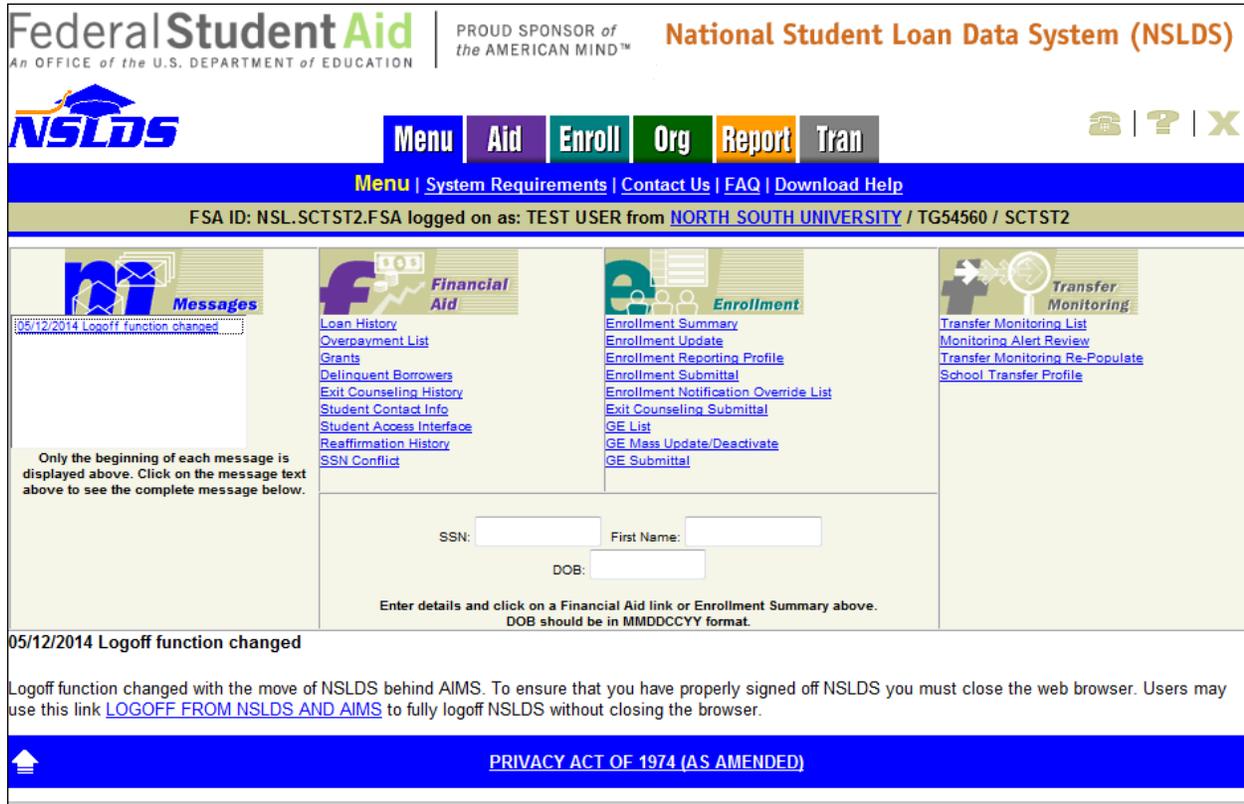


Figure 2-3, Menu Page, Navigation Tabs

The **Menu** page allows users to view system messages and access Financial Aid, Enrollment Data, Organization Information, and Reports. The Menu page also includes help-related links and icons, which are used throughout the site as quick and easy information and navigation tools. A list of system messages appears under the Messages heading on the Menu page. Each line of the list displays the date a message was posted and the beginning words of the message. To display the full message, click it. The message text appears at the bottom of the Menu page.

2.2.2 Financial Aid

Links to the financial aid pages appear under the **Aid** heading. The financial aid pages contain data about a borrower’s loans, Federal grants for students, and overpayments of Federal aid as well as exit counseling history and an access to the student view of NSLDS data. Based on your access authority, you can view some or all of these pages. To access a borrower’s loan history, type the student’s Social Security number (SSN), First Name, and Date of Birth (DOB) and click the “Retrieve” button.

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NSLDS | Menu | Aid | Enroll | Org | Report | Tran

Loan History | Overpayment List | Grants | Delinquent Borrowers | Exit Counseling History | Student Contact Info | Student Access Interface | Reaffirmation History | SSN Conflict

SSN: [] First Name: [] DOB: [] (MMDDCCYY) Retrieve

FSA ID: NSL.SCTST2.FSA logged on as: TEST USER from NORTH SOUTH UNIVERSITY / TG54560 / SCTST2

SHAUNA I LUMMUS
 ***-**-0000 + DOB: 07/09/1960

Loan History

Aggregate Loan Information

Loan Type	Outstanding Principal Balance	Pending Disbursements	Total
Undergraduate Award Year: 2008 ⓘ			
Subsidized Loans	\$3,001	\$0	\$3,001
Unsubsidized Loans	N/A	N/A	N/A
Combined Loans	\$3,001	\$0	\$3,001
Consolidation Loans, Unallocated	N/A		N/A
Totals			
Subsidized Loans	\$3,001	\$0	\$3,001
Unsubsidized Loans	N/A	N/A	N/A
Combined Loans	\$3,001	\$0	\$3,001
Consolidation Loans, Unallocated	N/A		N/A
Other			
Perkins Loans	N/A		N/A

Master Promissory Notes

MPN Type	Code	PLUS Borrower
Direct Stafford	N	N/A
Direct PLUS	N	N/A

Loan Summary

Sort by: --- Select --- Submit

Display Only: ----- ALL -----

Currently Sorted by LOAN DATE, No filtering

SF - FFEL STAFFORD SUB		Status: EB as of 09/28/2009		Loan Detail	
ALABAMA AGRICULTURAL & MECHANICAL UNIVERSITY - 00100200					
Guaranteed Amt:	\$3,501	Disbursed Amt:	\$3,500	OPB:	\$3,001
Loan Date:	09/28/2008	Sep. Loan Ind:	A	Loan Period:	01/01/2008 - 12/31/2009
Last Disb. Date:	02/02/2010	Last Disb. Amt:	\$3,500	Acad. Lv:	1
ED Servicer: DEPARTMENT OF ED/GRANITE STATS - GSMR - NH - 504					
Agg. OPB: \$3,001					

Notes:
 ⓘ For the determined award year and academic level displayed, the dependency status is/was Independent.

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Figure 2-4, Aid Tab Showing Loan History Page

Details on each loan are available by clicking on the blue number beside the loan or on the "Loan Detail" button for that loan.

Additional functions found beneath the **Aid** tab can be accessed by clicking the associated link found in the Navigation bar.

2.2.3 Enrollment

The Enrollment (**Enroll**) tab contains pages with information about student enrollment at every school where enrollment has been reported for a student. Links to the Enrollment pages, Exit Counseling Submittal, and Gainful Employment pages appear under the Enrollment heading on the Menu page.

The screenshot shows the NSLDS Enrollment Summary page. At the top, there is a navigation menu with tabs for Menu, Aid, Enroll, Org, Report, and Tran. The 'Enroll' tab is currently selected. Below the navigation bar, there is a search section with fields for SSN, First Name, and DOB, and a 'Retrieve' button. The user is logged in as TEST USER from NORTH SOUTH UNIVERSITY. The main content area displays the student's name, MAX C STUDENT, and their DOB, 07/02/1970. Below this, there is an 'Enrollment Summary' section with a table of enrollment records. The table has columns for School Name, OPEID, Most Recent Status, Eff. Date, ACD, Cert. Date, and Cert. Method. The first record shows enrollment at NORTH SOUTH UNIVERSITY with OPEID 06789900, status Withdrawn, and effective date 07/01/2015.

School Name	OPEID	Most Recent Status	Eff. Date	ACD	Cert. Date	Cert. Method
1 NORTH SOUTH UNIVERSITY	06789900	Withdrawn	07/01/2015	N/A	09/08/2015	NSLDS Web

Figure 2-5, Enrollment Tab Showing Enrollment Summary Page

Detailed information regarding the Enrollment Reporting process, or the Gainful Employment Reporting process, and the responsibilities of the schools can be found on www.ifap.ed.gov under NSLDS Reference Materials, NSLDS User Documentation in the associated documentation (*NSLDS Enrollment Reporting Guide* or *NSLDS Gainful Employment User Guide*).

2.2.4 Organization

The Organization (**ORG**) tab allows you to look at information about an organization, depending on your access. Links to the Organization pages appear under the Org Heading on the Menu page. The organization search bar is located directly below the Navigation Bar. The Type, Code, and Name boxes appear here. When an organization is retrieved or selected, the organization identifier information appears at the top of each organization page. NSLDS encourages all schools, lenders, and GAs to provide as many contacts as possible for their organization and to keep the NSLDSFAP Web site ORG contacts current and always list at least a Primary Contact for an organization.

Organization Contact List

Function	First Name / Last Name	Phone / Ext.	Email
1 PRIMARY CONTACT	SUE ADMINISTRATOR	(123) 123-4567	
2 OVERPAYMENT ISSUES	BARRY BURSAR	(123) 123-4567 123	
3 DISABILITY PROCESSING	JOHN DOE	(555) 555-5555	

Figure 2-6, Organization Contact List

2.2.4.1 Data Provider Schedule Page

The Data Provider Schedule page displays current, past, and future scheduled data provider submittals. The table displays information based on your user id and cannot be updated.

For schools that provide data on Perkins Loans, the table displays:

- Scheduled Submittal Date—The date NSLDS expects to process the submittal.
- Received Date—The date NSLDS received the incoming submittal from SAIG.
- Processed Date—The date on which NSLDS completely processed the submittal.
- Loan Records Submitted—The total number of detail records on the submittal file transmitted to NSLDS. This number may include records that were in error and did not update the NSLDS database.
- Loan Records Extracted—The total number of detail records extracted from the data provider database for this submission.
- Two fields are viewable only by the school that submits the data:
 - Loans with Errors—The total number of detail records extracted from the data provider database that included errors and did not update the NSLDS database.
 - Submittal Pass Rate (%)—The percentage of detail records extracted from the

data provider database that contained no errors and updated the NSLDS database.

Note: The statistics appearing on this screen are reflective of those files which are submitted over the SAIG network from the TG mailbox associated with Perkins loan data reporting batch service established on www.fsawebroll.ed.gov. Spreadsheet submittals are not calculated into the Submittal Pass Rate, do not count toward or display on the monthly submittal schedule statistics. See the NSLDS Perkins Data Provider Instructions, Chapters 2.2 and 8.1.1.

2.2.5 Report

NSLDS Users, depending upon their access, can request reports on the NSLDS Professional Access Web site. The **Report** Tab contains two options, Report List and Web Report List. The list that is displayed is associated with your FSA User ID. You will have a list to select from that pertains to the data you use from NSLDS.



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National Student Loan Data System (NSLDS)

Menu
Aid
Enroll
Org
Report
Tran





[Report List](#) | [Web Report List](#)

FSA ID: NSL.SCTST2.FSA logged on as: TEST USER from [NORTH SOUTH UNIVERSITY](#) / TG54560 / SCTST2

Report List

Search Report ID:

	Report ID	Names	Log Page
1	DELQ01	DELINQUENT BORROWER REPORT	
2	DER001	DATE ENTERED REPAYMENT REPORT	
3	DRCNL1	CDR NOTIFICATION LETTER REPORT	
4	DRC015	24 MONTH REPAYMENT INFO LOAN DETAIL	
5	DRC016	36 MONTH REPAYMENT INFO LOAN DETAIL	
6	DRC035	SCHOOL COHORT DEFAULT RATE HIST RPT	
7	FAT001	REQUEST FOR FINANCIAL AID HISTORY	
8	GEDMP1	GE DEBT MEASURES BKUP BY PROGRAM	
9	GEDMY1	GE DEBT MEASURES BKUP BY CALC YR	
10	GENEX1	GE DATA EXTRACT FILE	
11	GEPDC1	GE COMPLETERS LIST	
12	OVP001	SCHOOL OVERPAYMENT REPORT	
13	PRKDF1	PERKINS DEFAULT SUMMARY	
14	REC005	PERKINS EXTRACT BY PARAMETERS	
15	SCHBR1	BORROWER DEMOGRAPHIC REPORT	
16	SCHDF1	BORROWER DEFAULT SUMMARY REPORT	
17	SCHER1	ENROLLMENT REPORTING SUMMARY REPORT	
18	SCHER4	ENROLLMENT REPORTING CERTIFICATION	
19	SCHLL1	SCHOOL LOAN LIST	
20	SCHMB1	MEDIAN BORROWING BACKUP DETAIL	
21	SCHPR1	SCHOOL PORTFOLIO REPORT	
22	SCHSB1	SUBSIDIZED USAGE	
23	SCH01A	EXIT COUNSELING BY SSN	
24	SCH01B	EXIT COUNSELING	
25	SCH07B	TRANSFER MONITORING SUMMARY REPORT	
26	TEACH1	TEACH OVERSIGHT SUMMARY REPORT	


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Figure 2-7, Report List

Clicking on the number by the report to be requested brings the Report Parameters page. Criteria may be entered and submitted to request the generation of a report. A description of the report is displayed in a box at the bottom of the page. Reports are available as either an extract of data or a formatted report. For some reports, you can choose the format. For others, the format is determined by NSLDS.

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NSLDS | **Menu** | **Aid** | **Enroll** | **Org** | **Report** | **Tran**

Report List | **Web Report List**

FSA ID: NSL.SCTST2.FSA logged on as: TEST USER from [NORTH SOUTH UNIVERSITY](#) / TG54560 / SCTST2

Web Report List

Search Report ID:

	Report ID	Names	Log Page
1	ENLST1	ENROLLMENT STATISTICS REPORT	
2	EXTCD1	LOAN EXIT COUNSEL. SUMMARY BY DATE	
3	EXTCS1	LOAN EXIT COUNSEL. SUMMARY BY SSN	
4	EXTC01	LOAN EXIT COUNSEL. COMPLETION	
5	EXTD01	TEACH EXIT COUNSEL. COMPLETION	
6	EXTSD1	TEACH EXIT COUNSEL. SUMMARY BY DATE	
7	EXTSS1	TEACH EXIT COUNSEL. SUMMARY BY SSN	
8	GEDRS1	GE PROGRAM DETAIL RESPONSE STATUS	
9	PLPED3	STATUS OF LOANS PURCHASED BY ED	

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Figure 2-8, Web Report List

Results from Report List requests are sent to the SAIG mailbox of the user who made the request. Reports listed under the Web Report List allow the user to retrieve limited data in a PDF and/or XLS that is available immediately on your computer as well as providing output to the SAIG mailbox.

2.2.6 Transfer Student Monitoring

The Transfer Student Monitoring (**Tran**) tab contains pages with information regarding students the school has indicated have either transferred to their institution, or have an

interest in transferring to their institution and the school would like to receive transfer monitoring alerts of financial aid history information for those students. Initiated by the inform process, users enter a list of students they have an interest in and NSLDS monitors and alerts schools to their information regarding those students, including any changes in financial aid information or status to the school for a specific period of time. For more information on this process, please see the [Transfer Student Monitoring User Guide](#) posted on IFAP.

2.3 Perkins Reporting Comparisons

School users have the ability to report your Perkins loan data to NSLDS by batch using the Perkins Data Prep software and transmitting it over the SAIG network or the spreadsheet submittal online submission. For batch reporting, please reference the Perkins Loan Data Provider Instruction (DPI) found on <http://ifap.ed.gov>. The following figure depicts these options.

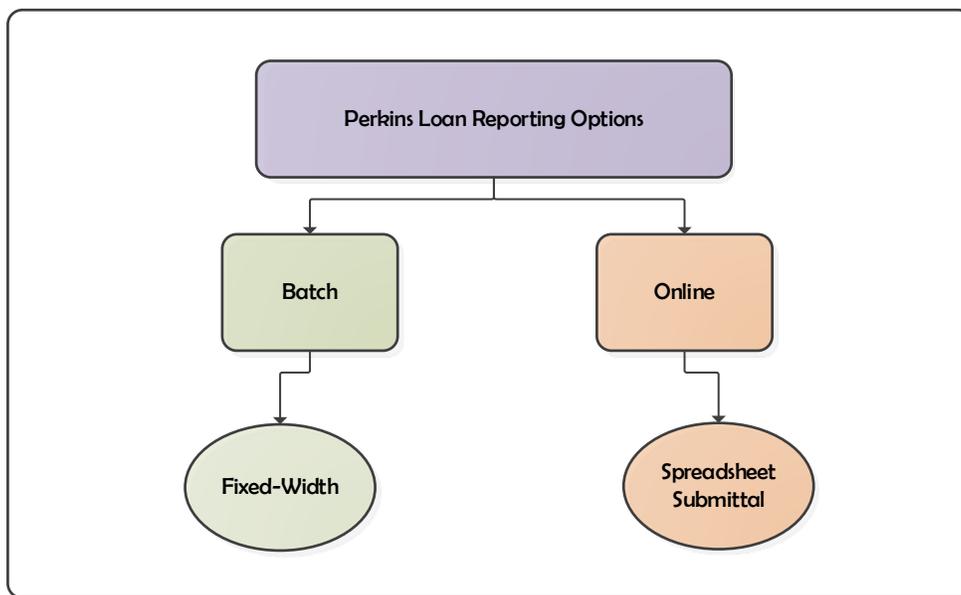


Figure 2-9: Perkins Loan Reporting Options

The first step in creating Perkins Spreadsheet Submittal is obtaining the data from your source system. Refer to Chapter 6 of the Perkins Data Provider Instruction regarding extract instructions and data formats. Throughout this processes it is imperative that any changes made to the extract, by way of error correction, also be made to the data found in the source system. The end result is to ensure all data end points are updated consistently with the same information so systems will not be out of synch.

Unlike the batch process which uses the DataPrep software to assist with file preparation prior to submission, the online process does not have a data preparation tool to be used prior to submitting data online. All errors which are encountered during the online submittal process will be returned to the user in real-time so corrections/updates can be made on the spreadsheet itself and resubmitted. Detailed instruction regarding errors can be found in section 3.3 below.

Another difference between the batch process and the online submittal process is the Past Period Change (PPC) record. PPC records are only supported by the batch process and cannot be submitted with the spreadsheet. More information on the PPC record type can be found in section 6.2.3 of the Perkins Data Provider Instructions.

As mentioned in section 2.2.4.1, each data provider is given a Data Provider Schedule in which to supply their batch data. Unlike the batch process, the online spreadsheet submittal process can be utilized at any point in time, regardless of submittal schedule timing.

	Spreadsheet Submittal	Batch Reporting
Must utilize ED's DataPrep software	No	Yes
Are errors presented in real-time	Yes	No
Can be used to close loans in the portfolio	Yes	Yes
Data corrections must be made to source data	Yes	Yes
Is the data provider statistics web page updated to reflect records submitted	No	Yes
Can be submitted at any time, including multiple times a day	Yes	No
Must conform to the NSLDS monthly submittal Data Provider Schedule found on the Professional Access Web site	No	Yes
Can report Past Period Change Records (PPC)	No	Yes
Can submit loan records for multiple OPEIDs in a	No	Yes

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	Spreadsheet Submittal	Batch Reporting
single file		
Can be used to submit grant overpayments	Yes	Yes
Loan data submitted using spreadsheet format	Yes	No
Which loan data reporting file layouts in the DPI, appendix A are used	Detail Record Only	Header, Detail and Trailer Records
Can be used by domestic schools	Yes	Yes

3 Perkins Loan Spreadsheet Submittal

The Perkins Loan Spreadsheet Submittal process was created to assist schools and loan servicers, having online access for the school they're reporting on behalf of, in submitting and/or updating Perkins loan records on the NSLDS Professional Access Web site. This process allows for the creation of a spreadsheet containing loan data which can be linked to existing loans on NSLDS, or can create new loans.

These instructions have been created to assist you with the creation of the spreadsheet, usage of the NSLDS Professional Access web site, and usage of the Spreadsheet Submittal tool.

3.1 Perkins Loan Spreadsheet Submittal Basics

3.1.1 Process Overview

The Perkins Loan Spreadsheet Submittal is accomplished when a user creates a spreadsheet by populating the Perkins loan data and uses the instructions found in this guide. The spreadsheet is created using the file layout in Appendix A. It can be created wholly by the user, utilizing the instructions below, or the template can be used. The Perkins Loan Spreadsheet Submittal Format template is available on [Federal Student Aid Download](#) (FSADownload) to assist with ensuring the data in the spreadsheet is correctly completed for submission. The template is pre-populated with the field (column) names and is named correctly for immediate usage. The user only needs to supply the Perkins loan data. The following sections describe the creation and usage processes in detail.

3.1.2 Spreadsheet Creation

The spreadsheet has a file size limit of 1,000 KB (approximately 1 MB). Any file size over this limit will cause the spreadsheet to be rejected. File size varies depending on the version of software used.

The spreadsheet can be created with the first row containing the field names found in Appendix A, Index 1 of this document, or without the field names. Each method will be described in the following sub-sections. NSLDS does not have a preferred method. The decision whether or not to include this row is done at your discretion. When creating the spreadsheet, the Perkins Spreadsheet Submittal File layout found in Appendix A of this document must be used as a reference.

During the creation of the spreadsheet there are a few rules to remember specific to Perkins Spreadsheet Submittal that are different from what is found in Appendix A of the Perkins DPI:

- OPEID associated with the FSA User ID must match the Code for Original School (Field Code 220, represented in Column A)
- Only one unique OPEID can be submitted in a spreadsheet by any online school user at that submitting institution.
- Past Period Change Records (PPCs) are not permitted in the spreadsheet

If not opting to use the FSADownload Perkins Submittal Spreadsheet template, it is imperative that the user created spreadsheet be saved in a secure manner. With either spreadsheets used, it is recommended that the spreadsheet have a unique name so that it can be easily identified during the upload process. Please ensure that when saving the file it is saved as a spreadsheet file in a format with an extension of xls orxlsx (Excel™ format). Any other extensions will cause the entire file to be rejected.

3.1.3 Rename Worksheet

The first step in creating the spreadsheet is to rename the spreadsheet worksheet that will be utilized for data entry and subsequent data upload. The name of this worksheet should be changed to be “**upload file**”. To rename the worksheet:

- Right click on the worksheet tab name (Figure 3-1)
- Select Rename
- When the current name of the tab is highlighted, type “**upload file**”
- Click out of the tab and the name will be stored (Figure 3-2)

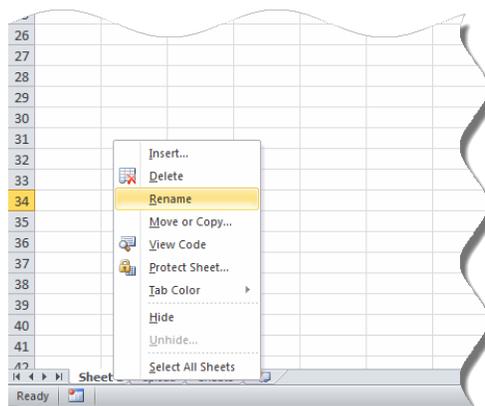


Figure 3-1: Rename Worksheet

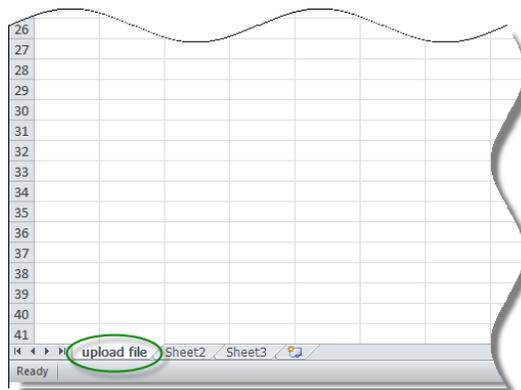


Figure 3-2: Renamed Worksheet

NSLDS will look for a worksheet with the name *"upload file"*. If the worksheet has any other name, NSLDS will attempt to load the data found in the first tab, or Sheet 1, of the spreadsheet. If Sheet 1 is empty, the user will receive the message "Spreadsheet has no data". So it is suggested that the worksheet be renamed. Also, NSLDS will only process one worksheet per spreadsheet. Any other worksheets will be ignored if they are present in the file, as will any records they may contain.

3.1.4 Spreadsheet with Field Names

When creating the spreadsheet with field names, the column names of the fields appearing in the Spreadsheet Submittal File, as listed in Appendix A, Index 1 of this document can be created by the user by typing them into a spreadsheet. The names of the fields must precisely match those presented in the Appendix A and each name must be contained within an individual column. The column names of the fields will appear in Row One, beginning in column A as "Code for Original School" and ending in column AQ with "Data Provider Identifier".

The submittal detail data record is to be completed as a single row at a time beneath Row One of the spreadsheet, with the first loan record appearing in Row Two.

	A	B	C	D	E	
1	Code for Original School	Student's Social Security Number	Date of Student's Birth	Student's First Name	Type of Loan/Other Aid	Date
2	00100200	181800040	1/1/1900	FRED	SE	
3	00100200	181880003	3/26/1970	JOSEPH	PU	
4	0010020A	68180002A	2/2/1975	FRED	NU	21/1/2004
5	00000000	181800041	2/2/1975	FRED	DU	

Figure 3-3: Spreadsheet Creation with Field/Column Names

Fields identified as optional do not require the data to be populated. However, the column for the field name must still appear in Row One of the spreadsheet, even if the data is not being supplied, as shown in Figure 3-4.

	D	E	F	G	H	I	J	K
1	FRED	SE	1/1/2004	N	A			
2	JOSEPH	PU	1/1/2004	N	A			
3	FRED	NU	21/1/2004	N	A			
4	FRED	DU	1/1/1957	N	A			
5	FRED	EU	1/1/1995	N	A	00000000	00000000	
6	FRED	IC	1/1/2004	N	A	00000000	00000000	

Figure 3-4: Spreadsheet Creation with Field Names and Empty Optional Fields

3.1.5 Spreadsheet without Field Names

When creating the spreadsheet without field names Row One of the spreadsheet will contain the first submittal loan Detail Record, beginning in column A and ending in column AQ. The loan detail record data is to be completed as a single row at a time beginning in Row One of the spreadsheet, with the second loan record appearing in Row Two, as shown in Fig #-# .

	A	B	C	D	E
1	00100200	181800040	1/1/1900	FRED	SE
2	00100200	181880003	3/26/1970	JOSEPH	PU
3	0010020A	68180002A	2/2/1975	FRED	NU
4	00000000	181800041	2/2/1975	FRED	DU
5	00000000	181800041	2/2/1975	FRED	DU

Figure 3-5: Spreadsheet Creation without Field Names

Fields identified as optional do need to have data provided. However, the column must still appear in the spreadsheet, even if the data is not being supplied, as shown in Figure 3-6.

G	H	I	J	K	L	M	N	O	P
20100921	06789900	A	20100601	1000	650	10012014	300		
20100207	06789900	B	20100207	2000	850	11012014			800
20050101	06789900	B	20050101	1600	600	12012014			
20090929	06789900	A	20090929	2000	680	10152014			

Figure 3-6: Spreadsheet Creation without Field Names and Empty Optional Fields

3.1.6 Data Entry

The spreadsheet can be populated with data by typing the data in manually, cutting and pasting the data into the spreadsheet from another source, or importing the data into the spreadsheet from another data source or toolset. Spreadsheets assume that all numbers typed into them are going to be used for math purposes. Therefore, it automatically removes any zero which precedes a number. In other words, it strips out leading zeros. As in the case, for example, for an OPEID if typed in as "06788900" it may appear in the spreadsheet as "6789900" if the format wasn't defined as text.

To compensate and assist with the default formatting, the spreadsheet upload was created with various types of formatting issues in mind. While some loan reporting fields have specific formatting requirements, others do not. Please refer to Appendix A of this document for the cross-walk for formatting of specific fields.

3.2 NSLDS Professional Access File Upload

3.2.1 Perkins Spreadsheet Submittal Page

The Perkins Spreadsheet Submittal page is found on the menu under the **Aid** tab. This page is used to submit a file via the NSLDS Professional Access Web site.

The actual file upload process starts by selecting the completed spreadsheet file stored in a secure manner on the local hard drive of the user's computer, or stored in a secure manner on an external medium, such as a flash drive or network. The Perkins Spreadsheet Submittal page allows the user to click on the **Browse** button, and then use the Browse function to search for a file, and upload it from the location where it is stored. Once the file is located, the user needs to make some decisions regarding the presentation of any errors which the system may return.

Federal Student Aid | PROUD SPONSOR of the AMERICAN MIND™ | **National Student Loan Data System (NSLDS)**
 An OFFICE of the U.S. DEPARTMENT of EDUCATION

Menu | **Aid** | **Enroll** | **Org** | **Report** | **Tran**

[Loan History](#) | [Overpayment List](#) | [Grants](#) | [Delinquent Borrowers](#) | [Exit Counseling History](#) | [Student Contact Info](#) | [Student Access Interface](#) | [Reaffirmation History](#) | **Perkins Submittal** | [SSN Conflict](#)

FSA ID: NSL.SCTST2.FSA logged on as: TEST USER from [NORTH SOUTH UNIVERSITY](#) / TG54560 / SCTST2

Name: NORTH SOUTH UNIVERSITY
Code: 06789900 **Type:** School
Status: OPEN
Address: 2300 MARYLAND AVE.
 WASHINGTON, DC 20001

i Enter the location and file name and submit for processing.

Perkins Spreadsheet Submittal

I am running on Windows.

File Name: [Browse...](#)

Rows in Result File

- Result File contains all rows submitted
- Result File contains only input rows with errors

Background color for cells with error in Result File

- Yellow background for errors
- Grey background for errors
- White background for errors

Mouseover comment for cells with error in Result File

- Add comment to error cell
- Do not add comment to error cell

[Validate](#) [Validate and Submit](#)

[PRIVACY ACT OF 1974 \(AS AMENDED\)](#)

[FOIA](#) | [Privacy](#) | [Security](#) | [Notices](#) [WhiteHouse.gov](#) | [USA.gov](#) | [ED.gov](#)

Figure 3-7: Perkins Loan Spreadsheet Submittal Page

3.2.2 Perkins Spreadsheet Submittal Page Result Presentation

The following section explains the use of each option. There are multiple options available to users regarding how they view any errors which may have resulted from the validation which occurs while uploading the Perkins loan spreadsheet. A radio button must be selected for each option prior to clicking the Validate or Validate and Submit buttons.

Federal Student Aid | PROUD SPONSOR of the AMERICAN MIND™ | **National Student Loan Data System (NSLDS)**

NSLDS | Menu | Aid | Enroll | Org | Report | Tran

Loan History | Overpayment List | Grants | Delinquent Borrowers | Exit Counseling History | Student Contact Info | Student Access Interface | Reaffirmation History | Perkins Submittal | SSN Conflict

FSA ID: NSL.SCTST2.FSA logged on as: TEST USER from NORTH SOUTH UNIVERSITY / TG54560 / SCTST2

Name: NORTH SOUTH UNIVERSITY
Code: 06789900 **Type:** School
Status: OPEN
Address: 2300 MARYLAND AVE.
 WASHINGTON, DC 20001

Enter the location and file name and submit for processing.

Perkins Spreadsheet Submittal

I am running on Windows.

File Name:

Rows in Result File

Result File contains all rows submitted
 Result File contains only input rows with errors

Background color for cells with error in Result File

Yellow background for errors
 Grey background for errors
 White background for errors

Mouseover comment for cells with error in Result File

Add comment to error cell
 Do not add comment to error cell

PRIVACY ACT OF 1974 (AS AMENDED)

FOIA | Privacy | Security | Notices | WhiteHouse.gov | USA.gov | ED.gov

Figure 3-8: Result Presentation

Rows in Result File

Rows in Result File indicates which rows will be returned to the user after validation has been completed. The default is **Result File contains all rows submitted**.

- If the user selects **Result File contains all rows submitted** all rows on the submittal spreadsheet will be present in the Result File. Records with one or more errors will have data present in the error columns and records without errors will have no data present in the error columns. If no errors are identified, the Result File will not be available, but a message will display indicating the results.
- If the user selects **Result File contains only input rows with errors only** rows from the submittal spreadsheet which were determined to have one or more errors in them will be included. If no errors are

identified, the Result File will not be available but a message will display indicating the results.

Background color for cells with error in Result File

Background color for cells with error in Result File indicates what color the cells which contain errors will be after validation has completed. Data cells with errors will be indicated by a color highlight. The default is **Yellow background for errors**.

Mouse over comment for cells with error in Result File

Mouse over comment for cells with error in Result File indicates whether or not the Result file, which is created after validation has completed, contains comments which appear when the mouse is moved over them. Regardless of the selection made, the error codes and messages will appear on the far right hand side of the spreadsheet Result file. The default is **Add comment to error cell**.

- If the user selects *Add comment to error cell* a red Tooltip triangle will appear in the cell which houses the field in error. When the computer mouse is moved over this error, the error applicable to this field will appear on the screen.
- If the user selects **do not add comment to error cell** the Tooltip triangle will not appear.

Validate / Validate and Submit

There are two options for reviewing data available at the bottom of the screen. When clicked, the

- **Validate** button will review all data in the spreadsheet for errors. No data has been loaded to NSLDS during the validation process when the **Validate** button has been clicked. The upload process **MUST** be repeated and the **Validate and Submit** button selected in order to load the data to NSLDS.
- **Validate and Submit** button is selected, all data will be validated, even if it has been previously validated by the system and any data without error will be submitted and stored in NSLDS. Data will be presented to the user according to the Result File preference radio button selections.

Once the submittal file has been validated by clicking either the **Validate** or **Validate and Submit** buttons, a message will be returned to the user on the screen regarding the number of total records in the spreadsheet and the number of records in error. Also a pop-up box appears, presenting the option to Open, Save or Cancel the Result File which was created by the submission.

Figure 3-9: Number of Errors Example

If Open is selected, the Result File will open in the computer’s default spreadsheet software and the errors in the right hand column will be presented in the manner previously selected on the Perkins Spreadsheet Submittal web page. The file will have the same name as that which was uploaded, however “ - Result” will be appended to the end of the name. For example: if the name of the spreadsheet being submitted is “Perkins Loan Online Submittal.xlsx”, the name of the Result file will be “Perkins Loan Online Submittal – Result.xlsx”.

Note: The user MUST click the **Validate and Submit** button for the data to be processed and updated on NSLDS.

3.3 Working Errors

All records will utilize the edits described in the Perkins DPI, Appendix A, and any errors identified during the validation processing of the spreadsheet upload will be identified real-time to the user online, in their corresponding result spreadsheet file.

	A	B	C	D	E	F
1	Code for Original School	Student's Social Security Number	Date of Student's Birth	Student's First Name	Type of Loan/Other Aid	Date of First Disbursement
2	00100200					
3	0010020A					21/1/2004
4	00000000					
5	00100200					
6	00100200	181800043	2/2/1975	FRED	IC	

Figure 3-10: Result File with Yellow Highlight and Tool Tip

The errors will be presented in the first available right hand column of the spreadsheet. The errors will be comprised of a 6 digit number with a description. For example, 2201150 represents Field Code 220, Error Code number 1150. To find out how to fix this error, reference the Perkins DPI, Appendix A, Field Code 220, Code for Original School, Error Number 1150. Based on the edits/errors, users can correct the data in the spreadsheet, or Result file, as it is presented in the spreadsheet, or go back to the file used for upload to make the updates. Additionally, the user can rename the spreadsheet Result file prior to re-submitting it in order to keep record of what has been submitted. Regardless of which method is used, the remaining records must be re-submitted to NSLDS for processing.

	AO	AP	AQ	AR
Ability	Type of Cancellation	Code for Current School	Data Provider Identifier	ERRORS
		00100200	ABC1234567890	2201150 - Invalid Code for Original School
		00100200	ABC1234567890	
		00100200	ABC1234567890	
		00100200	ABC1234567890	
2/2/2013	FF	00100200	ABC1234567890	2201150 - Invalid Code for Original School 2201150 - Invalid Code for Original School 2251377 - Date of First Disbursement for SE Overpayments must be >= 19580101 2711130 - Indicator of Grant Overpayment is required 2611286 - Amount of Loan is not used for Grants 2861325 - Code for Current School is

Figure 3-11: Result File with Error Column in the first available right hand column

During the process of correcting errors, it may be determined that a record needs to be removed from the file. Although spreadsheet software provides the Clear function, NSLDS does not recommend using this function. If records or rows need to be removed from the worksheet, the Delete Sheet Rows function use the Excel Spreadsheet ribbon or highlight each Excel row, then right click and select delete must be used in order to ensure that all data is removed from the spreadsheet.

Appendix A: Record Layout Index – Perkins Spreadsheet Submittal File

The following section provides specifications of the Detail records that are part of the Perkins Spreadsheet Submittal file. NSLDS has utilized features found within typical spreadsheet tools to assist with the data creation and submission of Perkins loan data to NSLDS. The definitions of each column remain the same as those field names found in the Perkins Data Provider Instructions (DPI) Appendix.

This appendix defines the layout for each record/row within the Perkins loan spreadsheet file and each column within the record. You must ensure the accuracy of the reported data, the correct placement within the spreadsheet and use the appropriate codes as defined in the DPI.

Please refer to the Perkins Data Provider Instruction (DPI) for specific formatting and edit criteria for each field. Field codes noted in the following Index are those field codes found in Appendix A of the DPI.

Index 1: File Type –Spreadsheet Submittal File			
Field Name	Spreadsheet Location	Field Code #	Record Type
Code for Original School	Column A	220	Detail
Student’s Social Security Number	Column B	221	Detail
Date of Student’s Birth	Column C	222	Detail
Student’s First Name	Column D	223	Detail
Type of Loan/Other Aid	Column E	224	Detail
Date of First Disbursement	Column F	225	Detail
Record Type Indicator	Column G	226	Detail
Action Code	Column H	227	Detail
New Code for Original School	Column I	240	Detail
New Student’s Social Security Number	Column J	241	Detail
New Date of Student’s Birth	Column K	242	Detail
New Student’s First Name	Column L	243	Detail
New Type of Loan/Other Aid	Column M	244	Detail
New Date of First Disbursement	Column N	245	Detail
Date Entered Repayment	Column O	260	Detail
Amount of Loan	Column P	261	Detail
Date of Loan Status	Column Q	262	Detail
Code for Loan Status	Column R	263	Detail
Date of Cancellation	Column S	264	Detail
Amount of Cancellation	Column T	265	Detail
Date of Disbursement	Column U	266	Detail
Amount of Disbursement	Column V	267	Detail
Student’s Last Name	Column W	268	Detail
Student’s Social Security Number Indicator	Column X	269	Detail
Student’s Academic Level	Column Y	270	Detail

Index 1: File Type –Spreadsheet Submittal File			
Field Name	Spreadsheet Location	Field Code #	Record Type
Indicator of Grant Overpayment	Column Z	271	Detail
Date Grant Overpayment Repaid	Column AA	272	Detail
Date Enrollment Period Begins	Column AB	273	Detail
Date Enrollment Period Ends	Column AC	274	Detail
Student’s Middle Initial	Column AD	275	Detail
Type of Deferment	Column AE	276	Detail
Date Deferment Starts	Column AF	277	Detail
Date Deferment Stops	Column AG	278	Detail
Code for Servicer	Column AH	280	Detail
Date Enrollment Status Effective	Column AI	281	Detail
Code for Enrollment Status	Column AJ	282	Detail
Date of Outstanding Principal Balance	Column AK	283	Detail
Amount of Outstanding Principal Balance	Column AL	284	Detail
Interest Rate	Column AM	285	Detail
Date of Servicer Responsibility	Column AN	287	Detail
Type of Cancellation	Column AO	288	Detail
Code for Current School	Column AP	286	Detail
Data Provider Identifier	Column AQ	289	Detail