

# **National Student Loan Data System**

## **Transfer Student Monitoring User Guide**

**June 14, 2002**



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## 1.0 Introduction

The Transfer Student Monitoring User Guide explains the functions available on the NSLDS FAP Web site to assist you with the NSLDS Transfer Monitoring process. It should be used in conjunction with, or instead of, the NSLDS Transfer Monitoring Batch File Specifications, currently posted on [www.ifap.ed.gov](http://www.ifap.ed.gov).

**Before you can submit any transfer student information to the NSLDS for monitoring, you must establish a School Transfer Profile on the NSLDS FAP Web site.** Therefore, you must have at least one authorized online NSLDS user at your school, which has been a requirement since January 1998.

Begin by clicking the Tran tab on the NSLDS FAP Menu page (Figure 1–1). The Transfer Monitoring process is a three-step process and involves the following:

1. Complete the School Transfer Profile Add page.

On this page, you provide your school's contact information and indicate how you would like to receive Alerts. (Section 2.0)

2. Complete the Student Monitoring Add page.

On this page, you inform the NSLDS which students your school needs to have monitored. (Section 3.0)

3. View the Monitoring Alert Review page.

On this page, you can monitor the list of changes that the NSLDS sends you regarding student aid information that may affect eligibility for the current award year. The NSLDS sends an email to the contact listed on the School Transfer Profile page stating that an alert file for the school is available. (Section 4.0)

**NSLDS** Menu Aid Enroll Org Report Tran

Menu | Change Password | System Requirements | Contact Us | FAQ | Download Help

Logged on as: JIM NEILL from STATE UNIVERSITY

### Messages

**01/02/2002 (18300)**  
[New Enroll Tab](#)

**12/20/2001 (18200)**  
[A new report is now available to schools and ED users on](#)

Only the first line of each message is displayed. To see the complete message, click on the message text above.

### Financial Aid

[Loan History](#) ♦ [Overpayment History](#) ♦ [Pell Grant](#) ♦ [Student Access Interface](#)

SSN:  First Name:

DOB:

(Enter details and click on a link above, DOB should be in MMDDCCYY format)

### Enrollment

[Enrollment Summary](#)

### Organization

[Org Contact List](#) ♦ [Org Search](#) ♦ [Data Provider Schedule](#) ♦  
[Repayment Information](#) ♦ [Cohort Default Rate](#)

Type:  Code:

Name:

(Enter details and click on a link above)

### Reporting

[Report List](#)

### Transfer Monitoring

[Transfer Monitoring List](#) ♦ [Monitoring Alert Review](#) ♦ [School Transfer Profile](#)

Figure 1-1, NSLDS Menu Page

## 2.0 School Transfer Profile

### 2.1 School Transfer Profile Add

The School Transfer Profile Add page (Figure 2–1) allows you to add School Transfer Profile information. You must complete this page before submitting your first Inform data.

**The School Transfer Profile Add page is the first page a school must complete before using the Transfer Monitoring process.**

- If a school attempts to add a student to its Transfer Monitoring List via batch before completing this page, the NSLDS will send back an error file.
- If a school attempts to add a student to its Transfer Monitoring List via online before establishing a School Transfer Profile, you will be directed to the School Transfer Profile Add page.
- If a school tries to access any of the Transfer Monitoring functions from the Tran tab when a School Transfer Profile has not been established, you will be directed to the School Transfer Profile Add page.

This page will only display once. After the information on this page is completed, if the school wishes to make any changes, it must use the School Transfer Profile Update page.

The School Transfer Profile Add page displays the following:

- **Title of Page**—School Transfer Profile Add.

Directly below the title are the following text boxes to complete:

- **First Name**—The first name of the school contact. This is provided by the school.
- **Last Name**—The last name of the school contact. This is provided by the school.
- **Title**—The school contact's title. This is provided by the school.
- **Phone**—The school contact's phone. This is provided by the school.
- **E-mail**—The e-mail address for Alert notifications. It can also be set up as a group e-mail. This is provided by the school.
- **Inform**—Anyone with a user ID that can be associated to this school can submit an Inform file via Batch. If the school wants an agency outside the school, a servicer for example, to submit Inform files as well as, or instead of the school, the school must provide a TG# from which those files will be sent.

- **Alert**—The school must designate whether they want Alert information via the Web Only or via Web and Batch file. In order to do so, you must check one of these boxes. If Web and Batch is checked, the school must provide a TG#.
- **Batch Alert Method**—This provides an option for those schools who choose to receive Alerts via Web and Batch to designate whether they want an Extract or Report format. The Extract format is strictly a string of data, usually imported into a spreadsheet format, such as Excel™. The Report format presents the data in an easily readable report.

The minimum information required for a School Transfer Profile includes:

- First and Last Names
- Phone number
- Alert Method
- Batch Alert Method (if Alert Method selected is Batch)
- E-mail address

The School Transfer Profile Add page is completed when you click **Submit** at the bottom of the page. This takes you back to the School Transfer Profile page with a message that the Add has been performed successfully.

**Note** This page is not to be used to add students to the school's Transfer Monitoring List. This is only for school information.



NSLDS

Menu Aid Enroll Org Report Tran

Transfer Monitoring List | Monitoring Alert Review | School Transfer Profile

Logged on as: SAM GLASER from [ORANGE COAST COLLEGE](#)

### School Transfer Profile Add

First Name:

Last Name:

Title:

Phone:  Ext:

E-Mail:

Designated Batch

Inform: SAIG Mailbox for School, Servicer or Central Administration Office (Optional):

Is this your Servicer for Transfer Monitoring? Yes No

Alert:  Web Only

Web and Batch File

SAIG Mailbox for School, Servicer or Central Administration Office:

Is this your Servicer for Transfer Monitoring? Yes No

Batch Alert Method:  Extract  Report

Figure 2-1, School Transfer Profile Add Page

## 2.2 School Transfer Profile

The School Transfer Profile page (Figure 2–2) provides information about the school contact for the Transfer Monitoring process. After the School Transfer Profile Add page is completed, it shows a contact name, title, phone number and e-mail address for the contact, and the Inform and Alert options selected by the school. It also shows the name of the last person to update the page and the date of the update.

The School Transfer Profile page displays the following:

- **Title of Page**—School Transfer Profile.
- **Update**—Directly below the title. This links to the School Transfer Profile Update page.

Directly below the **Update** button is the information on record for the school for Transfer Monitoring. This information includes the following:

- **First Name**—The first name of the school contact. This is provided by the school.
- **Last Name**—The last name of the school contact. This is provided by the school.
- **Title**—The school contact’s title. This is provided by the school.
- **Phone**—The school contact’s phone. This is provided by the school.
- **E-mail**—The e-mail address for Alert notifications. It can also be set up as a group e-mail. This is provided by the school.
- **Inform**—Identifies whether the school designated a servicer to submit its Inform batch files. If the school designated an agency outside the school to submit Inform files as well as, or instead of the school, that agency’s TG#, as provided by the school, displays in this box. If the school has not designated anyone outside the school to submit inform files, this box is blank.
- **Alert**—Identifies whether the school requested the Alert information to be via the Web Only or via Web and Batch files through SAIG.
- **SAIG Mailbox**—If the school designated Web and Batch Alerts as the output option, this box shows the TG# to which those Batch Alerts will be sent, as provided by the school. If the school requested Web Only Alerts, this box is blank.
- **Batch Alert Method**—If the school designated Web and Batch Alerts as the output option, this box shows whether the Alert is to be provided in an Extract or Report format, as requested by the school.

- **Last Update By**—This box displays the name of the person to make the last update to the school’s Transfer Profile and the date of the last update.

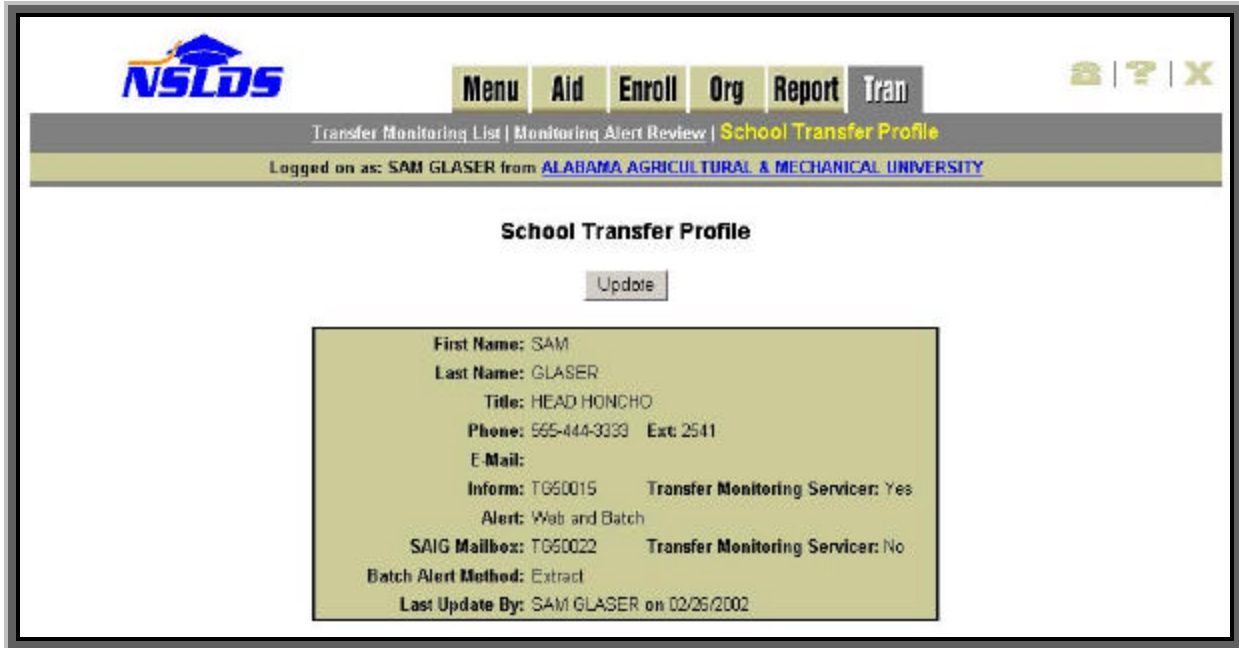


Figure 2–2, School Transfer Profile Page

## 2.3 School Transfer Profile Update

The School Transfer Profile Update page (Figure 2–3) allows you to update the School Transfer Profile information.

The School Transfer Profile Update page displays the following:

- **Title of Page**—School Transfer Profile Update.
- **Left Arrow Icon**—Click to return to the School Transfer Profile page.

Directly below the title are the following boxes, which can be updated except for the Last Update By line. These boxes display information that has been previously provided:

- **First Name**—The first name of the school contact. This is provided by the school.
- **Last Name**—The last name of the school contact. This is provided by the school.
- **Title**—The school contact’s title. This is provided by the school.
- **Phone**—The school contact’s phone. This is provided by the school.
- **E-mail**—The e-mail address for Alert notifications. It can also be set up as a group e-mail. This is provided by the school.
- **Inform**—Identifies whether the school designated a servicer to submit its Inform batch files. If the school designated an agency outside the school to submit Inform files as well as, or instead of the school, that agency’s TG#, as provided by the school, displays in this box. If the school has not designated anyone outside the school to submit Inform files, this box is blank.
- **Alert**—Identifies whether the school requested the Alert information to be via the Web Only or via Web and Batch Files through SAIG.
- **SAIG Mailbox**—If the school designated Web and Batch Alerts as the output option, this box shows the TG# to which those Batch Alerts will be sent, as provided by the school. If the school requested Web Only Alerts, this box is blank.
- **Batch Alert Method**—If the school designated Web and Batch Alerts as the output option, this box shows whether the Alert will be provided in an Extract or Report format, as requested by the school.
- **Last Update By**—This box displays the name of the person to make the last update to the school’s Transfer Profile and the date of the last update.

To update the School Transfer Profile, click **Submit** at the bottom of the page.

**NSLDS** Menu Aid Enroll Org Report Tran

Transfer Monitoring List | Monitoring Alert Review | School Transfer Profile

Logged on as: SAM GLASER from [MODESTO JUNIOR COLLEGE](#)

Return To School Transfer Profile

### School Transfer Profile Update

First Name:

Last Name:

Title:

Phone:  Ext:

E-Mail:

Designated Batch

Inform: SAIG Mailbox for School, Servicer or Central Administration Office (Optional):

Is this your Servicer for Transfer Monitoring? Yes No

Alert:  Web Only

Web and Batch File

SAIG Mailbox for School, Servicer or Central Administration Office:

Is this your Servicer for Transfer Monitoring? Yes No

Batch Alert Method:  Extract  Report

Last Update By: SAM GLASER on 03/12/2002

Figure 2–3, School Transfer Profile Update Page

## 3.0 Student Monitoring

### 3.1 Student Monitoring Add

The Student Monitoring Add page (Figure 3–1) allows you to add a student to the Transfer Monitoring List. **If you are adding a student to the Transfer Monitoring List who is not in the NSLDS database, the student is only added to the Transfer Monitoring List and does not display on any other pages of the NSLDS FAP Web site.** This page is accessible from the Transfer Monitoring List page, or from a student’s Loan History page or Pell Grant page.

The Student Monitoring Add page displays the following:

- **Student Search Boxes**—The boxes displayed are standard. You can type a student’s SSN, First Name, and DOB (or SSN only), then click **Retrieve** to retrieve student information from the NSLDS.
- **Student Identifiers**—Directly below the Student Search are the standard identifiers with student’s name, SSN, and DOB. They display after you click **Retrieve**, or if you access this page from the student’s Loan History or Pell Grant History page.
- **Left Arrow Icon**—Click to return to the Transfer Monitoring List page.
- **Title of Page**—Student Monitoring Add.

Directly below the title are the following:

- **SSN**—The student’s Social Security Number. It automatically displays when the Student Monitoring Add page is accessed from the Loan History, Pell Grant History, or Transfer Monitoring List pages, assuming a student has been selected.
- **First Name**—The student’s first name. It automatically displays when the Student Monitoring Add page is accessed from the Loan History, Pell Grant History, or Transfer Monitoring List pages, assuming a student has been selected.
- **Last Name**—The student’s last name. It automatically displays when the Student Monitoring Add page is accessed from the Loan History, Pell Grant History, or Transfer Monitoring List pages, assuming a student has been selected.
- **Date of Birth**—The student’s date of birth. It automatically displays when the Student Monitoring Add page is accessed from the Loan History, Pell Grant History, or Transfer Monitoring List pages, assuming a student has been selected.
- **Enrollment Begin Date**—You must type a date in this box. There is a standard date prompt to the right of the box.

- Monitor Begin Date**—This box shows the current date when you access this page. It is an updateable box; you can change the date. If the date is changed to a future date, it cannot be after the Enrollment Begin date entered above. There is a standard date prompt to the right of the box.

To add the student to the school’s Transfer Monitoring List, click **Submit**.

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

[Transfer Monitoring List](#) | [Monitoring Alert Review](#) | [School Transfer Profile](#)

SSN:  First Name:  DOB:  (MMDDCCYY)

Logged on as: Pat Gerdes from [STATE TECH](#)

Return To Transfer Monitoring List

No student currently selected.

### Student Monitoring Add

SSN:

First Name:

Last Name:

Date of Birth:  (MMDDCCYY)

Enrollment Begin Date:  (MMDDCCYY)

Monitor Begin Date:  (MMDDCCYY)

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

Figure 3–1, Student Monitoring Add Page

## 3.2 Transfer Monitoring List

The Transfer Monitoring List page (Figure 3–2) lists all students that were submitted by the school via the online Student Monitoring Add page or via the Transfer Monitoring Inform batch file. The Transfer Monitoring List page only shows the students submitted by the school associated with the user ID of the person viewing the list.

The Transfer Monitoring List page is the default page when you click the Tran tab after your initial completion of the School Transfer Profile Add page.

The Transfer Monitoring List page displays the following:

- **Title of Page**—Transfer Monitoring List.
- **Add Student to Monitoring List Button**—Directly below the title. When you click **Add Student to Monitoring List**, you link to the Student Monitoring Add page.
- **Sort By**—Directly below the **Add Student** button. The default sort order for this list is alphabetical by Student Last Name. You are able to sort by the following:
  - Name
  - SSN
  - Enrollment Begin Date
  - Monitor Begin Date
  - Last Changed By
- **Display Only**—You can filter the list by using the Display Only box. You are also able to specify a group of students on the list to be displayed by the following:
  - SSN
  - Last Name
  - Enrollment Begin Date
  - Monitor Begin Date
  - Last Changed By

Sorting/filtering occurs when you click **Retrieve**. You are able to view the list without having to make any changes. The list displays up to 120 students per scrollable page, then has Next and Previous arrows at the bottom and top of page, respectively.

Each student is displayed in the following order, reading from left to right across page:

- **Active Bullet Number Icon**—Numbering does change with sorting. Clicking the number icon takes you to the Transfer Monitoring Detail page.
- **SSN**—The student’s Social Security Number. If the student has had an Alert sent from the NSLDS, there will be an Alert icon displayed next to the Social Security number.



- **Name**—The student’s first and last name as reported by the school on the Inform file.
- **DOB**—The student’s date of birth. If the student was added to the Transfer Monitoring List, but is not in the NSLDS, the DOB displays as provided by you.
- **Enrollment Begin Date**—The date when the student was reported to begin classes at the school.
- **Monitor Begin Date**—The date when the NSLDS began or will begin monitoring the student.
- **Last Changed By**—This displays the name of the person who made the last update to this student’s monitoring record, and the date that change was made. If there have been no updates since the student was added to the list, the name of the user who added the student displays here, as well as the date the student was added. If the student was added or last updated via batch process, Batch displays here.



### Transfer Monitoring List

Add Student to Monitoring List

Sort By:

Display Only: SSN:

Last Name:

Enrollment Begin Date:  (MMDDCCYY)

Monitor Begin Date:  (MMDDCCYY)

Last Changed By:

	SSN	Name	DOB	Enrollment Begin Date	Monitor Begin Date	Last Changed By
<a href="#">1</a>	137-02-7728	MALKA CROSBY	07/10/1973	03/12/2002	10/25/2001	PAT GERDES 10/25/2001
<a href="#">2</a>	561-49-1551	MAXWELL KLINGER	09/04/1932	03/12/2002	10/25/2001	PAT GERDES 10/25/2001
<a href="#">3</a>	043-90-5190	TANYA LANGLAIS	01/15/1973	03/12/2002	10/25/2001	PAT GERDES 10/25/2001
<a href="#">4</a>	043-86-5256	MAXWELL SHEFFIELD	01/02/1958	03/12/2002	10/25/2001	PAT GERDES 10/25/2001



Figure 3-2, Transfer Monitoring List Page

### 3.3 Student Monitoring Detail

The Student Monitoring Detail page (Figure 3–3) provides detailed transfer monitoring student information that can be updated or deleted. It is accessible from the Transfer Monitoring List page, Loan History page, or Pell Grant History page. To access this page from the Transfer Monitoring List, click the numbered bullet icon next to the student’s information.

The Student Monitoring Detail page displays the following:

- **Title of Page**—Student Monitoring Detail.
- **Left Arrow Icon**—Click to return to the Transfer Monitoring List page.
- **Update**—Located directly below the title. To update the student’s record, click **Update**. This links you to the Student Monitoring Update page.
- **Delete**—Located directly below the title. To delete the student’s record from the Monitoring and Alert lists, click **Delete**. This links you to the Student Monitoring Delete page.
- **Student Information**—Following the **Update** and **Delete** buttons. This information is from the school’s Inform file:
  - **SSN**—The student’s Social Security Number.
  - **First Name**—The student’s first name.
  - **Last Name**—The student’s last name.
  - **Date of Birth**—The student’s date of birth.
  - **Enrollment Begin Date**—The date when the student was reported to begin classes at the school.
  - **Monitor Begin Date**—The date when the NSLDS began or will begin monitoring the student.
  - **Last Changed By**—This displays the name of the person who made the last update to this student’s monitoring record, and the date that change was made. If there have been no updates since the student was added to the list, the name of the user who added the student displays here, as well as the date the student was added. If the student was added or last updated via batch process, Batch displays here.

**NSLDS** Menu Aid Enroll Org Report Tran

Transfer Monitoring List | Monitoring Alert Review | School Transfer Profile

Logged on as: PAT GERDES from [STATE TECH](#)

Return To Transfer Monitoring List

### Student Monitoring Detail

Update Delete

<b>SSN:</b> 137-02-7728
<b>First Name:</b> MALKA
<b>Last Name:</b> CROSBY
<b>Date of Birth:</b> 07/10/1973
<b>Enrollment Begin Date:</b> 03/12/2002
<b>Monitor Begin Date:</b> 10/25/2001
<b>Last Changed By:</b> PAT GERDES on 10/25/2001

Figure 3–3, Student Monitoring Detail Page

### 3.4 Student Monitoring Update

The Student Monitoring Update page (Figure 3–4) allows you to update the student’s Transfer Monitoring Detail information and is accessible from the Student Monitoring Detail page.

The Student Monitoring Update page displays the following:

- **Title of Page**—Student Monitoring Update.
- **Left Arrow Icon**—Click to return to the Student Monitoring Detail page.

Directly below the title is the following:

- **SSN**—The student’s Social Security Number.
- **First Name**—The student’s first name. This is an updateable text box.
- **Last Name**—The student’s last name. This is an updateable text box.
- **Date of Birth**—The student’s date of birth. This is an updateable text box.
- **Enrollment Begin Date**—The date when the student was reported to begin classes at the school. This is an updateable text box.
- **Monitor Begin Date**—The date when the NSLDS began or will begin monitoring the student. If the date is changed to a future date, it cannot be after the Enrollment Begin date. This is an updateable text box.

To update the information, click **Submit**.

**NSLDS**    **Menu**   **Aid**   **Enroll**   **Org**   **Report**   **Tran**    ?   X

Transfer Monitoring List | Monitoring Alert Review | School Transfer Profile

Logged on as: PAT GERDES from [STATE TECH](#)

[Return To Student Monitoring Detail](#)

### Student Monitoring Update

SSN: 561-49-1551

First Name:

Last Name:

Date of Birth:  (MMDDCCYY)

Enrollment Begin Date:  (MMDDCCYY)

Monitor Begin Date:  (MMDDCCYY)

Figure 3–4, Student Monitoring Update Page

### 3.5 Student Monitoring Delete

The Student Monitoring Delete page (Figure 3–5) allows you to delete the student from your school’s Transfer Monitoring List. Student Monitoring records should only be deleted if the student will not be attending the school, or the student was added to your school’s list in error. **Do not delete a student simply to stop monitoring him or her.**

The Student Monitoring Delete page appears after you click **Delete** on the Student Monitoring Detail page. This page confirms the student’s deletion from the Transfer Monitoring process. Once the delete has been confirmed, the student’s information is removed from the Monitoring list and Alert list, if applicable.

The Student Monitoring Delete page displays the following:

- **Title of Page**—Student Monitoring Delete.
- **Left Arrow Icon**—Click to return to the Student Monitoring Detail page.
- **Delete Confirmation Statement**—Displays beneath the title. This statement confirms that you wish to delete student monitoring information.

Directly below the Delete Confirmation Statement displays the following student information:

- SSN
- First Name
- Last Name
- Date of Birth
- Enrollment Begin Date
- Monitor Begin Date
- Last Changed By and associated date

To delete a record, click **Confirm** at the bottom of the page. Once the deletion has been confirmed, the student’s information will be removed from the Monitoring and Alert list(s). It does not delete the student from the Monitoring table; it just ends the Monitoring and removes the student from viewable lists online. A record of the deletion is maintained by the NSLDS for auditing purposes.

**NSLDS** Menu Aid Enroll Org Report Tran ☎ | ? | X

Transfer Monitoring List | Monitoring Alert Review | School Transfer Profile

Logged on as: PAT GERDES from [STATE TECH](#)

Return To Student Monitoring Detail

### Student Monitoring Delete

You are asking that this Student Monitoring record be DELETED from your List. Student Monitoring records should be deleted only if the student will not be attending your institution or the student was entered in error. Please do not DELETE a student simply to stop monitoring him or her. **To complete this DELETE, please click CONFIRM.**

SSN: 043-90-5190  
 First Name: TANYA  
 Last Name: LANGLAIS  
 Date of Birth: 01/15/1973  
 Enrollment Begin Date: 03/12/2002  
 Monitor Begin Date: 10/25/2001  
 Last Changed By: PAT GERDES on 10/25/2001

[Return To Student Monitoring Detail](#)

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

Figure 3–5, Student Monitoring Delete Page



## 4.0 Monitoring Alert

### 4.1 Monitoring Alert Review

The Monitoring Alert Review page (Figure 4–1) lists all students on a school's Transfer Monitoring List for whom relevant changes have been reported.

The NSLDS sends a school an Alert on any student listed on that school's Transfer Monitoring List whenever a relevant change has been reported on that student's record. Any NSLDS authorized online user for a school can view that school's current Alert list at any time via online. In addition, a school can request that any Alert generated be sent in a batch file via its SAIG mailbox.

Changes that prompt an Alert for Loans are:

- New loan reported (FFEL, Direct Loan, or Perkins)
- New disbursement or reduction in disbursed amount on an existing loan (FFEL, Direct Loan, or Perkins)
- A change in the Amount of Outstanding Principle Balance on an existing loan (FFEL, Direct Loan, or Perkins)
- New, increased, or decreased cancellation amount reported on a loan
- Change in Amount of Loan (FFEL, Direct Loan, or Perkins)

Changes that prompt an Alert for Pell Grants are:

- New Pell Grant reported
- New disbursement or reduction in disbursed amount on an existing Pell Grant
- Changes in Pell Grant percentage
- Change in Amount of Pell Grant awarded

A student's record will be monitored until the 91<sup>st</sup> day after the Enrollment Begin Date reported by the school.

The Monitoring Alert Review page displays the following:

- **Title of Page**—Monitoring Alert Review.
- **Monitoring Results as of**—Directly below the title. This date line is automatically updated after the NSLDS runs the Monitoring process. This allows you to see at a glance when the last Monitoring process took place.

- **Sort By**—Located directly below the message. The default sort order for this list is alphabetical by Student Last Name. The default sort for list is broken into two sections: Reviewed and Not Reviewed. Those records with no check in the Reviewed box will display at the top of the list, in alphabetical order by last name. Those records with Reviewed boxes checked will display next, in alphabetical order by last name. You are able to sort by:
  - Name
  - SSN
  - Alert Date
  - Enrollment Begin Date
  - Monitor Begin Date
  - Loan First
  - Pell First
  
- **Display Only**—You are able to filter the list by using these boxes. You can specify a group of students on the list to be displayed by the following:
  - SSN
  - Last Name
  - Date Alerted
  - Enrollment Begin Date
  - Loans Only
  - Pell Only

Sorting/filtering will take place when you click **Retrieve**.

You are able to view the list without having to mark any changes Reviewed. The list displays up to 120 changes per scrollable page, then add Next and Previous arrows to bottom and top of page, respectively.

Each student is displayed in the following order, reading from left to right across the page:

- **SSN**—The student’s Social Security Number.
- **Name**—The student’s first and last name.
- **DOB**—The student’s date of birth.
- **Change/Reviewed**—This box lists links to the changes that prompted the Alert as follows:
  - If the student had a relevant change reported on a Pell Grant, the Pell link appears. Clicking **Pell** links you to the student’s Pell Grant History page to view the change reported.

- If the student had a relevant change reported on a loan, the Loan link appears. Clicking **Loan** links you to the student’s Loan Detail page for that specific loan to view the change reported.
- If the student has changes to more than one loan, there are multiple links, each going to a different Loan Detail page.
- **Reviewed**—This is a column of check boxes. You can check the box once you have reviewed the change immediately to the left of the box. Checking the box determines the placement of the student’s Alert record on the list. Clicking the link to the changed information does not check the box automatically. If the school requested that its Alerts be sent via Batch file, any change reported via batch is automatically checked online as Reviewed.
- **Date Alerted**—This is the date when the NSLDS added the student’s name/change to the Alert list and/or sent a batch Alert on the student to the school, if that’s the chosen output method.
- **Enrollment Begin Date**—The date when the student was reported to begin classes at the school.
- **Monitor Begin Date**—The date when the NSLDS began monitoring the student.

The **Submit** button at the bottom of the page reorders the list by checked Reviewed boxes.



### Monitoring Alert Review

Monitoring Results as of: 04/04/2002

Sort By:

Display Only: SSN:

Last Name:

Date Alerted:  (MMDDCCYY)

Enrollment Begin Date:  (MMDDCCYY)

Loans Only  Pell's Only

SSN	Name	DOB	Change	Reviewed	Date Alerted	Enrollment Begin Date	Monitor Begin Date
137-02-7728	MALKA CROSBY	07/10/1973	<a href="#">Pell</a>	<input type="checkbox"/>	10/25/2001	07/06/2002	10/25/2001
043-90-5190	TANYA LANGLAIS	01/15/1973	<a href="#">Loan</a>	<input type="checkbox"/>	10/01/2001	03/10/2002	07/18/2001
			<a href="#">Loan</a>	<input type="checkbox"/>	10/01/2001	03/10/2002	07/18/2001
043-86-5256	MAXWELL SHEFFIELD	01/02/1958	<a href="#">Loan</a>	<input type="checkbox"/>	10/25/2001	06/06/2002	10/25/2001
			<a href="#">Pell</a>	<input type="checkbox"/>	10/25/2001	06/06/2002	10/25/2001



Figure 4-1, Monitoring Alert Review Page

## 4.2 Loan History

The Loan History page allows you to link to the Student Monitoring Add page or the Student Monitoring Detail page, depending on whether the student is on the Transfer Monitoring List for your school. Below the student identifiers, an information symbol and a button appear.

- If the student displayed is not on the Transfer Monitoring List for your school, the **Add Student to Monitoring List** button appears (Figure 4–2). Clicking this links you to the Student Monitoring Add page (Figure 3–1).

NSLDS Menu Aid Enroll Org Report Tran

Loan History | Overpayment History | Pell Grant | Enrollment History | Enrollment Update

SSN:  First Name:  DOB:  (MMDDCCYY) Retrieve

Logged on as: Pat Gerdes from STATE TECH

MAXWELL J KLINGER  
SSN: 561-49-1551 DOB: 09/04/1932

**i** Student is not on your school's Transfer Monitoring List.

Add Student to Monitoring List

Overpayments Discharge

**? Aggregate Loan Information**

Loan Type	Outstanding Principal Balance (OPB)	Pending Disbursements	Total
Subsidized Loans	N/A	N/A	N/A
Unsubsidized Loans	N/A	N/A	N/A
Combined Loans	N/A	N/A	N/A
FFEL Consolidation	N/A		N/A
Perkins	\$0		\$0

Figure 4–2, Loan History Page—Add Student to Monitoring List Button

- If the student displayed is on the Transfer Monitoring List for your school, the **Student Monitoring Detail** button appears on the Loan History page (Figure 4–3). Clicking this links you to the Student Monitoring Detail page (Figure 3–3).

**NSLDS** Menu Aid Enroll Org Report Tran

Loan History | Overpayment History | Pell Grant | Enrollment History | Enrollment Update

SSN:  First Name:  DOB:  (MMDDCCYY) Retrieve

Logged on as: Pat Gerdes from [STATE TECH](#)

TANYA J LANGLAIS  
SSN: 043-90-5190 DOB: 01/15/1973

**i** Student is on your school's Transfer Monitoring List.

Student Monitoring Detail

**!** Defaulted **i** Pell Grants

**?** **Aggregate Loan Information**

Loan Type	Outstanding Principal Balance (OPB)	Pending Disbursements	Total
Subsidized Loans	\$3,938	N/A	\$3,938
Unsubsidized Loans	\$124	N/A	\$124
Combined Loans	\$4,062	N/A	\$4,062
FFEL Consolidation	N/A		N/A
Perkins	N/A		N/A

Figure 4–3, Loan History Page—Student Monitoring Detail Button

### 4.3 Pell Grant

The Pell Grant History page allows you to link to the Student Monitoring Add page or the Student Monitoring Detail page, depending on whether the student is on the Transfer Monitoring List for your school. Below the student identifiers, an information symbol and a button appear.

- If the student displayed is not on the Transfer Monitoring List for your school, the **Add Student to Monitoring List** button appears on the Pell Grant History page (Figure 4–4). Clicking this links you to the Student Monitoring Add page (Figure 3–1).

NSLDS Menu Aid Enroll Org Report Tran

Loan History | Overpayment History | **Pell Grant** | Student Access Interface

SSN:  First Name:  DOB:  (MMDDCCYY) Retrieve

Logged on as: DUMMY SCHOOL ID FOR TRAINING from [MERCY HOSP SCH OF RAD-TECH](#)

TANYA J LANGLAIS  
SSN: 043-90-5190 DOB: 01/15/1973

Student is not on your school's Transfer Monitoring List.

[Add Student to Monitoring List](#)

**Pell Grant History**

Award Year	Scheduled Amount	Award Amount	Disbursed Amount	Remaining Amount	% Scheduled Used	As of Date	Tran
1994 - 1995	\$2,300	N/A	\$863	\$0	37.52	04/04/1995	01
<a href="#">MCINTOSH COLLEGE_00473000</a>				Disb. Post Date: N/A	EFC: 0000	Ver. Flag: N	

Figure 4–4, Pell Grant History Page—Add Student to Monitoring List Button

- If the student displayed is on the Transfer Monitoring List for your school, the **Student Monitoring Detail** button appears on the Pell Grant History page (Figure 4–5). Clicking this links you to the Student Monitoring Detail page (Figure 3–3).

The screenshot shows the NSLDS Pell Grant History page. At the top, there is a navigation menu with options: Menu, Aid, Enroll, Org, Report, Tran. Below this is a sub-menu with options: Loan History, Overpayment History, Pell Grant, Student Access Interface. A search bar contains fields for SSN, First Name, and DOB (MMDDCCYY), with a Retrieve button. The user is logged on as SAM GLASER from TEXAS TECH UNIVERSITY. The student's name is JOHN F MC LENNAN, with SSN 562-89-1143 and DOB 5/29/1980. A message states: "Student is on your school's Transfer Monitoring List." Below this is a button labeled "Student Monitoring Detail". The main section is titled "Pell Grant History" and contains a table with the following data:

Award Year	Scheduled Amount	Award Amount	Disbursed Amount	Remaining Amount	% Scheduled Used	As of Date	Tran
1997 - 1998	\$1,200	N/A	\$888	\$312	100.00	8/15/1997	02
<a href="#">CALIFORNIA STATE UNIVERSITY, FU 00113700</a>			Disb. Post Date: N/A		EFC: 16	Ver. Flag: N	

At the bottom of the page, there is a link to the PRIVACY ACT OF 1974 (AS AMENDED).

Figure 4-5, Pell Grant History Page—Student Monitoring Detail Button



## 4.4 Organization Contact

The Organization Contact List Page (Figure 4–6) has a function that enables each school to designate a contact specifically for Transfer Monitoring questions. This contact does not have to be the same as the one listed on the School Transfer Profile. This contact information can be viewed by other schools, GAs, servicers, etc.

The screenshot displays the NSLDS Organization Contact List Page. At the top, the NSLDS logo is on the left, and navigation links for Menu, Aid, Enroll, Org, Report, and Tran are in the center. On the right, there are icons for help and search. Below the navigation is a green header bar with links for Org Contact List, Org Search, Data Provider Schedule, Repayment Information, Cohort Default Rate Ed, Cohort Default Rate DM, Cohort Default Rate, Cohort Default Rate, View Date Control, and School Profile. A search form includes a 'Type' dropdown (set to '--- Select ---'), 'Code' and 'Name' input fields, and a 'Retrieve' button. Below the search form, it shows the user is logged on as JIM NEILL from STATE UNIVERSITY. A box displays the details for STATE UNIVERSITY: Name: STATE UNIVERSITY, Code: 00100200, Type: School, Status: OPEN, Address: 4900 MAIN STREET, CANTON, CA 99028. A message icon indicates 'Contact successfully added.' Below this is the title 'Organization Contact List' and an 'Add New Contact' button. At the bottom, a table lists the primary contact.

Function	First Name / Last Name	Phone / Ext.	Email
1 PRIMARY CONTACT	BETSY SMITH	(324)309-2292 3939	

Figure 4–6, Organization Contact List Page