Technical Update PK–2017-01

February 21, 2017

NSLDS Perkins Reconciliation Report and

Organization Profile Page

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.

Introduction

The purpose of this Technical Update is to inform the Federal Perkins Loan community— schools and their servicers— of upcoming modifications to NSLDS, including the new Organization Profile page that has been added to the NSLDS Professional Access website. Information is also provided on how to request the Perkins reconciliation report. Perkins school users can use this extract data to reconcile their Perkins Loan portfolio with the data in NSLDS.

Organization Profile Page

The Perkins Extract by Parameters Report (described in more detail below) can be scheduled from the new Organization Profile page under the Org tab of the NSLDS Professional Access website. In addition, the new Organization Profile page allows the user to navigate to the Data Provider Schedule and Enrollment Reporting Profile pages for the school associated with the user's FSA User ID. Scheduled reports and the Transfer Student Monitoring Profile are also managed from the Organization Profile page. Finally, NSLDS batch services that the school is signed up for are displayed in the Batch Services section. For additional information about this new web page and related enhancements, refer to NSLDS Newsletter #57, available in the NSLDS Reference Materials section of the Information for Financial Aid Professionals (IFAP) website.

Perkins Reconciliation Scheduled Report

As a reminder, in order to assist schools with reconciling their Perkins Loan portfolio with what has been reported to NSLDS, a scheduled report is available to receive on a regular occurring frequency. Schools may sign up for the monthly Perkins Extract by Parameters Report on the new Organization Profile page on the NSLDS Professional Access website, under the 'Org' tab. If not previously scheduled, click on the Add Scheduled Report drop down list and click on "Perkins Extract by

Parameters". This will bring you to the Perkins Extract By Parameters Profile Update page for you to designate the SAIG Mailbox to which the report will be delivered (in message class SCHRECOP).

Note that the School Branch that will appear on this page is based on the logon of the school user. If your school reports Perkins Loans under multiple branch locations, or specifically your main location where your 8 digit OPEID ends in '00', to receive the output results for the corresponding location a user with the appropriate school branch location will need to request the report individually.

Perkins Reconciliation Ad-Hoc Report

If you prefer to set your own parameters or do not want the report to be scheduled for receipt on a monthly basis, request the report as an Ad-hoc. Access the report under the Report List on the Report tab of the NSLDS Professional Access website. Select the Perkins Extract by Parameters (REC005) and choose the parameter for the data to be produced including the Desired Loan Status for All (every loan regardless of loan status), No Cancelled (all open and closed loan statuses and excludes cancelled loan status), or Open (every loan with an open loan status). The user also chooses the Extract By Data Provider ID. This is a unique loan identifier assigned to a student by the awarding school. Users can select All, With Provider, or Without Provider. The report output is sorted by SSN, DOB, and First Name and is delivered (under message class SCHRECOP) to the SAIG Mailbox associated with the User ID requesting this report.

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National Student Loan Data System (NSLDS)

NSLDS

Menu | Aid | Enroll | Org | Report | Tran

Report List | Web Report List

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

◀II Return to Report List

ID: REC005   Type: Extract
Name: PERKINS EXTRACT BY PARAMETERS

II▶ Go to Report Log

Report Parameters

SCHOOL CODE:	06789900
DESIRED LOAN STATUSES:	--Select-- ▼
EXTRACT BY DATA PROVIDER ID:	--Select-- ▼
Sort By:	1 STU SSN,STU DOB,FST NME
Output Medium:	SAIG

Submit

The *Perkins Extract by Parameters (REC005)* provides school users with an extract file containing information on campus-based loans. The user indicates the Desired Loan Statuses for All (every loan regardless of loan status), No Cancelled (all open and closed loan statuses and excludes cancelled loan status), or Open (every loan with an open loan status). The user also chooses the Extract By Data Provider ID which is a unique loan identifier optionally assigned to a student by the awarding school. Users can select All, With Provider, Without Provider. The report output is sorted by SSN, DOB, and First Name. The report is delivered to the SAIG mailbox (TG Number) associated with the User ID requesting this report, under message class SCHRECOP. The NSLDS Record Layouts for the extract file is available in the NSLDS Reference Materials section of the Information for Financial Aid Professionals (IFAP) Web site.

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Again, the School Code (8 digit OPEID location) that will appear on this page is based on the logon ID of the school user. If your school reports Perkins Loans under multiple branch locations, or specifically your main location where your 8 digit OPEID ends in '00", to receive the report for each location a user with the appropriate school branch location will need to request the report individually.

The Perkins Extract by Parameters (REC005) Extract File Layout is now available in the NSLDS Record Layouts section of the IFAP website.

For assistance with your school's enrollment on the SAIG Enrollment Site for Perkins Loan reporting to NSLDS, contact CPS/SAIG Technical Support at 800/330-5947 (TDD/TTY 800/511-5806) or by email at CPSSAIG@ed.gov.

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

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