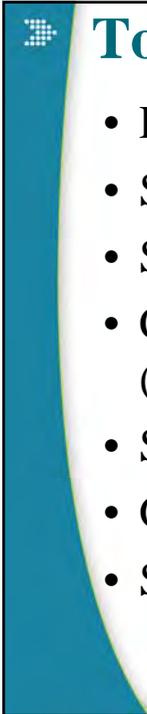




Direct Loans Systems Primer

Direct Loan Training Suite



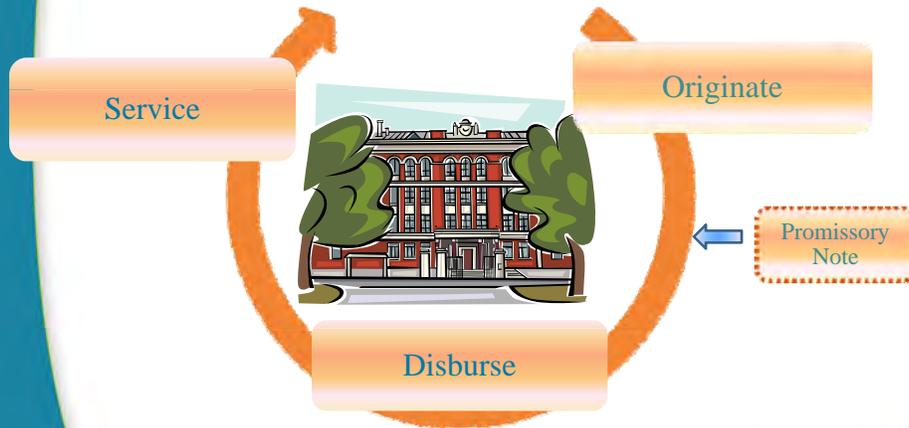
Topics for Today

- Direct Loan Process Overview
- School Software Solutions
- Student Aid Internet Gateway (SAIG)
- Common Origination & Disbursement (COD)
- StudentLoans.gov
- G-5
- Servicing

Direct Loan Training Suite



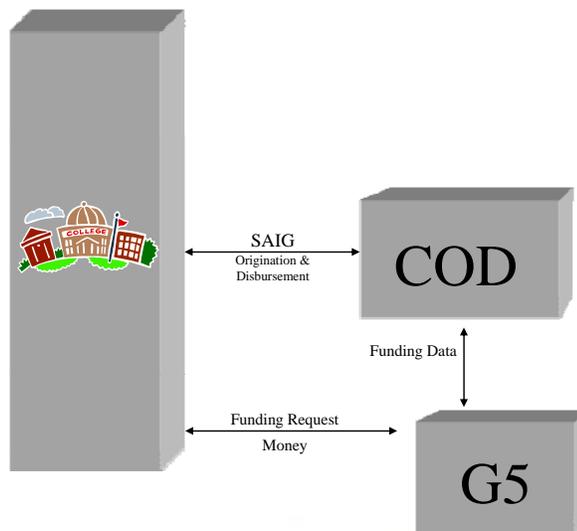
Direct Loan Processing Cycle



Direct Loan Training Suite



Direct Loan Processing Systems



Direct Loan Training Suite



Common Origination and Disbursement (COD) System

- COD is a person-centric
 - Pell, ACG, SMART, TEACH, DL
- School sends information to COD
- COD processes/edits and returns response

Direct Loan Training Suite



Submitting Records to COD

- Document
 - Via SAIG mailbox
 - Picked up by periodic “sweeps”
 - Typically transmits many student records
- Online at COD website
 - Transactions almost “real time”
 - Involves one student record at a time

Direct Loan Training Suite



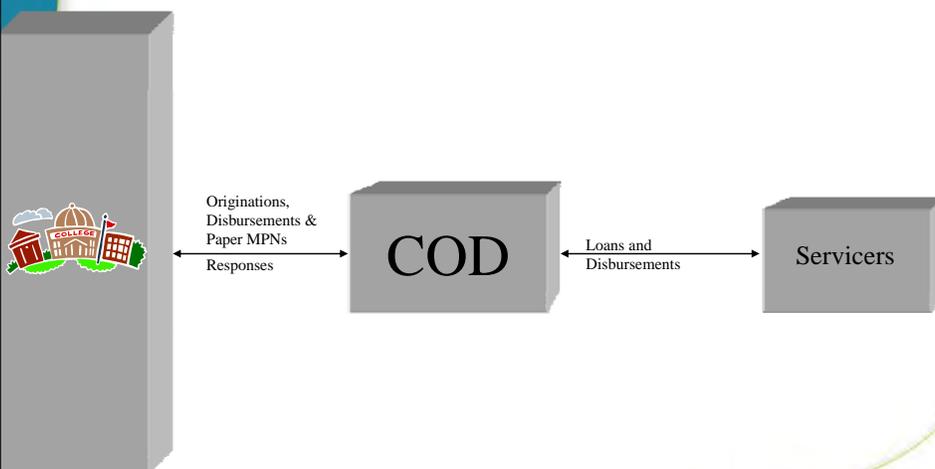
➤ G-5

- Maintains school's Direct Loan account
- Allows schools to request money via the G-5 Web site

Direct Loan Training Suite



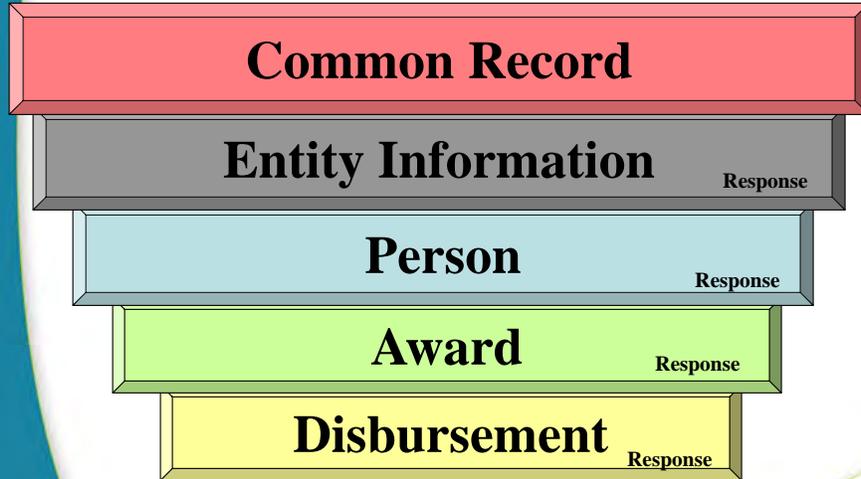
➤ Direct Loan Processing



Direct Loan Training Suite



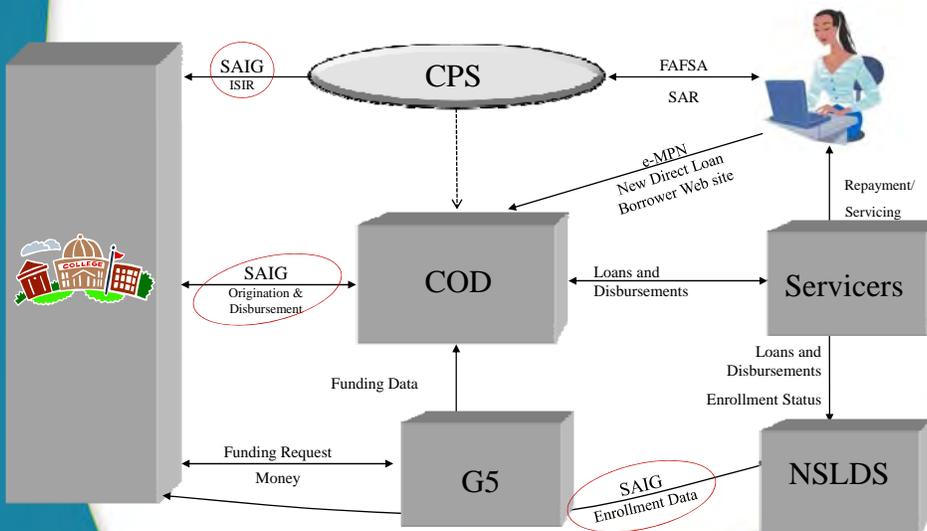
Common Record “Data Blocks”



Direct Loan Training Suite



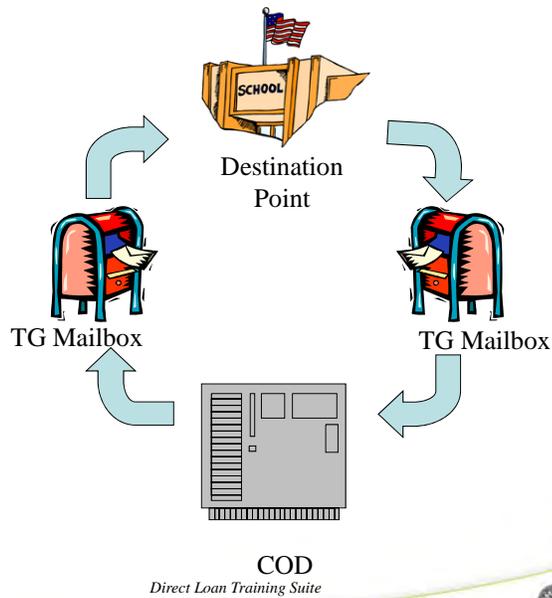
Direct Loan Processing Systems



Direct Loan Training Suite



SAIG Process



<https://fsawebenroll.ed.gov>

SAIG Enrollment

SAIG Enrollment Information

[SAIG Info](#)

Who is Eligible

What You Need to Enroll

FSA User ID Registration

Print Documents

[Print User Statement](#)

[Print Enrollment Signature Documents](#)

[Print Designee Signature Pages](#)

Related Sites

[FSA Download](#)

[FAA Access to CPS](#)

[SAIG Portal](#)

[FSA Tech Listserv Enrollment](#)

[E-Campus Based FSAID](#)

[COD](#)

Welcome to the **SAIG Enrollment Site**

The Student Aid Internet Gateway (SAIG) is the tool that allows Federal Student Aid trading partners to securely exchange batch data with Federal Student Aid Application Systems.
(Organizations are eligible to enroll to exchange and access data for the following systems (enrollments):

- CPS (CPS batch data, FAA Access to CPS Online centers)
- COD (Exchange Direct Loan, Pell, AGS, National SMART and TEACH Grant batch data)
- FISAP (eCampus-based access)
- ISLDS (Enrollment Rosters, Electronic Cohort Default Rate (eCDR), NSLDS Online semesters)
- FMS (Lender Reporting System/Surrogate Agency Financial Reports)
- CSB (Direct Loan Delinquency Reports, Entrance Services)

Primary Destination Point Administrator Access:

Select this option if you are the Primary Destination Point Administrator (PDPA) or designated Secondary Destination Point Administrator (SDPA) for your organization to manage your organization's enrollment services. PDPA's and SDPA's may:

- Add and Modify SAIG mailboxes (TO Numbers)
- Enroll users

Initial Enrollment for Services:

Select this option if your organization is not currently enrolled for any SAIG services in order to:

- Establish an initial SAIG mailbox (TO Number)
- Assign SAIG OIG services to be exchanged
- Identify your organization's Primary Designated Point Administrator (PDPA)

Review Your Organization's SAIG Mailboxes (TO Numbers)

Select this option to:

- View a list of the SAIG Mailboxes (TO numbers) assigned to your organization
- Determine your organization's Primary Destination Point Administrator (PDPA)

Review Services Assigned to Your SAIG Mailboxes (TO Numbers) | Activate Your

Direct Loan Training Suite



cod.ed.gov



U.S. DEPARTMENT OF EDUCATION
COMMON ORIENTATION & DISBURSEMENT



School
Search

Batch Search



Welcome to the Common Origination & Disbursement Web Site

Welcome to the U.S. Department of Education's Common Origination and Disbursement (COD) web site. Financial Aid Administrators, Servicers, or other officials can use this site to perform a variety of functions related to student/award/disbursement data for Pell, Direct Loan, and Campus-Based programs.

If you are a student looking for information on Federal Student Financial Aid, please visit:
<http://studentaid.ed.gov/PORTALSWebApp/students/english/index.jsp>.

To access this site, please login: [Login](#)

[Click here if you are looking for more information on Common Origination and Disbursement.](#)

If you experience any problems with the information presented on this page, please use the [Contact Us](#) feature.

Sep 18 2008 14:15 EDT

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Direct Loan Training Suite



COD Welcome Screen



U.S. DEPARTMENT OF EDUCATION
COMMON ORIENTATION & DISBURSEMENT



Person

School

Batch

Award

Services

User

Welcome Wood Mason

Welcome to the Common Origination & Disbursement Web Site

Financial Aid Administrators, other school officials, and servicers can use this web site to verify batch status, submit data requests, check account balances, and enter or change institution data records via the internet.

COD News:

[COD Reporting NewsBox Outage Information - 03/24/2010](#)

[Pell and Direct Loan Daily News Update - 01/29/2003](#)

Mar 24 2010 09:53 EDT

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Direct Loan Training Suite



Batch Search

U.S. DEPARTMENT OF EDUCATION
COMMON ORIENTATION & DISBURSEMENT

Person School **Batch** Award Services User Program

Batch Search

Use this screen to search for existing Batches to modify.

Batches that were submitted and processed prior to July 1, 2007 may have been archived and will no longer be available to view.

To search for Batches for a particular School, please enter the entity ID and the date range:

Entity ID Type: COD Entity ID: 00219534

Batch Type: All

Award Year: All

Start Date: May 4 2009

End Date: July 2 2009

Status: All

To search for a specific Batch, please enter the Document ID:

Document ID: _____

To search for all records for a particular Person, enter their SSN and Award Year. To filter this list by status, enter the status:

SSN: _____

Status: All

Award Year: '09-'10

SEARCH

Direct Loan Training Suite



Batch Search Results

U.S. DEPARTMENT OF EDUCATION
COMMON ORIENTATION & DISBURSEMENT

Person School **Batch** Award Services User Program

Search Results

Click on a Document ID from the list below to view detailed information about the Batch.

| Entity ID | School Name | Begin Date | End Date |
|-----------|-------------------------|------------|------------|
| xxxxxxx | Grand Moolah University | 05/04/2009 | 07/03/2009 |

Batch Type: All Award Year: All

Records 1 to 100 of 323

| Document ID | Record Type | Doc Type | Date Received | Date Response Sent | Status | Students Accepted | Rejected | Warning |
|--------------------------------|-------------|----------|---------------|--------------------|----------|-------------------|----------|---------|
| 2009-07-03T00:31:15.0000000001 | DL | PN | 07/03/2009 | 07/03/2009 | Accepted | 15 | 15 | 0 |
| 2009-07-03T00:31:14.0000000001 | TH | AT | 07/03/2009 | 07/03/2009 | Accepted | 2 | 2 | 0 |
| 2009-07-03T00:31:13.0000000001 | TH | AC | 07/03/2009 | 07/03/2009 | Accepted | 1 | 1 | 0 |
| 2009-07-02T15:18:28.0000000001 | DL | PN | 07/02/2009 | 07/02/2009 | Accepted | 10 | 10 | 0 |
| 2009-07-02T15:18:27.0000000001 | TH | AT | 07/02/2009 | 07/02/2009 | Accepted | 2 | 2 | 0 |
| 2009-07-02T15:18:26.0000000001 | TH | AC | 07/02/2009 | 07/02/2009 | Accepted | 2 | 2 | 0 |
| 2009-07-02T00:38:42.0000000001 | DL | PN | 07/02/2009 | 07/02/2009 | Accepted | 16 | 16 | 0 |
| 2009-07-02T00:38:41.0000000001 | TH | AT | 07/02/2009 | 07/02/2009 | Accepted | 2 | 2 | 0 |
| 2009-07-02T00:38:40.0000000001 | TH | AC | 07/02/2009 | 07/02/2009 | Accepted | 2 | 2 | 0 |
| 2009-07-01T15:55:32.0000000001 | DL | PN | 07/01/2009 | 07/01/2009 | Accepted | 264 | 264 | 0 |
| 2009-07-01T15:55:31.0000000001 | TH | AT | 07/01/2009 | 07/01/2009 | Accepted | 2 | 2 | 0 |
| 2009-07-01T15:55:24.0100000001 | TH | AC | 07/01/2009 | 07/01/2009 | Accepted | 1 | 1 | 0 |
| 2009-07-01T15:53:50.0000000001 | DL | PN | 07/01/2009 | 07/01/2009 | Accepted | 119 | 119 | 0 |
| 2009-07-01T11:53:56.4440219534 | DL | RS | 07/01/2009 | 07/02/2009 | Accepted | 265 | 265 | 0 |
| 2009-07-01T11:53:46.780019534 | TH | RS | 07/01/2009 | 07/01/2009 | Accepted | 53 | 53 | 0 |

| | | | | | | | | | |
|--------------------------------|----|----|------------|------------|----------|-----|-----|---|---|
| 2009-07-01T11:22:49.0000219534 | DL | RS | 07/01/2009 | 07/01/2009 | Accepted | 221 | 221 | 0 | Y |
|--------------------------------|----|----|------------|------------|----------|-----|-----|---|---|

Direct Loan Training Suite



Batch Summary

Return to: [Batch List](#)

Batch Detail Information

| School | Entity ID | Date Received | Date Response Sent | Award Year |
|-------------------------|-----------|---------------|--------------------|------------|
| Grand Moolah University | XXXXXXXX | 09/23/2009 | 09/23/2009 | All |

To print the below records, select the Print Batch link on the bottom of the page. The records will print a maximum of 1,000 at a time.

Program: All

School Reported Data

| Document ID | Status | Total Students |
|--------------------------------|----------|----------------|
| 2009-09-22T20:58:16.0030712431 | Accepted | 132 |

| Total Number of Awards | Award Amount |
|------------------------|----------------|
| 136 | \$1,240,327.00 |

| Total Number of Disbursements | Disbursement Amount |
|-------------------------------|---------------------|
| 587 | \$1,240,327.00 |

Batch Statistics

| Total Number of Awards Accepted | Award Amount Accepted | Total Students |
|---------------------------------|-----------------------|----------------|
| 176 | \$1,066,602.00 | 132 |

| Total Number of Awards Rejected | Award Amount Rejected |
|---------------------------------|-----------------------|
| 5 | \$11,361.00 |

| Total Number of Awards Accepted with Corrections | Corrections |
|--|-------------|
| 0 | \$0.00 |

| Total Number of Duplicate Awards | Amount of Duplicate Awards |
|----------------------------------|----------------------------|
| 0 | \$0.00 |

| Total Number of Awards Accepted with Warnings | Award Amount Accepted with Warnings |
|---|-------------------------------------|
| 15 | \$262,364.00 |

| Total Number of Disbursements Accepted | Disbursement Amount Accepted |
|--|------------------------------|
| 351 | \$710,883.00 |

| Total Number of Disbursements Rejected | Disbursement Amount Rejected |
|--|------------------------------|
| 19 | \$11,361.00 |

| Total Number of Disbursements Accepted with Corrections | Disbursement Amount Accepted with Corrections |
|---|---|
| 0 | \$0.00 |

Direct Loan Training Suite



Batch Detail

| | |
|---|---|
| Total Number of Disbursements Accepted with Warnings | Disbursement Amount Accepted with Warnings |
| 221 | \$518,283.00 |
| Total Financial Award Accepted | Total Financial Disbursement Accepted |
| \$1,228,966.00 | \$1,228,966.00 |
| Total Funded Disbursement Accepted | Total Non Funded Disbursement Accepted |
| \$0.00 | \$1,228,966.00 |

Enter filter criteria here to narrow down your search.

SSN: Status: **Rejected**

Award Type: All

| Award Year | Name | Accepted with corrections | Disbursement Type | Award No | Disb No |
|------------|-----------------|---------------------------|-------------------|----------------|---------------|
| '09-'10 | Mike Mouse | XXXXX1111 - Accepted | DLU | 003 - Rejected | 01 - Rejected |
| '09-'10 | Mike Mouse | XXXXX1111 - Accepted | DLU | 003 - Rejected | 02 - Rejected |
| '09-'10 | Mike Mouse | XXXXX1111 - Accepted | DLU | 003 - Rejected | 03 - Rejected |
| '09-'10 | Mary Flintstone | XXXXX2222 - Accepted | DLU | 003 - Rejected | 01 - Rejected |
| '09-'10 | Mary Flintstone | XXXXX2222 - Accepted | DLU | 003 - Rejected | 02 - Rejected |
| '09-'10 | Mary Flintstone | XXXXX2222 - Accepted | DLU | 003 - Rejected | 03 - Rejected |
| '09-'10 | Wanda Wonder | XXXXX3333 - Accepted | DLU | 002 - Rejected | 01 - Rejected |
| '09-'10 | Wanda Wonder | XXXXX3333 - Accepted | DLU | 002 - Rejected | 02 - Rejected |
| '09-'10 | Wanda Wonder | XXXXX3333 - Accepted | DLU | 002 - Rejected | 03 - Rejected |
| '09-'10 | Hank Friendly | XXXXX4444 - Rejected | DLS | 001 - Rejected | 01 - Rejected |
| '09-'10 | Hank Friendly | XXXXX4444 - Rejected | DLS | 001 - Rejected | 02 - Rejected |
| '09-'10 | Hank Friendly | XXXXX4444 - Rejected | DLS | 001 - Rejected | 03 - Rejected |
| '09-'10 | Greg Bines | XXXXX5555 - Rejected | DLU | 001 - Rejected | 01 - Rejected |
| '09-'10 | Greg Bines | XXXXX5555 - Rejected | DLU | 001 - Rejected | 02 - Rejected |
| '09-'10 | Greg Bines | XXXXX5555 - Rejected | DLU | 001 - Rejected | 03 - Rejected |

Records 1 to 15 of 15

[Print Batch](#)

Direct Loan Training Suite



Person Menu

U.S. DEPARTMENT OF EDUCATION
COMMON ORIENTATION & DISBURSEMENT

FSA
FEDERAL
STUDENT AID

Person School Batch Award Services User Program

Person Search

Use this screen to search for individuals. The information consists of student and borrower demographics along with details about the awards they hold. Please enter a Social Security Number or Name.

SSN [] OR []

Name Last [] First [] MI []

SEARCH

- Please enter full SSN for SSN search. (No dashes)
- You may enter up to nine characters of the last name and up to five characters of the first name.
- If you enter a **partial** name the search may take longer to display the results.
- If you enter a valid SSN, the Person Detail page will appear allowing you to view information an individual and their associated awards.
- If you enter a valid name, the Person Detail page will appear allowing you to view information about the person and their associated awards.

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Person Information

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STUDENT AID

Person School Batch Award Services User Program

Person Search

View Person Information

Margaret Day
XXXXXXXXXX
01/01/1980

Permanent Information

Address 123 Main Street
Oak City, TN 12345 USA

Email mdaw@usa.com JU Citizenship US Citizen
Previous SSN

Telephone (123) 456-7890

School Assigned Id
Post 9/11
Deceased Veteran
Dependent
Indicator

Local Information

Address 123 Main Street
Oak City, TN 12345 USA

Direct Loan Training Suite



Person Direct Loan Information

Return to: [Person Detail](#)

Person Direct Loan Information

Margaret Day
 XXXXXXXX
 01/01/1980

Award Year: ALL

| Loan Summary | | | | | | |
|----------------------------------|-------------|-----------------------|-----------------------|------------------------|-------------|---------|
| Attending School | Person Type | Award ID | Award Amount Approved | Award Amount Disbursed | Grade Level | Type |
| Year '09-'10 | | | | | | |
| UNIVERSITY OF CALIFORNIA, IRVINE | Student | XXXXX1234510G12345001 | \$4,900.00 | \$1,833.00 | 4 | DLSUB |
| UNIVERSITY OF CALIFORNIA, IRVINE | Student | XXXXX1234P10G12345001 | \$0.00 | \$0.00 | 4 | DLPLUS |
| UNIVERSITY OF CALIFORNIA, IRVINE | Student | XXXXX1234U10G12345001 | \$0.00 | \$0.00 | 4 | DLUNSUB |
| UNIVERSITY OF CALIFORNIA, IRVINE | Student | XXXXX1234U10G12345002 | \$1,600.00 | \$533.00 | 4 | DLUNSUB |
| Total for Grade Level 4: | | | \$6,500.00 | \$2,366.00 | | |
| Total for '09-'10: | | | \$6,500.00 | \$2,366.00 | | |
| Year '08-'09 | | | | | | |
| UNIVERSITY OF CALIFORNIA, IRVINE | Student | XXXXX1234509G12345001 | \$5,500.00 | \$5,500.00 | 3 | DLSUB |
| UNIVERSITY OF CALIFORNIA, IRVINE | Student | XXXXX1234P09G12345001 | \$1,065.00 | \$1,065.00 | 3 | DLPLUS |
| UNIVERSITY OF CALIFORNIA, IRVINE | Student | XXXXX1234P09G12345001 | \$7,516.00 | \$7,516.00 | 3 | DLPLUS |
| UNIVERSITY OF CALIFORNIA, IRVINE | Student | XXXXX1234U09G12345001 | \$2,000.00 | \$2,000.00 | 3 | DLUNSUB |
| Total for Grade Level 3: | | | \$16,081.00 | \$16,081.00 | | |

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Award Detail

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Person School Batch **Award** Services User Program

Return to: [Batch List](#) -> [Batch Detail](#) -> [Person Detail](#) -> [Direct Loan Awards](#)

Award Detail Information

Margaret Day
 XXXXXXXX
 01/01/1980

University
 XXXXXXXX 3509G12345002
 '08-'09

| Award Information | |
|------------------------------|---|
| Award ID | XXXXXXXXXXS09G12345002 |
| Award Amount Approved | \$3,500.00 |
| Award Amount Disbursed | \$0.00 |
| Award Start Date | 05/18/2009 |
| Award End Date | 12/18/2009 |
| Grade Level | 1st year, undergraduate/attended college before |
| CPS Transaction Number | 02 |
| Disclosure Print Indicator | COD Prints (Sends to Borrower) |
| Disclosure Print Date | 06/25/2009 |
| Print Indicator | School or its Delegate Prints and Sends |
| Booked Date | 06/29/2009 |
| Dependency Status | Dependent |
| Loan Fee Percentage | 2.0% |
| Academic Start Date | 05/18/2009 |
| Academic End Date | 12/18/2009 |
| Interest Rebate Percentage | 1.5% |
| Less than Full-time Flag | |
| Loan Default / Grant Overpay | N |
| School Use Only | 7252581 |

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Disbursement Information

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STUDENT AID

Person School Batch **Award** Services User

Return to: [Batch List](#) -> [Batch Detail](#) -> [Person Detail](#) -> [Direct Loan Awards](#) -> [Award Detail](#)

Award Disbursements Information 

Please click on the Disbursement number to view Disbursement Detail.

| | |
|---|---|
| Margaret Day XXXXXXXXXX 01/01/1980 | University XXXXXXXXXX 123456789012345002 '08-'09 |
|---|---|

Totals for Actual Disbursements
Gross: \$0.00 **Origination Fee:** \$0.00 **Rebate:** \$0.00 **Net Award:** \$0.00

Totals for Pending Disbursements
Gross: \$1,750.00 **Origination Fee:** (\$35.00) **Rebate:** \$27.00 **Net Award:** \$1,742.00

Disbursements

| No. | Disb. Date | Gross | Orig. Fee | Rebate | Net Award | Status |
|-----|------------|------------|-----------|---------|------------|-----------|
| 1 | 06/25/2009 | \$0.00 | (\$0.00) | \$0.00 | \$0.00 | Disbursed |
| 2 | 09/07/2009 | \$1,750.00 | (\$35.00) | \$27.00 | \$1,742.00 | Pending |

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FEDERAL STUDENT AID

Disbursement History

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STUDENT AID

Person School Batch **Award** Services User

Return to: [Batch List](#) -> [Batch Detail](#) -> [Person Detail](#) -> [Direct Loan Awards](#) -> [Award Detail](#) -> [Disbursement List](#) -> [Disbursement Detail](#)

Disbursement History Information 

| | |
|--|--|
| Margaret Day 123456789 01/01/1980 | University 123456789012345002 '08-'09 Disbursement 1 |
|--|--|

Actual History

| Sequence # | Description | Action Date | Gross | Fee | Rebate | Net | Disbursement Date | Response Date | Booked Date |
|------------|---------------------------|-------------|--------------|-----------|-----------|--------------|-------------------|---------------|-------------|
| 1 | SUBSTANTIATED DISBURSEMNT | 06/29/2009 | \$1,750.00 | (\$35.00) | \$27.00 | \$1,742.00 | 06/25/2009 | 06/29/2009 | 06/29/2009 |
| 66 | SUB DISB CREDIT ADJ | 09/24/2009 | (\$1,750.00) | \$35.00 | (\$27.00) | (\$1,742.00) | 06/25/2009 | 09/24/2009 | 09/24/2009 |

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FEDERAL STUDENT AID

COD-MPN Search

U.S. DEPARTMENT OF EDUCATION
COMMON ORIGIN & DISBURSEMENT

FSA
FEDERAL STUDENT AID

Person School Batch Award Services User

Person Search ATN/MPN Search HELP

TEACH Loan Search

SSN

ATN/MPN ID

Name search will return Linked Agreement to Serve and Promissory Notes only.

Name

Last Name First Name

Name and Date of Birth search will return unlinked TEACH Agreements to Serve or Direct Loan Promissory Notes. If Last Name is provided, it will be used to search for TEACH Agreements to Serve.

Name and Date of Birth

First Name Date of Birth July 5 2009

Last Name (ATN Only)

Date Range search returns all linked and unlinked TEACH Agreements to Serve or Direct Loan Promissory Notes for a specified school and date range.

Note: All MPN date range searches will reflect status as of the previous business day.

Date Range

Entity ID Type COD Entity ID

Begin Date July 5 2009

End Date July 5 2009

SEARCH

Direct Loan Training Suite



Promissory Note Search By Date

Agreement to Serve/Promissory Note Search Results

Records 1 to 100 of 1276

| SSN | Name | ATN/MPN ID | DOB | NOTE STATUS/LINK STATUS | Type Indicator |
|-----------|--------------|--------------------|------------|-------------------------|----------------|
| Xxxxx1234 | AA | xxxxx1234M10G04444 | 02/02/1982 | Pending / Unlinked | |
| Xxxxx1111 | FLINT, FRED | xxxxx1111M10G04444 | 02/02/1982 | Accepted / Linked | |
| Xxxxx2222 | BB | xxxxx2222M10G04444 | 10/25/1982 | Pending / Unlinked | |
| Xxxxx3333 | CC | xxxxx3333M10G04444 | 06/02/1969 | Pending / Unlinked | |
| Xxxxx4444 | DD | xxxxx4444N10G04444 | 10/21/1958 | Pending / Unlinked | Parent PLUS |
| Xxxxx5555 | JAMES, JILL | xxxxx5555M10G04444 | 10/21/1991 | Accepted / Linked | |
| Xxxxx6666 | EE | xxxxx6666N10G04444 | 10/31/1965 | Pending / Unlinked | Parent PLUS |
| Xxxxx7777 | DAVIS, BELLE | xxxxx7777M10G04444 | 10/02/1991 | Accepted / Linked | |
| Xxxxx8888 | FF | xxxxx8888M10G04444 | 04/03/1981 | Pending / Unlinked | |
| Xxxxx9999 | GG | xxxxx9999N10G04444 | 01/10/1982 | Pending / Unlinked | Graduate PLUS |

Direct Loan Training Suite



Master Promissory Note

U.S. DEPARTMENT OF EDUCATION
COMMON ORIENTATION & DISBURSEMENT

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Person School Batch Award Services User Program

Person Search
TEACH Coun Search
ATS/Pnote Search
Credit Check Search
Applicant Search

Award Promissory Notes

Barbara Davis
xxxxx1234
01/01/1994

[View Signed Promissory Note](#)

Details

| | | | |
|------------------------|-----------------------|------------------------------|------------|
| MPN ID | xxxxx1234M06G01234001 | MPN Received Date | 10/10/2005 |
| MPN Status | Accepted | MPN Expiration Date | 10/08/2015 |
| Type | Electronic | MPN Last Updated Date | 10/10/2005 |
| # linked awards | 4 | MPN Close Date | |

Borrower Type Indicator

Linked Awards

| Program | School Name | Award Year | Award ID |
|------------------------|-------------------------------------|------------|-----------------------|
| DIRECT LOAN/SUBSIDIZED | Favorite University, Over the Hills | '06-'09 | xxxxx1234S09G01234001 |
| DIRECT LOAN/SUBSIDIZED | Favorite University, Over the Hills | '07-'08 | xxxxx1234S08G01234001 |
| DIRECT LOAN/SUBSIDIZED | Favorite University, Over the Hills | '06-'07 | xxxxx1234S07G01234001 |
| DIRECT LOAN/SUBSIDIZED | Favorite University, Over the Hills | '-'06 | xxxxx1234S06G01234001 |

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FEDERAL STUDENT AID

Credit Check Information

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FEDERAL
STUDENT AID

Person School Batch Award Services User Program

Person Search
TEACH Coun Search
ATS/Pnote Search
Credit Check Search
Applicant Search

Credit Check Information

Credit Check Decision

| | |
|--------------------------|------------|
| SSN | Xxxxx1111 |
| Name | Barb Davis |
| Date of Birth | 01/01/1972 |
| Request Date | 02/02/2009 |
| Original Decision | Accepted |
| Decision Date | 02/02/2009 |

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Direct Loan Training Suite

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FEDERAL STUDENT AID

School Options

- For the 2010-2011 Award Year, there will be six new School Options for the Direct Loan program.
 - Default values will be populated in the School Options fields
 - The new options are not award year specific
 - Default values for the one time update are listed below:

| Field Name | Valid Values Displayed on the Web | One Time Update Entries: |
|--|-----------------------------------|--------------------------|
| Participate in Electronic Parent PLUS Application | Yes or No | Yes |
| Participate in Electronic Parent PLUS Application Begin Date | MM/DD/YYYY | 05/01/2010 |
| Parent PLUS Application Response Option | Daily or On Demand | Daily |
| Participate in Electronic Grad PLUS Application | Yes or No | Yes |
| Grad PLUS Application Response Option | Daily or On Demand | Daily |
| Participate in Electronic Grad PLUS Application Begin Date | MM/DD/YYYY | 05/01/2010 |

Direct Loan Training Suite



New Schema – 3.0c

- The DL PLUS Award Block the new elements associated with the new application process:

| New Tag | Valid Values |
|-------------------------------|---|
| ApplicationCompleteDate | Formatted Date – YYYY-MM-DD |
| LoanAmount | Numeric |
| CreditBalanceOption | "B" – for borrower or "S" – for student |
| CreditActionChoice: | "A" – for appeal credit decision, "E" – for pursue an endorser, "N" – for pursue an unsubsidized loan (not pursuing PLUS) or "U" – for no action will be taken at this time |
| CreditAppealStatus: | "A" – for appeal accepted, "D" – for appeal denied, "P" – for appeal pending, "R" – for appeal closed without final decision |
| MaximumLoanIndicator | "true" – for up to maximum cost of attendance selected or "false" – for loan amount selected |
| CreditDecisionExpirationDate | Formatted Date – YYYY-MM-DD |
| OriginalCreditDecisionStatus: | "A" – for Accepted, "P" – for Pending or "D" – for Denied |
| DefermentOption: | "true" – for deferring or "false" – for not deferring |
| ApplicationID | Will have a sequence number that is unique to each PLUS Application |

Direct Loan Training Suite



Student Access: www.nsls.ed.gov

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Financial Aid Review **Exit Counseling** Glossary of Terms Browser Information/Setup FAQs Contact Us

Hurricane Assistance

NSLDS STUDENT ACCESS
National Student Loan Data System

Retrieve Your Loan Information

The National Student Loan Data System (NSLDS) is the U.S. Department of Education's (ED's) central database for student aid. NSLDS receives data from schools, guaranty agencies, the Direct Loan program, and other Department of ED programs. NSLDS Student Access provides a centralized, integrated view of Title IV loans and grants so that recipients of Title IV Aid can access and inquire about their Title IV loans and/or grant data.

Financial Aid Review **Exit Counseling**

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Exit Counseling


National Student Loan Data System (NSLDS) for Students

Financial Aid Review
Exit Counseling
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Browser Information Setup
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Contact Us

Intro

Student loans, unlike grants and work-study, are borrowed money that must be repaid, with interest, just like car loans and home mortgages. You cannot have these loans canceled because you didn't like the education you received, didn't get a job in your field of study or because you're having financial difficulty. Loans are legal obligations that you'll have to repay.

Exit Counseling:

- Is required before you withdraw, graduate, or drop below half-time attendance (regardless if you plan to transfer to another school)
- Helps you understand your rights and responsibilities as a student loan borrower
- Provides information and terms to help you manage your loans and make the right choices

This counseling session covers the following federal student loan types:

Direct Loans

- Subsidized
- Unsubsidized
- PLUS (Graduate/Professional)

Federal Family Education Loan (FFEL)

- Subsidized
- Unsubsidized
- PLUS (Graduate/Professional)

Your school may choose to have you complete the online exit counseling or to administer exit counseling in person. Check with your school's financial aid office to confirm that online exit counseling will satisfy your school's requirements before completing this session.

[Next](#)

Your Progress

Getting Started

Intro

- Basics
- Log in to Exit Counseling
- Loan Programs
- Terminology
- Quiz

Repaying Your Loan

- Loan Summary (NSLDS)
- Interest Rates and Accruals
- Entering Repayment
- Repayment Incentives
- Choosing a Repayment Plan
- Billing Methods and Making Payments
- Quiz

Having Trouble Making Payments

- Deferment and Forbearance
- Delinquency and Default
- Quiz
- Loan Consolidation

Discharge/ Cancellation/ Forgiveness

- Discharge and Cancellation
- Quiz

Resources

- Financial Literacy
- Borrowers Rights and Responsibilities Checklist
- Resources Links

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Direct Loan Training Suite



FAA exit counseling reports

Upload external excel file of results


National Student Loan Data System (NSLDS)



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Report
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[Enrollment Summary](#) | [Enrollment Add](#) | [Enrollment Update](#) | [Enrollment Reporting Schedule](#) | [Exit Counseling Submittal](#)

Logged on as: SCTST1 ONLINE SCHOOL TESTING from UNIVERSITY OF FEDERAL STUDENT AID, WASHINGTON, DC

Name:

Code: **type:** School

 Enter the location and file name and submit for processing.

Exit Counseling File Submittal

I am running on Windows.

File Name:

PRIVACY ACT OF 1974 (AS AMENDED)

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Direct Loan Training Suite



School Summary Financial

U.S. DEPARTMENT OF EDUCATION
COMMON ORIENTATION & DISBURSEMENT

FSA
FEDERAL
STUDENT AID

Person School Batch Award Services User Program

School Search School Summary Financial Information

School Information
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Refunds of Cash
Cash Activity
Events
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Message List
Yearly Totals
Relationships
Balance Confirmation
Request Post
Deadline/Extended
Processing
Correspondence
Report Selection

School Summary Financial Information

Summary Financial Information

Program DIRECT LOAN Award Year '09-'10

Entity ID 04304838

Beginning Cash Balance \$0.00

Cash Receipts \$48,257,032.00

Refunds of Cash \$0.00

Net Drawdowns/Payments \$48,257,032.00

Booked Disbursements \$49,418,411.00

Booked Adjustments (\$888,060.00)

Total Net Booked Disbursements \$48,530,351.00

Ending Cash Balance (\$273,319.00)

Unbooked Disbursements \$41,312.00

Unbooked Adjustments (\$41,312.00)

Total Net Unbooked Disbursements \$0.00

Cash > Accepted and Posted Disbursements (\$273,319.00)

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Direct Loan Training Suite



Cash Activity

U.S. DEPARTMENT OF EDUCATION
COMMON ORIENTATION & DISBURSEMENT

FSA
FEDERAL
STUDENT AID

Person School Batch Award Services User Program

School Search School Summary Financial Information

School Information
School Summary
Financial Aid Contact
Eligibility
General
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Refunds of Cash
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Request Post
Deadline/Extended
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Correspondence
Report Selection

Cash Activity

Grand Moolah University

Program/Year Selection

Program DIRECT LOAN Award Year '08-'09 Printer Friendly

Cash Activity Summary

Net Draws \$120,685,078.00

Cash > Accepted & Posted Disbursements & older than 30 days \$20,350.00

| Date of Transaction | Totals | 06/08/2009 | 06/03/2009 |
|---|------------------|---------------|--------------|
| Time | | 10:45:20 AM | 12:34:42 P |
| GAPS Debit Date | | 06/08/2009 | 06/03/2009 |
| Drawdowns/Payments | \$120,685,078.00 | \$33,487.00 | \$100,090.00 |
| Drawdown Adjustments | \$0.00 | | |
| Refunds of Cash | \$0.00 | | |
| Returns of Cash | \$0.00 | | |
| Drawdown Offsets | \$0.00 | | |
| Days Since Net Draws Increase | | 28 | 33 |
| Days Left For On-time Reporting | | 002 | 000 |
| Payment Control Number | | 2009060519842 | 200906021 |
| Accepted & Posted Disbursements Applied | \$120,513,175.00 | \$0.00 | \$79,740.00 |
| % of Accepted & Posted Disb. Applied to Net Draws | 99.9% | | |
| Cash > Accepted & Posted Disbursements | \$171,903.00 | | |
| % of Cash > Accepted & Posted Disbursements | 0.14% | | |
| Source System | | GAPS | GAPS |

Amounts in parentheses decrease net draws

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Direct Loan Training Suite



Direct Loan Newsbox

U.S. DEPARTMENT OF EDUCATION
COMMON ORIGINATOR & DISBURSEMENT

Index Search

307124 11111100 Search

Search results:
View results in right frame

11111100
11111100

Grand Moolah University

00000000-DL
00000000-PI

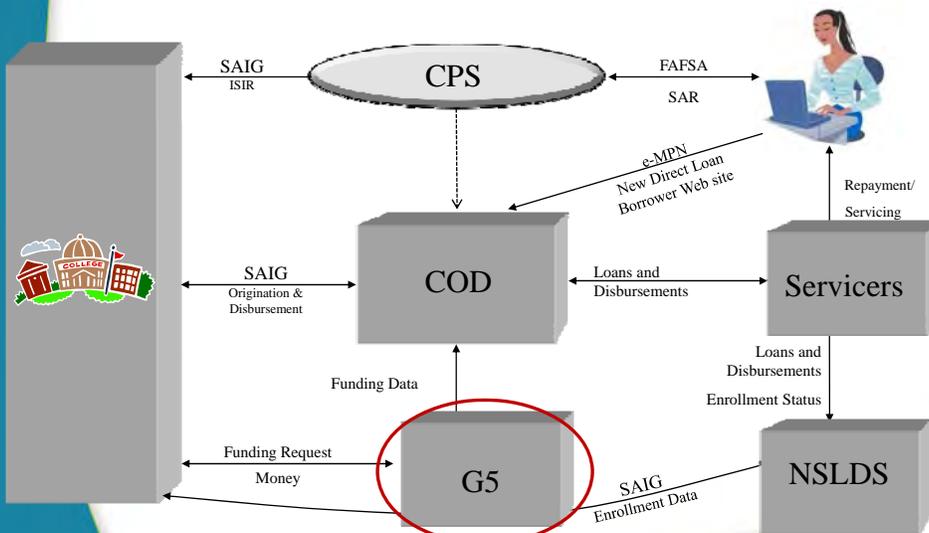
30 DAY WARNING (CSV) 2008-2009
DUPLICATE STUDENT BORROWER (CSV)
INACTIVE LOANS (CSV)
MPNS DUE TO EXPIRE REPORT
PENDING DISBURSEMENT LIST (CSV) 2008-2009
SSH.NAME-DATE OF BIRTH CHANGE(CSV)

30 DAY WARNING (CSV) 2009-2010
EXPIRED MPN REPORT
MPN DISCHARGE REPORT
PENDING DISBURSEMENT LIST (CSV) 2007-2008
PENDING DISBURSEMENT LIST (CSV) 2009-2010

Direct Loan Training Suite



Direct Loan Processing Systems



Direct Loan Training Suite



➤ The G5 System

- www.G5.gov
- Provides location for all school funding processes
 - Drawdowns
 - Drawdown adjustments
 - Refunds (money returned to the Department electronically)
 - G5 funding reports

Direct Loan Training Suite



➤ Establish G5 Account

- Have a DUNS Number
 - Call 1-866-705-5711 or
 - Complete a D-U-N-S Request Form at <http://www.dnb.com>
- Award Document ID
 - 11 Character unique ID
 - P268K10#####
- Set up bank information
 - Enroll in Automated Clearing House (ACH) using Direct Deposit Sign-Up Form (SF-1199A), or
 - FEDWIRE by enrolling with CFO, Department of Education
- Obtain user ID and password
 - ED mails User IDs and passwords to payee's business address



Direct Loan Training Suite



Requesting DL Funds via G5

| Award No. | Payment Amount (\$) | Deposit Date (MM/DD/YYYY) | Recipient Reference | Available Balance | Net Authorization | Last Day to Draw | Bank Account | Flag |
|-------------|---------------------|---------------------------|----------------------|-------------------|-------------------|------------------|--------------|------|
| P268K081111 | | 09/28/2009 | Direct Loan 0708 8/1 | \$0.00 | \$9,567,163.00 | 12/31/2012 | ***** | |
| P268K091111 | | 09/28/2009 | Direct Loan 0809 | \$168,360,473.00 | \$648,582,205.00 | 12/31/2013 | ***** | |
| P268K101111 | | 09/28/2009 | Direct Loan 200910 | \$251,097,016.00 | \$489,897,016.00 | 12/31/2014 | ***** | |

START HERE
GO FURTHER
FEDERAL STUDENT AID

G5 – Returning Funds

- Returning funds electronically through G5 is preferred
 - Amounts > \$100,000 must use G5
- Designated Refund Bank Account
- COD Disbursement Record may need updating

View Your Account Balances

Export to CSV File Export to PDF Total: 13 Page 1 of 1 Show All Awards

U.S. Department of Education - EDCAPS G5
G5 - External Award Activity History Report
As of Fri Sep 25 08:33:24 EDT 2009

| Award No. | Recipient Reference No. | Net Authorizations* | Total Draws | Total Refunds | Total Returns | Net Adjustments** | Net Draws*** | Last Date to Draw Funds |
|-----------|-------------------------|---------------------|-------------------|---------------|---------------|-------------------|-------------------|-------------------------|
| H12BL01 | | -\$425.16 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | 11/15/2006 |
| P037Y07 | | \$304,388.00 | -\$304,388.00 | \$0.00 | \$0.00 | \$0.00 | -\$304,388.00 | 09/30/2013 |
| P063P04 | | -\$1,287.00 | \$0.00 | \$1,012.00 | \$0.00 | \$0.00 | \$1,012.00 | 11/02/2009 |
| P063P05 | | -\$507.00 | \$0.00 | \$507.00 | \$0.00 | \$0.00 | \$507.00 | 11/01/2010 |
| P063P06 | | -\$29,979.00 | \$0.00 | \$14,719.00 | \$0.00 | \$0.00 | \$14,719.00 | 11/01/2010 |
| P063P07 | Pell 0708 | -\$26,724.00 | -\$35,513.85 | \$23,938.00 | \$0.00 | \$0.00 | -\$11,575.85 | 10/31/2013 |
| P063P08 | Pell 0809 | \$27,392,559.95 | -\$32,828,669.95 | \$0.00 | \$0.00 | \$0.00 | -\$32,828,669.95 | 10/31/2014 |
| P063P09 | Pell 0910 | \$37,697,885.00 | -\$34,800,000.00 | \$0.00 | \$0.00 | \$0.00 | -\$34,800,000.00 | 11/02/2015 |
| P063Q07 | | \$1,645.00 | -\$1,645.00 | \$0.00 | \$0.00 | \$0.00 | -\$1,645.00 | 10/31/2013 |
| P063Q08 | | \$83,825.00 | -\$83,825.00 | \$0.00 | \$0.00 | \$0.00 | -\$83,825.00 | 10/31/2014 |
| P248K08 | Direct Loan 0708 W19 | -\$15,432,837.00 | -\$31,290.00 | \$0.00 | \$0.00 | \$0.00 | -\$31,290.00 | 12/31/2012 |
| P248K09 | Direct Loan 0809 | \$300,278,067.00 | -\$217,613,201.00 | \$0.00 | \$0.00 | \$0.00 | -\$217,613,201.00 | 12/31/2013 |
| P248K10 | Direct Loan 200910 | \$489,897,016.00 | -\$238,800,000.00 | \$0.00 | \$0.00 | \$0.00 | -\$238,800,000.00 | 12/31/2014 |

* Total increase & decrease in Authorization
** Total increase & decrease in Adjustments
*** Total Expenditure (Draws + Refund + Return + Adjustment)

Export to CSV File Export to PDF Total: 13 Page 1 of 1 Show All Awards



G5 Online Training

G5 Empowering the grant community

G5 Home Help

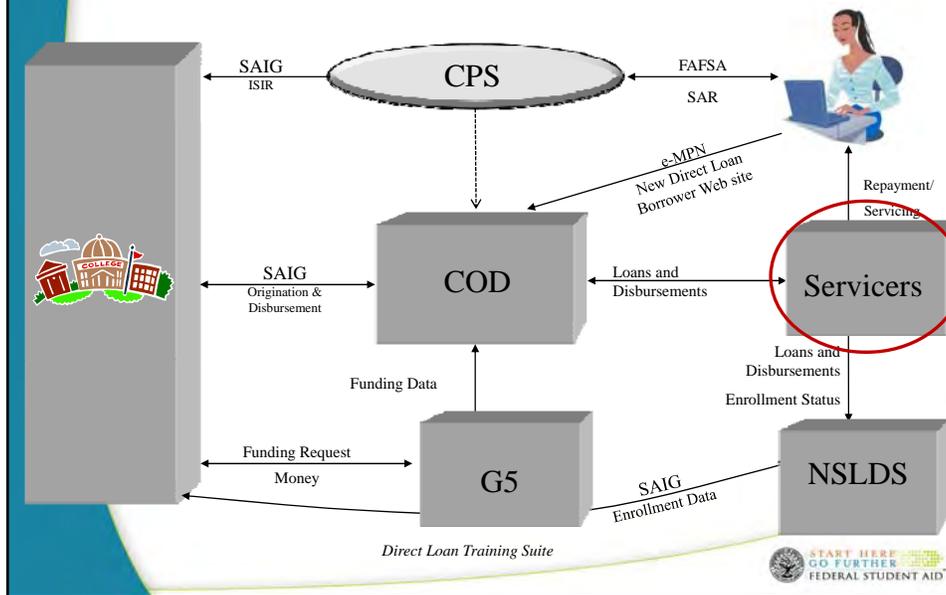
New On-Line Training and Help Functions --

- Training will provide online guided simulations to demonstrate steps required to complete G5 procedures
- Help will provide Tip Sheets (Job Aids) - quick step-by-step documents for each procedure
- Prior to G5 implementation, Training and Help will be accessible from e-Payments
- Post implementation Training and Help will be accessed from G5

Direct Loan Training Suite



Direct Loan Processing Systems



Direct Loan Servicing

- ACS
- AES / PHEAA
- Great Lakes Education Loan Services
- Nelnet
- Sallie Mae Corporation

Direct Loan Servicing

- Servicers comply with all legislative and regulatory requirements and **unique** best in business services.
- Borrower's loans with one Servicer
- Schools work with Multiple Servicers

Direct Loan Training Suite



Direct Loan Servicers

| Servicer | School Contact |
|--|--|
| <u>School Services – DLSS (ACS)</u> | School Phone: 888- 877-7658 Web: www.dl.ed.gov/schools |
| <u>FedLoan Servicing (PHEAA)</u> NSLDS Servicer Code: 700579 | School Phone: 800-655-3813 Web: www.myfedloan.org |
| <u>Great Lakes Educational Loan Services</u> NSLDS Servicer Code: 700581 | School Phone: 888-686-6919 Web: www.mygreatlakes.org |
| <u>Nelnet</u> NSLDS Servicer Code: 700580 | School Phone: 866-463-5638 Web: www.nelnet.com |
| <u>Sallie Mae</u> NSLDS Servicer Code: 700578 | School Phone: 888-272-4665 Web: www.opennet.salliemae.com |

Direct Loan Training Suite



Call Center Contacts for Borrowers

General Federal Student Aid Information

<http://www.studentaid.ed.gov> (800) 433-7327

COD School Relations-Applicant Services (800) 557-7394

Direct Loan Servicing Center – Borrower Services

<http://www.dl.ed.gov> (800)848-0979

Direct Loan Consolidation Center

<http://www.loanconsolidation.ed.gov> (800) 557-7392

Federal Student Aid Ombudsman

<http://www.ombudsman.ed.gov> (877) 557-2575

Direct Loan Information

<http://www.direct.ed.gov>

Direct Loan Training Suite



School Customer Service Centers

COD School Relations Center

<http://www.cod.ed.gov>

(800) 848-0978

School Services – DLSS (ACS)

<http://www.dl.ed.gov/schools>

(888) 877-7658

Direct Loan Consolidation Center

<http://www.loanconsolidation.ed.gov>

(800) 557-7392

Direct Loan Training Suite





School Customer Service Centers

CPS/SAIG

<http://www.fsawebenroll.ed.gov>

(800) 330-5947

G5 Help Desk

<http://www.g5.gov>

(888) 336-8930

NSLDS

<http://www.nsldsfa.gov>

(800) 999-8219

Direct Loan Training Suite



Direct Loan Systems Primer

Questions???

dlenrollment_fsa@ed.gov

Direct Loan Training Suite

