

9.2 Process NSLDS Request


Purpose: Use this document as a reference on how to run the NSLDS Request process using ctcLink.

Audience: Financial Aid staff

The National Student Loan Data System (NSLDS) is a centralized source for a student's federal financial aid history. Schools can request NSLDS data and incorporate key elements into the awarding and packaging routines. NSLDS data is sent to schools on the ISIR, on a financial aid history request, or based on a transfer- monitoring request. You can view NSLDS data loaded using the **NSLDS Inquiry** components, designed to match the NSLDS file structure.

This QRG demonstrates the three steps for processing a NSLDS request.

- Assign Checklist
- Validate Checklist
- Process NSLDS

 You must have at least one of these local college managed security roles:

- ZC CC 3Cs User
- ZZ CC 3Cs User

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Process NSLDS Request

Assigning Checklist

 ***Please Note**


The checklist assignment and Transfer Monitoring request must be run on the same day.

The subsequent processing requires a Monitor Start date that coincides with the checklist assign date.

i Assign checklist using 3C engine for students requiring transfer monitoring. Begin by navigating to the Run 3C Engine page.

Navigation: NavBar > Navigator > Campus Community > 3C Engine > Run 3C Engine

1. The 3C Engine search page displays.
2. Enter a new or existing **Run Control ID**.
3. Select the **Add** or **Search** button.



4. The Run 3C Engine page displays.
5. On the 3C Engine Parameters, complete the following steps:
 - a. In the Process 3C's section, select **Population Selection** checkbox.
 - b. In the Event Selection section, select values from the following fields:
 - **Academic Institution** = Desired Institution.
 - **Administrative Function** = FINA.
 - **Event ID** = (Description) "I-Transfer Alert Process Compl" *Note Event ID will differ between institutions.
6. In the Population Selection section, select values from the following drop-down menus:
 - **Selection Tool** = PS Query
 - **Query Name** = CTC_FA_SB_PS_NSLDS_TM_CHKL_REQ

i The query criteria is a student is not enrolled in Summer or Fall term, has a Federal Item Type in an offered status of greater than zero, and does not already have the checklist assigned.

- OR **CTC_FA_NSLDS_TM_CHKL_REQ_2**

The query criteria is a student not enrolled for the prompted term, has a Federal Item Type in an offered status of greater than zero, and does not already have a checklist assigned.

7. Select the **Edit Prompts** link.

3C Engine Parameters | Manage Duplicate Assignment

Run Control ID: Assn_Chklist | Report Manager | Process Monitor | Run

Process 3Cs

- ☒ Population Selection
- ☐ Trigger Table
- ☐ Mass Change

Process Joint Records

- ☒ No Joint Processing
- ☐ Yes, all Joint IDs
- ☐ Yes, if match exists

Event Selection

Academic Institution: WA220 | Tacoma CC

Administrative Function: FINA | Financial Aid

Event ID: FISETC062I | I-Transfer Alert Process Compl | Detail

Communication Key

Checklist Code

ETC062 | NSLDS Transfer Monitoring

Checklist Item

100 | ETC062 | NSLDS Transfer Monitoring

Comment Category

Population Selection

Selection Tool: PS Query

Query Name: CTC FA SB PS NSLDS TM CHKL REQ

[Edit Prompts](#)

[Launch Query Manager](#) | [Preview Selection Results](#)

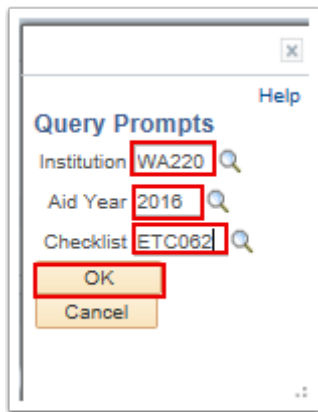
Save | Notify | Add | Update/Display

8. A Query Prompts pagelet displays.

9. Select values for the following fields:

- **Institution**
- **Aid Year**
- **Checklist Item**

10. Select the **OK** button.



11. The 3C Engine Parameters page displays.
12. Select **Preview Selection Results** and choose a student listed to validate in later section.
13. Select the **Return** button.



14. The 3C Engine Parameters tab displays.
15. Select the **Manage Duplicate Assignment Tab**.
16. Select the **Check Duplicate Checklist** checkbox from the Duplicate Checklist Check section.
17. Select **Match** from the **Variable Data** drop-down menu in the Additional Conditions to Prevent Duplicate Checklist subsection.
18. Select the **Run** button.

3C Engine Parameters **Manage Duplicate Assignment**

Run Control ID Assn_Chklist Report Manager Process Monitor **Run**

Duplicate Communication Check

☐ Check Duplicate Communication [Explain](#)

Additional Conditions to Prevent Duplicate Communication

Variable Data [Explain](#)

Communication Status [Explain](#)

Duplicate Checklist Check

☒ **Check Duplicate Checklist** [Explain](#)

Additional Conditions to Prevent Duplicate Checklist

Variable Data **Match** [Explain](#)

Checklist Status [Explain](#)

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

19. The Process Scheduler Request page displays.
20. Select the **OK** button.

Process Scheduler Request

User ID 201253052 Run Control ID Assn_Chklist

Server Name Run Date 12/14/2018

Recurrence Run Time 8:58:50AM [Reset to Current Date/Time](#)

Time Zone [?](#)

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	3C ENGINE	3CENGINE	Application Engine	Web	TXT	Distribution

OK [Cancel](#)

21. The Manage Duplicate Assignment tab displays.
22. Make note of the assigned **Process Instance** number.
23. Select the **Process Monitor** link.
24. The Process Monitor page displays.
25. On the Process List tab, select **Refresh** until **Run Status** = Success and **Distribution Status** = Posted.

Process List | Server List

View Process Request For

User ID: Type: Last: 1 Days

Server: Name: Instance From: Instance To:

Run Status: Distribution Status: ☒ Save On Refresh

Process List									
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	21356576		Application Engine	3CENGINE	201253052	12/14/2018 8:58:50AM PST	Success	Posted	Details
<input type="checkbox"/>	21356552		Application Engine	3CENGINE	201253052	12/13/2018 9:20:41AM PST	Success	Posted	Details

Go back to 3C Engine

Process List | Server List

26. The process of assigning the checklist is now complete.
27. Next, the checklist will be validated.

Validate Checklist Assigned

! You must have at least one of these local college managed security roles:

- ZD FA Director
- ZD FA Student Aid Info
- ZZ FA Student Aid Info

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Financial Aid > View Financial Aid Status

1. The Financial Aid Status search page displays.
2. Enter the **ID** from the Preview Selection Results step in previous section.
3. Enter the **Academic Institution**.
4. Enter the **Aid Year**.
5. Select the **Search** button.

Financial Aid Status

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

ID begins with

Academic Institution =

Aid Year =

National ID begins with

Campus ID begins with

Last Name begins with

First Name begins with

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1 of 1 Last

ID	Academic Institution	Aid Year	National ID	Date of Birth	Name
201277808	WA220	2016	*****	06/27/1977	Foster, Archer

- The Financial Aid Status page displays.
- Ensure the checklist has been added to the student checklist.

Financial Aid

Financial Aid Status

Foster, Archer ID 201277808

Aid Year 2015-2016 Financial Aid Year

Institution WA220

National ID 200944389

Campus ID

Birthdate 06/27/1977

Dependency Independent w/Primary EFC

EFC Status Official

Date Application Received 09/02/2015

CPS Process Date 12/01/2015

Institution Process Date 12/04/2015

Correction Status

Correction Status Date

Packaging Status Summary

Aid Application Status Active

Package Status Packaging Completed

SAP Meeting Satis Acad Progress

Review Status Review Complete

INST Verification Status Non Select

Verification Flag ED Verification Complete

Verification Status Verified

Disbursement Hold

[Checklists](#) [Personalize](#) [Find](#) [View All](#) First 1 of 1 Last

Item Code	Description	Status Date	Status
ETC062	NSLDS Transfer Monitoring	12/14/2018	Initiated

- The validation is now complete.
- Next the final step: process NSLDS.

Process NSLDS

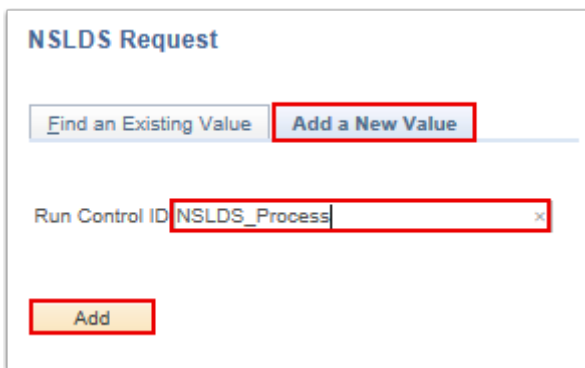
! You must have at least one of these local college managed security roles:

- ZD FA NSLDS Prcs
- ZZ FA NSLDS Prcs

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: NavBar > Navigator > Financial Aid > File Management > NSLDS > Process NSLDS Request

1. The NSLDS Request search page displays.
2. Enter a New or existing **Run Control ID**.
3. Select the **Add** or **Search** button.



4. The NSLDS Request page displays.
5. Create the transfer monitoring request by entering the following information in the **Parameters** section:
 - **Institution**
 - **School Code**
 - **Aid Year**
 - **Branch Code**
 - **File Path**
6. Complete the following steps in the **Population Selection**:
 - Check the **Population Selection** checkbox.
 - Select PS Query from the **Selection Tool** drop-down menu.
 - Select the **Query Name: CTC_FA_SB_PS_NSLDS_REQ**.
7. Select **Edit Prompts** link.

NSLDS Request

Run Control ID: NSLDS_Process Report Manager Process Monitor [Run](#)

Parameters

*Institution: *School Code: Last Submittal Date: 03/05/2018
 *Aid Year: *Branch Code: Last Sequence: 02
 *File Path:

Population Selection

☒ Population Selection

Selection Tool: [Edit Prompts](#)
 Query Name: [Launch Query Manager](#) [Preview Selection Results](#)

Request Type

☒ Financial Aid History only ☐ Transfer Monitoring only ☐ Both FAH and TM

Student Override

☐ Student Override

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

8. The Query Prompts pagelet displays.
9. Enter the following:
 - **Institution**
 - **Aid Year**
 - **Checklist** (The first three letters of the code are institution specific. Example: ETC062)
10. Select the **OK** button.

Query Prompts [Help](#)

Institution: [Search](#)
 Aid Year: [Search](#)
 Checklist: [Search](#)

11. The NSLDS Request page displays.
12. Select the **Transfer Monitor only** radio button.
13. In the **Transfer Monitoring Parameters** section, enter the following data:
 - **Enrollment Date** = 1/5/20xx (Term Start Date)
 - **Monitor Begin Date** = Current Date (same date as checklist assignment)
14. Select the **Preview Selection Results** link.

15. The Preview Selection Results page displays.
16. Select the **Return** button.
17. Select the **Run** button.

NSLDS Request

Run Control ID: NSLDS_Process Report Manager Process Monitor **Run**

Parameters

*Institution: WA220 *School Code: 003796 Last Submittal Date: 03/05/2018
 *Aid Year: 2016 *Branch Code: 00 Last Sequence: 02
 *File Path:

Population Selection

☒ Population Selection
 Selection Tool: PS Query Edit Prompts
 Query Name: CTC_FA_SB_PS_NSLDS_REQ Launch Query Manager **Preview Selection Results**

Request Type

☐ Financial Aid History only ☒ **Transfer Monitoring only** ☐ Both FAH and TM

Transfer Monitoring Parameters

Enrollment Date: Monitor Begin Date: ☐ Delete from TM

Student Override

☐ Student Override

Save Notify Add Update/Display

18. The Process Scheduler Request page displays.
19. Select the **OK** button.
20. The NSLDS Request page displays.
21. Make note of the newly assigned **Process Instance** number.
22. Select the **Process Monitor** link.
23. The Process Monitor page displays.
24. On the Process List tab, select the **Refresh** button until the **Run Status** = Success and the **Distribution Status** = Posted.
25. Select the **Details** link.
26. The Message Log page displays.
27. Verify that the details in the **Message Log** file states that the NSLDS Request file <file path name used above> TRNINFIN.## successfully created.
28. Sample message: **NSLDS Request file** /u01/app/psrepo/Interface/CSTRANSFER/WA171/NSLDS2016/ TRNINFIN.01
29. Note the TRNINFIN.xx file created to use during the Upload/Download process.
30. You have successfully processed a NSLDS Request.
31. End of procedure.