

## 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.



The screenshot shows the '3C Engine' search interface. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these is a text input field labeled 'Run Control ID' with the value 'Assn\_Chklist' entered. At the bottom left, there is an 'Add' 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 | **Edit Prompts**

Query Name: CTC\_FA\_SB\_PS\_NSLDS\_TM\_CHKL\_REQ | Launch Query Manager | Preview Selection Results

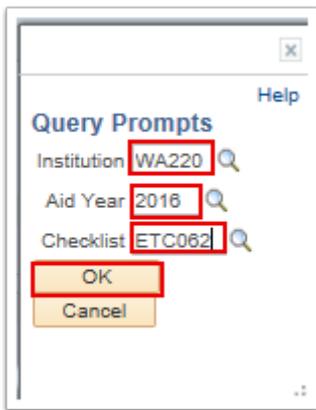
Save | Notify | Add | Update/Display

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

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     

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

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** Personalize | Find | View All |  |  First 1-2 of 2 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	21356578		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

6. The Financial Aid Status page displays.
7. 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

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

# Process NSLDS

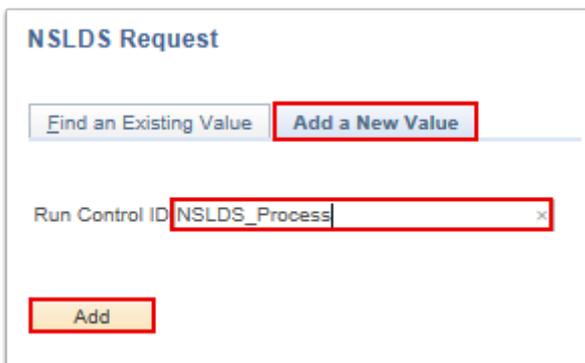
**!** You must have at least one of these local college managed security roles:

- 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.



The screenshot shows the 'NSLDS Request' search interface. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' button is highlighted with a red border. Below these buttons is a text input field labeled 'Run Control ID' with the text 'NSLDS\_Process' entered. Below the input field is an 'Add' button, also highlighted with a red border.

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: 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

---

**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: WA220  
 Aid Year: 2016  
 Checklist: ETC062

[OK](#)  
[Cancel](#)

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.

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.