

Session #2

Advanced Direct Loan Processing in the Common Origination and Disbursement System for FAAs

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Agenda

- Adding and Removing New Users
- Direct Loan School Options Information
- Borrower-Servicer Relationship
- Return to Previous Screen(s)
- Action Queue
- Batch Information Menu
- Financial Information
 - Funding Info
 - Summary Financial Info
 - Refunds of Cash
 - Cash Activity
- Reports
- Wrap-up
- Questions?

Agenda

- Providing COD Access to new users at your school
- Deactivating COD Access for former users at your school
- COD User Roles

Access to the COD System

- Two types of COD Users:
 - Level 5 (all access)
 - Levels 1-4
- Level 5 Access requires a written letter on school letterhead
- Access for Levels 1-4 requires the COD System Administrator (Level 5 User) to add that user directly online

Access to the COD System

The screenshot shows the 'User Search' page of the COD System. At the top, there is a header with the U.S. Department of Education logo, the text 'U.S. DEPARTMENT OF EDUCATION COMMON ORIGINATION & DISBURSEMENT', and the FSA Federal Student Aid logo. Below the header is a navigation bar with tabs for 'Person', 'School', 'Batch', 'Award', 'Services', and 'User'. The 'User' tab is selected. On the left side, there is a sidebar with a 'User Search' dropdown menu and two links: 'Update Your Profile' and 'Message Search'. The main content area is titled 'User Search' and includes a 'HELP' icon. Below the title, there is a text instruction: 'Use this screen to search for existing user profiles to modify.' The search form contains several fields: 'Entity ID' (a dropdown menu showing 'COD - 10000356 - SOUTHEAST MISSOURI STATE'), 'First Name', 'Last Name', 'Email Address', 'User Name', and 'Role' (a dropdown menu showing 'All'). At the bottom of the form are two buttons: 'SEARCH' and 'CREATE NEW'. The footer of the page displays the date and time 'Jan 06 2011 07:25 EST' and a series of links: 'Home | Privacy Act | Links | Contact Us | Today's Update | Help | Glossary | Log Off'.



Access to the COD System



▼ User Search Create Profile ? HELP
▶ Update Your Profile Enter user information and click "Submit" to create user.
▶ Message Search

First Name: test
Last Name: user
Keyword: maiden name
Phone Number: 222-333-4444
Email Address: wendy.jerrel@d.ed.gov
User Role: School User 3 - View/Update
Entity Id: School User 1 - Credit Check and View
 School User 2 - View Only
 School User 3 - View/Update
 School User 4 - View/Update CC
New Password:
Re-enter New Password:
SUBMIT

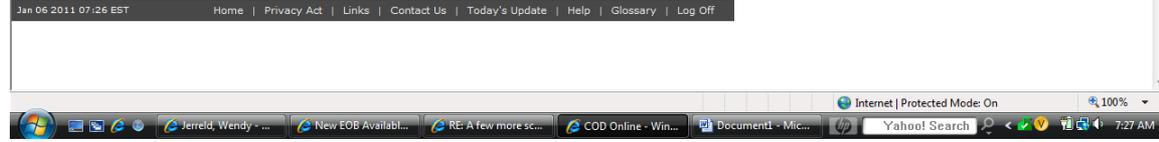


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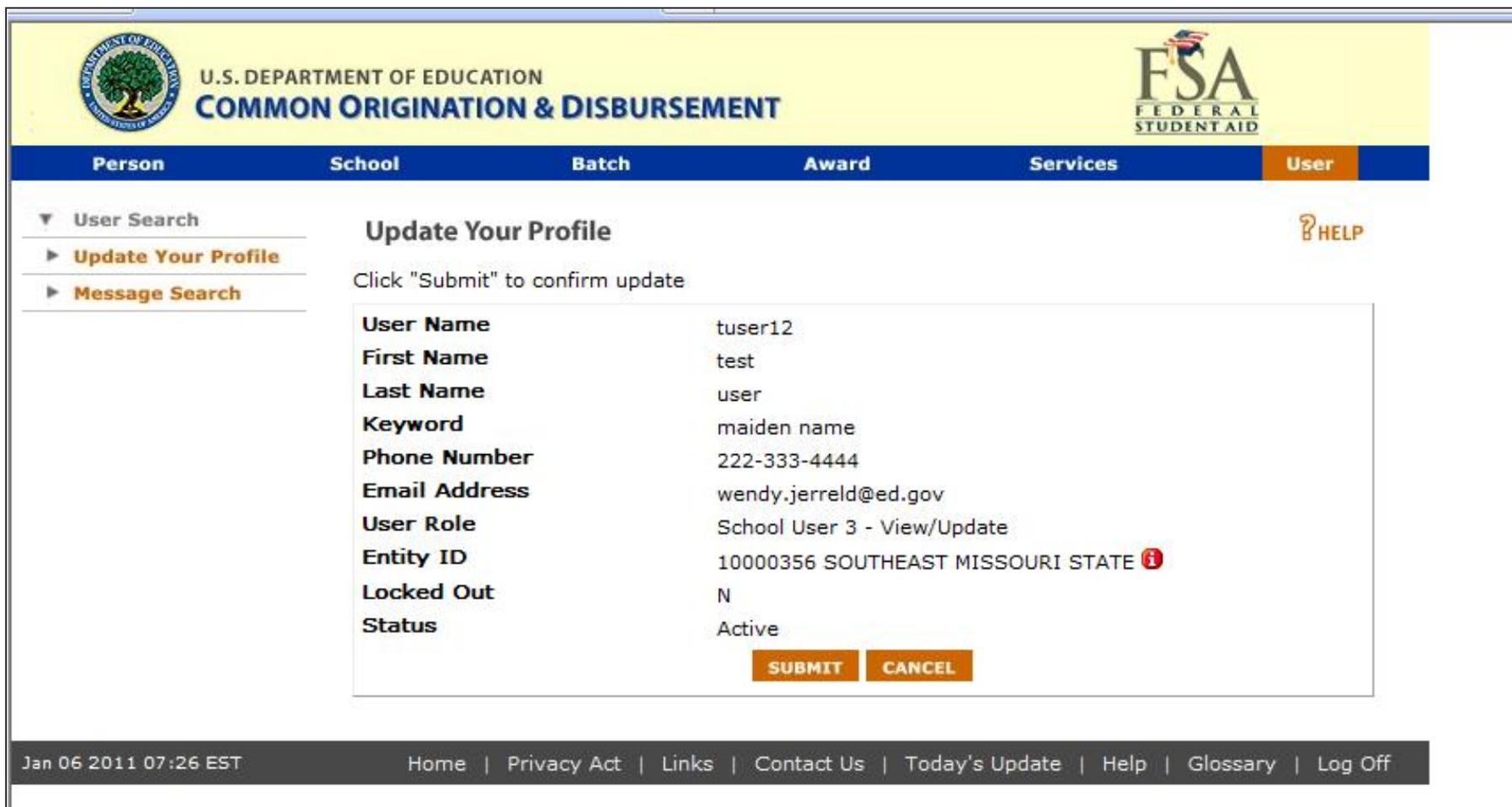
Person School Batch Award Services User

▼ User Search Create Profile ? HELP
▶ Update Your Profile Enter user information and click "Submit" to create user.
▶ Message Search

First Name: test
Last Name: user
Keyword: maiden name
Phone Number: 222-333-4444
Email Address: wendy.jerrel@d.ed.gov
User Role: School User 3 - View/Update
Entity Id: Entity ID COD - 10000356 - SOUTHEAST MISSOURI STATE
New Password:
Re-enter New Password:
SUBMIT



Access to the COD System



The screenshot shows the user interface for the COD System. At the top, there is a header with the U.S. Department of Education logo and the text "U.S. DEPARTMENT OF EDUCATION COMMON ORIGATION & DISBURSEMENT". To the right is the FSA Federal Student Aid logo. Below the header is a navigation bar with tabs for "Person", "School", "Batch", "Award", "Services", and "User". The "User" tab is selected. On the left side, there is a sidebar with a "User Search" dropdown menu containing "Update Your Profile" and "Message Search". The main content area is titled "Update Your Profile" and includes a "HELP" link. Below the title, there is a message: "Click 'Submit' to confirm update". A table displays the user's profile information:

User Name	tuser12
First Name	test
Last Name	user
Keyword	maiden name
Phone Number	222-333-4444
Email Address	wendy.jereld@ed.gov
User Role	School User 3 - View/Update
Entity ID	10000356 SOUTHEAST MISSOURI STATE ⓘ
Locked Out	N
Status	Active

At the bottom of the profile table, there are two buttons: "SUBMIT" and "CANCEL". The footer of the page contains the date and time "Jan 06 2011 07:26 EST" and a series of links: "Home | Privacy Act | Links | Contact Us | Today's Update | Help | Glossary | Log Off".



Access to the COD System

From: donotreply_u2495@cod.ed.gov [donotreply_u2495@cod.ed.gov]
Sent: Thursday, January 06, 2011 7:27 AM
To: Jerreld, Wendy
Subject: Welcome to the Common Origination and Disbursement System

Welcome, test user to the Common Origination and Disbursement (COD) System. You have been set up as a School User 3 - View/Update. Your user name is tuser12.

Your password will be coming in a separate email.

To log into the site, please go to:

<https://cod.u2495.tsysecom.com>

If you have received this email in error or have any questions about it, please respond to this email.

This message is for the designated recipient only and may contain privileged, proprietary, or otherwise private information. If you have received it in error, please notify the sender immediately and delete the original. Any other use of the email by you is prohibited.



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Access to the COD System

From: donotreply_u2495@cod.ed.gov [donotreply_u2495@cod.ed.gov]
Sent: Thursday, January 06, 2011 7:27 AM
To: Jerreld, Wendy
Subject: Welcome to the Common Origination and Disbursement System

Welcome, test user to the Common Origination and Disbursement (COD) System. You have been set up as a School User 3 - View/Update.

Your temporary password is Codset00.

Your user name will be coming in a separate email.

After logging in to COD, you will need to change your temporary password. Passwords are case sensitive and must be eight characters in length. Passwords should consist of at least three of the following four criteria: English uppercase letters (A-Z), English lowercase letters (a-z), westernized Arabic numerals (0-9) or non-alphanumeric special characters (!, @, \$, &, *).

To log into the site, please go to:

<https://cod.u2495.tsysecom.com>

If you have received this email in error or have any questions about it, please respond to the email.

This message is for the designated recipient only and may contain privileged, proprietary, or otherwise private information. If you have received it in error, please notify the sender immediately and delete the original. Any other use of the email by you is prohibited.

Thank you,
COD Administrator



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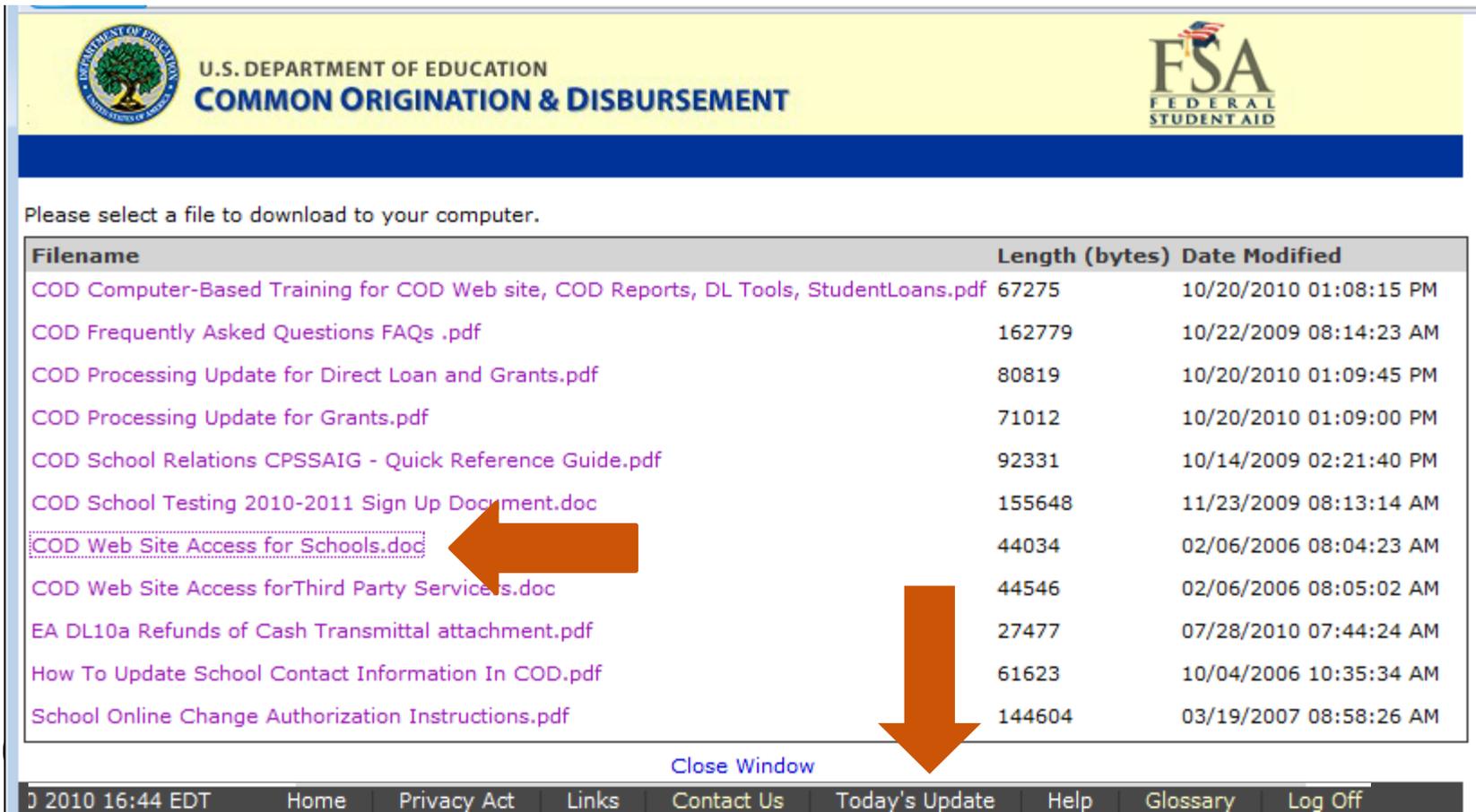
COD User Roles Chart

COD Web Site Functionality	School User Roles					Third Party Servicer User Roles				
	1 - Credit Check	2 - View Only	3 - View/ Update	4 - View/ Update CC	5 - Admin	1- Credit Check	2-View Only	3- View/ Update	4- View/ Update CC	5- Admin
Add and update school contact and address information					▼					▼
Create new users, update user profiles, lock/unlock users, and reset user passwords					▼					▼
Add, edit, and delete school messages					▼					▼
Update school processing options					▼					▼
Create and update person			▼	▼	▼			▼	▼	▼
Create and update awards			▼	▼	▼			▼	▼	▼
Create and update disbursements			▼	▼	▼			▼	▼	▼
Order and Re-request school correspondence			▼	▼	▼			▼	▼	▼
Request Pell Grant Administrative Relief			▼	▼	▼			▼	▼	▼
Update school report options for Direct Loan			▼	▼	▼			▼	▼	▼
Request credit check and resubmit credit check request for Direct Loan	▼			▼	▼	▼			▼	▼
Update School Balance Confirmation for Direct Loan			▼	▼	▼			▼	▼	▼



Access to the COD System

- See "COD Web Site Access for Schools" document to add a Level 5 user:



Please select a file to download to your computer.

Filename	Length (bytes)	Date Modified
COD Computer-Based Training for COD Web site, COD Reports, DL Tools, StudentLoans.pdf	67275	10/20/2010 01:08:15 PM
COD Frequently Asked Questions FAQs .pdf	162779	10/22/2009 08:14:23 AM
COD Processing Update for Direct Loan and Grants.pdf	80819	10/20/2010 01:09:45 PM
COD Processing Update for Grants.pdf	71012	10/20/2010 01:09:00 PM
COD School Relations CPSSAIG - Quick Reference Guide.pdf	92331	10/14/2009 02:21:40 PM
COD School Testing 2010-2011 Sign Up Document.doc	155648	11/23/2009 08:13:14 AM
COD Web Site Access for Schools.doc	44034	02/06/2006 08:04:23 AM
COD Web Site Access forThird Party Services.doc	44546	02/06/2006 08:05:02 AM
EA DL10a Refunds of Cash Transmittal attachment.pdf	27477	07/28/2010 07:44:24 AM
How To Update School Contact Information In COD.pdf	61623	10/04/2006 10:35:34 AM
School Online Change Authorization Instructions.pdf	144604	03/19/2007 08:58:26 AM

Close Window

© 2010 16:44 EDT Home Privacy Act Links Contact Us Today's Update Help Glossary Log Off

Removing User Access to the COD System

- User Levels 1-4 can be deactivated by the school's COD System Administrator
 - User Profile screen in COD
 - Deactivate and submit
- User Level 5 requires a written request to COD
 - This request can be faxed to 877-623-5082



Agenda

- Direct Loan School Options Information
 - MPN Print Option
 - Web Activity Response Option

School Options Information

- Release 9.2 implemented October 9-10th
 - Changed COD procedure for notifying borrowers who need an MPN
 - COD will now automatically e-mail borrowers who are missing an MPN
 - MPN option must be set to “Y”
 - Immediately upon receipt of LOR (loan origination record) and at 15 days
 - Only to borrowers whose LOR contains a valid e-mail address



School Options Information



- Eligibility
- General
- Options
- Funding Info
- Summary Financial Info
- Refunds of Cash
- Cash Activity
- Events
- Memos
- Yearly Totals
- Relationships
- Balance Confirmation
- Correspondence
- Report Selection

► **Post Deadline Proc**

CFL Option 0005
Call For Cash Option 0001

Program Relations Information

Number of Future Days to Accept Disbursements: 007
Number of Future Days to Display Disbursements: 014
Allow Drawdowns: Y
COD Automatically Generates Payment to School Based on Disbursements: N
Promissory Notes Type Option: Multi Year
Web Activity Response Option: Y
Schema Version for System Generated Response: 3.0c

Main Campus Information

Promissory Note Print Option: Y
Disbursements Funded Without Accepted Note: N
Disclosure Print Option: Y
Participate in Electronic Parent PLUS Application: Y
Electronic Parent PLUS Application Participation Begin Date: 04/26/2010
Parent PLUS Application Response Option: Daily
Participate in Electronic Grad PLUS Application: Y
Electronic Grad PLUS Application Participation Begin Date: 04/26/2010
Grad PLUS Application Response Option: Daily

UPDATE

eMPN School Options (Non-Award Year Specific)

eMPN Participation: Y
LOR Required: N
Multiple Location: N
Messane:



School Options Information

- Web Activity Response Option
 - Should be set to “Y” for schools who submit records via batch for processing
 - Will allow school to receive responses to changes made via web for import
 - School system will match COD
 - File name CRWBXXOP
- Check with your software provider to determine if your system can import and process the CRWB file



Web Activity Response Option

Eligibility	CFL Option	0005
General	Call For Cash Option	0001
Options		
Funding Info	Program Relations Information	
Summary Financial Info	Number of Future Days to Accept Disbursements:	007
Refunds of Cash	Number of Future Days to Display Disbursements:	014
Cash Activity	Allow Drawdowns:	Y
Events	COD Automatically Generates Payment to School Based on Disbursements:	N
Memos	Promissory Notes Type Option:	Multi Year
Yearly Totals	Web Activity Response Option:	Y
Relationships	Schema Version for System Generated Response:	3.0c
Balance Confirmation		
Correspondence		
Report Selection		
► Post Deadline Proc		
	Main Campus Information	
	Promissory Note Print Option:	Y
	Disbursements Funded Without Accepted Pnote:	N
	Disclosure Print Option:	Y
	Participate in Electronic Parent PLUS Application:	Y
	Electronic Parent PLUS Application Participation Begin Date:	04/26/2010
	Parent PLUS Application Response Option:	Daily
	Participate in Electronic Grad PLUS Application:	Y
	Electronic Grad PLUS Application Participation Begin Date:	04/26/2010
	Grad PLUS Application Response Option:	Daily
	UPDATE	
	eMPN School Options (Non-Award Year Specific)	
	eMPN Participation:	Y
	LOR Required:	N
	Multiple Location:	N
	Message:	



Agenda

- Borrower Servicer Relationship
 - Person Information Menu
 - Servicer Contact Information

Borrower Servicer Relationship

- First actual disbursement books the Direct Loan
 - CRBN file is sent to the school
 - Loan data is sent from COD to the servicer
- Loan Servicer information displayed in COD for the school
- Loan Servicer information displayed in NSLDS for the borrower (www.nsls.ed.gov)

Borrower Servicer Relationship

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Person School Batch Award Services User Program

▶ Person Search
▶ Person Info
▶ Counseling Search
▶ MPN/ATS Search
▶ PLUS App Search
▶ Credit Check
▶ Applicant Search
▼ **Servicer**

Borrower Servicer Relationship HELP

Award ID	Attending School	Servicer Name	Servicer ID	Booked Date	Initial Servicer Relationship Established Date	Previous Servicer ID	Loan Transfer Date
		DEPT OF ED GREAT LAKES	700581	09/07/2010	09/07/2010		

Oct 15 2010 14:59 EDT Home Privacy Act Links Contact Us Today's Update Help Glossary Log Off

Borrower Servicer Relationship (Contacts)

FedLoan Servicing (PHEAA)

NSLDS Servicer Code: 700579

NSLDS Name:

Dept of ED/ FedLoan Servicing (PHEAA)

Borrower Phone: 800-699-2908

Web: www.myfedloan.org

School Phone: 800-655-3813

Web: www.myfedloan.org

Great Lakes Educational Loan Services

NSLDS Servicer Code: 700581

NSLDS Name: **Dept of ED/ Great Lakes**

Borrower Phone: 800-236-4300

Web: www.mygreatlakes.org

School Phone: 888-686-6919

Web: www.mygreatlakes.org



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Borrower Servicer Relationship (Contacts)

Nelnet

NSLDS Servicer Code: 700580

NSLDS Name: **Dept of ED / Nelnet**

Borrower Phone: 888-486-4722

Web: www.nelnet.com

School Phone: 866-463-5638

Web: www.nelnet.com

Sallie Mae

NSLDS Servicer Code: 700578

NSLDS Name: **Dept of ED / Sallie Mae**

Borrower Phone: 800-722-1300

Web: www.salliemae.com

School Phone: 888-272-4665

Web: www.opennet.salliemae.com



Borrower Servicer Relationship (Contacts)

Direct Loan Servicing Center
NSLDS Servicer Code: 00100

NSLDS Name: **Direct Loan Servicing Center**

Borrower Phone: 800-848-0979

Web: www.dl.ed.gov

School Phone: 888-877-7658

Web: www.dl.ed.gov/schools

Student Loan Servicing Center (ACS)
NSLDS Servicer Code: 700577

NSLDS Name: **Dept of ED / ACS**

Borrower Phone: 800-508-1378

Web: www.ed-servicing.com

School Phone: 866-938-4750

Web: www.ed-servicing.com



Agenda

- Returning to Previous Screen(s)
- Action Queue
 - Actual Disbursements
 - Direct Loan Reconciliation

Returning to Previous Screen(s)

- “Crumb” Trail near top of screen is preferred to browser “back” button
 - Available on most COD screens
 - Allows the user to return to a desired screen in COD



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Person

School

Batch

Award

Services

User

Program

▶ **Award Search**

Return to: [Promissory Note Detail](#) -> [Award Detail](#) -> [Disbursement List](#) -> [Disbursement Detail](#)

Disbursement History Information

▶ **Award Information**

? **HELP**



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Action Queue

- The Action Queue allows users to enter multiple actual disbursements directly online
 - Simply mark the checkbox to make a disbursement
 - Date changes cannot be made
- Available from the Batch menu

Action Queue

- Schools can use the Action Queue to assist in monthly reconciliation
 - Action Queue will list any disbursements in a “Pending” status within a given date range
 - Schools can use this to determine if loans should have been disbursed



Action Queue

Action Queue List HELP

School: [] Disb. Start Date: 01/06/1999 Disb. End Date: 01/06/2011

Filter by Status: All Filter by Program Type: All

Filter by SSN: [] Filter by Last Name: []

FILTER **RESET**

Records 1 to 9 of 9

Select	Name	SSN	Prog.	Award Year	Disb. No.	Seq. No.	Disb. Amt.	Disb. Date	Status
<input type="checkbox"/>			DLSUB	'10-'11	1	01	\$995.00	12/05/2010	Pending
<input type="checkbox"/>			DLPLUS	'10-'11	1	01	\$975.00	12/09/2010	Pending
<input type="checkbox"/>			DLPLUS	'10-'11	1	01	\$975.00	12/14/2010	Pending
<input type="checkbox"/>			DLSUB	'10-'11	1	01	\$995.00	12/15/2010	Pending
<input type="checkbox"/>			DLSUB	'10-'11	1	01	\$1,990.00	12/15/2010	Pending
<input type="checkbox"/>			DLPLUS	'10-'11	1	01	\$1,170.00	12/17/2010	Pending
<input type="checkbox"/>			DLPLUS	'10-'11	1	01	\$975.00	12/17/2010	Pending
<input type="checkbox"/>			DLSUB	'10-'11	1	01	\$995.00	01/03/2011	Pending
<input type="checkbox"/>			DLSUB	'10-'11	5	01	\$100.00	01/06/2011	Pending

Records 1 to 9 of 9 **Total Disb. Amount:** \$9,170.00

Select All Clear All

PROCESS SELECTED DISBURSEMENTS



Agenda

- Batch Information Menu
 - Searches
 - Reviewing rejected records
 - Person Search
 - Viewing PLUS Application Data
 - Viewing MPN Data
 - Viewing Entrance Counseling Data

Batch Information Menu

- Allows the user to search batches for a particular school, batch or student
 - School data can be searched by date range, status and type of data
 - Student data can be searched by award year and status
- Allows the user to see reason(s) for rejected data at the transaction level
- Allows the user to see transactions for a particular student in chronological order

Batch Information Menu

60-day
limit on
date range
search

Batch Search HELP

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**

Batch Type All

Award Year All

Start Date October 17 2010

End Date October 17 2010

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 the list by status, enter the status:

SSN

Status All

Award Year '10-'11

SEARCH



Batch Information Menu – Viewing a Rejected Record

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[School](#) | [Batch](#) | [Award](#) | [Services](#) | [User](#) | [Program](#)

Return to: [Batch List](#) -> [Batch Detail](#)

Record Errors ? HELP

Document ID	Entity Id	Award Year	Person
2010-09-08T18:06:26.4774148137		'10-'11	

Award Error

Field	FinancialAwardAmount
Edit number	039
Description	INCORRECT AWARD AMOUNT
Edit status	Rejected
Field value	\$15,500.00

[VIEW RECORD](#) | [VIEW RESPONSE](#)

Disbursement 1 Error

Field	DisbursementReleaseIndicator
Edit number	054
Description	DISBURSEMENT DATE WITHIN 7 DAYS OR PASSED, PAYMENT TRIGGER SET TO N
Edit status	Warning
Field value	N

[VIEW RECORD](#) | [VIEW RESPONSE](#)

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Batch Information Menu – Correcting a Rejected Record

039	C/R	Award, Disbursement	Incorrect Award Amount	<p>Award and/or Disbursement amount exceeds the maximum annual limit (Pell/DL).</p> <p>Pell: Refer to the Federal Student Aid Handbook for maximum annual limits.</p> <p>Direct Loan Subsidized: Grade Level = 0 or 1 Max = 3500 Grade Level = 2 Max = 4500 Grade Level = 3, 4, 5 Max = 5500 Grade Level \geq6 Max = 8500</p>	Pell Direct Loan	<p>Pell: Review the maximum annual limit for this award. If appropriate, update this field and resubmit.</p> <p>Direct Loan: Review the maximum annual loan limit for this award. Also, review all sub/unsub awards and actual disbursements made for this student. If appropriate, update award and/or disbursement amount(s) and resubmit.</p>
-----	-----	---------------------	------------------------	--	---------------------	--

September 2010

2010-2011 COD Technical Reference
Volume II – Common Record Technical Reference

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Award and/or Disbursement amount exceeds the maximum annual limit (Pell/DL).

Pell:
Refer to the Federal Student Aid Handbook for maximum annual limits.

Direct Loan Subsidized:
Grade Level = 0 or 1 Max = 3500
Grade Level = 2 Max = 4500
Grade Level = 3, 4, 5 Max = 5500
Grade Level \geq 6 Max = 8500

Direct Loan:
Review the maximum annual loan limit for this award. Also, review all sub/unsub awards and actual disbursements made for this student. If appropriate, update award and/or disbursement amount(s) and resubmit.



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Batch Information Menu – Person Search

Search Results ? HELP

Enter filter criteria here to narrow down your search.

Status: All

Batch Type: All

Document ID	Record Type	Doc Type	Date Received	Date Response Sent	Entity	Award Year	Name	SSN	Award Type	Award No	Disb No
2010-05-24T09:42:17.	DL	RS	05/24/2010	05/24/2010		'10-'11		. Accepted	DLU	001 - Accepted	01 - Accepted
2010-05-24T09:42:17.	DL	RS	05/24/2010	05/24/2010		'10-'11		. Accepted	DLU	001 - Accepted	02 - Accepted
2010-07-12T13:11:13.	DL	RS	07/12/2010	07/13/2010		'10-'11		. Accepted	DLU	001 - Accepted	01 - Accepted
2010-07-12T13:11:13.	DL	RS	07/12/2010	07/13/2010		'10-'11		. Accepted	DLU	001 - Accepted	02 - Accepted
2010-07-20T04:10:01.	DL	EC	07/20/2010	07/20/2010		'10-'11		. Accepted	DLS	000 - Accepted	
2010-07-20T04:10:04.	DL	PN	07/20/2010	07/20/2010		'10-'11		. Accepted	DLU	001 - Accepted	
2010-07-20T04:58:00.	DL	PN	07/20/2010	07/20/2010		'10-'11		. Accepted	DLU	001 - Accepted	
2010-07-27T04:22:53.	DL	SP	07/27/2010	07/27/2010		'10-'11		. Accepted	DLP	000 - Accepted	
2010-07-29T11:36:50.	DL	RS	08/04/2010	08/04/2010		'10-'11		. Accepted	DLU	001 - Rejected	01 - Rejected
2010-07-29T11:36:50.	DL	RS	08/04/2010	08/04/2010		'10-'11		. Accepted	DLU	001 - Rejected	02 - Rejected
2010-08-18T12:43:43.	DL	RS	08/18/2010	08/19/2010		'10-'11		. Accepted	DLU	001 - Accepted	01 - Accepted
2010-08-18T12:43:43.	DL	RS	08/18/2010	08/19/2010		'10-'11		. Accepted	DLU	001 - Accepted	02 - Accepted
2010-08-23T16:28:04.	DL	RS	08/24/2010	08/24/2010		'10-'11		. Accepted	DLU	001 - Accepted	01 - Accepted
2010-08-25T06:20:21.	DL	RN	08/25/2010	08/25/2010		'10-'11		. Accepted	DLU	001 - Accepted	



Batch Information Menu – PLUS Application Information

Award Information	
Financial Award Type	DLPLUS
Award Year	2011
Application Number	
Credit Decision Status	D
Credit Decision Date	08/02/2010
Credit Expiration Date	10/31/2010
Application Complete Date	08/02/2010
Max Loan Indicator	true
Credit Action Choice	E
Response Indicator	A

Borrower Information			
Borrower Identifier	SSN	DOB	Last Name
Borrower First Name			
Borrower Middle Initial			
Address Line 1			
City			
State			
Zip			
Phone			
Email			
Citizenship Status	1		
Endorser Amount	50000.00		



Batch Information Menu – Master Promissory Notes

- Recent Master Promissory Note information can be viewed on the batch screen
 - View by school batch data
 - View by individual student data
- Promissory Note type displayed
- Link to loan indicator (True/False)

View MPN Batch Data by School

- MPN batches denoted by Doc Type "PN"
- All MPNs on a single day sent to school in one batch
- Individual student details can be viewed from here
 - "DLP" denotes a PLUS MPN
 - "DLS" and "DLU" denote a Stafford MPN

View MPN Batch Data by School

10/16/2010 10/16/2010 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.

Summary information does not exist for Document ID 2010-10-16T00:24:30.5000000002.

Enter filter criteria here to narrow down your search.

SSN: Status: All

Award Type: All

Award Year	Name	SSN	Award Type	Award No	Disb No
'10-'11		- Accepted	DLP	000 - Accepted	
'10-'11		- Accepted	DLP	000 - Accepted	
'10-'11		- Accepted	DLU	000 - Accepted	
'10-'11		- Accepted	DLP	000 - Accepted	
'10-'11		- Accepted	DLU	000 - Accepted	
'10-'11		- Accepted	DLU	000 - Accepted	
'10-'11		- Accepted	DLP	001 - Accepted	
'10-'11		- Accepted	DLS	001 - Accepted	
'10-'11		- Accepted	DLU	001 - Accepted	
'10-'11		- Accepted	DLS	001 - Accepted	

Click on "Accepted" in the "Award No" Column to see details about a particular student



MPN Response Data Viewed from Batch (Stafford)

Response Information HELP

Common Record Information

Document ID
Attending Entity ID
Reporting Entity ID
Processed Response Date
Full Response Code

Student Information

Student Identifier	SSN	DOB	Last Name
Student First Name			
Student Middle Initial			
Response Indicator		A	

Award Information

Financial Award Type	DLUnsubsidized
Award Year	2011
Award ID	
Financial Award Number	001
Loan Key	01
EMPN Indicator	true
MPN ID	
MPN Status	A
MPN Expiration Date	07/16/2020
MPN Link Flag	true
Response Indicator	A

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MPN Response Data Viewed from Batch (PLUS)

Return to: [Batch List](#) ? HELP

Response Information

[Redacted]

[Redacted]

Common Record Information

Document ID
 Attending Entity ID
 Reporting Entity ID
 Processed Response Date
 Full Response Code

Student Information			
Student Identifier	SSN	DOB	Last Name
Student First Name			
Student Middle Initial			
Response Indicator	A		

Award Information

Financial Award Type: DLPLUS
 Award Year: 2011
 Award ID:
 Financial Award Number: 001
 Award Amount Requested: 17800.00
 Loan Key: 01
 EMPN Indicator: true

MPN ID	[Redacted]		
MPN Status	A		
MPN Link Flag	true		
Response Indicator	A		

Borrower Information			
Borrower Identifier	SSN	DOB	Last Name
Borrower First Name			

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View MPN Batch Data by Student

School	Batch	Award	Services	User	Program						
<p>Search Results</p> <p>Enter filter criteria here to narrow down your search.</p> <p>Status: All</p> <p>Batch Type: All</p>											
Document ID	Record Type	Doc Type	Date Received	Date Response Sent	Entity	Award Year	Name	SSN	Award Type	Award No	Disb No
	DL	PN	04/05/2010	04/05/2010		'10-'11		- Accepted	DLU	000 - Accepted	
	DL	PN	04/05/2010	04/05/2010		'10-'11		- Accepted	DLP	000 - Accepted	
	DL	RS	07/28/2010	07/28/2010		'10-'11		- Accepted	DLS	001 - Accepted	01 - Accepted
	DL	RS	07/28/2010	07/28/2010		'10-'11		- Accepted	DLS	001 - Accepted	02 - Accepted
	DL	RS	07/28/2010	07/28/2010		'10-'11		- Accepted	DLU	001 - Accepted	01 - Accepted
	DL	RS	07/28/2010	07/28/2010		'10-'11		- Accepted	DLU	001 - Accepted	02 - Accepted
	DL	RS	07/28/2010	07/28/2010		'10-'11		- Accepted	DLP	001 - Accepted	01 - Accepted
	DL	RS	07/28/2010	07/28/2010		'10-'11		- Accepted	DLP	001 - Accepted	02 - Accepted



View Entrance Counseling Batch Data by School

- Entrance Counseling batches denoted by Doc Type "EC"
- All Entrance Counseling results on a single day sent to school in one batch
- Individual student details can be viewed from here
 - "DLP" denotes Entrance Counseling for graduate students
 - "DLS" and "DLU" denote Entrance Counseling for undergraduate students



View Entrance Counseling Batch Data by School

Search Results ? HELP

Enter filter criteria here to narrow down your search.

Status: All

Batch Type: All

Document ID	Record Type	Doc Type	Date Received	Date Response Sent	Entity	Award Year	Name	SSN	Award Type	Award No	Disb No
2010-05-24T09:42:17.	DL	RS	05/24/2010	05/24/2010		'10-'11		. Accepted	DLU	001 - Accepted	01 - Accepted
2010-05-24T09:42:17.	DL	RS	05/24/2010	05/24/2010		'10-'11		. Accepted	DLU	001 - Accepted	02 - Accepted
2010-07-12T13:11:13.	DL	RS	07/12/2010	07/13/2010		'10-'11		. Accepted	DLU	001 - Accepted	01 - Accepted
2010-07-12T13:11:13.	DL	RS	07/12/2010	07/13/2010		'10-'11		. Accepted	DLU	001 - Accepted	02 - Accepted
2010-07-20T04:10:01.	DL	EC	07/20/2010	07/20/2010		'10-'11		. Accepted	DLS	000 - Accepted	
2010-07-20T04:10:04.	DL	PN	07/20/2010	07/20/2010		'10-'11		. Accepted	DLU	001 - Accepted	
2010-07-20T04:58:00.	DL	PN	07/20/2010	07/20/2010		'10-'11		. Accepted	DLU	001 - Accepted	
2010-07-27T04:22:53.	DL	SP	07/27/2010	07/27/2010		'10-'11		. Accepted	DLP	000 - Accepted	
2010-07-29T11:36:50.	DL	RS	08/04/2010	08/04/2010		'10-'11		. Accepted	DLU	001 - Rejected	01 - Rejected
2010-07-29T11:36:50.	DL	RS	08/04/2010	08/04/2010		'10-'11		. Accepted	DLU	001 - Rejected	02 - Rejected
2010-08-18T12:43:43.	DL	RS	08/18/2010	08/19/2010		'10-'11		. Accepted	DLU	001 - Accepted	01 - Accepted
2010-08-18T12:43:43.	DL	RS	08/18/2010	08/19/2010		'10-'11		. Accepted	DLU	001 - Accepted	02 - Accepted
2010-08-23T16:28:04.	DL	RS	08/24/2010	08/24/2010		'10-'11		. Accepted	DLU	001 - Accepted	01 - Accepted
2010-08-25T06:20:21	DL	RN	08/25/2010	08/25/2010		'10-'11		. Accepted	DLU	001 - Accepted	



View Entrance Counseling Batch-Details (Undergraduate)



U.S. DEPARTMENT OF EDUCATION
COMMON ORIGATION & DISBURSEMENT



Person
School
Batch
Award
Services
User
Program

Return to: [Batch List](#)

Record Information ? HELP

Common Record Information

Document ID
 Attending Entity ID
 Reporting Entity ID
 Created Date Time
 Full Response Code

Student Information

Student Identifier	SSN	DOB	Last Name
Student First Name			
Student Middle Initial			

Award Information

Financial Award Type: Direct Loan Entrance Counseling
 Award Year: 2011
 Financial Award Number: 000

VIEW PERSON DATA
VIEW AWARD DATA
VIEW RESPONSE

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View Entrance Counseling Batch-Details (Graduate)

▼ Batch Search

▶ Action Queue

▶ Grant Data Requests

▶ PLUS App Rsp Request

▶ DL Origination Tool

Return to: [Batch List](#)

Record Information ? HELP

Common Record Information

Document ID
 Attending Entity ID
 Reporting Entity ID
 Created Date Time
 Full Response Code

Student Information

Student Identifier	SSN	DOB	Last Name
Student First Name			
Student Middle Initial			

Award Information

Financial Award Type	Direct Loan Entrance Counseling with Grad PLUS
Award Year	2011
Financial Award Number	000
Application Complete Date	
Loan Amount	0.00
Credit Balance Option	

VIEW PERSON DATA
VIEW AWARD DATA
VIEW RESPONSE

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Agenda

- Direct Loan Funding Information screens
 - Funding Information
 - Summary Financial Information
 - Refunds of Cash
 - Cash Activity

School Funding Information

- Contains updated information on such items as:
 - Available Funding Balance
 - Target Cash > Net Accepted & Posted Disbursements
 - Net Drawdowns
 - Disbursement to Drawdown Ratio

School Funding Information

Person **School** Batch Award Services User Program

▶ School Search

▼ School Information

- School Summary
- Financial Aid Contact
- Eligibility
- General
- Options
- Funding Info
- Summary Financial Info
- Refunds of Cash
- Cash Activity
- Events
- Memos
- Yearly Totals
- Relationships
- Balance Confirmation
- Correspondence
- Report Selection

▶ Post Deadline Proc

School Funding Information HELP

Funding Information

Program Award Year

Entity ID	
Initial CFL	\$23,760,300.00
Current CFL	\$23,760,300.00
Previous CFL	\$0.00
CFL Adjustment	\$23,760,300.00
Last CFL Change Date & Time	04/06/2010 17:11:36
Available Balance	\$3,610,300.00
Cash > Net Accepted & Posted Disbursements	(\$65,141.00)
Net Accepted & Posted Disbursements	\$20,215,141.00
Net Drawdowns	\$20,150,000.00
School Ceiling Amount	\$23,760,300.00
Target Cash > Net Accepted & Posted Disbursements	\$11,015,435.00
Target Disbursement To Drawdown Ratio	0.0
Disbursement To Drawdown Ratio	1.07242
Grace Period	30
Date School Confirmed Program Year Closeout	
Date Department of Ed Confirmed Program Year Closeout	

Disbursement To Drawdown Ratio excludes cash activity within Grace Period.

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School Summary Financial Information

- Same data contained on the School Account Statement Cash Summary
- Updated Daily
 - Current Month's Cash Receipts
 - Current Ending Cash Balance
 - Current Unbooked Net Disbursements



School Summary Financial Information

Person	School	Batch	Award	Services	User	Program
--------	--------	-------	-------	----------	------	---------

School Summary Financial Information [? HELP](#)

► School Search

▼ School Information

- School Summary
- Financial Aid Contact
- Eligibility
- General
- Options
- Funding Info
- Summary Financial Info
- Refunds of Cash
- Cash Activity
- Events
- Memos
- Yearly Totals
- Relationships
- Balance Confirmation
- Correspondence
- Report Selection

► Post Deadline Proc

Program: DIRECT LOAN Award Year: '10-'11

Entity ID			
Beginning Cash Balance			\$0.00
Cash Receipts		\$20,150,000.00	
Refunds of Cash		\$0.00	
Net Drawdowns/Payments			\$20,150,000.00
Booked Disbursements		\$20,485,231.00	
Booked Adjustments		(\$270,090.00)	
Total Net Booked Disbursements			\$20,215,141.00
Ending Cash Balance			(\$65,141.00)
Unbooked Disbursements		\$0.00	
Unbooked Adjustments		\$0.00	
Total Net Unbooked Disbursements			\$0.00
Cash > Accepted and Posted Disbursements			(\$65,141.00)

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Refunds of Cash Information

- Lists each transaction where funds were returned to the Direct Loan Program
- Can only list one program year at a time



Refunds of Cash Information



U.S. DEPARTMENT OF EDUCATION
COMMON ORIGATION & DISBURSEMENT



Person
School
Batch
Award
Services
User
Program

► **School Search**

▼ **School Information**

- School Summary
- Financial Aid Contact
- Eligibility
- General
- Options
- Funding Info
- Summary Financial Info
- Refunds of Cash
- Cash Activity
- Events
- Memos
- Yearly Totals
- Relationships
- Balance Confirmation
- Correspondence
- Report Selection

► **Post Deadline Proc**

Refunds of Cash Information ? HELP

Refunds of Cash Information

Program DIRECT LOAN Award Year '10-'11

Applied Date	Check Number	Amount Applied	Award Sequence	SF215/SF5515 Number	Comment
10/19/2010	7672	\$5,486.25	6656	711380	
10/04/2010	7664	\$25,175.00	6656	711354	
09/20/2010	0	\$97,632.00	6656	306539-089	
08/25/2010	0	\$374,610.00	6656	306403-707	

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Cash Activity

- Lists all cash drawdowns for the program year
- Can only view one program year at a time
- One column per transaction
- First column lists totals for the program year

Cash Activity

Person		School			
Cash Activity					
Program/Year Selection					
Program	DIRECT LOAN				
Cash Activity Summary					
Net Draws					
Cash > Accepted & Posted Disbursements & older than 30 days					
	Totals				
Date of Transaction		10/19/2010	10/19/2010	10/15/2010	10/12/2010
Time		11:33:23 PM	12:55:40 PM	3:34:29 PM	1:12:40 PM
GAPS Debit Date			10/19/2010	10/15/2010	10/12/2010
Drawdowns/Payments	\$21,459,437.00		\$7,501.00	\$1,170.00	\$13,707.00
Drawdown Adjustments	\$0.00				
Refunds of Cash	(\$502,903.25)	(\$5,486.25)			
Returns of Cash	\$0.00				
Drawdown Offsets	\$0.00				
Days Since Net Draws Increase			1	5	8
Days Left For On-time Reporting			029	025	022
Payment Control Number			2010101856301	2010101443411	2010100824054
Accepted & Posted Disbursements Applied	\$20,956,533.75		\$7,501.00	\$1,170.00	\$13,707.00
% of Accepted & Posted Disb. Applied to Net Draws	100.0%				
Cash > Accepted & Posted Disbursements	(\$66,467.25)				
% of Cash > Accepted & Posted Disbursements	-0.32%				
Source System		COD	GAPS	GAPS	GAPS
Amounts in parentheses decrease net draws					



Agenda

- Report Selection
 - Award-Year Specific
 - 30 Day Warning Report
 - Funded Disbursement List
 - Pending Disbursement List
 - School Account Statement (SAS)
 - Non Award-Year Specific
 - Duplicate Student Borrower
 - Inactive Loans
 - SSN/Name/DOB
 - MPN Discharge
 - Expired MPNs
 - MPN Due to Expire
- Online Reports



Report Selection

Report Selection

Program: DIRECT LOAN Award Year: '10-'11

Award Year Specific Reports

- 30 Day Warning: Preformatted
- Funded Disbursement List: Preformatted
- Pending Disbursement List: Preformatted
- SAS: [Modify SAS Options](#)

Non-Award Year Specific Reports

- Duplicate Student Borrower: Preformatted
- Inactive Loans: Preformatted
- SSN/Name/Date of Birth Change: Preformatted
- MPN Discharge: Fixed Length
- Expired MPN: Fixed Length
- MPNs Due to Expire: Fixed Length

[SUBMIT](#)

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Report formats displayed are the default report settings in COD



Report Selection

School Search

School Information

- School Summary
- Financial Aid Contact
- Eligibility
- General
- Options
- Funding Info
- Summary Financial Info
- Refunds of Cash
- Cash Activity
- Request CFL Reduction
- Events
- Message List
- Yearly Totals
- Relationships
- Balance Confirmation
- Request Post
- Deadline/Extended
- Processing
- Correspondence
- Report Selection

Report Selection

Report Selection

Program DIRECT LOAN **Award Year** '10-'11

Award Year Specific Reports

30 Day Warning: Preformatted

Funded Disbursement List

Pending Disbursement List

SAS [Modify SAS Options](#)

Non-Award Year Specific Reports

Duplicate Student Borrower Preformatted

Inactive Loans Preformatted

SSN/Name/Date of Birth Change Preformatted

MPN Discharge Fixed Length

Expired MPN Fixed Length

MPNs Due to Expire Fixed Length

SUBMIT

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Use the dropdown boxes to select the report formats compatible with your system



School Account Statement

- Run the first **full** weekend of each new month
- Sent the first Monday after it is run
- Monthly reports contain data for the most recently completed month and YTD Cash Summary
- Used for monthly reconciliation and program year closeout



School Account Statement-Settings

SAS Options HELP

Program DIRECT LOAN **Award Year** '10-'11

SAS Options

Report Format Fixed Length

Include Names of Borrowers No

Report Activity Type Monthly

Regardless of your choice (Monthly, Year-to-Date, or Both), you will receive Year-to-Date and Monthly Cash Summaries.

You will receive Monthly Cash Detail if you choose Monthly activity and Year-to-Date Cash Detail if you choose Year-to-Date.

You will receive both the Monthly and Year-to-Date Cash Detail if you select Both as your option.

Sections of SAS to Receive

Summary by Loan Type Yes

If chosen, you will receive Monthly and Year-to-Date.

Disbursement Detail Yes

Loan Level (optional) N/A

Loan Level is only available for Year-to-Date.

UPDATE

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School Account Statement-Settings

U.S. DEPARTMENT OF EDUCATION
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FSA
FEDERAL STUDENT AID

Person School Batch Award Services User

► School Search

▼ School Information

- School Summary
- Financial Aid Contact
- Eligibility
- General
- Options
- Funding Info
- Summary Financial Info
- Refunds of Cash
- Cash Activity
- Request CFL Reduction
- Events
- Message List
- Yearly Totals
- Relationships
- Balance Confirmation
- Request Post
- Deadline/Extended
- Processing
- Correspondence
- Report Selection

SAS Options HELP

Program: DIRECT LOAN Award Year: '10-'11

SAS Options

Report Format: Fixed Length

Include Names of Borrowers

Report Activity Type

Regardless of your choice (Monthly, Year-to-Date, or Both), you will receive Year-to-Date and Monthly Cash Summaries.

You will receive Monthly Cash Detail if you choose Monthly activity and Year-to-Date Cash Detail if you choose Year-to-Date.

You will receive both the Monthly and Year-to-Date Cash Detail if you select Both as your option.

Sections of SAS to Receive

Summary by Loan Type: Yes

If chosen, you will receive Monthly and Year-to-Date.

Monthly

Disbursement Detail: Yes



School Account Statement-Settings

The screenshot displays the 'SAS Options' configuration page in the FSA COD system. The page is titled 'SAS Options' and includes a 'HELP' icon. The navigation menu on the left lists various options under 'School Information', including 'School Search', 'School Summary', 'Financial Aid Contact', 'Eligibility', 'General', 'Options', 'Funding Info', 'Summary Financial Info', 'Refunds of Cash', 'Cash Activity', 'Request CFL Reduction', 'Events', 'Message List', 'Yearly Totals', 'Relationships', 'Balance Confirmation', 'Request Post', 'Deadline/Extended Processing', 'Correspondence', and 'Report Selection'. The main content area shows the following settings:

- Program:** DIRECT LOAN
- Award Year:** '10-'11
- SAS Options:**
 - Report Format:** Fixed Length
 - Include Names of Borrowers:** No
 - Report Activity Type:** Monthly (selected), Year-to-Date, Both
- Sections of SAS to Receive:**
 - Summary by Loan Type:** Yes
 - Disbursement Detail:** Yes

Additional text on the page explains that regardless of the choice, users will receive Year-to-Date and Monthly Cash Summaries. It also notes that users will receive Monthly Cash Detail if they choose Monthly activity and Year-to-Date Cash Detail if they choose Year-to-Date. Finally, it states that users will receive both the Monthly and Year-to-Date Cash Detail if they select Both as their option.



School Account Statement-Settings

The screenshot shows a web application interface for setting school account statement preferences. On the left is a navigation menu with options like 'School Summary', 'Financial Aid Contact', 'Eligibility', 'General', 'Options', 'Funding Info', 'Summary Financial Info', 'Refunds of Cash', 'Cash Activity', 'Request CFL Reduction', 'Events', 'Message List', 'Yearly Totals', 'Relationships', 'Balance Confirmation', 'Request Post', 'Deadline/Extended Processing', 'Correspondence', and 'Report Selection'. The main content area is titled 'SAS Options' and includes the following settings:

- Program:** DIRECT LOAN (dropdown)
- Award Year:** '10-'11 (dropdown)
- Report Format:** Fixed Length (dropdown)
- Include Names of Borrowers:** Yes (dropdown, highlighted with a red box)
- Report Activity Type:** Monthly (dropdown)

Below these settings, there are explanatory paragraphs and a section titled 'Sections of SAS to Receive' with the following options:

- Summary by Loan Type:** Yes (dropdown)
- Disbursement Detail:** Yes (dropdown)
- Loan Level (optional):** N/A

An orange 'UPDATE' button is located at the bottom right of the settings area. The footer of the page includes the date 'Jan 06 2011 07:38 EST' and navigation links: Home, Privacy Act, Links, Contact Us, Today's Update, Help, Glossary, and Log Off.



School Account Statement-Settings

Person School Batch Award Services User

School Search

School Information

- School Summary
- Financial Aid Contact
- Eligibility
- General
- Options
- Funding Info
- Summary Financial Info
- Refunds of Cash
- Cash Activity
- Request CFL Reduction
- Events
- Message List
- Yearly Totals
- Relationships
- Balance Confirmation
- Request Post
- Deadline/Extended
- Processing
- Correspondence
- Report Selection

SAS Options

Program: DIRECT LOAN Award Year: '10-'11

SAS Options:

Report Format: Fixed Length

Include Names of Borrowers: No

Report Activity Type: Both

Regardless of your choice (Monthly, Year-to-Date, or Both), you will receive Year-to-Date and Monthly Cash Summaries.

You will receive Monthly Cash Detail if you choose Monthly activity and Year-to-Date Cash Detail if you choose Year-to-Date.

You will receive both the Monthly and Year-to-Date Cash Detail if you select Both as your option.

Sections of SAS to Receive

Summary by Loan Type: Yes

If chosen, you will receive Monthly and Year-to-Date.

	Monthly	Year-to-Date
Disbursement Detail	Yes	No
Loan Level (optional)	N/A	No

Loan Level is only available for Year-to-Date.



COD Reports Available Online

- Most reports available online
 - SAS not available
- Same reports that are sent to SAIG mailbox
- All are displayed in spreadsheet format
- All available program years displayed

COD Reports Available Online

U.S. DEPARTMENT OF EDUCATION
COMMON ORIGATION & DISBURSEMENT

FSA
FEDERAL
STUDENT AID

Person School Batch Award **Services** User Program

▼ COD Reports HELP

▶ **Direct Loan Servicing**

Selecting the link will open a separate browser window. You will be automatically logged into the COD Reports with the username you provided to the COD Website. Pop-Up blockers may prevent the window from opening, please be sure to turn off all Pop-Up blockers. If you are not automatically logged into COD Reports website, please contact the [COD Customer Service Call Center](#)

<https://codreports.cod.ed.gov>

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COD Reports Available Online

[COD Reporting](#) > [Direct Loan Reports](#)

-DL |

[30 DAY WARNING \(CSV\) 2009-2010](#)

[Actions](#)

[DUPLICATE STUDENT BORROWER \(CSV\)](#)

[Actions](#)

[INACTIVE LOANS \(CSV\)](#)

[Actions](#)

[PENDING DISBURSEMENT LIST \(CSV\) 2009-2010](#)

[Actions](#)

[SSN-NAME-DATE OF BIRTH CHANGE\(CSV\)](#)

[Actions](#)

[30 DAY WARNING \(CSV\) 2010-2011](#)

[Actions](#)

[EXPIRED MPN REPORT](#)

[Actions](#)

[MPNS DUE TO EXPIRE REPORT](#)

[Actions](#)

[PENDING DISBURSEMENT LIST \(CSV\) 2010-2011](#)

[Actions](#)



Wrap Up

- COD System Administration
 - User access maintenance
 - School Options
- Borrower-Servicer Relationship
- Managing Direct Loan events via COD on-line screens
 - Action Queue
 - Batch search and tools
- Monitoring your school's Direct Loan portfolio
 - Funding and cash activity information
 - Direct Loan reports



QUESTIONS?

BEST

PRACTICES?



Contact Information

We appreciate your feedback and comments. We can be reached at:

- Phone: 800-848-0978
- E-mail: CODSupport@acs-inc.com