

## Transfer Monitoring List

### Purpose of this page

The Student Monitoring Detail page displays detailed transfer monitoring student information that can be updated or deleted.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to interpret the Transfer Monitoring List

The Transfer Monitoring List information is defined as follows:

- **SSN**-The student's Social Security Number. (The blue numbered icon next to the SSN will change with sorting. If you click the icon, it will take you to the Transfer Monitoring Detail page for that student. If a student has had an Alert sent from the NSLDS, there will be an Alert icon displayed next to the SSN.)
- **Name**-The student's name. (The Transfer Monitoring List by default is displayed in alphabetical order by last name, but you can change how the list is sorted.)
- **Enrollment Begin Date**-The date on which the student is expected to, or did begin classes at the school.
- **Monitor Begin Date**-The date on which NSLDS began monitoring the student.
- **Last Changed By**-The name of the user who last changed the student's record, or the name of the user who added the student to the list.

### How to a retrieve a sorted/filtered Transfer Monitoring List

To sort/filter and retrieve a Transfer Monitoring List:

1. In the **Sort By** list, click the sort criteria.
2. In the **Display Only** boxes, type in the display criteria that you wish to view.
3. Click **Retrieve** to view the sorted/filtered list.

#### Notes:

- The Add Student to Monitor List button at the top of the page will take you to the Student

Monitoring Add page when you click it.

- If a student was added/updated via a batch file, the Last Changed By will read Batch.

Last updated: July 1, 2001

close

## Student Monitoring Add

### Purpose of this page

The Student Monitoring Add page allows you to add a student to the Transfer Monitoring List. If the user is adding a student to the Transfer Monitoring List who is not in the NSLDS database, the student will only be added to the Transfer Monitoring List and will not display on any other pages in the NSLDS FAP site.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to add a student to the Transfer Monitoring List

1. In the **SSN** box, type the student's Social Security Number. (The SSN appears automatically if you linked from the Loan or Grant History pages.)
2. In the **First Name** box, type the student's first name. (The First Name appears automatically if you linked from the Loan or Grant History pages.)
3. In the **Last Name** box, type the student's last name. (The Last Name appears automatically if you linked from the Loan or Grant History pages.)
4. In the **Date Of Birth** box, type the student's date of birth. (The Date of Birth appears automatically if you linked from the Loan or Grant History pages.)
5. In the **Enrollment Begin Date** box, type the date on which the student is expected to, or did begin classes at the school.
6. In the **Monitor Begin Date** box, type the date on which you want NSLDS to begin monitoring the student. The current date will appear by default, although the date can be changed.
7. Click **Submit**.

Last updated: December 31, 2006

close

## Student Monitoring Detail

### Purpose of this page

The Student Monitoring Detail page displays detailed transfer monitoring student information that can be updated or deleted.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to interpret the Student Monitoring Detail

- **SSN**-The student's Social Security Number.
- **Name**-The student's current name in the NSLDS. If the student was added to the Transfer Monitoring List, but is not in the NSLDS, the name will display as provided by the school user.
- **DOB**-The student's date of birth. If the student was added to the Transfer Monitoring List, but is not in the NSLDS, the DOB will display as provided by the school user.
- **Enrollment Begin Date**-The date on which the student was reported to begin classes at the school.
- **Monitor Begin Date**-The date on which the NSLDS began monitoring the student.
- **Last Changed By**-The name of the user who added or last changed the student information.

### How to update or delete the Student Monitoring Detail

- To update or delete the Student Monitoring Detail information, click **Update** or **Delete**.

**Note:** If a student was added/updated via a batch file, the Last Changed By will read Batch.

Last updated: July 1, 2001

close

## Student Monitoring Update

### Purpose of this page

The Student Monitoring Update page allows you to update the Enrollment Begin Date and/or the Monitoring Begin Date for student's Transfer Monitoring Detail information.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to update Student Monitoring Detail

1. Type the new **Enrollment Begin Date** and/or the new **Monitoring Begin Date** in the respective box(es).
2. Click **Submit**.

#### Notes:

- If you are updating the Monitoring Begin Date to a date in the future, it cannot be later than the Enrollment Begin Date.
- After clicking Submit, your name will appear in Last Changed By until the record on the Transfer Monitoring List is changed again.

Last updated: July 1, 2001

close

## Student Monitoring Delete

### Purpose of this page

The **Student Monitoring Delete Confirmation** page allows you to delete the student from the **Transfer Monitoring List** page. Student Monitoring records should only be deleted if the student will not be attending your school, or the student was added to your school's list in error. Do not delete a student simply to stop monitoring him or her. Once the delete has been confirmed, the student's information will be removed from the Monitoring and, if applicable, Alert lists. It does not delete him or her from the NSLDS database.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to delete the student from the Transfer Monitoring List

To delete the student from the Transfer Monitoring List, read the Delete Confirmation statement, then click **Confirm**.

**Note:** If a student was added/updated via a batch file, the **Last Changed By field** will read **Batch**.

Last updated: July 1, 2001

close

## Monitoring Alert Review

### Purpose of this page

The Monitoring Alert Review page lists all transfer students on a school's Transfer Monitoring List to which changes have been reported.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to interpret the Monitoring Alert Review

- **Monitoring Results as of**-The date on which the Transfer Monitoring Process last ran.
- **SSN**-The student's Social Security Number.
- **Name**-The first and last name of the student.
- **DOB**-The student's date of birth.
- **Change**-The type of change reported on the student's record.
  - If new information was reported on a student's loan, **Loan** will appear in the text box. **Loan** is a link to the Loan Detail page of the loan that had a change reported.
  - If new information was reported on a student's grant, the type of grant will appear in the text box and provide a link to the Grant page for this student. The Grant link will display as one of the following:
    - **Grant-PE**- Designates an alert generated by a Pell Grant change.
    - **Grant-AG**- Designates an alert generated by an Academic Competitiveness Grant (ACG) change.
    - **Grant-SG**- Designates an alert generated by a National Science Mathematics Access to Retain Talent (SMART) Grant change.
    - **Grant-TG**- Designates an alert generated by a Teacher Education Assistance for College and Higher Education (TEACH) Grant change.
- **Reviewed**-Indicates to other users at your school that this information was reviewed. Clicking the check box and then clicking **Submit** indicates that you have reviewed the Change immediately to the left of the box. The check boxes determine whether the change information is listed in the top section of the list or the section following.
- **Date Alerted**-The date on which the NSLDS alerted the school of the change to the student's record.
- **Enrollment Begin Date**-The date on which the school reported that the student is expected to, or did begin classes at the school.
- **Monitor Begin Date**-The date on which the NSLDS began monitoring the student.

## How to a retrieve a sorted/filtered Monitoring Alert Review List

To use **Sort By** and **Display Only** at the top of the page:

1. In the **Sort By** list, click how the list should be sorted. The default sort is Non-reviewed records in alphabetical order by last name, then Reviewed records in alphabetical order by last name. Options include: SSN, Date Alerted, Enrollment Begin Date, Monitor Begin Date, Loan First and Grant First.
2. In the **Display Only** boxes, type the information that you wish to view.
3. Click **Loans Only** or **Grants Only**, if you wish to view only one type of Alert information.
4. Click **Retrieve** to view the sorted/filtered list.

To re-order the list by **Reviewed** check boxes selected, click **Submit**.

### Notes:

- Clicking the link in the Change box will not automatically place a check mark in the Reviewed box. To place a check mark in the Reviewed box when reviewing online, you must manually click it and then submit.
- If the school designated that Alerts be sent via Web and Batch, those records sent in the batch Alert file will automatically have check marks in the Reviewed boxes.
- The Monitoring Alert Review page can be viewed without accessing the student's record to view the change reported. The Batch Alert file cannot be viewed without reviewing the change information because it is the batch file.

Last updated: December 31, 2008

close

## School Transfer Profile

### Purpose of this page

The **School Transfer Profile** page displays information about the school contact for the Transfer Monitoring process. This page shows how your school is set up to submit Inform files and receive Alert notifications. This information is provided and updated by school users, and must be completed prior to submitting your school's first Inform.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to update the School Transfer Profile

To update the School Transfer Profile information:

1. Click **Update** at the top of the page.
2. The School Transfer Profile Update page appears.

### How to interpret the School Transfer Profile

The **School Transfer Profile** information is defined as follows:

- **First Name** -The first name of the school's contact.
- **Last Name** -The last name of the school's contact.
- **Title** -The title of the school's contact.
- **Phone** -The phone number of the school's contact.
- **E-Mail** -The e-mail address provided by the school to receive Alert notification messages, which could be set up at the school as a group e-mail.
- **Inform** -The designated batch SAIG mailbox for the School, Servicer, or Central Administration Office. This may appear blank if the user is not using a batch interface (via the SAIG mailbox) and only wishes to use the Web. For example, many smaller schools do not have a batch interface and only use the Web.
- **Monitor** -The number of days, designated by the school, for NSLDS to monitor beyond a transfer student's enrollment begin date.
- **Transfer Monitoring Servicer** -The servicer that is responsible for receiving and/or sending the Transfer Monitoring information for a school. This indicates whether the school uses ('Yes') or does not use ('No') a Transfer Monitoring Servicer.

- **Alert** -Indicates how the school requested its Alert to be sent (Web Only or Web and Batch).
- **SAIG Mailbox** -The designated SAIG mailbox for Alerts. A TG number displays, which indicates that the school has designated Web and Batch as its output option for Alerts. This appears blank if the school designated Web Only.
- **Batch Alert Method** -If the school requested Web and Batch Alerts, in addition to providing a SAIG mailbox number, the school must select an Alert format. Extract indicates that the school requested the Alerts as a data file; Report indicates that the school requested the Alerts be in a Report format. If this field is not present, the school designated Web Only.
- **Last Update By** -The name of the user who last updated the school's Transfer Profile, and the date of that update.

Last updated: December 31, 2008

close

## School Transfer Profile Update

### Purpose of this page

The School Transfer Profile Update page allows you to update the School Transfer Profile information.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to update the School Transfer Profile

To update the School Transfer Profile:

1. In the **First Name** box, type the first name of the school's contact.
2. In the **Last Name** box, type the last name of the school's contact.
3. In the **Title** box, type the title of the school's contact.
4. In the **Phone** and **Ext** boxes, type the phone number and extension of the school's contact.
5. In the **E-Mail** box, type the e-mail address designated to receive Alert notification messages.  
**Note:** This could be set up at the school as a group e-mail.
6. In the **Inform** section, type the TG number for the **Designated Batch SAIG Mailbox for School, Servicer, or Central Administration Office**. You may leave this blank if you are not using the batch interface (via the SAIG mailbox) and only wish to use the Web.
7. Also in the **Inform** section, if the TG number provided is for your servicer, respond to "**Is this your Servicer for Transfer Monitoring?**" by clicking the check box to indicate Yes.
8. In the **Monitoring Duration** box type in the number of days you want NSLDS to monitor your students.  
**Note:** The **Monitoring Duration** defaults to 90 days, but can be updated for a number of days that is most appropriate for your institution's monitoring time period.
9. In the **Alert** section, click how you want your school's Alert information to be sent, **Web Only** or **Web and Batch File**.  
**Note:** If you choose to receive Alerts via Web and Batch File, type the TG number you want the batch file to be sent to in the **SAIG Mailbox for School, Servicer, or Central Administration Office** box. Batch files will be sent in a data file (**Extract**) format, or in a report (**Report**) format.
10. If you use a Servicer, select either **Servicer Extract** or **Servicer Report** from the **Servicer/Non-Servicer Batch Alert Method** dropdown box.
11. If you do not use a Servicer, select either **Non-Servicer Extract** or **Non-Servicer Report** from the **Servicer/Non-Servicer Batch Alert Method** dropdown box.
12. Click **Submit**.

In Last Update By, the name of the user who last updated the School Transfer Profile and the date of the last School Transfer Profile update appear.

Last updated: December 31, 2008

close

## School Transfer Profile Add

### Purpose of this page

The School Transfer Profile Add page allows you to add School Transfer Profile information. You must complete this page before initiating the Transfer Monitor process.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to add a School Transfer Profile

To add a School Transfer Profile:

1. In the **First Name** box, type the first name of the school's contact.
2. In the **Last Name** box, type the last name of the school's contact.
3. In the **Title** box, type the title of the school's contact.
4. In the **Phone** and **Ext** boxes, type the phone number and extension of the school's contact.
5. In the **E-Mail** box, type the e-mail address designated to receive Alert notification messages.  
**Note:** This could be set up at the school as a group e-mail.
6. In the **Inform** section, type the TG number for the **Designated Batch SAIG Mailbox for School, Servicer, or Central Administration Office**. You may leave this blank if you are not using the batch interface (via the SAIG mailbox) and only wish to use the Web.
7. Also in the **Inform** section, if the TG number provided is for your servicer, respond to "**Is this your Servicer for Transfer Monitoring?**" by clicking the check box to indicate Yes. Leave the box unchecked if the TG number is not for your servicer.
8. In the **Monitoring Duration** box type in the number of days you want NSLDS to monitor your students.  
**Note:** The **Monitoring Duration** defaults to 90 days, but can be updated for a number of days that is most appropriate for your institution's monitoring time period.
9. In the **Alert** section, click how you want your school's Alert information to be sent, **Web Only** or **Web and Batch File**.  
**Note:** If you choose to receive Alerts via Web and Batch File, type the TG number you want the batch file to be sent to in the **SAIG Mailbox for School, Servicer, or Central Administration Office** box. Batch files will be sent in a data file (**Extract**) format, or in a report (**Report**) format.
10. If you use a Servicer, select either **Servicer Extract** or **Servicer Report** from the **Servicer/Non-Servicer Batch Alert Method** dropdown box.
11. If you do not use a Servicer, select either **Non-Servicer Extract** or **Non-Servicer Report** from the **Servicer/Non-Servicer Batch Alert Method** dropdown box.

12. Click **Submit**.

When adding a School Transfer Profile, keep in mind the following:

- After the School Transfer Profile has been added, your name and the date appear on the School Transfer Profile page in Last Update By.
- If you attempt to add a student to your school's Transfer Monitoring List via batch file before completing this page, NSLDS sends back an error file. If you attempt to add a student to your school's Transfer Monitoring List via this Web site before completing this page, you are re-directed to this page.
- This page only displays once. After this page is completed, use the School Transfer Profile Update page to make any updates.

Last updated: December 31, 2008

close

## Transfer Monitoring Re-Populate

### Purpose of this page

The Transfer Monitoring Re-Populate page allows school users to retrieve those students previously submitted that no longer display on the Transfer Monitoring List page. This will allow the user to add students back to the Inform list for additional Transfer Monitoring.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

### How to retrieve student information previously submitted for Transfer Monitoring

The Search/Retrieval Options allow you to designate which students you wish to retrieve. You may retrieve students based on SSN, Last Name, previously listed Enrollment Begin Date, or previously listed Monitor Begin Date. The selection is made in the **Sort By** option.

**Sort by** - Allows you to retrieve and display student Transfer Monitoring records by:

- *SSN (Default)*-Displays student records in ascending numeric order by student Social Security Number.
- *Last Name*-Displays student records in ascending alphabetic order by student last name.
- *Enroll. Begin Date*-Displays student records ordered by the Enrollment Begin Date.
- *Monitor Begin Date*-Displays student records ordered by the Monitor Begin Date.

To retrieve ALL students by one of these sort orders:

1. In the **Sort by** list, click the selection or leave the default selection of SSN.
2. Click **Retrieve**.
3. The **Re-Populate Transfer Monitoring List** page displays with all the most recent students previously listed for transfer monitoring who are no longer on your Inform list.

Use the additional Search/Retrieval Options to refine the list you wish to review.

#### Note:

- The Re-Populate Transfer Monitoring List displays 20 students per page. The search options you select on the Transfer Monitoring Re-Populate page apply to all results on subsequent

pages display using the arrow icons. To change search options, you must return to Transfer Monitoring Re-Populate page.

## How to use the Search/Retrieval Options

Search/Retrieval Options can be used to focus the students retrieved based on more defined criteria. You will still select the Sort By option to determine how the data is to be displayed but may further refine information to be retrieved by using any of the following:

- **Last Name Begin / End** - Allows you to retrieve records for students whose last names fall within an alphabetic range. You may use a single letter (such as 'A') rather than a whole name. Be careful to be inclusive when typing the End value if using single letters. A single letter End value (such as 'B') will not retrieve names that begin with that letter (such as 'Ball') since the names come after the letter alphabetically. You also have the option of not entering an End value which will retrieve all students beginning with the name in the Begin value through the end of the alphabet.
- **SSN Begin / End** - Allows you to retrieve records for students whose Social Security Numbers fall within a numeric range. Be careful to be inclusive when typing the End value. An End value containing fewer than nine digits (such as '99') will not retrieve SSNs that begin with that number but contain more digits (such as '990-00-0000'), since the longer number comes after the shorter one numerically. To retrieve a single student, enter the SSN in both the Begin and End fields.
- **Previous Enrollment Begin Date Begin/ End** - Allows you to retrieve records for students whose previous reported Transfer Monitoring enrollment begin date fall within a specified date range. The Begin and End values are inclusive; that is, records with an Enrollment Begin Date equal to the Begin or End date are retrieved, as well as records Enrollment between those two dates.
- **Previous Monitor Begin Date Begin/ End** - Allow you to retrieve records for students whose previous reported Transfer Monitoring monitor begin date fall within a specified date range. The Begin and End values are inclusive; that is, records with a Monitor Begin Date equal to the Begin or End date are retrieved, as well as records Monitored between those two dates.

Last updated: December 31, 2008

close

## Re-Populate Transfer Monitoring List

### Purpose of this page

The Re-Populate Transfer Monitoring List page allows school users to update Transfer Monitoring information for students previously submitted and no longer displayed on the Transfer Monitoring List web page for their school. Students submitted from the re-populate page will be added to the school's current Transfer Monitoring List.

### [Navigation](#)

The Navigation Tabs and their links allow you to navigate to the main pages of each section of the site.

Re-Populate Transfer Monitoring List displays up to 20 student records at a time. If the search options you typed retrieve more than 20 records, those records are spread across as many pages as necessary to display them 20 at a time. Use the Next and Previous arrows to move from page to page.

You must submit and confirm any changes to the re-populate records displayed on an individual Re-Populate Transfer Monitoring List page before navigating to another page. Clicking the Previous or Next arrow, or otherwise navigating to another page, before submitting and confirming changes causes any new data you typed to be lost.

### How to update transfer student information on the re-populate monitoring list

To update transfer student monitoring information:

1. Type an Enrollment date in the **Enrollment Begin Date** box. This date is used to populate the Enroll. Begin Date box of the individual student records you select in step 3 below.
2. Type a Monitor date in the **Monitor Begin Date** box, or accept the default date (the current date) displayed by the page. This date is used to populate the Monitor Begin Date box of the individual student records you select in step 3 below.
3. Select the transfer student monitoring records you want to re-populate. There are two ways to do this:
  - a. Select the records individually by clicking the check box to the far left of the row with the student's SSN, name, and DOB.
  - b. Select all the records displayed on the page by clicking **Check All** at the top of the form. (You may individually uncheck records if using the Check All option.)
4. Update as necessary for each individual student the information in the following boxes:
  - a. Enroll. Begin Date (Enrollment Begin Date)
  - b. Monitoring Begin Date

5. Click **Submit Checked Rows**.
6. If the information you submitted passes the edits applied by the NSLDS, the data is saved to the database.

When updating transfer student monitoring information, keep in mind the following:

- If you check records (Step 3) but then decide that you do not want to update them, uncheck the records individually or click **Uncheck All** at the top of the form. When you uncheck a record, the enrollment begin and monitoring begin dates revert to whatever date they were set to before you selected the record.
- Submitting an update to a student's transfer monitoring record causes that student to "disappear" from the Re-Populate Transfer Monitoring List page. This happens because your updates cause the record to be displayed on the Transfer Monitoring List page. To view your submitted record, navigate to the Transfer Monitoring List page and use the SSN search to find the student.
- Monitoring Duration is the number of days NSLDS will monitor your students beyond the enrollment period begin date. It will be displayed at the top of the transfer student re-populate page and can be updated on the School Transfer Profile web page.

### Understanding transfer student re-populate monitoring list records

The Re-Populate Transfer Monitoring List page displays individual student records across two rows. The first row is shaded and contains the following items, from left to right:

- **Check Box** - Click this box to select a record for re-populating the monitoring list page. You can check records one-by-one, or you can check all the records on the page by clicking **Check All**.
- **Number Icon** - Each record on the page has a number icon. Records are numbered in ascending sequence and displayed in groups of 20. As you submit records for update new records will roll up from the bottom keeping the list always at 20. Although individual records may "disappear" in this fashion, the group of records displayed on the page retains its integrity until you retrieve a new set of records or leave the re-populate transfer monitoring list page entirely.
- **SSN**-The student's Social Security Number.
- **Name**-The student's full name (first name, middle initial and last name).
- **DOB**-The student's date of birth.

The second row is not shaded and contains the following items, from left to right:

- **Enroll. Begin Date**- The date the student is expected to, or did begin classes at the school. There are two ways to change the enrollment begin date for an individual transfer student record:
  1. Type a new Enrollment Begin Date at the top of the page and then check the transfer student record. By default, the enrollment begin date is set to a blank date because enrollment start dates vary from institution to institution.

2. Check the transfer student record first and then edit the contents of the Enroll. Begin Date box directly.
- **Monitor Begin Date**-The date you would like NSLDS to begin monitoring the student. There are two ways to change the enrollment begin date for an individual transfer student record:
  1. Type a new Monitoring Begin Date at the top of the page and then check the transfer student record. By default, the monitoring begin date is set to the current date but can be modified for a future date if desired.
  2. Check the transfer student record first and then edit the contents of the Monitoring Begin Date box directly.

Last updated: December 31, 2008

close