CAMPUS PARTNERS
Study Hall Webinar

SYSTEM III

QUIKLETTERS

HOW TO READ HISTORY

Table of Contents

SYSTEM III

System III is Campus Partners' on-line transaction processing and loan maintenance system. It is a powerful processing system offering features such as automated reprocessing, automatic pro-ration of payment amount, loan monitoring, permanent chronological history file, and much more.

System III was written to comply with Federal Regulations. Deferment and cancellation edits are built into the system to prevent processing errors.

Accounts are updated daily as transactions occur and data access is in real time. This **real-time access** provides the most current activity on your loans. You are able to view and update data, and review historical activity for all accounts in your portfolio.

With on-line access, inquiry and update capability is available for an **unlimited** number of users and **is a true real-time processing system**. An ACF2 security package utilized by Campus Partners allows the University to determine the level of processing/viewing access they wish to give their staff.

SCREEN COMMANDS

BORROWER MAINTENANCE MENU - BORM

➔	ADR	BORROWER ADDRESSES	Page 205
	ARCI	ARCHIVED BORROWER INQUIRY	
	BADR	BORROWER ADDRESS REFERENCE	
➔	BOR	BORROWER DISPLAY	Page 203
	BRCC	BORROWER CALL CENTER	
➔	BSUP	BORROWER SUPPLEMENTAL INFO	
➔	NAMQ	NAME INQUIRY	Page 217
➔	NAMX	NAME INDEX/CHANGING A NAME	Page 215
	POOR	PAID OUT ACCOUNT RESTORE	
	RADR	CHANGING/ADDING A REFERENCE ADDRESS	
➔	RMK	REMARKS	Page 413 - Student Remark, Page 510 - Loan Remark

BORROWER CONTACT MENU - BORC

➔	AUDT	AUDIT LETTER REQUEST	Page 419
➔	XPKG	EXIT INTERVIEW PACKAGE REQUEST	Page 409
➔	HCOM	ADD HISTORY COMMENTS	Page 309 and Glossary Page 110
➔	HCMT	ADD EXPANDED HISTORY COMMENTS	Page 311

FORMS PROCESSING MENU - FORM

DEF	DEFERMENT
PPM	POSTPONEMENT
CNC	CANCELLATION
FREV	FORMS REVERSAL
SREV	SPECIAL BILLING/DEF REVERSAL
SEPD	SEPARATION DATE

➔ HISTORY MENU - HIST

Page 303 D56+D87

	HADV	ADVANCE HISTORY	
➔	HALL	ALL HISTORY	Page 305
	HBOR	BORROWER HISTORY ONLY	
	HCAN	CANCELLATION/POSTPONEMENT HIST	
	HCON	CONSOLIDATION HISTORY	
	HDEF	DEFERMENT HISTORY	
	HLON	LOAN HISTORY	
	HORG	ORIGINATION FEE HISTORY	
➔	HOSB	OUTSTANDING BILLING HISTORY	Page 307
	HPAY	PAYMENT HISTORY	
	HPRI	PRIOR SERVICES HISTORY	

HISTORY RESEARCH

RADV	RESEARCH HISTORY OF ADVANCES	
RALL	RESEARCH HISTORY ALL	(Note: "*" means post & transaction dates are different)
RBOR	RESEARCH HISTORY OF BORROWER	
RCAN	RESEARCH HISTORY OF CANCELLATIONS	
RCON	RESEARCH HISTORY OF CONSOLIDATIONS	
RDEF	RESEARCH HISTORY OF DEFERMENTS	
RLON	RESEARCH HISTORY OF LOAN	
RORG	RESEARCH HISTORY OF ORIGINATION FEES	
RPAY	RESEARCH HISTORY OF PAYMENTS	
RPRI	RESEARCH HISTORY OF PRIOR SERVICES	

LOAN MAINTENANCE MENU - LOAN

➔ MAIN	MAIN SCREEN	Pages 503, 505
➔ LSUM	LOAN SUMMARY	
LN1	LOAN - BILLING SUMMARY	
LN2	LOAN - DUE DILIGENCE SUMMARY	
LN3	LOAN - FORMS SUMMARY (DEF/SB)	
LN4	LOAN - FORMS SUMMARY (CANC/PPM)	
LN5	LOAN - DEFAULT SUMMARY	
LN6	LOAN - CAPITALIZATION SUMMARY	
BASE	LOAN - BASE DISPLAY	
CADR	CO-MAKER/CO-SIGNER ADDRESSES	
CGLN	CHANGE A LOAN NUMBER	
COLL	COLLECTION PROCESSING	
CONL	CONSOL/INCONSOL LOANS	
CONM	CONSOLIDATION MAINTENANCE	
COST	OTHER COST PROCESSING SCREEN	
DFLT	DEFAULT PROCESSING SCREEN	
DLON	DELETE A LOAN	
FEES	FEES REVERSAL	
LOS	LOAN ORIGINATION SCREEN	
SCHD	PAYMENT SCHEDULE	
TIP	TUITION INSTALLMENT PLAN	
WOL	WRITE OFF A LOAN	
WOR	WRITE OFF REVERAL	

MONETARY ADJUSTMENT MENU - MONY

➔ ADVA	ADVANCE	Page 405
➔ ADVR	ADVANCE REFERSAL	Page 407
MCAP	MANUAL CAPITALIZATION	
➔ PAY	PAYMENT	Page 703
PAYC	COLLECTION PAYMENT	
➔ PAYO	PAYOFF PROJECTION	Page 713
➔ PAYR	PAYMENT REVERSAL	Page 709
➔ PREQ	ACH PAYMENT REQUEST	Page 711
RFND	CREDIT BALANCE REFUND	
RFNR	CREDIT BALANCE REFUND REVERSAL	

COLLECTIONS

PLAC	PLACEMENT WITH COLLECTION AGENCY
RMV	REMOVE FROM COLLECTION AGENCY
WITHD	WITHOLD FROM COLLECTION AGENCY
TRNS	TRANSFER TO ANOTHER COLLECTION AGENCY

MISCELLANEOUS

➔ COPY	COPY	Page 207
EXIT	GET OUT OF HELP SCREEN	
HELP	HELP	
HERR	HELP ERROR	
PFK	PF KEY ASSIGNMENTS	
➔ RECL	RECALL SAVED SCREEN PLACEMENT	
➔ SAVE	SAVE CURRENT SCREEN PLACEMENT	

SYSTEM III KEY SCREEN COMMANDS

SCREEN COMMANDS	DESCRIPTION	REFERENCE PAGE IN ON-LINE PROCESSING MANUAL
BOR	BORROWER DISPLAY	Page 203
ADR	BORROWER ADDRESSES	Page 205
	COPY	Page 207
BSUP	BORROWER SUPPLEMENTAL INFO	
NAMQ	NAME INQUIRY	Page 217
NAMX	NAME INDEX/CHANGING A NAME	Page 215
RMK	REMARKS	Page 413 - Student Remark, Page 510 - Loan Remark
MAIN	MAIN SCREEN	Pages 503, 505
	SAVE CURRENT SCREEN PLACEMENT	
	RECALL SAVED SCREEN PLACEMENT	
	NAME CHANGE	
	ADDRESS CHANGE	
	CHANGE PHONE NUMBER	
	ADD REMARKS	
	SEPARATION DATES	
	SPECIAL BILLING	
	REPAYMENT SCHEDULE	
LSUM	LOAN SUMMARY	Page 417
ADVA	ADVANCE	Page 405
ADVR	ADVANCE REFERSAL	Page 407
PAY	PAYMENT	Page 703
PAYR	PAYMENT REVERSAL	Page 709
PAYO	PAYOFF PROJECTION	Page 713
PREQ	ACH PAYMENT REQUEST	Page 711
XPKG	EXIT INTERVIEW PACKAGE REQUEST	Page 409
AUDT	AUDIT LETTER REQUEST	Page 419
HALL	ALL HISTORY	Page 305
RALL	RESEARCH HISTORY ALL	Note: "*" means post and transaction dates are different.
HCMT	ADD EXPANDED HISTORY COMMENTS	Page 311
HCOM	ADD HISTORY COMMENTS	Page 309 and Glossary Page 110
HOSB	OUTSTANDING BILLING HISTORY	Page 307
HIST	HISTORY MENU	Page 303

Borrower Display

```
BORROWER DISPLAY                                    OPTION ___     SELECT __
TRANS SOURCE W                                        _________________________
ACCOUNT  999 980 133 01   SSN   990 00 0133           TRAINING FILE
PROGRAM  99920            LOAN  999 98 0133 45        STUDENT ID  ___________
NAME     PADRON, CARL                                 _________________________

ADDR1       17106 SUMMER HOLLOW
ADDR2       _________________________          ADDR3
CITY/STATE  WINSTON-SALEM, NC    ZIP 23384 ____   PHONE  282 012 1211      BAD
GOOD DOM    SRC INST     ADR CHG 06 16 99         PH SRC INST   PH CHG 01 03 01

DATE OF BIRTH 05 10 65     MARITAL STATUS M    SEX M   RACE
DRIVER LICENSE STATE TX    NUMBER 10246439             INTEREST PAID STMT FLG

SELECT  CONS  PGM    LOAN NUMBER    TYPE/ST   COLL        LENDER NAME

  1)     01  99920  999 98 0133 45  NDSL 49  R 00806   TRAINING FILE
  2)     02  99921  999 98 0133 45  NDSL 40    00000   TRAINING FILE
```

Demographic Information

BOR = Borrower Display

1. OPTION = ***BOR***.

2. Press ***ENTER.***

   If the borrower has multiple loans and your search argument is the **account** number, System III will default to the borrower display screen with this message:

   I0852 ACCT HAS MORE THAN ONE LOAN, SPECIFY LOAN.

3. To change the borrower's name or any of the demographic information on this screen, type ***CHG*** in the option field and key the new data over the existing information.

Then:

1. Option = ***MAIN*** (or any other screen you choose).

2. Select = ***1*** (or whichever loan you wish to access).

3. Press ***ENTER***.

Changing an Address

```
BORROWER ADDRESSES                                          OPTION ____     SELECT __

ACCOUNT  999 980 133 01   SSN   990 00 0133
PROGRAM  99920            LOAN  999 98 0133 45          STUDENT ID  ___________
NAME     PADRON, CLYDE
                                                        COPY FROM __  TO __
 1) PRIMARY
    ADDR1       17106 SUMMER HOLLOW
    ADDR2       _________________________
    CITY/STATE  WINSTON-SALEM, NC  ZIP 23384 ____   PHONE  282 012 1211     BAD
    GOOD DOM    SRC INST   ADR CHG 06 16 99         PH SRC INST  PH CHG 01 03 01

 2) SECONDARY  1
    ADDR1       _________________________
    ADDR2       _________________________           _________________________
    CITY/STATE  __________________ ZIP _____ ____   PHONE  ___ ___ ____      ____
    ____ ___    SRC ____   ADR CHG 00 00 00         PH SRC ____  PH CHG 00 00 00
```


Changing an Address

ADR = Address

1. OPTION = ***ADR***.
2. Press ***ENTER***.
3. OPTION = ***CHG***.
4. Tab to **ADDR1** (Primary Address Line 1).
5. Begin typing your address change, moving to **ADDR2** (if needed for a second line of address) and completing the CITY/STATE/ZIP, TELEPHONE and TELEPHONE SOURCE fields (if these have also changed and are available).
6. Press ***ENTER***.

   Your transaction is complete when: **I2029 UPDATES SUCCESSFUL** is displayed in the MESSAGE field.

Note: To change a secondary address, access the ***ADR*** screen, enter the ***CHG*** option, and tab to **ADDR1** in the secondary position; then follow steps 5 and 6 above.

To maintain an existing address and add a new primary address, you may use the COPY function, which is explained on page 207.

Copy Function

```
 BORROWER BORROWER ADDRESSES                                    OPTION ____
SELECT __

 ACCOUNT  999 980 133 01   SSN   990 00 0133
 PROGRAM  99920            LOAN  999 98 0133 45       STUDENT ID ___________
 NAME     PADRON, CLYDE
                                                      COPY FROM 01  TO 02
  1) PRIMARY
     ADDR1       17106 SUMMER HOLLOW
     ADDR2       _________________________
     CITY/STATE  WINSTON-SALEM, NC  ZIP 23384 ____  PHONE  282 012 1211     BAD
     GOOD DOM    SRC INST   ADR CHG 06 16 99        PH SRC INST  PH CHG 01 03 01

  2) SECONDARY  1
     ADDR1       _________________________
     ADDR2       _________________________           _________________________
     CITY/STATE  __________________ ZIP _____ ____  PHONE ___ ___ ____     ____
     ____ ___    SRC ____   ADR CHG 00 00 00        PH SRC ____  PH CHG 00 00
00ADDRESSES                                    OPTION ____     SELECT __
```

Copy Function

ADR = Address

1. OPTION = ***CHG***.
2. Tab to **COPY FROM** _ _. Key the number of the address you wish to copy.
3. Your cursor will be at **TO** _ _. Key the number of the address you wish to copy to.
4. Press ***ENTER***. Your transaction is complete when: **I2029 UPDATES SUCCESSFUL** is displayed in the **MESSAGE** field.
5. Now you can change the primary address by following steps 3-6 on page 205.

Borrower Supplemental Screen

```
BORROWER SUPPLEMENTAL INFORMATION                     OPTION ____
 TRANS SOURCE W           RAAN  800 19 1829           _________________________
 ACCOUNT  999 980 133 01  SSN   990 00 0133           CAMPUS PARTNERS TRAINING
 PROGRAM  99920           LOAN  999 98 0133 45        STUDENT ID  ___________
 NAME     PADRON, CLYDE                               _________________________

 PRIMARY ADDRESS
 17106 SUMMER HOLLOW      _________________________
 CITY/STATE  WINSTON-SALEM, NC    ZIP 23384       PHONE  282 012 1211      BAD
 GOOD DOM    SRC INST     ADR CHG 06 16 99        PH SRC INST   PH CHG 01 03 01

 WORK PHONE     ___ ___ ____   EXT ____    ST ____   CHG 00 00 00   SRC ____
 MOBILE PHONE   ___ ___ ____               ST ____   CHG 00 00 00   SRC ____
 INTL PHONE     _____ _____ ___ ____       ST ____   CHG 00 00 00   SRC ____

 EMAIL ADDRESS  ________________________________________
                                           ST ____   CHG 00 00 00   SRC ____
```

BSUP = Borrower Information

1. OPTION = BSUP.
2. Press ***ENTER.***
3. To change any of the information on this screen, type ***CHG*** in the option field and key the new data over the existing information.
4. Press ***ENTER***.

Searching By Name

```
NAME INQUIRY                                         OPTION F       SELECT __

 ACCOUNT  ___ ___ ___ __    SSN  ___ __ ____
 PROGRAM  _____             LOAN ___ __ ____ __       STUDENT ID  ___________
 NAME     PADRON
..............................................................................
  1)* PADRON                             BORROWER 999 980 133    SSN 990 00 0133
      17106 SUMMER HOLLOW                99920 NDSL - CAMPUS PARTNERS TRAINING F
      WINSTON-SALEM, NC   23384               ST 49   LOAN 999 98 0133 45 CON 01
                                         99921 NDSL - CAMPUS PARTNERS TRAINING F
                                              ST 40   LOAN 999 98 0133 45 CON 02
..............................................................................
  2)  PADRON, CLYDE                      BORROWER 999 980 133    SSN 990 00 0133
      17106 SUMMER HOLLOW                99920 NDSL - CAMPUS PARTNERS TRAINING F
      WINSTON-SALEM, NC   23384               ST 49   LOAN 999 98 0133 45 CON 01
                                         99921 NDSL - CAMPUS PARTNERS TRAINING F
                                              ST 40   LOAN 999 98 0133 45 CON 02
..............................................................................
  3)* PADRON, RICHARD                    BORROWER 999 980 133    SSN 990 00 0133
      17106 SUMMER HOLLOW                99920 NDSL - CAMPUS PARTNERS TRAINING F
      WINSTON-SALEM, NC   23384               ST 49   LOAN 999 98 0133 45 CON 01
                                         99921 NDSL - CAMPUS PARTNERS TRAINING F
```

Searching By Name

(if only a name is provided)

NAMQ = Name Inquiry

1. OPTION = ***NAMQ***.
2. Tab to name position.
3. Key the name (last name, <space> first name format).
4. Press ***ENTER***. A list of borrowers with that name will be displayed.

From This Point:

1. OPTION = Screen you want to view next.
2. SELECT = # displayed to the left of the borrower's name.
3. Press ***ENTER***.

   You'll automatically be taken to the screen you chose for that borrower.

Note: An asterisk (*) will appear to the left of a borrower's name if Campus Partners has a more recent name on file. You can view all name changes for a borrower on the Name Index Screen (NAMX). The system maintains all previous names for a borrower; you can search on previous names.

Changing a Name

```
 NAME INDEX                                                     OPTION ____     SELECT __

ACCOUNT  999 980 133 __   SSN   990 00 0133
PROGRAM  _____            LOAN  ___ __ ____ __        STUDENT ID  ___________
NAME     PADRON, CLYDE

  02)    PADRON
  03)    PADRON, RICHARD
NAME INDEX                                                     OPTION ____     SELECT __

 ACCOUNT  999 980 140 01   SSN   990 00 0140
 PROGRAM  99920            LOAN  999 98 0140 24        STUDENT ID  ___________
 NAME     HOOVER, EARL

   02)    HOOVER, CLYDE
```


Changing a Name

NAMX = Name Index

1. OPTION = ***NAMX***.
2. Press ***ENTER***.
3. OPTION = ***CHG*** (**Note:** Must enter **CHG** first).
4. Tab to the **NAME** position.
5. Key the new name (last name, <space> first name format).
6. Press ***ENTER***.
7. This message will be displayed: **I0734 ENTER YES TO CONFIRM UPDATE, NO TO CANCEL.**
8. OPTION = ***YES***.
9. Press ***ENTER***.

   Your transaction is complete when: **I0003 UPDATE SUCCESSFUL - CONTINUE PROCESSING** is displayed in the MESSAGE field.

Note: The borrower's name also can be changed on the BOR, MAIN, or LN1 screens.

Student ID & Borrower Remarks

```
REMARKS / STUDENT ID                                             OPTION ____
                                                  RAAN  800 19 1829
ACCOUNT  999 980 133 02   SSN   990 00 0133
PROGRAM  99921            LOAN  999 98 0133 45        STUDENT ID  ___________
NAME     PADRON, CLYDE

 LENDER NUM         LENDER NAME         STUDENT ID         REMARKS

  00000-000  CAMPUS PARTNERS                        _________________________
  99990-001  CAMPUS PARTNERS TRAINING   ___________ _________________________
```

Student ID & Borrower Remarks

RMK = Remarks

1. OPTION = ***RMK***.
2. PRESS ***ENTER***.
3. OPTION = ***CHG***.
4. TAB to the blank line under **STUDENT ID**.
5. Type in Student ID.
6. Press ***ENTER***.

   Your transaction is complete when: **I0715 UPDATE SUCCESSFUL-CONTINUE PROCESSING** is displayed in the **MESSAGE** field.

   Follow the same procedures for entering or changing **Borrower Remark**, except substitute the following for Steps 4 and 5 above:

   4. Tab to the blank line under the **REMARK** field.
   5. Key the ***BORROWER REMARK***.

Note: **BORROWER REMARK** can be updated on **MAIN** and other maintenance screens.

MAIN Screen

MAIN

```
MAIN 99990 001 CAMPUS PARTNERS TRAINING    REPR 011202 OPTION ____ SRC W   INST
 ACCT 999 980 133 01  SSN 990 00 0133             17106 SUMMER HOLLOW       GOOD
 PROG 99920  LN 999 98 0133 45   ID ___________   _________________________ DOM
 NAME PADRON, CLYDE                   282 012 1211                          PRIM
 RMK _________________________ BAD  INST 01 03 01 WINSTON-SALEM, NC   23384
 MORE LOANS  MORE CONS                             ACCEL
 LOAN AMT   2,339.00  NEXT DUE   03 13 02 PREV W/AGCY   00806 STATUS       49
 PRIN BAL   2,184.07  NEXT PMT      35.94 DT PLACED  04 12 01 ADR CHG   06 16 99
 CUR DUE       35.94  ACT/NOT   397   397 EFFECT DT  01 24 02 CR BUREAU 10 97  S
 PAST DUE     554.64  OLDEST BIL 12 13 00 ***  SCHEDULE   *** LT CHG Y SP FEES P
 FEES DUE      46.55  ** SPCL BILLING  ** MIN AMT       35.94 NOTE DATE 09 10 97
 TOTL DUE   2,439.83  PMT AMT   _________ MIN CD Y PRORATE  Y SEP DATE  11 27 98
 PAYOFF     2,439.83  FIRST BILL __ __ __ AUTO  N JUDGEMENT N GRCE END  08 27 99
 TOT INT      209.21  LAST BILL  __ __ __ 1ST   70    35.94 M INT RATE     5.000
 DAILY INT     .2992  SB FREQ/PLAN   _ __ 2ND    1     8.07 M GRCE MONTHS      9
 LST PMT DT 02 24 00  DROP _ PD ALLOW ___ 3RD    0      .00 M DEF END   12 13 00
LST PMT       111.47  AGRMT  _ DEF TYPE _ 4TH    0      .00   LN TYPE N  SUB 000
 PRN PAID     154.93  DEF PLAN _ RESCHD _ 5TH    0      .00   FIN CHG     339.80
 INT PAID      57.06  LTR _____ LN MON  _ BILLED OUT FREQ     **  STOP CODES  **
 FEE PAID      14.60  SB DUE           .00 PLAN I    TERM  120 INT    0   PDUE  0
 PRIN CANC       .00  SB DAYS PD         0 MATURITY   11 13 06 INVOIC 0   DELQ  0
 CANC END   00 00 00  DUE END          .00 TERM DATE  07 28 10 BILL   0   AUDT  0
 PPM END    00 00 00  PROJ INT         .00 LOAN RMK _________________________
 I6960 CURRENT PAYMENT DUE ON 02/13/02
```

Update Capabilities

Trans Source
Address
Address Status
Address Location
Name
Address Source
Borrower Remark
Telephone
Phone Status
Phone Source
Reschedule Code

Next Due
Payment Amount
First Bill Date
Last Bill Date
Special Billing Frequency/Plan
Drop (When Current)
Past Due Allowance
Agreement (Written)
Deferment Type
Deferment Plan
Loan Remark
Letter (Audit Letter #)
Loan Monitoring

Effect Date
Minimum Amount
Minimum Code
Prorate Code
Auto Scheduling
Judgement Flag
Schedule
Billed Out Frequency
Plan
Term

Status
Credit Bureau
Late Charge Code
Special Fees Flag
Note Date
Separation Date
Interest Rate
Grace Months
Stop Codes
Phone Date

Entering Changes on MAIN

```
MAIN 99990 001 CAMPUS PARTNERS TRAINING    REPR 011202 OPTION ____ SRC W   INST
ACCT 999 980 133 01  SSN 990 00 0133             17106 SUMMER HOLLOW       GOOD
PROG 99920  LN 999 98 0133 45   ID ___________   _________________________ DOM
NAME PADRON, CLYDE                    282 012 1211                         PRIM
RMK _________________________ BAD  INST 01 03 01 WINSTON-SALEM, NC   23384
MORE LOANS  MORE CONS                                 ACCEL
LOAN AMT   2,339.00  NEXT DUE   03 13 02 PREV W/AGCY   00806 STATUS       49
PRIN BAL   2,184.07  NEXT PMT       35.94 DT PLACED  04 12 01 ADR CHG   06 16 99
CUR DUE       35.94  ACT/NOT   397   397 EFFECT DT  01 24 02 CR BUREAU 10 97  S
PAST DUE     554.64  OLDEST BIL 12 13 00 ***  SCHEDULE   *** LT CHG Y SP FEES P
FEES DUE      46.55  ** SPCL BILLING  ** MIN AMT       35.94 NOTE DATE 09 10 97
TOTL DUE   2,439.83  PMT AMT   _________ MIN CD Y PRORATE  Y SEP DATE  11 27 98
PAYOFF     2,439.83  FIRST BILL __ __ __ AUTO  N JUDGEMENT N GRCE END  08 27 99
TOT INT      209.21  LAST BILL  __ __ __ 1ST   70    35.94 M INT RATE     5.000
DAILY INT     .2992  SB FREQ/PLAN   _ __ 2ND    1     8.07 M GRCE MONTHS      9
LST PMT DT 02 24 00  DROP _ PD ALLOW ___ 3RD    0      .00 M DEF END   12 13 00
LST PMT      111.47  AGRMT  _ DEF TYPE _ 4TH    0      .00   LN TYPE N  SUB 000
PRN PAID     154.93  DEF PLAN _ RESCHD _ 5TH    0      .00   FIN CHG     339.80
INT PAID      57.06  LTR _____ LN MON  _ BILLED OUT FREQ     **  STOP CODES  **
FEE PAID      14.60  SB DUE          .00 PLAN I    TERM  120 INT    0   PDUE  0
PRIN CANC       .00  SB DAYS PD        0 MATURITY   11 13 06 INVOIC 0   DELQ  0
CANC END   00 00 00  DUE END         .00 TERM DATE  07 28 10 BILL   0   AUDT  0
PPM END    00 00 00  PROJ INT        .00 LOAN RMK _________________________
I6960 CURRENT PAYMENT DUE ON 02/13/02
```

Entering Changes on MAIN

1. OPTION = ***CHG****
2. Tab to one of the updatable fields.
3. Key in new data.
4. Press ***ENTER***.

   Your transaction is complete when: **I2029 UPDATES SUCCESSFUL** is displayed in the **MESSAGE** field.

Note: *The option for making a change to the repayment schedule is ***UPD***. Rescheduling and Special Billing transactions are detailed in Section 6.

Loan Summary Screen

```
LSUM  ACCT 999 980 133 00     SSN  990 00 0133    SRC W   OPTION ____  SEL __
NAME PADRON, CLYDE                      282 012 1211 BAD  INST 01 03 01   INST
17106 SUMMER HOLLOW          _________________________
CTY/ST WINSTON-SALEM, NC  ZIP 23384       MORE LOANS MORE CONS   PRIM GOOD DOM
SELECT =======> 01            02                                      *TOTALS*
PG/SQ/ST: 99920 45 49 : 99921 45 40 :
PL/FQ/RT: I  M  5.000 : I  M  5.000 :             :
TAJM/GRC: N 1 N N 009 : N 0 N N 009 :             :
LOAN AMT:   2,339.00  :    264.00   :             :            :   2,603.00
PRI BAL :   2,184.07  :       .51   :             :            :   2,184.58
PRI PAID:     154.93  :    263.49   :             :            :     418.42
INT PAID:      57.06  :     22.81   :             :            :      79.87
FEE PAID:      14.60  :      4.05   :             :            :      18.65
LST PAID:   02 24 00  :  01 22 02   :             :
LST AMT :     111.47  :     88.73   :             :            :     200.20
NEXT DUE:   03 13 02  :  12 16 02   :             :
CURR DUE:      35.94  :             :             :            :      35.94
PAST DUE:     554.64  :             :             :            :     554.64
FEES DUE:      46.55  :             :             :            :      46.55
TOTL DUE:   2,439.83  :             :             :            :   2,439.83
INT ACCR:     209.21  :             :             :            :     209.21
PAYOFF  :   2,439.83  :       .51   :             :            :   2,440.34
SC/DI/CI: N   .2992   : N   .0001   :
```

Update Capabilities:

Borrower's Name, Primary Address, Telephone Number, Source Codes associated with these fields

Loan Summary Screen

LSUM = Loan Summary Screen

1. OPTION = ***LSUM***.

2. Press ***ENTER***.

Up to four loans can be displayed on each screen in addition to a totals column. If the borrower has more than four loans, the **TOTALS** column will reflect zeros, and the message **MORE LOANS/MORE CONS** will be displayed in the Special Message line.

Additional loans can be viewed by entering ***F*** or ***FOR*** in the **OPTION** field.

If the borrower has loans with another lender, a **MORE LNDRS** message will appear in the Special Message field.

Applying An Advance

```
ADVA                                                   OPTION chg
                                                       _________________________
ACCOUNT  999 980 105 01   SSN   990 00 0105            TRAINING FILE
PROGRAM  99920            LOAN  999 98 0105 09         STUDENT ID  __________
NAME     GREELEY, CLYDE                                _________________________

BASE CODE                         4                   LOAN AMT        5000.00
FUND ISSUE               __________                   NOTE DATE      09 11 98
ADVANCE DATE               01 01 02                   LAST ADVANCE   12 22 00
ADVANCE AMOUNT               500.00                   GRACE MONTHS        009
DISBURSEMENT TYPE                 P
SOURCE                            I
SEP DATE                   06 01 02
ACADEMIC LEVEL
ENROL STATUS CODE                 F
ENROL EFFECTIVE DATE       09 11 98
ENROL PERIOD START DATE    08 28 98
ENROL PERIOD END DATE      06 01 02

HISTORY COMMENT     ________________________________
```

Update Capabilities

Separation Date
History Comment
Source
Enrollment Status Code
Enrollment Effective Date
Enrollment Period Start Date
Enrollment Period End Date

Default Fields

Base Code
Disbursement Type

Default Values

Base Code: 4 = current money being disbursed
Disbursement Type: P = paid to borrower, C = credited to borrower's account
Source (source of advance): I = Institution, D = DataLink

Applying An Advance

ADVA = Adding Advance

1. OPTION = ***ADVA***.
2. Press ***ENTER.***
3. OPTION = ***CHG***.
4. Tab to the **FUND ISSUE** field and enter the fund number if applicable.
5. Key **ADVANCE DATE**.
6. Key **ADVANCE AMOUNT**.
7. Key the following fields as appropriate:

   Enrollment Status Code
   Enrollment Effective Date
   Enrollment Period Start Date
   Enrollment Period End Date

Note: See page G-104 for a list of codes.

8. Press ***ENTER***.

   Your transaction is complete when: **ADVANCE APPLIED** is displayed in the **MESSAGE** field.

Note: Key over any undesired default values.

Reversing an Advance

```
ADVANCE REVERSAL                                     OPTION chg_    SELECT 03

ACCOUNT  999 980 105 01   SSN   990 00 0105          TRAINING FILE
PROGRAM  99920            LOAN  999 98 0105 09       STUDENT ID  ___________
NAME     GREELEY, CLYDE                 COMM : adv applied to wrong loan_____

  SELECT   BASE CD  BASE #   FUND ISSUE    ADVANCE DATE  ADVANCE AMT

     1)       4       001                    12 15 99       2000.00
     2)       4       001                    12 22 00       1000.00
     3)       4       001                    01 01 02        500.00
```

Reversing an Advance

ADVR = Advance Reversal

1. OPTION = ***ADVR***.*
2. Press ***ENTER.***
3. OPTION = ***CHG***.
4. SELECT = # of the ADVANCE to reverse.
5. COMM = enter a free-form history comment.
6. Press ***ENTER***.

   Your transaction is complete when: **I2029 UPDATES SUCCESSFUL** is displayed in the MESSAGE field.

Note: *This screen will be blank if advances were applied before the loan was converted to System III.

Entering Non-Cash Payments

```
PAYMENT                                                     OPTION CHG

 ACCOUNT  999 980 105 01   SSN   990 00 0105                 CAMPUS PARTNERS TRAINING
 PROGRAM  99920            LOAN  999 98 0105 09              STUDENT ID  ___________
 NAME     GREELEY, CLYDE
 MORE LOANS
 TYPE                       20
 SOURCE                      I
 PAYMENT DATE         01 30 01
 PAYMENT AMOUNT   50.00_____
 SPECIAL PMT FLAG            _

 BATCH NUM              _____
 ITEM NUM               _____
 FILM NUM          __________
```

Non-Cash Payments

PAY

1. OPTION = ***PAY***.
2. Press ***ENTER.***
3. Option = ***CHG***.
4. Tab to **TYPE** field.
5. Key **20** (noncash payment).
6. Key SOURCE — **I** = Institution
   D = DataLink
   T = Tax Offset
7. Key **PAYMENT DATE.**
8. Key **PAYMENT AMOUNT.**
9. Press ***ENTER***. ***CHG*** will appear in the **OPTION** field.
10. Press ***ENTER*** again. Your transaction is complete when: **I2029 UPDATES SUCCESSFUL** appears in the **MESSAGE** area. If this is an advance payment, enter an **A** in the **SPECIAL PAYMENT FLAG** field. Otherwise, the overpayment will not stop the generation of future bills.

Payment Reversals

```
PAYMENT REVERSAL 99990 001                              OPTION chg_    SELECT 1

ACCOUNT  999 980 105 01   SSN   990 00 0105             CAMPUS PARTNERS TRAINING
PROGRAM  99920            LOAN  999 98 0105 09          STUDENT ID  ___________
NAME     GREELEY, CLYDE                                 MORE LOANS
REVERSAL:   SOURCE I      REASON 7   COMMENT 1 NSF CHECK______________________
2  ______________________________          3 ______________________________
SELECT:              1)
TYPE/SOURCE         20/I
ADV/SPLIT
DATE            01/30/01
PAYMENT AMT       50.00
PRINCIPAL         50.00
INTEREST            .00
LATE CHARGE         .00
COLL FEES-BOR       .00
OTHER CST-BOR       .00
C/FEES-INST         .00
O/COST-INST         .00
BATCH NUM
ITEM NUM
FILM NUM     0000000000
AGENCY NUM        00000
```

Payment Reversals

PAYR

1. OPTION = ***PAYR***.
2. Press ***ENTER***.
3. OPTION = ***CHG***.
4. SELECT = # of payment to reverse.*
5. Tab to **SOURCE.**
6. Key SOURCE — **I** = Institution
   D = DataLink
7. REASON — **7** = NSF *For additional codes, please access the HELP screen*
   9 = Other *by keying **HELP** in the **OPTION** field or consult the Glossary.*
8. Key a brief comment explaining the reason for the reversal.
9. Press ***ENTER***.

   Your transaction is complete when: **I0715 UPDATE SUCCESSFUL ─ CONTINUE PROCESSING** appears in the **MESSAGE** area.

Note: *You can reverse only non-cash payments. Your Customer Service Representative handles cash payment reversals.

Payoff Projection

```
PAYOFF PROJECTION                                      OPTION ____

ACCOUNT  999 980 145 01   SSN   990 00 0145            CAMPUS PARTNERS TRAINING
PROGRAM  99920            LOAN  999 98 0145 50         STUDENT ID  ___________
NAME     BULANADI, CLYDE

CURRENT POST DATE         01 30 02          PAYOFF PROJECTED FOR 15 DAYS
PROJECTED DATE OF PAYOFF  02 14 02
PROJECTED DAYS TO PAYOFF  15


LOAN INFORMATION

                                    INT RATE    CURRENT  PROJECTED   PROJECTED
EXL  PROG      LOAN/SEQ      STAT   END DATE     PAYOFF   INTEREST      PAYOFF
 _   99920   999 98 0145 50   49    00 00 00   1,824.93       3.73    1,828.66




                                                             TOTAL    1,828.66
```

Payoff Projection

PAYO

1. Option = ***PAYO.***

2. Press ***ENTER***.

3. Enter the **Projected Date of Payoff** <u>or</u> the number of days in the **Projected Days to Payoff** field.

   <u>Note</u>: System III will automatically set the Projected Date and Projected Days to 15 days in the future. However, you may key over this information with a date or days up to 90 days in advance of today's date.

4. If you wish to exclude one or more loans from the payoff calculation, place an "X" in the Exl (exclude) field.

5. Press ***ENTER***.

   <u>Note</u>: Loans in the following statuses will automatically be excluded for the payoff calculation: 80, 81, 82, 83, 85, 90, 91, 92, 93, 94, 95, and 96.

Payment Request

```
      ACH PAYMENT REQUEST                                  OPTION ____

   ACCOUNT  999 980 145 01   SSN   990 00 0145          CAMPUS PARTNERS TRAINING
   PROGRAM  99920            LOAN  999 98 0145 50       STUDENT ID ___________
                             NAME     BULANADI, CLYDE

                              TRANS/RTE NUM _________
                            ACCOUNT NUM   _________________
                        ACCOUNT TYPE  C    ( C=CHECKING, S=SAVINGS )
                        PROC FEE IND  Y    ( Y=ASSESS FEE, N=NO FEE )
                         ADV PMT IND   N    ( Y=ADV PMT, N=REG PMT )

    PROG      LOAN/SEQ      STAT    CURR DUE    PAST DUE    FEES DUE     PMT AMT
    99920   999 98 0145 50   49         0.00       40.00        0.00       40.00




                                                      PROCESSING FEE        5.00
                                                               TOTAL       45.00
```

Payment Request

PREQ

1. OPTION = ***PREQ***
2. Press ***ENTER.***
3. Option = ***CHG***
4. Tab to **TRANS/RTE NUM**.
5. Key the **TRANSIT/ROUTING** number of the bank.
6. Key the bank **ACCOUNT NUMBER**.
7. Key **ACCOUNT TYPE**, if other than **C.**

   C = Checking (default)
   S = Savings
8. The **PROCESSING FEE** will default to **Y** (yes, assess processing fee). If you wish to waive this fee, change this field to **N** (no fee).
9. Key **PAYMENT AMOUNT**.
10. Press *ENTER*. **VRFY** will appear in **OPTION** field.
11. Key **CHG** in **OPTION** field.

Your transaction is complete when “ACH PAYMENT REQUEST PROCESSED” appears in the message area.

Exit Interview Package

```
EXIT INTERVIEW PACKAGE REQUEST                        OPTION PROC

ACCOUNT  999 980 105 01   SSN   990 00 0105
PROGRAM  _____            LOAN  ___ __ ____ __        STUDENT ID  ___________
NAME     GREELEY, CLYDE                               _________________________

PRIMARY .............................
75 CUMBERLAND ST
_________________________

WINSTON-SALEM, NC  23384 ____
GOOD DOM          516 548 9265 GOOD
INST 01 02 01     INST

ADDRESS TO BE USED:  PRIMARY

PKG         CONSOLIDATION
REQ(X)     PGM      LOAN NUMBER    TYPE   STATUS
    X     99920  999 98 0105 09   NDSL     10
    X     99921  999 98 0105 09   NDSL     10
```

Generating an Exit Interview Package

XPKG = Exit Package

1. OPTION = ***XPKG***.

2. Press ***ENTER***.

   PROC immediately appears in the **OPTION** field.

3. Type an **X** in the **PKG REQ(X)** field beside each loan for which you want to generate an exit package.

4. Press ***ENTER***.

   Your transaction is complete when: **I0000 PROCESS SUCCESSFUL** is displayed in the **MESSAGE** field.

Note: If the borrower has multiple loans, type an **X** in the **PKG REQ(X)** field beside each loan for which you want to generate an exit package. To block generation, leave this field blank. **The history comment for this transaction will appear after the evening's post.**

On-Line Exit Interview Package

```
EXIT INTERVIEW PACKAGE REQUEST                         OPTION PROC

ACCOUNT  999 980 105 01   SSN   990 00 0105
PROGRAM  _____            LOAN  ___ __ ____ __         STUDENT ID  ___________
NAME     GREELEY, CLYDE                                _________________________

PRIMARY ............................
75 CUMBERLAND ST
_________________________

WINSTON-SALEM, NC  23384 ____
GOOD DOM          516 548 9265 GOOD
INST 01 02 01     INST

ADDRESS TO BE USED:  PRIMARY

PKG         CONSOLIDATION
REQ(X)      PGM     LOAN NUMBER    TYPE   STATUS
    S      99920  999 98 0105 09   NDSL     10
    S      99921  999 98 0105 09   NDSL     10
```

```
STUDENT LOAN DISCLOSURE STATEMENT            DATE: 01-24-02
BORROWER: 999 980 105                        LOAN PAYABLE TO:
GREELEY, CLYDE                               TRAINING
75 CUMBERLAND ST                             MAIL YOUR PAYMENTS TO:
WINSTON-SALEM, NC  23384-                    CAMPUS PARTNERS
                                             P.O. BOX 1810
                                             WINSTON-SALEM, NC  27102-1810

PROGRAM/LOAN NUMBER: 99920-999-98-0105-09     LOAN TYPE: FEDERAL PERKINS
    ***********************************--------------------------------
    *    ANNUAL       *    FINANCE    *     AMOUNT    ¦  TOTAL OF     ¦
    * PERCENTAGE RATE *    CHARGE     *    FINANCED   ¦  PAYMENTS     ¦
    *     5.000 %     *    $1,484.56  *    $5,500.00  ¦     $6,984.56 ¦
    ***********************************--------------------------------
                          YOUR PAYMENT SCHEDULE
INTEREST ACCRUES BEGIN: 03-02-03             TOTAL # OF PMTS:    118
FIRST PAYMENT DUE:      04-16-03               117 PMTS AT    $59.34
BILL FREQUENCY:         MONTHLY              FINAL PMT  OF    $41.78

ITEMIZATION OF AMOUNTS FINANCED:  $_________ AMOUNT GIVEN DIRECTLY TO YOU
                                  $_________ AMOUNT PD TO INST. ON YOUR BEHALF
THE BORROWER ACKNOWLEDGES RECEIPT OF AN EXACT COPY OF THIS STATEMENT.
BORROWER ______________________________________________________  DATE ________
```

Requesting an On-Line Exit Interview Package

XPKG = Exit Package

1. OPTION = ***XPKG***.

2. Press ***ENTER***.

   PROC immediately appears in the **OPTION** field.

3. Type an **S** in the **PKG REQ(X)** field beside each loan for which you want to generate an on-line exit package.

4. Press ***ENTER***. Page 2 of the on-line exit screen will appear. At this point, you may print the Student Loan Disclosure Statement using your normal print functions.

Note: If the borrower has multiple loans and you selected all loans for a borrower, press ***ENTER*** to view the on-line exit screen for each loan.

5. After all loans have been viewed, press ***ENTER*** to return to page 1 of the on-line exit screen.

6. You will then receive the following message in the **MESSAGE** field: **I0000 REPORT VIEW SUCCESSFUL**.

7. In order to have a permanent record in history of this transaction, go to **HCMT** and enter a history comment indicating that you generated an exit.

QUIKLETTERS

Need to get the message across to cohort borrowers, delinquent borrowers, or any borrowers that you may have? What could be any more effective than a personalized letter that you send to their address? You can do that quickly and easily by sending them a Quikletter. With the proper security, you can order a standard Quikletter while on line, and we will send it to any eligible borrowers that you designate. If you want to go a step further, create your own custom Quikletter and mail it to your Customer Service Representative, and we'll take care of the rest.

Why QuikLetters are a great choice for communicating with your borrowers.

- Choose from hundreds of standard messages with proven impact
- Create your own letter with a final review by our Marketing team
- Send a letter to any single borrower, group of borrowers, or all borrowers
- Individual letters are mailed on a daily basis and mass mailings are produced every Friday
- Include account information (similar to what is included on a billing statement) if you choose
- Order your standard letters online in seconds or call your Customer Service Representative for consultation
- Edits prevent letters from going to borrowers without a good address, in a 8x or 9x status, or flagged with a stop code, saving you money by not producing unnecessary letters
- Include a form or other stuffer at no additional charge
- Specify a specific date range for a mailing campaign or leave it open-ended
- After a custom letter is created, just enter its number to order online in the future
- Custom letters are available for your institution's use only

The possibilities are endless with Quikletters for scheduling exit interviews, sending additional collection letters, confirming address information, verifying loan information, or reminding borrowers about E-Bill, E-Pay, or AutoDraft options.

QuikLetters

```
AUDIT LETTER REQUEST                                         OPTION PROC

ACCOUNT 999 980 105 01      SSN  990 00 0105                 TRAINING FILE
PROGRAM 99920               LOAN 999 98 0105 09              STUDENT ID ___________
NAME    GREELEY, CLYDE

PRIMARY .............................
75 CUMBERLAND ST
_________________________

WINSTON-SALEM, NC  23384 ____
GOOD DOM          516 548 9265 GOOD
INST 01 02 01     INST     __ __ __

ADDRESS TO BE USED: PRIMARY

                             CONSOLIDATION          AUDIT     CRED BUR BOR
AUDIT             REQ(X)     PGM    LOAN NUMBER     STOP CODE  CNTC REQ(X)    ST
CODE 50435           X     99920  999 98 0105 09       0              _       10
                     X     99921  999 98 0105 09       0              _       10
```

```
AUDIT LETTER REQUEST                                         OPTION ____

AUDIT CODE 50435    STUFF CODE RR     NO STUFFER
O                           IMPORTANT NOTICE
O
OYOUR FEDERAL PERKINS STUDENT LOAN(S) WILL BE MONITORED CLOSELY BY THE
OFEDERAL GOVERNMENT AND THE DEPARTMENT OF EDUCATION THROUGHOUT THE NEXT
OYEAR.  YOU ARE PART OF A "COHORT GROUP" OF INDIVIDUALS THAT ENTERED
OREPAYMENT ON OR AROUND THE SAME TIME.  PLEASE TAKE TIME TO READ ALL THE
OINFORMATION PROVIDED IN YOUR PROMISSORY NOTE TO ENSURE THAT YOU ARE
OFAMILIAR WITH THE OBLIGATIONS AND OPTIONS AVAILABLE.
O
OIT IS OUR INTENTION TO PROVIDE YOU WITH THE BEST SERVICE POSSIBLE.  IF
OANY PROBLEMS ARISE AND YOU ARE UNABLE TO MAKE YOUR REGULAR PAYMENT,
OPLEASE CONTACT ------------------------------ IMMEDIATELY.
O
OBELOW IS THE STATUS OF THIS ACCOUNT:
CPLEASE NOTIFY CAMPUS PARTNERS IMMEDIATELY WITH NAME/ADDRESS
CCHANGES AND SUBMISSION OF DEFERMENT/CANCELLATION FORMS.




I2212 ENTER "Y" OR "YES" OPTION TO SEND LETTER
```

QuikLetters

1. OPTION = ***AUDT***.

2. Press ***ENTER***.

   PROC immediately appears in the **OPTION** field.

3. Type the 5-digit number associated with the QuikLetter you wish to send.

4. An **X** in the **REQ (X)** field indicates that a QuikLetter is being generated for this loan.

5. Press ***ENTER***. Page 2 of the QuikLetter screen appears allowing for review of the message. If you have chosen the wrong letter, cancel the request by keying ***CANC*** in the **OPTION** field.

6. Re-enter ***AUDT*** in the **OPTION** field to access the same borrower previously viewed.

7. When you are ready to send the letter, key ***YES*** in the Option field and press ***ENTER***. The following message will appear: **I2029 UPDATES SUCCESSFUL**. The letter will generate during the nightly post, along with the comment in History.

Note: The O's and C's that precede each line of text will indicate if this is an opening or closing paragraph

How to Read History

Campus Partners' history contains a permanent, complete and chronological record of all transactions processed on a borrower or a loan record. This includes monetary (payments, deferments, etc.) and non-monetary (address changes, collection activities, due diligence sent) transactions. Campus Partners also retains the ID # of the person performing the transaction. In the event that old data needs to be researched or in the event that a user makes a change on the wrong account, the old data can be checked in the history file.

Unlike some servicers, Campus Partners does not remove (or purge) history after a certain period of time. Therefore the complete, permanent history is always available for on-line review or printing by the University staff or Campus Partners.

HISTORY OVERVIEW:

System III stores comprehensive historical records of the borrowers and their loans. History entries are generated from three sources:

- on-line processing
- batch processing
- system processing

System III groups the transactions by borrower number and loan number and assigns each transaction with a sequence number and a date so that the history entries can be viewed chronologically. For inquiry only, these entries permit no updates.

To get an idea of the data stored on history, look at the **History Menu** screen below:

```
HISTORY MENU                                                OPTION ____
 ACCOUNT  ___ ___ ___ __   SSN   ___ __ ____
 PROGRAM  _____            LOAN  ___ __ ____ __        STUDENT ID  ___________
  NAME     ______________________________

                                                              RESEARCH

              ALL HISTORY ..................... HALL     RALL
              ADVANCE HISTORY ................. HADV     RADV
              BORROWER HISTORY ONLY ........... HBOR     RBOR
              CONSOLIDATION HISTORY ........... HCON     RCON
              DEFERMENT HISTORY ............... HDEF     RDEF
              CANCELLATION/POSTPONEMENT HIST .. HCAN     RCAN
              LOAN HISTORY .................... HLON     RLON
              PAYMENT HISTORY ................. HPAY     RPAY
              PRIOR SERVICER HISTORY .......... HPRI     RPRI
              ORIGINATION FEE HISTORY ......... HORG     RORG
              OUTSTANDING BILLING HISTORY ..... HOSB
              PF KEY ASSIGNMENTS .............. PFK

 E0226 ENTER SEARCH ARGUMENTS
```

Note: Although the option to make PF Key assignments appears on this screen, it is not a history option.

Options: The History Menu gives you several options for choosing the type and amount of history you will view. You have three main options:

First, you can view history for a borrower, a loan, or an account by choosing among the three search arguments below:

- borrower number
- program and loan number
- account number

Second, you have 10 options for choosing the ***type*** of history you will view.

- HALL - All History
- HADV - History of Advances
- HBOR - History of Borrower Only
- HCON - History of Consolidation
- HDEF - History of Deferments
- HCAN - History of Cancellations
- HLON - History of the Loan
- HPAY - History of Payments
- HPRI – Prior Servicer History
- HOSB - History of Outstanding Billing

Third, you may use the research option to examine specific transactions. To do so, you would use an "R" instead of "H" for any of the first 9 options above.

Accessing History:

1. Access the History Menu by keying **HIST** and pressing ENTER.

2. Using the chart on the next page as a guide, key the options for the type and amount of history you wish to view.

3. Press ENTER. The screen for the options you have chosen will appear.

Accessing History:

The chart below shows how different option codes and search arguments indicate which history transactions you will view.

Option Code	Research Option	Search Argument	Description
HOSB	N/A	Borrower Number, Account Number, or Program and Loan Number	List of all bills outstanding for this borrower on all loans, loans within this consolidation, or a single loan, depending on the Search Argument.
HADV	RADV	Borrower Number, Account Number, or Program and Loan Number	List of all advances and advance reversals made for this borrower for all loans, loans within this consolidation, or a single loan, depending on the Search Argument.
HPAY	RPAY	Borrower Number, Account Number, or Program and Loan Number	List of all payments, payment reversals, and manually input history comments made for this borrower on all loans, loans within this consolidation, or a single loan, depending on the Search Argument.
HDEF	RDEF	Borrower Number, Account Number, or Program and Loan Number	List of all deferments, deferment reversals, denials or returns of deferment forms, and manually input history comments for this borrower for all loans, loans within this consolidation, or a single loan, depending on the Search Argument.
HCAN	RCAN	Borrower Number, Account Number, or Program and Loan Number	List of all cancellations and postponements, plus reversals, returns or denials of these forms, and manually input history comments for this borrower for all loans, loans within this consolidation, or a single loan, depending on the Search Argument.
HCON	RCON	Borrower Number or Account Number	List of all consolidated or unconsolidated transactions or changes to ACH arrangements for this borrower for all consolidations or for the single consolidation having this account number, depending on the Search Argument.
HBOR	RBOR	Borrower Number	List of all changes to name and address(es), Student ID, Lender Remark, or other miscellaneous demographic data for this borrower.
HLON	RLON	Borrower Number, Account Number, or Program and Loan Number	List of all transactions <u>not included</u> under HBOR Loan or HCON for this borrower for all loans, loans within this consolidation, or a single loan, depending on Search Argument used. This includes all monetary transactions and adjustments affecting loan status as well as notices of borrower contacts.
HALL	RALL	Borrower Number, Account Number, or Program and Loan Number	List of <u>all</u> transactions for this borrower (HLON/RLON, HCON/RCON) and all his loans, loans within a consolidation, or a single loan, as appropriate for transaction type and Search Argument used.

<u>INTERPRETING HISTORY:</u>

There are several primary fields that are common to the history screens on System III.

HOW TRANSACTIONS ARE DISPLAYED on History Screens--

When you use any of the options on the History Menu, the screen will first display the most current data. A message at the bottom of the screen will indicate that you are viewing the <u>last page of history</u>.

All history is displayed chronologically by the most recent transaction date. Adjustments and related comment transactions will be stored under the same date and sequence number as the transactions they affect. For this reason, multiple history transactions can be listed under the same date and sequence number.

TO PAGE WITHIN THE HISTORY LISTINGS --

To Move Back and Forth -- Key **F** (forward) or **B** (backward) in the OPTION field to move within the history listings.

To Display History for a Particular Period -- If you know what date or even what year the transaction should have occurred, you can limit the amount of history you will view at one time on both the standard and research screens.

Entering dates in the **SEARCH START DATE** and **END** fields will save you time in searching for the transaction you need. To use this option, enter one or both of these dates and re-key the history option before pressing ENTER. The system will adjust the display.

Note: When using one of the history options, System III will only display history for the last two years (two years from today's date). However, you may view <u>ALL</u> of a borrower's history by entering zeroes in the **SEARCH START DATE** field and re-entering your history option (e.g., HALL, HPAY, etc.)

FIELDS COMMON TO HISTORY SCREENS

HALL - All History Display Screen

```
 ALL HISTORY DISPLAY                                   OPTION B
❶ SEARCH START DATE 012400      END 999999
❷ ACCOUNT  999 980 140 01 _ SSN   990 00 0140           TRAINING FILE
❷ PROGRAM  99920            LOAN  999 98 0140 24        STUDENT ID
❷ NAME     HOOVER, CLYDE                                GOVERNOR'S SON
❸ 204 N RAY ST              _________________________ _________________________
❸ CITY/STATE  WINSTON-SALEM, NC    ZIP 23384 ___ ❸ PHONE  724 669 4847    GOOD
  GOOD DOM    SRC INST  ADR CHG 04 30 96          PH SRC BORR  PH CHG 09 07 01

TRANDT P PROGM LOAN NUMBER  S TRAN DESC     T R A N S A C T I O N  D E T A I L
                                             TO   #BIL 116  AMT   44.67 FREQ M
                                                  #BIL 001  AMT   44.59 FREQ M
                                             TOTAL FINCHGS  1096.85 GEN BIL000
 122101   99920 999980140-24 W HIST COMMENT   EIR-CLD PH#-WOULD RING TWICE
 122101   99920 999980140-24 W HIST COMMENT   AND THEN DISCONNECT-CLD DA-NL
 122501 * 99920 999980140-24 B DEFERMENT      TYPE S     FS 020100 FE 020600
                                                         PS 011225 PE 020624
                                              HARDSHIP-RSCHD CD-2 DEF PLAN-
 010702   99920 999980140-24   SYSTEM HIST CM    75 DAY EIP NOTICE
 012402   99920 999980140-24 B REPR LOAN ADJ  ORIG TRAN:   DEFERMENT
                                              ORIG TRANDT: 011225
                                              AMT DUE     44.67- PAST   .00+
                                              INT ACRD    17.91- PAID   .00+
 I0000 LAST PAGE OF HISTORY
```

These fields appear on all standard and research history screens:

❶ **SEARCH START DATE** and **END**. The search option allows you to limit the history display to a particular period. In using these fields, you enter a time range that includes the transaction date of the items you wish to view. You can choose to use one, both, or neither of these fields.

- If you leave the Search Start Date blank, the listing will begin exactly two years back from today's date.
- If you leave the End date blank, the listings will stop with the most recent transaction recorded in history.

❷ **Search Argument**. These are common to all screens in the borrower loan processing database.

❸ **Primary Address, Telephone Number, Address Location**, and **Address Status** of the borrower as well as **Source**.

FIELDS COMMON TO ALL HISTORY SCREENS

(except for Outstanding Billing History Display)

HALL - All History Display Screen

```
ALL HISTORY DISPLAY                                       OPTION B
 SEARCH START DATE 012400      END 999999
 ACCOUNT  999 980 140 01 _ SSN   990 00 0140          TRAINING FILE
 PROGRAM  99920            LOAN  999 98 0140 24        STUDENT ID
 NAME     HOOVER, CLYDE                               GOVERNOR'S SON
 204 N RAY ST             _________________________ _________________________
 CITY/STATE  WINSTON-SALEM, NC    ZIP 23384 ___    PHONE  724 669 4847    GOOD
  GOOD DOM    SRC INST  ADR CHG 04 30 96          PH SRC BORR  PH CHG 09 07 01
  ❶ ❷
TRANDT P PROGM LOAN NUMBER  S TRAN DESC     T R A N S A C T I O N  D E T A I L
                                             TO   #BIL 116  AMT   44.67 FREQ M
                                                  #BIL 001  AMT   44.59 FREQ M
                                             TOTAL FINCHGS  1096.85 GEN BIL000
 122101   99920 999980140-24 W HIST COMMENT   EIR-CLD PH#-WOULD RING TWICE
 122101   99920 999980140-24 W HIST COMMENT   AND THEN DISCONNECT-CLD DA-NL
 122501 * 99920 999980140-24 B DEFERMENT      TYPE S     FS 020100 FE 020600
                                                         PS 011225 PE 020624
                                              HARDSHIP-RSCHD CD-2 DEF PLAN-
 010702   99920 999980140-24   SYSTEM HIST CM    75 DAY EIP NOTICE
 012402   99920 999980140-24 B REPR LOAN ADJ  ORIG TRAN:   DEFERMENT
                                              ORIG TRANDT: 011225
                                              AMT DUE     44.67- PAST   .00+
                                              INT ACRD    17.91- PAID   .00+
 I0000 LAST PAGE OF HISTORY
```

❶ **TRANDT** - The effective date of the transaction, or the date the transaction began to affect the borrower's loan.

Example: The period start date on a deferment, postponement, and/or cancellation form.

❷ **P** - Posting Sequence. The following values may appear in this field:

* = The post date is different from the transaction date.

C = The transaction occurred before the loan was converted to our system.

```
 ALL HISTORY DISPLAY                                   OPTION B
 SEARCH START DATE 012400      END 999999
 ACCOUNT  999 980 140 01 _ SSN   990 00 0140           TRAINING FILE
 PROGRAM  99920            LOAN  999 98 0140 24        STUDENT ID
 NAME     HOOVER, CLYDE                                GOVERNOR'S SON
 204 N RAY ST             _________________________ _________________________
 CITY/STATE  WINSTON-SALEM, NC    ZIP 23384 ___  PHONE  724 669 4847    GOOD
  GOOD DOM    SRC INST  ADR CHG 04 30 96         PH SRC BORR  PH CHG 09 07 01
             ③       ④        ⑤    ⑥                    ⑦
TRANDT P PROGM LOAN NUMBER  S TRAN DESC     T R A N S A C T I O N  D E T A I L
                                             TO   #BIL 116  AMT   44.67 FREQ M
                                                  #BIL 001  AMT   44.59 FREQ M
                                             TOTAL FINCHGS  1096.85 GEN BIL000
 122101   99920 999980140-24 W HIST COMMENT   EIR-CLD PH#-WOULD RING TWICE
 122101   99920 999980140-24 W HIST COMMENT   AND THEN DISCONNECT-CLD DA-NL
 122501 * 99920 999980140-24 B DEFERMENT      TYPE S     FS 020100 FE 020600
                                                         PS 011225 PE 020624
                                              HARDSHIP-RSCHD CD-2 DEF PLAN-
 010702   99920 999980140-24   SYSTEM HIST CM    75 DAY EIP NOTICE
 012402   99920 999980140-24 B REPR LOAN ADJ  ORIG TRAN:   DEFERMENT
                                              ORIG TRANDT: 011225
                                              AMT DUE     44.67- PAST   .00+
                                              INT ACRD    17.91- PAID   .00+
 I0000 LAST PAGE OF HISTORY
```

❸ **PROGM** - Program number for the loan affected by the transaction.

❹ **LOAN NUMBER** - Loan number of the affected loan.

Note: Program/Loan Number will be replaced by Consolidation Number for transactions that are part of Consolidation History. The listing will read "CONS 01" (or 02, 03, etc.) to identify the consolidation for which this change took place.

These fields will be blank for Borrower History transactions since they affect all loans.

❺ **S** - Transaction Source. This code shows where authorization for the transaction originated.

A	=	Automatic Direct Draft
L	=	Lockbox
W	=	Campus Partners(Winston-Salem)
I	=	Institution
B	=	Borrower
C	=	Collection Agency
D	=	DataLink
R	=	IRS
S	=	System-generated
T	=	Tax Offset
K	=	Clearing House

❻ **TRAN DESC** - Abbreviated description of the transaction.

❼ **TRANSACTION DETAIL** - Details of the actual changes made during the transaction.

The information displayed in these fields will vary according to the type of transaction recorded. Using abbreviations to identify the transaction, the Transaction Description should be self-explanatory.

RESEARCHING A HISTORY TRANSACTION

At times, you may need a more comprehensive history of a transaction because you are researching a problem account. By using the **research option** for history display, you can view these additional details:

Sequence Number
Post Date
Employee Number
Batch, Item, and Group Numbers

RALL: All History Display - Research

```
ALL HISTORY DISPLAY - RESEARCH                    OPTION B
SEARCH START DATE 012500      END 999999
ACCOUNT  999 980 153      SSN   990 00 0153
PROGRAM  _____            LOAN  ___ __ ____ __    STUDENT ID ___________
NAME     ABED MD, CLYDE
401 BEVERIDGE RD
CITY/STATE  WINSTON-SALEM, NC  ZIP 23384 ____     PHONE  973 456 1654     GOOD
GOOD DOM    SRC WSI   ADR CHG 01 26 88            PH SRC WSI_  PH CHG 06 18 98

TRANDT P PROGM LOAN NUMBER  S TRAN DESC    T R A N S A C T I O N  D E T A I L
                                             INT CYR      .28-
 SEQ-151  POSTDT- 030404  EMP#-W680    BATCH-         ITEM-        GROUP-
030404   99980 999980153-01 W LOAN STATUS     FROM 090          TO 080
❶SEQ-052❷POSTDT- 030404 ❸EMP#- W680 ❹BATCH-     ❺ITEM-      ❻GROUP-
030404   99980 999980153-01 I REPR LOAN ADJ   ORIG TRAN:   PAYMENT REVERSL
                                              ORIG TRANDT: 970409
                                              AMT DUE        .00+ PAST   35.02+
                                              PRIN BAL     28.96+ PAID   28.96-
                                              INT ACRD      6.24+ PAID     .23-
                                              IN CYR         .23-
SEQ-153  POSTDT- 030404   EMP#- W680    BATCH-         ITEM-        GROUP-
030404   99920 999980153-02 W R/W FROM COLL   ASSGN FLG-  SUCCESS-X TRANS ACT-W
SEQ-154  POSTDT- 939494   EMP#- W680    BATCH-         ITEM-        GROUP-
I0000 LAST PAGE OF HISTORY
```

❶ **SEQ** - Sequence number assigned to this transaction by S-III.

❷ **POSTDT** - Post Date. Date the transaction posted to the account. This may differ from the Transaction Date, which is the first day the transaction took effect.

If a future or post-dated transaction is keyed, the transaction will appear in history in order of Transaction Date with an asterisk in the "P" column to show that the two dates are different.

❸ **EMP #** - The User ID Number of the employee who keyed this transaction. This field will be blank for system-generated transactions.

❹ **BATCH** - Batch number assigned to work with which this transaction was processed. This field will be blank if the transaction was entered on-line or generated by the system.

❺ **ITEM** - The item number assigned to this transaction within the specified batch. This field will be blank if the transaction was entered on-line or generated by the system.

❻ **GROUP** - This field indicates whether this transaction was originally recorded in history under this borrower number or if it was recorded for this borrower under another number and then brought into the grouping.

OUTSTANDING BILLING HISTORY SCREEN

HOSB – History of Outstanding Bills

The **Outstanding Billing History Display** lists the unsatisfied bills for all loans associated with the borrower. Unlike the other history screens, HOSB does not retain information permanently. Instead, its entries are displayed in order of bill date so that the display changes as the bills are paid.

Billing history is created as bills are generated. When a coupon book is generated, all bills in that book are added to Outstanding Billing History. As bills are paid, the display is updated and the bill amounts are removed. If the borrower has paid all the bills that have been generated, no entries will appear on HOSB.

Since billing should be continuous, periods with no billing must be indicated by an exempt days segment entry identifying the type of form processed and the duration of the exempt period. (See fields 1, 6, and 12.)

```
OUTSTANDING BILLING HISTORY DISPLAY                    OPTION B
 SEARCH START DATE 000000      END 999999
 ACCOUNT  999 980 140 01   SSN   990 00 0140          TRAINING FILE
 PROGRAM  99920            LOAN  999 98 0140 24       STUDENT ID
 NAME     HOOVER, CLYDE                               GOVERNOR'S SON
 204 N RAY ST              _________________________ _________________________
 CITY/STATE  WINSTON-SALEM, NC    ZIP 23384 ____   PHONE  724 669 4827   GOOD
 GOOD DOM    SRC WSI   ADR CHG 04 30 96           PH SRC BORR  PH CHG 09 07 01
   ❶     ❷       ❸     ❹      ❺  ❻ ❼     ❽        ❾        ❿   SB AMT/ 11
 DUE DT PROGM LOAN NUMBER CON GEN DT T C  AMT DUE  BLL INT   AMT PD EXMPT DYS 12
 102400 99920 999980140-24 01 091900 2 1    44.72      .00      .00
 112400 99920 999980140-24 01 110400 2 1    45.39      .00      .00
 122400 99920 999980140-24 01 120400 2 1    45.39      .00      .00
 122500 99920 999980140-24 01 000000 3        .00      .00      .00  365
 122501 99920 999980140-24 01 000000 3        .00      .00      .00  365

 I0000 LAST PAGE OF HISTORY
```

❶ **DUE DT** - The date the payment for this bill is due (MMDDYY), or the start date of the period covered by the form for an exempt days segment.

❷ **PROGM** - The program number of the loan for which this listing was generated.

❸ **LOAN NUMBER** - The number of the loan for which this listing was generated.

❹ **CON** - The consolidation number for the consolidation, which held this loan.

❺ **GEN DT** - The date this bill was generated. If this listing marks an exempt days segment, the date will contain zeros.

❻ **T** - The bill type code. This field will indicate if the bill is a non-repayment interest bill or a repayment bill. It will also identify whether this listing pertains not to a bill but to an exempt period. The codes are:

1 = Non-repayment interest bill
2 = Repayment bill
3 = Deferment exempt days segment
4 = Postponement exempt days segment

❼ **C** - The conversion code. This code will indicate if the bill was generated before or after the System III Conversion. The values are:

1 = Bill created after the conversion
2 = Bill created before the conversion
3 = Analyst-created bill

❽ **AMT DUE** - The original amount of the payment bill.

Note: This amount will not be reduced by a partial payment.

❾ **BLL INT** - The billed interest due for non-repayment.

❿ **AMT PD** - The partial amount of the billed amount due that has been paid.

11 **SB AMT** - Special Bill Amount. The amount to be billed during the special billing period or during a customer adjustment period.

12 **EXEMP DYS** - The number of days the loan is exempt from billing due to a form processed. This period begins on the date shown in the DUE DT field for this listing.

History Comment

```
FREE-FORM HISTORY COMMENTS                              OPTION CHG

ACCOUNT  999 980 105 01   SSN   990 00 0105
PROGRAM  _____            LOAN  ___ __ ____ __          STUDENT ID  ___________
NAME     GREELEY, CLYDE

 DATE            VARIABLE COMMENTS
______     ______________________________
           ______________________________
           ______________________________
           ______________________________
           ______________________________
           ______________________________
           ______________________________
           ______________________________
           ______________________________

        REQ(X)  PGM     LOAN NUMBER
CONS 01   X    99920  999 98 0105 09
          X    99921  999 98 0105 09
```

Entering a History Comment

HCMT = History Comment

1. OPTION = ***HCMT***.

2. Press ***ENTER***. (***CHG*** will automatically appear.)

3. Tab to the **VARIABLE COMMENT** field.

4. The system will default to the current date if you leave the date field blank. You can backdate the comment, but the system will not accept future dates.

5. Press ***ENTER***.

   You will see this message: **I0025 ENTER YES TO UPDATE, NO TO CANCEL. YES** will automatically appear as the option. **Remember:** Once entered, history comments are permanent.

6. To update, press ***ENTER***.

   Your transaction is complete when: **I0715 UPDATE SUCCESSFUL – CONTINUE PROCESSING** is displayed in the **MESSAGE** field.

   To cancel the comment, key **NO** and press ***ENTER***. **I0725 UPDATE CANCELLED** will appear in the **MESSAGE** field.

Note: If the borrower has multiple loans, place an **X** to the left of each loan that is to receive the comment.

Reminder: When entering history comments, please abbreviate clearly.

History Comment

```
HISTORY COMMENT                                        OPTION CHG

 ACCOUNT  999 980 105 01   SSN   990 00 0105
 PROGRAM  _____            LOAN  ___ __ ____ __        STUDENT ID  ___________
 NAME     GREELEY, CLYDE

 ADDR1       75 CUMBERLAND ST
 ADDR2       _________________________
 CITY/STATE  WINSTON-SALEM, NC    ZIP 23384 ____   PHONE  336 548 9265      GOOD
 GOOD DOM    SRC INST   ADR CHG 01 02 01           PH SRC INST   PH CHG 01 24 02

 CODE  VARIABLE COMMENT                  TRANSLATION                        DATE
 ___   ______________________________                                     ______
 ___   ______________________________                                     ______
 ___   ______________________________                                     ______
 ___   ______________________________                                     ______

 _  AUDIT    REQ(X)  PGM    LOAN NUMBER    ST
 CONS 01       X    99920  999 98 0105 09  10
               X    99921  999 98 0105 09  10
```

Entering a History Comment

HCOM = History Comment

1. OPTION = ***HCOM***.
2. Press ***ENTER***. (***CHG*** will automatically appear.)
3. Tab either to the **CODE** field (codes are listed in the Glossary) ***or*** to the **VARIABLE COMMENT** field.
4. If entering a code, key the appropriate three-digit code. If entering a variable comment, key your comment.
5. The system will default to the current date if you leave the date field blank. You can backdate the comment, but the system will not accept future dates.
6. Press ***ENTER***.

   You will see this message: **I0025 ENTER YES TO UPDATE, NO TO CANCEL. YES** will automatically appear as the option. **Remember:** Once entered, history comments are permanent.

7. To update, press ***ENTER***.

   Your transaction is complete when: **I0715 UPDATE SUCCESSFUL – CONTINUE PROCESSING** is displayed in the **MESSAGE** field.

   To cancel the comment, key **NO** and press ***ENTER***. **I0725 UPDATE CANCELLED** will appear in the **MESSAGE** field.

Note: If the borrower has multiple loans, place an **X** to the left of each loan that is to receive the comment.

Reminder: When entering history comments, please abbreviate clearly.