

NEW LOAN INPUT FORM-- (BATCH TICKET MUST ACCOMPANY INPUT FORMS)

Post Office Box 2902
Winston-Salem, NC 27102



YOU MUST HAVE ENTRIES IN ALL FIELDS WITH AN ASTERISK (*). **INDICATES NSLDS FIELDS

SI	Program No. *	Loan Number *	Seq. No. *	You Must Indicate Sequence Number
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PRIMARY NAME
Last Name, Suffix, Space, First Name, Middle Initial * Social Security No. *

Address Status (1) Address - Line 1*
Address - Line 2* MAY BE BLANK WHEN USING SOCIAL SECURITY HEADER OPTION

Location (2) City/State (State must be a valid two digit State abbreviation) * Zip Code*
Foreign Address Line (Use only if additional line for Foreign Address is needed) Telephone Area Code

SECONDARY ADDRESS

Address Status Address - Line 1
Address - Line 2 WHEN ENTERING SECONDARY INFORMATION, USE SAME REQUIREMENTS AS FOR PRIMARY

Location City/State (State must be a valid two digit State abbreviation) Zip Code Bill-to-Address (Y,N)

Foreign Address Line (Use only if additional line for Foreign Address is needed) Telephone Area Code

LOAN DATA

Loan (3) Sub-Type* Type (4) Loan Amount (5)* Interest Rate (6)* Note Type (7) Note Date (8)* Mo. Day Yr. Separation Date (9)* Mo. Day Yr. Status (10) *

Repymnt Freq Term Grace Min. Code (15) * Min. Pmt. Amt. (16) * MPOC (17) * Student Lt. Chg. Fund Issue No. (For Private Funds Only)

Plan (11) (12) (Mnth) (13) Months (14) * Fin. (18) Code (19)

OTHER INFORMATION

Student ID No. Income Code Marital Status Sex Race **Birth Date **Acad Lev (24) Driver's License No. State

**Enrolled St Cde (20) **Dte St Cd Eff (21) **Enr Start Dte (22) **Enr End Dte (23) **Acad Year (25)

Loan Remark

Items in red in "Other Information" section required for Perkins Loans only

INTEREST ACCRUAL INFORMATION

IBE IAC IRC BIF SUB DCF FIELD1 FIELD 2 FIELD3

COMAKER/COSIGNER ADDRESS

Last Name, Suffix, Space, First Name, Middle Initial Type

Address Status Address - Line 1
Address - Line 2

Location City/State (State must be a valid two digit State abbreviation) Zip Code Telephone Area Code

Foreign Address Line (Use only if additional line for Foreign Address is needed)

INPUT CODES AND FIELD DEFINITIONS

- | | | | |
|---|---|--|--|
| <p>(1) Address Status
G – Good
B – Bad</p> | <p>(2) Location
D – Domestic
F – Foreign
N – Domestic Foreign (Canada/ Mexico)</p> | <p>(3) Loan Type
N – Federal Perkins
H – HPSL/PCL/LDS
T – NSL
I – Institutional (Private)</p> | |
| <p>(4) Sub-Type
000 – Federal Perkins, HPSL, NSL and most Institutional
011 – HELA Programs (only University of Chicago)
022 – Institutional Programs with variable interest rates</p> | <p>(5) Loan Amount
The total amount disbursed to date. If any activity has occurred on this loan, please do <u>not</u> use this form. Contact your Customer Service Representative.</p> | | |
| <p>(6) Interest Rate
Federal Perkins: 05.000 = 10/01/81 to present
HPSL: 05.000 = 11/04/88 to present
LDS: 05.000 = 11/06/90 to present
PCL: 05.000 = 07/01/93 to present</p> | <p>(7) Note Type Code
C (Single Borrower Note) – Note Date between 10/01/92 and 06/30/93 with \$40 minimum (T – Co-Signer Note, N – Co-Maker Note)
D (Single Borrower Note) – Note Date 07/01/93 and after with \$40 minimum and new deferments (U – Co-Signer Note, O – Co-Maker Note)
B (Single Borrower Note) – Loans with note dates prior to 10/01/92 or a borrower who has an outstanding previous note with a \$30/\$90 minimum (S – Co-Signer Note, M – Co-Maker Note)</p> | | |
| <p>(8) Note Date
Date of first disbursement on this loan</p> | <p>(9) Separation Date
The expected or actual date of graduation</p> | <p>(10) Status
10 – Enrolled, Undergraduate
11 – Enrolled, Graduate
20 – In Grace
40 – In Repayment, Not Past Due</p> | |
| <p>(11) Repayment Plan
I – Equal Total Payments
IA – Equal Principal Payments
H1 – HPSL/NSL Equal Payments</p> | <p>(12) Frequency
M – Monthly
B – Bi-Monthly
Q – Quarterly
S – Semi-Annually
A – Annually
* Blank – Default value selected by customer</p> | <p>(13) Term
The length of the repayment period expressed in months
Ex. Perkins/NDSL -120 (10 years)</p> | <p>(14) Grace Months
Number of grace months determined by the Promissory Note.
Ex. Private Loans – If no grace period, enter 000.</p> |
| <p>(15) Minimum Code
Y – Bill Minimum
N – No minimum on this loan
* Blank – Default value by the customer</p> | <p>(16) Minimum Payment Amount
Applicable minimum to bill on this loan. If left blank, the system uses the Default value selected by the customer.</p> | <p>(17) MPOC – Minimum Proration Override Code
N – Do not prorate the minimum
Y – Prorate the minimum
* Blank – Default value selected by customer</p> | |
| <p>(18) Student Financial Code
D – Dependent Undergraduate
I – Independent Undergraduate
S – Dependent Graduate
G – Independent Graduate</p> | <p>(19) Late Charge Code
Y – Assess Late Charges
N – Do not assess late charges
* Blank – Default value selected by customer</p> | <p>(20) Enrollment Status Code
The status code reflecting the borrower's current enrollment status.
A – Approved Leave of Absence
D – Deceased
F – Full Time
G – Graduated
H – Half Time < Full Time
L – Less than Half Time
W – Withdrawn
N – Not Available</p> | |
| <p>(21) Date Enrollment Status Effective
Date borrower entered into his/her current enrollment status.
(Coincides with field #20)</p> | <p>(22) Enrollment Start Date
Date classes are to begin as certified on the financial aid application for the specific period covered by the aid. (Ex. Aid received 10/01/07, classes begin 09/04/07 – Enrollment Start Date – 09/04/07)</p> | <p>(23) Enrollment End Date
Date classes are to end as certified on the financial aid application for the specific period covered by the aid. (Ex. Aid received 10/01/07, classes end 12/18/07 – Enrollment Start Date – 12/18/07)</p> | |
| <p>(24) Academic Level
Required field, if Perkins/NDSL. Otherwise, may be left blank. Valid codes are:
1 = Freshman/First Year
2 = Sophomore/Second Year
3 = Junior/Third Year
4 = Senior/Fourth Year
5 = Fifth Year/Other Undergraduate
A = First Year Graduate/Professional
B = Second Year Graduate/Professional
C = Third Year Graduate/Professional
D = Beyond Third Year Graduate/Professional
G = Graduate/Professional, Year of Study Unknown
N = Not Available, may be used only if the Date of First Disbursement is prior to July 1, 2008</p> | <p>(25) Academic Year
Required field, if Perkins/NDSL. Otherwise, may be left blank.
Code values are: The 2-digit year value that represents the first year of the academic award year (i.e. 08 = 2008-2009 academic award year).</p> | | |