Overview
A major modification was made to Loan Counseling processing in 2014. The most significant change is that we are no longer using Program Completion to try to determine when a student is a completer. The way Exit Counseling Forecasts are made and used is also different.

Another significant change is that we will move the time consuming processing to the evening hours and have Production Control run that for you, based on your set up. As part of the morning run, we’ll also have Production Control process the incoming files for entrance counseling, exit counseling and MPN, and complete entrance/exit/MPN requirements and checklists as appropriate.

You’ll continue to have full control over when you want to create communications and checklists, but should find that your processes run much faster.

The process continues to look for students with ACCEPTED loan awards that require entrance counseling (per your setup), but do not have an entrance counseling row on the loan counseling page. Entrance counseling is only assigned when students have an originated loan with a response file from COD and no counseling is indicated in the response file.

For Exit Counseling, the system is:
- Finding students with loans who do not have at least one-half time enrollment load as of the “last date to add” for a term (i.e., the effective FA Term Census date)
- Finding students with loans who had at least one-half time enrollment load but who withdrew after the “last date to add”.
- Finding students with loans who dropped below one-half time enrollment load after the “last date to add”.
- Allowing you to identify students who have graduated/completed. If these students subsequently add enrollment for a future term before the Counseling Required Date, the system will remove them from the forecast.

The Exit Counseling Forecast page will help you to identify students who require counseling. You control how many days after the enrollment opens that students who haven’t enrolled will start to show upon the forecast list. You also control how many days after the actual “required” date that the displayed date will be set. They will remain on the forecast list until the displayed required date and at that point a checklist/communication is triggered. This allows you time to review the list.
The process is designed to create two exit counseling communications. If the student responds to the first by completing Exit Counseling (as reported by COD or entered by you), no second communication is created. The second communication is created on/after the checklist due date and is intended to be the cover letter for counseling materials that you would send the student.
Setup:

**Tab 1**

**Entrance Counseling.** Selecting this causes the early evening process to review awards and to determine which loans need counseling; and to cancel checklists if awards are canceled.

**Exit Counseling.** Selecting this causes the forecast table to be built by the evening process.

**Update MPN Checklists.** Selecting this causes an MPN Checklist to be created for new borrowers who have a loan that is originated and acknowledged by COD but does not have an MPN linked to it. When MPN link information is received, the checklist is completed.

**Entrance Complete on Loan History.** Select this if you want to post a “Completed” counseling on new borrowers at your school if NSLDS shows a loan of a matching type from a school other than yours. If this box is unchecked, only students who complete a counseling reported by ED will be marked as complete.
Exit Forecast: Counseling Required: Delay Action XX Days. If you want to be able to vet the forecast list, enter the number of days you want students to remain on the forecast after they meet counseling requirements before they are processed for Exit Counseling. Seven days is recommended if you review the lists weekly.

Exit Forecast: Not Enrolled Delay Selection XX Days After First Date to Enroll. If a student is not enrolled after the First Date to Enroll for a term, she will be selected for Exit Counseling Forecast. Since the first date to enroll is normally well before the beginning of a term, enter the number of days you want between the first day to enroll for a term and the day you want the student to appear on the forecast.

The Exit Counseling Required date will be the end of the Add period for students with no future enrollment.

Auto Compl Entr allows you to specify which loans should be completed if you have selected the Entrance Complete on Loan History option.

Auto Cmpl Exit. Allows you to specify which loans should be completed if you have selected Exit Counseling for overnight updates.

- End of Add can be found at Set Up SACR > Foundation Tables > Term Setup > Term/Session Table, Session Time Periods.
- First Date to Enroll can be found at Set Up SACR > Foundation Tables > Term Setup > Term/Session Table, Session Table

Example: With this set up, if the first date for enrollment for 1510 is 25 March 2014, students who haven’t enrolled in 1510 would begin showing up on the forecast list 90 days later (about 25 June 2014).

The last day to add for 1510 is 2 September 2014. The Exit Counselling process would not put a checklist/communication on students who had not enrolled for 7 days, so the first checklists would be put on about 9 September 2014.
Tab 2: (no changes) This setup for each loan code identifies checklists and communications with the appropriate loan types.

This example would cause the process to create a checklist and create an initial exit counseling communication that gives the student an opportunity to complete counseling on the NSLDS website. If a counseling notification is received from NSLDS, the checklist is completed and the exit counseling marked as complete.

If no counseling notification is received from NSLDS, the first communication is followed up with a second communication after the checklist due date and the checklist and counseling are marked as complete.

The E-Mail Address Usage entered here must match what is used on the Comm Gen run control used to create e-mail communications.
This process creates the Communications and Checklists for students who need entrance or exit loan counseling, or who need to complete a DL MPN.

You should run the process for exit counseling at least weekly.

The Entrance and Exit check boxes determine which communications/checklist, as indicated in your set up, are to be processed.

The **Initiate Checklists** and **Initiate Communications** check boxes cause the process to initiate the checklists and communications indicated in your setup.

If you uncheck one of these boxes, the next time the process runs with the box checked it will initiate checklists/communications for all students previously identified as needing that action.

**Force Exit counseling** will cause the process to skip the initial exit counseling communication and to just send the follow up communication.
If a student is forecast for Exit Counseling, they will be displayed on this page until the Counseling Required Date is reached.

**EmplID**: If you are adding a student (from a Graduation List, for example), Add a row and enter an EmplID, reason and date. If you have a lengthy list, it can be imported using the **File Parser** utility.

**Reason for Selection**
include:
- Completed/Graduated
- Load Below Half time
- Officially Withdrawn
- No Future Enrollment

Since **No Future Enrollment** is a projection, all other reasons take precedence!

Except for Completed/Graduated, which must be assigned manually, the forecast process will assign appropriate reasons. You may also add a row and enter a student ID, reason and date.

**Counseling Required Date**
is variable.
- For No Future Enrollment, it is the

**End of Add** can be found at **Set Up SACR > Foundation Tables > Term Setup > Term/Session Table**, Session Time Periods.

**First Date to Enroll** can be found at **Set Up SACR > Foundation Tables > Term Setup > Term/Session Table**, Session Table

The Exit Counseling Forecast does not project who would be selected if you ran Exit Counseling today, but rather forecasts when a particular student will be selected.

The icon on the Title bar can be used to pull all the rows from this component into an Excel spreadsheet.

To see who would be selected if Exit Counseling were run today, use query **NDU_FA_0001_2**.

Staff with security for **Set Up** have access to this screen.
regular session **last date** to enroll for the future term.

- **For Load Below Half Time or Officially Withdrawn**, the date would be based on when the enrollment activity happened plus the number of “Delay” days on your set up. Load does not begin to be calculated until after census.

- **For Completed/Graduated**, enter the current date

Except for Completed/Graduated, you may modify the date to extend the time the student remains on the forecast or enter today's date to cause the student to be processed sooner.

Since there is a delay between when a student is placed on the forecast and when they will be assigned counseling (the next term’s census), a feature was added in the Summer of 2016 to update the **Counseling Required Date** to a date that is sooner. To update the date select the “**Change required date**” box and select a **Reason For Selection**. Enter the current date that is listed on the forecast that you would like to update and the new date that you would like the requirement to be added. When you save a message will display confirming you want to make this change. The next time the Loan Counseling process runs it will assign the requirement and when you run your NDU Loan Counseling CCC process it will add the appropriate checklists and communications.
The **File Parser** can be used to load a .csv file containing completers/graduates.

The file needs to have no header row and 3 columns:

- **Column 1**: Institution (like BSC01)
- **Column 2**: EmplID (including leading zeroes)
- **Column 3**: Graduation/completion date in MM/DD/YYYY format (such as 5/24/2014). Use current date.

If you have duplicates in the list, the process will run to No Success.

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### Run File Parser

<table>
<thead>
<tr>
<th>Run Control ID:</th>
<th>Run_File_Parser_dj</th>
<th>Report Manager</th>
<th>Process Monitor</th>
</tr>
</thead>
</table>

**File Mapping ID**: NDU_EXIT_COUNSELING_GRAD

**File Path List**:

<table>
<thead>
<tr>
<th>File Path</th>
<th>File Name</th>
</tr>
</thead>
</table>
| \ndusftshare.ad.ndus.edu\CSData\FinancialAid\Reports\NDUS1\File_Name.csv | (Use your school code (BSC01, LRSC1, NDSCS, etc) instead of NDUS1 and your correct file name.)

On the Run control:

- **Use File Mapping ID** NDU_EXIT_COUNSELING_GRAD
  - **Use a File Path** like
    \ndusftshare.ad.ndus.edu\CSData\FinancialAid\Reports\NDUS1\File_Name.csv. (Use your school code (BSC01, LRSC1, NDSCS, etc) instead of NDUS1 and your correct file name.)

If students on your list are already on the Exit Counseling Forecast page, you will not be able to enter a new list containing repeated names (i.e., the File Parser will run to “No Success”).

Students from the file with no Manage Loan Counseling page will be displayed for 10 days on the Exit Counseling Forecast page; you can identify them, as they will have not have an entry in the Name column.

Students from the file who have a Manage Loan Counseling page but no accepted loans will remain on the Exit Counseling Forecast for 10 days.

If the completer/graduate subsequently enrolls and receives additional Federal Loans, when appropriate, the student will be again selected for Exit Counseling.
Entrance Counseling

Financial Aid > View Packaging Status Summary (Loan Counseling Link) or Financial Aid > Loans > View Loan Counseling Data

Running the entrance process creates rows on the Entrance/Exit Loan Counseling page. It also creates a checklist FASFCN (Stafford), FAPKSN (Perkins), FAPLCCN (Grad PLUS) or FANRCQN (Nursing), as appropriate, on the student’s To Do List.

The Update Loan Counseling process no longer expects an Exit row set to pending. If you manually add an Entrance row, do not add an Exit row at the same time.

If the Loan Counseling Update process is able to find a completed counseling in the COD files (or local NSLDS records if that option is set), it will complete the Entrance row with a completed date from the COD file and will also complete the appropriate checklist item.

To access the Comments page, click on the name of the loan in the Comments column.

Counseling entries that were “converted” based on information available in SA8.0 will have a June 2008 date and have an appropriate comment with a format like “LNCN: Automatic Entrance Completion - History /LNCN”. If you enter additional comments, you should enter them after the “/LNCN” tag.

If your school is not set up to complete Entrance Counseling based on NSLDS, then there will be a History comment that is strictly informational.
You must manually complete entrance or exit counseling that was completed outside of www.studentloans.gov (i.e., completed on Mapping Your Future or www.dl.ed.gov).

Complete the Entrance row and SAVE the page; you should also receive a message box telling you that the checklist has been completed.
Queries

Here are queries that can be used to assist with loan counseling:

**Query NDU_FA_0001_1, Loan Entrance Counseling**

Enter school code and Address Type for a list of students who still need to complete Entrance Loan Counseling. The prompted email address is provided in the event you want to send follow-up emails using mail merge.

**Query NDU_FA_0001_2, Exit Counseling Forecast**

Use this query to see who would be included if you ran Exit Counseling after a particular date.

An asterisk in the Chk column indicates that the counseling required date has gone past and the records may need to be checked. This can be normal, if there is a delay set up.

**Query NDU_FA_0001_3, Unprocessed CREC Notices**

CREC is the name of the file that COD uses to pass loan counseling information. If we’ve received information for your school that doesn’t match a student or a loan type, then the information is reflected here. **EC Cd** is:

- S – Sub/Unsub DL Loan
- P – PLUS DL Loan
- i – Exit Counseling

**Query NDU_FA_0001_4, Pending Counseling Letters**
Enter your School code and select a Counseling Type of Entrance or Exit. This query projects who would get a letter and a checklist if you were to run the Loan Counseling CCC process now.