



Scholastic ONline Information System  
for the Web

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# Clearinghouse

## Exporting for the National Loan Student Clearinghouse

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This text guides you in extracting student information from your SONISWEB® databases and exporting them to a file that you then transmitted to the Clearinghouse.

June 2006

*Systems, Inc.*

The logo for RJM Systems, Inc. It consists of the letters 'R', 'J', and 'M' stacked vertically in a stylized, blue, serif font. To the right of this logo, the text 'Systems, Inc.' is written in a blue, italicized, serif font.

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## NEW IN THIS EDITION

### June 2006 Enhancements

- “Computing the Anticipated Graduation Date (AGD)”, page 15.

### March 2006 Initial Release

- This edition is for SONISWEB® version 2.0. A few of these changes were also added to version 1.4.
- Figure 1 Toolbar for those with User-ID access, page 3, and Figure 17 Login Displays, Figure 18 Typical SONISWEB® Page on page 16, and Figure 12 Biographic Record without SSN, Figure 13 Biographic Record with an SSN, and Figure 14 Address Detail Record on page 13.

## NAVIGATING THE FUNCTIONS



• Figure 1 Toolbar<sup>1</sup> for those with User-ID access

Administrative users have User-IDs and Passwords and see an initial display like Figure 1. Administrative users can be anyone in your system with an ID but typically they're paid Staff and those few Faculty with additional administrative duties.

The access rights of an administrative user is defined by:

1. The **Profile** selected when you were issued a User-ID and Password. Typical Profile categories are the Registrar, the Registrar's staff, the Financial Officer, Admissions staff, Deans, etc. One profile covers all the people in each staff category.
2. The **individual limits** specified for you when you were issued a User-ID and Password. A typical limit is preventing access to faculty and staff personal records.
3. The **privileges** added for you when you were issued a User-ID and Password. The right to “Make Grades Official” or “View and Change PINs” are examples.



• Figure 2 Function Lists<sup>1</sup> - Partial

After clicking **Systems** in Figure 1 you get the selections shown at the top of Figure 2.

After clicking **Names** in Figure 1 and search for a person, you get the selections shown at the bottom of Figure 2.

<sup>1</sup> You only see what you're authorized to see by your Profile and individual Limits and Privileges. So your choices may be fewer than these.

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## Diagnosing and Fixing Problems

See the text “Messages, Errors, and Diagnosis”.

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## Setting Your Browser for Proper Function and Security

Internet Explorer<sup>2</sup> (IE), Fire Fox™, Netscape®, and Opera Web browsers have an “auto-complete” or password-form save feature that is handy for individual computers but defeats privacy on shared computers like those in computer labs and libraries. See the text “Browser Settings” to set your browser for security, good performance, and to prevent your getting old data.

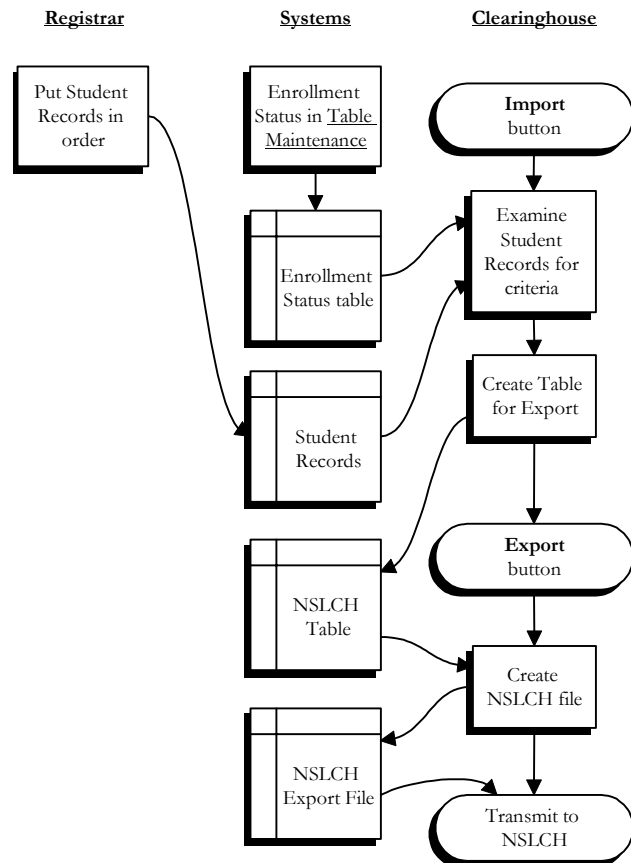
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<sup>2</sup> Only Internet Explorer (IE) version 5.5 or later is supported for administrative use.

## PREPARING FOR CLEARINGHOUSE EXPORT

Figure 3 shows the process for sending valid records to the National Student Loan Clearinghouse.

- Put student Records in Order. See “The Social Security Number in Records” on page 13 and “Address Records” on page 14.
- Set up the Enrollment Status Table. SONISWEB® uses this to figure out who is full-time, who is part-time, etc. See “Enrollment Table Settings” on page 11.
- Importing and examining student records as shown in “Import, View, and Export” on page 6 and “Reading the Clearinghouse Codes and Checking the Import”, page 7.
- Exporting to create the NSLCH file described on page 6.
- Transmitting the NSLCH file to the Clearinghouse, page 10.



• Figure 3 Clearinghouse Process

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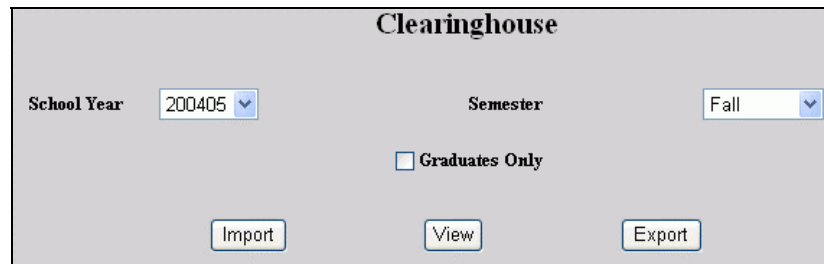
## IMPORT, VIEW, AND EXPORT

The only students who are imported, can be viewed, and will be exported are those with:

- Social Security numbers in the “SSN” field of their Biographic records (see page 13).
- The “NSLCH Block” checkboxes without checkmarks (page 13).
- A “Preferred” address in their Address records (see page 14).
- Enrolled courses for the year and semester you pick in Figure 4.
- For the “Graduates Only” option, no active Program record.

All of the Clearinghouse functions are under **Systems**. You must be authorized in your role-based security profile to access these functions. See your SONISWEB® administrator if you lack the access you need.

1. From Figure 1 click **Systems**.
2. Click Clearinghouse in Figure 2. You get Figure 4.
3. In Figure 4, pick the year and semester you want to process from pulldowns<sup>3</sup>. (This also determines which students will appear and which will not.)



• Figure 4 Clearinghouse Prompt

4. If you want to report only those who’ve graduated, click the “Graduates Only” checkbox before clicking the Import button.

“Graduates Only” are students who had classes in the semester prior to that selected in Figure 4, have graduated, and have no active program of study. If they graduated but are still in an active program, they’ll not appear in the “graduates only” report. See “Program Record” on page 14 for an example.

5. Click the Import button. This examines student records, builds an extracted table of NSLCH records (as shown in Figure 5) and displays them for you.

**Caution:** clicking the Import button erases your last import file and replaces it with a new one. Make sure you are finished with the prior import-export file before importing again.

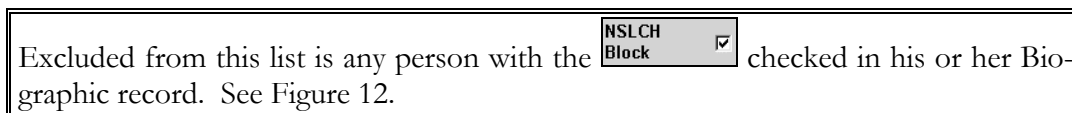
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<sup>3</sup> See “Figure 19 Arrows, Fields, Checkboxes and Buttons” on page 17 for guidance in using pulldown menus, checkboxes, etc.

Clearinghouse					
Student	SSN	Enroll Status	Start Status	Preferred Address	Anticipated Graduation
<u>Abbott, Louis C</u>	191919191	F		333 Abbott Billing Address Chapel Hill, NC 27515	06-01-2007
<u>Adams, Amy A</u>	000000000	D	02-02-2002	115 Poplar Chapel Hill, NC	06-01-2007
<u>Adams, Morticia J</u>	312115555	D	11-08-1998	458 Military Road Hut 91 Schenectady, NY 01111	06-01-2007
<u>Adams, Oscar</u>	111111111	F		1000 A Street Arlington, VA 29989	06-01-2007
<u>Anderson, Anna</u>	023527665	F			06-01-2007
<u>Bellows, Wendy</u>	789123456	H		3456 Carboro Rd Apt 17 Chapel Hill, NC 27561	06-01-2005
<u>Bendix, William T</u>	345987122	L		10791 Orchard Rd Wilmington, NC 27689	06-01-2007
<u>Bradford, Wilma</u>	715515788	L			06-01-2007
<u>Broadhurst, Pamela N</u>	333333333	H		12 E. Harvard Chapel Hill, NC	06-01-2007
<u>Dempsey, Jack M</u>	506506506	H		Chapel Hill, NC	06-01-2007
<u>McAfee, Roger</u>	661344505	H			06-01-2007

• Figure 5 Clearinghouse Student List see “Reading the Clearinghouse Codes and Checking the Import” below

If later you want to view the students Imported to the NSLCH table, click the View button in Figure 4.



- To change (edit) a student’s clearinghouse record, in Figure 5 click the underlined name, then go to “Editing Records Before Transmission” on page 9.
- Now or at a later time, click Clearinghouse again (Figure 2) and then click the Export button. You get Figure 6.



• Figure 6 Clearinghouse Export File Creation

- Write down the full file name in Figure 6. You will need it when you transmit it to the Clearinghouse.

## Reading the Clearinghouse Codes and Checking the Import

These are the significant items to examine in Figure 5.

- The total list of students; check this list against those you expected. Does it include all those enrolled and having or expecting loans? If any are missing, check the criteria for selection on page 6.
- Check the “Enroll Status” column and see that these reported values are correct:

**D** means deceased and is triggered by the “Expired”

date in the person’s Biographic record as shown here.



• Figure 7 Deceased Data in Biographic Record

**F** means full-time based on your enrollment table setting, see page 11.

**G** means graduated and not currently enrolled in another program of study at your institution.

**H** means half-time based on your enrollment table setting, see page 11.

**L** means less than half-time based on your enrollment table setting, see page 11.

**W** means withdrawn from all courses in this semester.

- Check “Start Status” dates. They have these meanings based on the “Enroll Status”.

**D** status date comes from the Biographic “Expired” date, see Figure 7.

**F** will never have a Start Status date, because the Clearinghouse always assumes the start date for these students is the first of the semester.

**H** or **L** status has a start status date only if the student withdrew from courses and that caused their “Enroll Status” to decrease. Students who add classes and increase their “Enroll Status” will not have start dates.

**W** and some **H** or **L** Start Status dates are determined from the most recent withdrawal dates in the student’s course records.

- If a Start Status Date occurs after the current date, that date will be displayed in a bold red font with a message warning that the future Start Status date will appear at the bottom of the page. This does not prevent the file from being exported, it only serves as a warning.
- If the “Enroll Status” entries of **D**, **G**, or **W** have blank start dates, there is a warning in the “Start Status” date column.

## EDITING RECORDS BEFORE TRANSMISSION

After clicking the Import or View buttons in Figure 4 you get Figure 5. To edit, click the underlined name of the person in Figure 5 to get Figure 8.

Clearinghouse			
PID	333333333	SSN	333333333
First	Pamela	MI	N
Suffix		Maiden	
DOB	08/14/1982	Anticipated Graduation	05/01/2006
Enroll Status	Less Than Half-Time	Start Status	01/01/2003
NSLCH Block	<input type="checkbox"/>		
Street Address	12 E. Harvard		
City	Chapel Hill	State	North Carolina
Zipcode	27516	Country	U.S.A.
	<input type="button" value="Reset"/>		<input type="button" value="Submit"/>
		<input type="button" value="View Export List"/>	

• Figure 8 Edit Clearinghouse Record

1. Make the changes in Figure 8.
2. Click the Reset button to clear your changes so you can start over.
3. Click the Submit button to save your changes.
4. Click the View Export List button to return to Figure 5.

This does not change the person's official SONISWEB® records. If the information in Figure 8 is wrong, you should change it in the person's records then import again.

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## TRANSMITTING TO THE CLEARINGHOUSE

Quoting from the National Student Clearinghouse Web site ([www.nslc.org](http://www.nslc.org), January 2006):

The Clearinghouse provides Secure File Transfer Protocol (FTP) for the secure exchange of data files. With Secure FTP, passwords and files are automatically encrypted for transmission, with no user involvement, no key management and no need for additional encryption such as PGP.

Once you have an account with the Clearinghouse, you can get this information. It guides you in transmitting to them the “NSLCH file” created on page 7. This information is available from the Clearinghouse:

- Schedule of Planned Submissions form is available on the secure site (log in, then scroll to the bottom of next page to find the link) You must have an ID and password issued by the Clearinghouse to access this form.
- FTP Access form: To submit an FTP account application for submission of data files via the Internet.
- Instructions on setting your Transmission Schedule
- Operations Guide: A school's handbook for use of the Clearinghouse basic service.

## ENROLLMENT TABLE SETTINGS

The SONISWEB® Enrollment Status table must have these entries in order to accurately run Clearinghouse.

**3T** for three-quarter time but it is treated as half-time (code of H) based on Clearinghouse rules.

**FT** for full-time reported as F.

**HT** half-time reported as H.

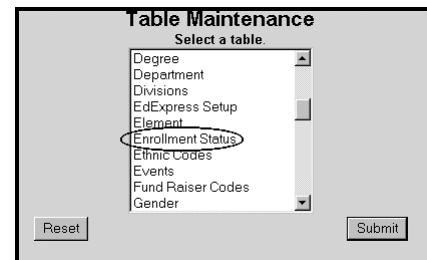
**PT** part-time, less than half-time thus reported with a code of L.

Table Maintenance is used to set the Enrollment Status table. You must be authorized in your role-based security profile to access these functions. See your SONISWEB® administrator if you lack the access you need.

1. Click **Systems** in Figure 1, then click **Table Maintenance** in Figure 2. You get Figure 9.
2. Select the “Enrollment Status” table from the list in the display shown in Figure 9. They are in alphabetical order.

To get to the table name quickly, click the top item, then keep pressing the E key on your keyboard until Enrollment Status appears.

3. Click the Submit button and the table will be presented as shown in Figure 10.



• Figure 9: System administration tables

Table Maintenance - <i>enrlstat</i>				
ADD New Record		OR Edit Record (click on first field): <a href="#">Sort Order</a>		
Credit Hours	Credit To	Disabled	Enrol status code	Enrol status text
(cred_hours)	(credit_to)	(disabled)	(enstat_cod)	(enstat_txt)
		0		
15.00	99.00	0	<input type="button" value="FT"/>	FULL TIME
6.00	8.00	0	<input type="button" value="HT"/>	HALF TIME
1.00	5.00	0	<input type="button" value="PT"/>	PART TIME
9.00	14.00	0	<input type="button" value="3T"/>	THREE-QUARTER TIME

• Figure 10 Enrollment Status Table

1. To change an item in the table, click its “button” (e.g., ) and it is presented for you to change as illustrated in Figure 11.

Table Maintenance - <i>enrlstat/enstat_cod</i>				
Credit Hours (cred_hours)	Credit To (credit_to)	Disabled (disabled)	Enrol status code (enstat_cod)	Enrol status text (enstat_txt)
<input type="text" value="15.00"/>	<input type="text" value="99.00"/>	<input type="text" value="0"/>	FT	<input type="text" value="FULL TIME"/>
<input type="button" value="Reset"/>	<input type="button" value="Submit"/>	<input type="button" value="Delete This Record"/>		

• Figure 11 Enrollment Status Entry

The “(disabled)” field lets you turn off a status if you do not want it used any longer. Put a 1 (the digit one) in the field to disable it. A zero (0) means it is enabled.

2. To add a new entry, click the Add button in Figure 10 and you get a blank version of Figure 11 with no Delete key.
3. Click the Reset button to erase your changes and start over.
4. Click the Submit button to save your entries.

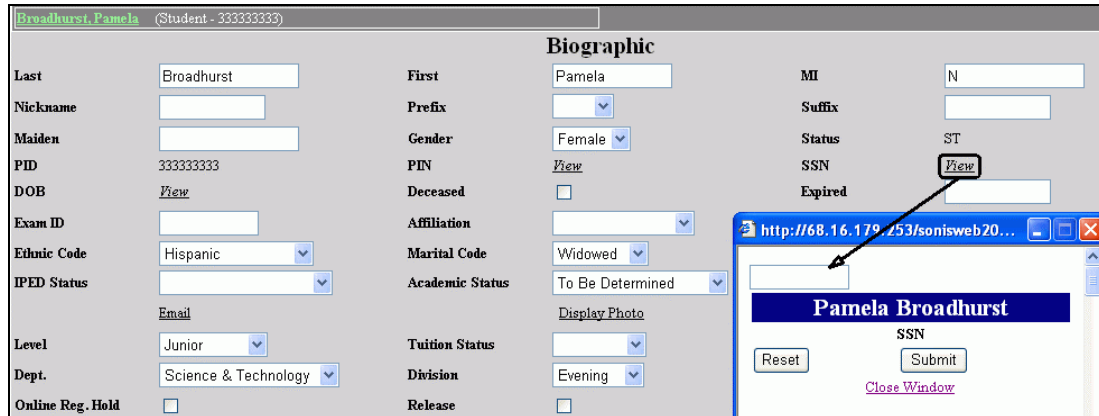
Check with your financial aid staff and with your academic standards staff to set these enrollment status values correctly. They have legal and financial repercussions.

If you are unfamiliar with maintaining tables, see the text “Table Configuration & Maintenance” and/or contact your SONISWEB® administrator.

## THE SOCIAL SECURITY NUMBER IN RECORDS

The social security number is the U.S. federal Social Security number. It must also be in the SSN field of each person’s biographic record. That is where SONISWEB® looks for a match.

SSN must be exactly nine digits with no hyphens or other punctuation. A description of the biographic record is in the SONISWEB® text “Students, Faculty, Applicant and Alumni/ae Record-keeping”.

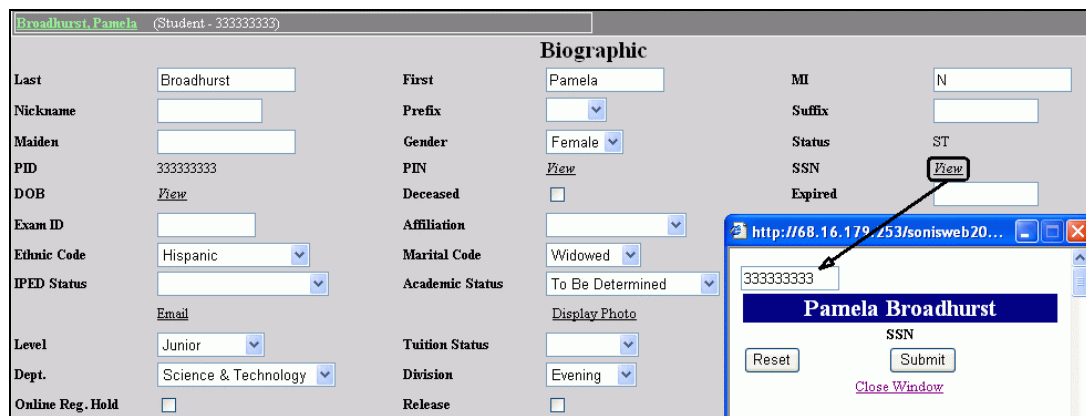


**Biographic**

Last	Broadhurst	First	Pamela	MI	N
Nickname		Prefix		Suffix	
Maiden		Gender	Female	Status	ST
PID	333333333	PIN	<a href="#">View</a>	SSN	<a href="#">View</a>
DOB	<a href="#">View</a>	Deceased	<input type="checkbox"/>	Expired	
Exam ID		Affiliation		<div style="border: 1px solid black; padding: 5px;"> <p>http://68.16.179.253/sonisweb20...</p> <p><b>Pamela Broadhurst</b></p> <p>SSN</p> <p><input type="Reset"/> <input type="Submit"/></p> <p><a href="#">Close Window</a></p> </div>	
Ethnic Code	Hispanic	Marital Code	Widowed		
IPED Status		Academic Status	To Be Determined		
Email		Display Photo			
Level	Junior	Tuition Status			
Dept.	Science & Technology	Division	Evening		
Online Reg. Hold	<input type="checkbox"/>	Release	<input type="checkbox"/>		

• Figure 12 Biographic Record without SSN

There is no Social Security number in the SSN field of Figure 12. SONISWEB® cannot match this person to any records in the importing process.



**Biographic**

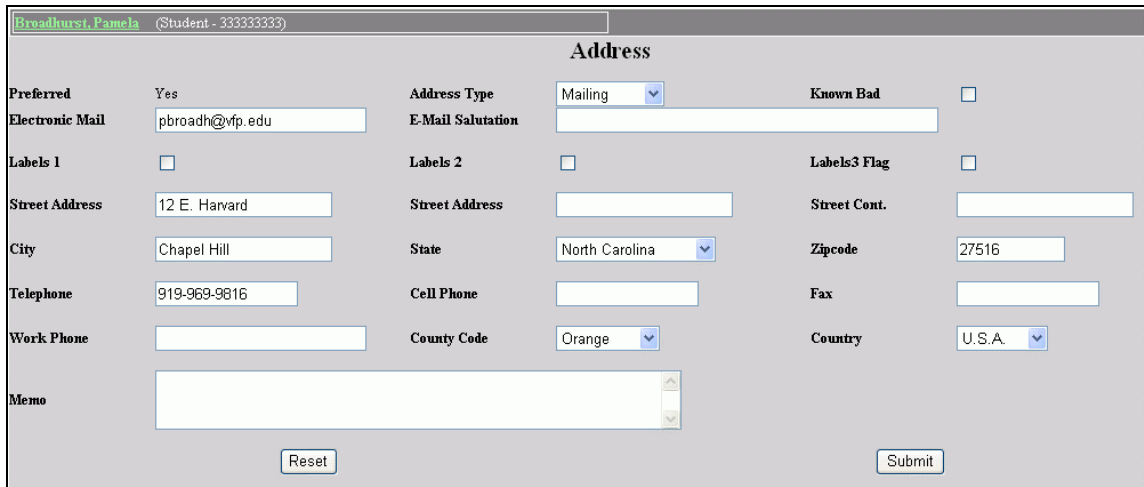
Last	Broadhurst	First	Pamela	MI	N
Nickname		Prefix		Suffix	
Maiden		Gender	Female	Status	ST
PID	333333333	PIN	<a href="#">View</a>	SSN	<a href="#">View</a>
DOB	<a href="#">View</a>	Deceased	<input type="checkbox"/>	Expired	
Exam ID		Affiliation		<div style="border: 1px solid black; padding: 5px;"> <p>http://68.16.179.253/sonisweb20...</p> <p><b>Pamela Broadhurst</b></p> <p>SSN</p> <p>333333333</p> <p><input type="Reset"/> <input type="Submit"/></p> <p><a href="#">Close Window</a></p> </div>	
Ethnic Code	Hispanic	Marital Code	Widowed		
IPED Status		Academic Status	To Be Determined		
Email		Display Photo			
Level	Junior	Tuition Status			
Dept.	Science & Technology	Division	Evening		
Online Reg. Hold	<input type="checkbox"/>	Release	<input type="checkbox"/>		

• Figure 13 Biographic Record with an SSN

In Figure 13 there is an SSN that SONISWEB® can use in import matching.

The NSLCH Block checkbox must also be blank. If there’s a checkmark in it, this person’s record will not appear when you click the Import button in Figure 4.

## ADDRESS RECORDS



**Address**

Preferred: Yes  
 Electronic Mail: pbroadh@vfp.edu  
 Address Type: Mailing  
 Known Bad:   
 E-Mail Salutation:   
 Labels 1:   
 Labels 2:   
 Labels3 Flag:   
 Street Address: 12 E. Harvard  
 Street Address:   
 Street Cont.:   
 City: Chapel Hill  
 State: North Carolina  
 Zipcode: 27516  
 Telephone: 919-969-9816  
 Cell Phone:   
 Fax:   
 Work Phone:   
 County Code: Orange  
 Country: U.S.A.  
 Memo:   
 Reset Submit

• Figure 14 Address Detail Record

Figure 14 shows an Address record with “Preferred” set as “Yes”. (A person can have many addresses.) This is what SONISWEB® Clearinghouse looks for. Only students with a “Preferred” address record are selected.

## PROGRAM RECORD

The “Graduates Only” choice in Figure 4 checks the Program records for a person. A student can have more than one program of study.



**Programs - Agricultural Science**

Institution: RJM University Degree:   
 Active:   
 Graduated:   
 Started: 05/01/2002  
 Stopped:   
 Reset Delete Submit

• Figure 15 Program Record Example

The student in Figure 15 has an active program, so will not appear in the “Graduates Only” report. If the Graduated checkmark is present, no additional Program records have the Active checkmark, and he or she took courses last semester, the person is included in the report.



## GETTING STARTED - LOG IN AND THE USE OF TABS, BUTTON AND FIELDS

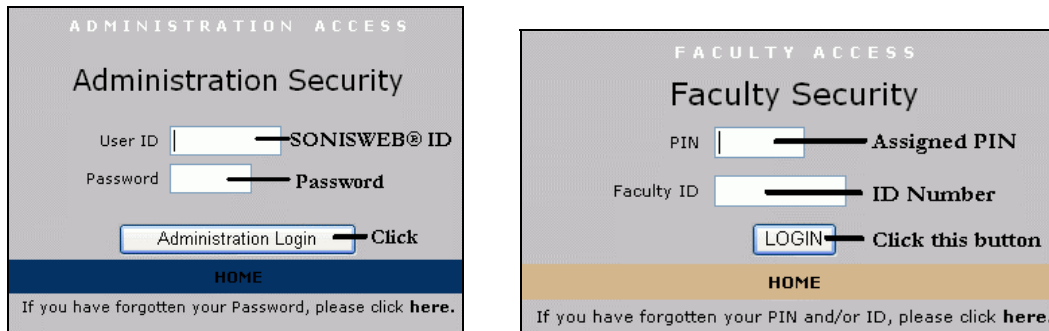
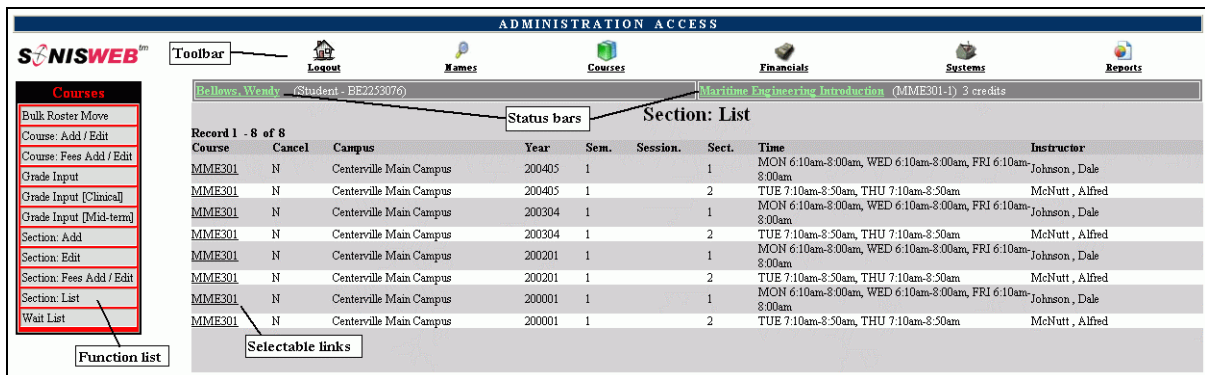


Figure 17 Login Displays

To log in as an administrator, select that option from your Web page. The standard SONISWEB® login pages look like Figure 17.



• Figure 18 Typical SONISWEB® Page

Figure 18 is a typical SONISWEB® page. The actions authorized in your profile appear at the top, called the **Toolbar**.

When you make a selection from the **Toolbar**, the applicable **Function List** appears on the left. Only the functions authorized in your assigned profile and your individual limits and privileges appear. Some might have only **Courses** in the toolbar and only **Course: Add/Edit** for functions.

Not apparent on the display is whether or not the profile permits editing or changing the information. Once the you select a function from the list on the left, you will see a Submit or similar button at the bottom of the display if you have the permissions to add, edit, or delete the data.

By clicking a **Status Bar** you quickly return to the “person” or the “course” you were processing even if you left it temporarily to look at a financial display or a report. Of course, if you have not selected a person with **Names** or a course with **Courses**, there will be no **Status Bars** at the top.

In Figure 18 click an underlined **Selectable Link** and you go to that record.

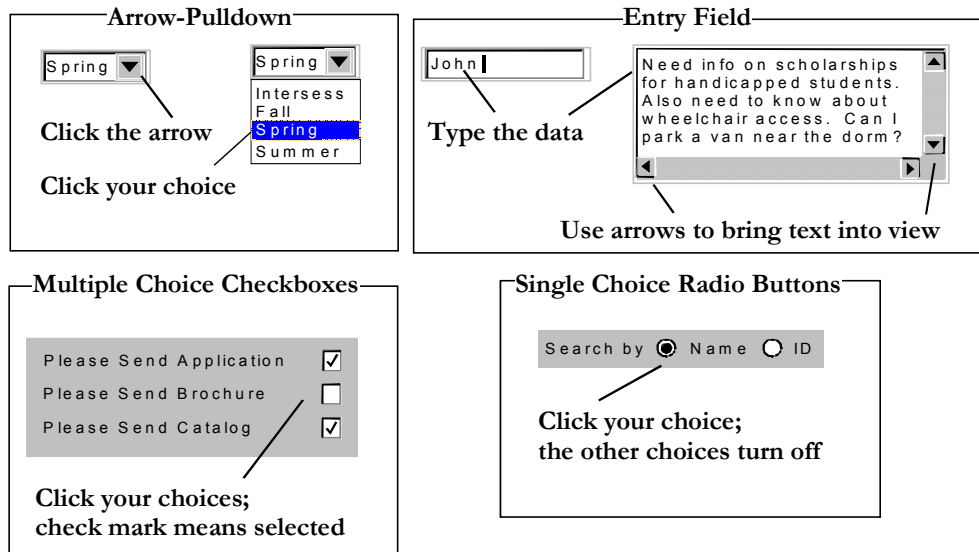


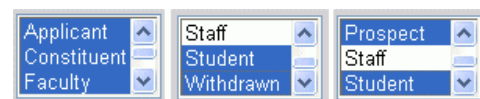
Figure 19 Arrows, Fields, Checkboxes and Buttons

SONISWEB® prompts you for information with windows like those in Figure 19. Use your mouse to click your selection.

- Once you have made your selection(s), you must click an action button; usually it is Submit, Delete, Reset, etc.
- For Entry Fields, click the beginning of the field so you don't get any blanks inserted in front of your entry.
- With Multiple Choice Checkboxes, each time you click a box it goes from selected (check mark) to unselected (no check mark). Click it again and it is selected, etc.
- Radio Buttons allow only one to be selected; when you click one, all the others are turned off.

Some SONISWEB® lists permit you to make multiple choices. It works just like most PC spread sheet software.

- To pick two or more in a series, click the top selection, hold down the **Shift** key on the keyboard and click the bottom item in the series. Release the shift key and they are selected as shown on the left and middle of Figure 20.
- To pick two or more that are not adjacent, click the first item, hold the **Ctrl** key on the keyboard, select the next item and the next, etc. When you have picked the last item you want, release the **Ctrl** key and you see the selections like those on the right of Figure 20.



● Figure 20 Selecting Multiple Choices