

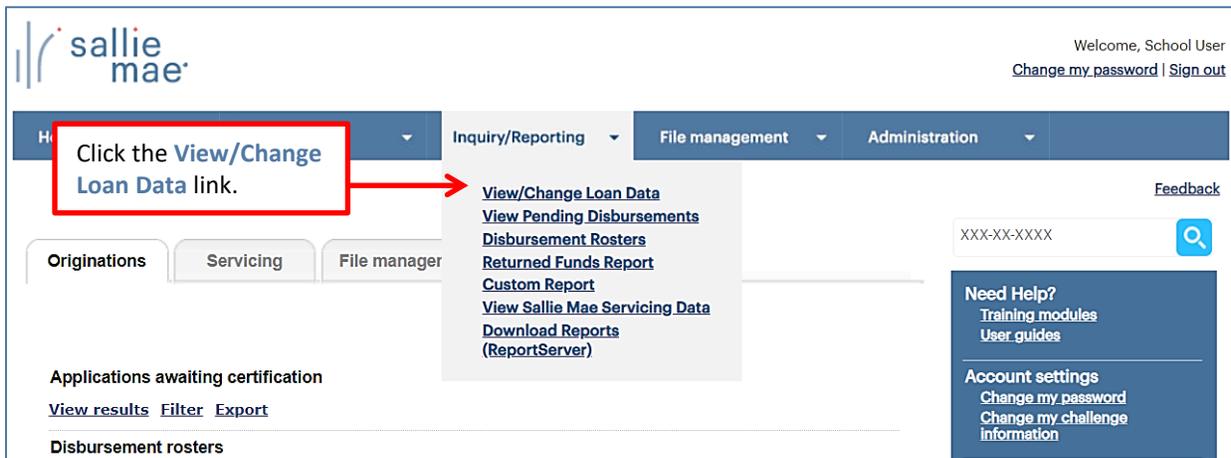
View Loan Data Overview

The View Loan Data function in OpenNet® displays originations information for a borrower’s loans, including applications that have been started but have not yet been certified.

Viewing Loan Data

How to view loan data:

1. Hover your cursor over the **Inquiry/Reporting** option on the Menu Bar of any OpenNet Web Loan Delivery page, and then click on **View/Change Loan Data**.



The Search Criteria page displays.

(Continued on the next page)

Search criteria

Enter either the SSN or the first and last names of the borrower/student whose information you want to view. You can search on a partial first name by entering the first two letters followed by an asterisk (*) as a wildcard.

Search criteria

SSN:

or

Last name:

First name:

Middle initial:

Enter a borrower's SSN or last name/first name.

Click the **Submit** button.

Submit

2. Search for a borrower by typing their SSN or last name/first name. The borrower's middle initial can also be entered to further filter results, but it is not required.
3. Click the **Submit** button.

The Application/Loan Summary page displays with the borrower's loans listed. The most recent loan or application displays at the top of the list.

(Continued on the next page)

Application/Loan summary

The following summary lists applications/loans on file for the borrower/student that are associated with your institution(s). Please note that the specific options that are available to you depend on your user access and the status of the application/loan.

Report run Wednesday, May 20, 2020 at 9:41:36 AM ET

Borrower/Student

Name:	ALICE ADAMS	View demographics >>
Social Security number:	666-52-5210	View aggregate loan totals >>
Date of birth:	03/01/1997	View acct servicing summary >> View multi-loan details >>

Records 1-2 (of 2)

Loan program Borrower name/SSN Student name/SSN	Status information	Amount	School ID Curr lender ID	CommonLine unique ID Loan period Application ID
SMART OPTION STUDENT LOAN (091)	Loan: AWAITING SCHOOL CERTIFICATION App start date: 03/30/2020 Credit: APPROVED What's next: We are awaiting school certification. You can certify the loan online by clicking the certify button and providing the required information.	\$0.00	000000-00 <u>900905</u>	899984AT100899205 09/15/2020-05/15/2021 100899205-01
SMART OPTION STUDENT LOAN (091)	Loan: FULLY DISBURSED App start date: 03/30/2020 Credit: APPROVED What's next: Fully disbursed	\$10,000.00	000000-00 <u>900905</u>	899984AT100899141 09/15/2019-05/15/2020 100899141-01

Click the **View/Update** button.

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School AssistSM Representatives are available during the following business hours:
 Monday - Friday
 9:00 a.m. - 6:00 p.m. ET
 Phone: 844-8-ASSIST (844-827-7478)
 International: 877-456-6221
 Direct: 302-451-4912
[Email Us](#)

4. Click the **View/Update** button for the record you want view.
 The Application/Loan Details page displays.

Other things you can do on the Application Loan Summary page include:

- **View Demographics** – View borrower demographic information (name, address, etc.).
- **View Aggregate Loan Totals** – View total dollar amounts for loans serviced by Sallie Mae®.
- **View Acct Servicing Summary** – View stored loan data for loans serviced by Sallie Mae.
- **View Multi-Loan Details** – View summarized loan information for all applications/loans associated with your institution for the corresponding borrower/student.
- **Certify App** – Certify an application that is in process.
- **Print Prom Note** – Print the Promissory Note and/or other loan documentation.
- **Cancel** – Discontinue the loan application.
- **Reinstate** – Revalidate a loan application that has previously been cancelled.

(Continued on the next page)

Welcome, School User
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Application / Loan details

Smart Option Student Loan (091)

Enter new SSN: [Search](#)

XXXXXXXXXX [Q](#)

Borrower [Return to top](#)

Name: ALICE ADAMS [View aggregate loan totals >>](#)
 Social Security number: 666-52-5210 [View acct servicing summary >>](#)
 Date of birth: 03/01/1997

Cosigner [Return to top](#)

Name: GIRDLER SHORON [Signature date:](#) 01/29/2020
 Social Security number: 719-89-1343 [Signature type:](#) E-SIGNED
 Date of birth: 02/01/1982

Status details [Return to top](#)

Loan status: FULLY DISBURSED [View rates and fees >>](#)
 Credit status: APPROVED
 What's next: Fully disbursed

Loan details [Return to top](#)

School name: UNIV-MAIN CAMPUS	Grade level: FRESHMAN UNDERGRADUATE Update loan data
School ID: 000000-00	Enrollment status: FULL TIME Update disb data
Loan period: 01/15/2020 - 04/15/2020	Enrollment effv date: 01/15/2020 Cancel
CommonLine unique ID: 899984AT100863447	Antcptd grad date: 08/31/2020
Alt loan program code: 091	Major course of study: MARKETING

Disbursing agent: SALLIE MAE [Lender ID:](#) 900905
 Servicer name: SLM [Lender name:](#) SALLIE MAE

Cost of attendance: \$55,175.00	Loan amt requested: \$5,000.00
Estimated financial aid: \$1,000.00	School cert amount: \$5,000.00
Expcd family contrbtrn:	Approved amount: \$5,000.00

School non-ed branch ID:	Application start date: 01/29/2020
School use field:	Loan terms acceptance date: 01/29/2020
School cert date: 01/29/2020	Borr self cert signature date: 01/29/2020
Credit expiration: 01/28/2021	Borr signature date: 01/29/2020
	From note received: 01/29/2020

Disbursement details [Return to top](#)

[View disbursement history >>](#)

Disb date	Disb status	H/R status	Gross amount	Disb fees	Net amount
02/10/2020	DISBURSED	RELEASE	\$2,500.00	\$0.00	\$2,500.00
03/09/2020	DISBURSED	RELEASE	\$1,000.00	\$0.00	\$1,000.00
03/09/2020	DISBURSED	RELEASE	\$1,500.00	\$0.00	\$1,500.00
Totals:			\$5,000.00	\$0.00	\$5,000.00

Make changes [Return to top](#)

[Update loan data](#)
[Update disb data](#)
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Enter new SSN: [Search](#)

[Return to disbursement rosters](#)

NOTE: The viewing options available on the Application/Loan Details page vary depending on your access level as well as the type of loan for which you are viewing details.

5. View the record details.

NOTE: If there are documents that still need to be uploaded, a **Secure Document Upload** link will display. Follow the onscreen instructions to upload the required documents.

Viewing Disbursement History

How to view disbursement history:

1. On the Application/Loan Details page, click the **View Disbursement History** link.
The Disbursement History page displays.

Disbursement history

Report run Wednesday, May 20, 2020 at 10:01:44 AM ET Disb Nbr 1 Activity Disb Nbr 2 Activity

Borrower [Return to top](#)

Name: ALICE ADAMS
Social Security number: 666-52-5210
Date of birth: 03/01/1997

Disbursement number 1 (of 2) activity [Return to top](#)

Date/Time	Activity	Details	User ID
02/25/2020 09:25 AM ET	DISB DATE CHANGED	Field name: DISB DATE Old value: 1/3/2020 New value: 3/15/2020	INTERNAL
02/25/2020 09:25 AM ET	FUNDS DISBURSED TO VIA ACH.	Field name: DISB STATUS Old value: CANCELLED(FUNDS RETURNED) New value: DISBURSED	INTERNAL
02/25/2020 09:25 AM ET	DISB REISSUED	Field name: DISB REISSUED Old value: NO New value: YES	INTERNAL
02/25/2020 09:20 AM ET	DISB REFUNDED	Field name: DISB STATUS Old value: DISBURSED New value: CANCELLED(FUNDS RETURNED)	INTERNAL
02/25/2020 09:16 AM ET	DISB REFUND/CANCEL PENDING, AWAITING FUNDS FROM SCHOOL	Field name: REFUND/CANCEL Old value: New value: 2500.00	INTERNAL
02/07/2020 08:44 AM ET	DISB RELEASED	Field name: HOLD/RELEASE STATUS Old value: HOLD New value: RELEASE	TYLERQA

Disbursement number 2 (of 2) activity [Return to top](#)

Date/Time	Activity	Details	User ID
02/07/2020 08:44 AM ET	DISB RELEASED	Field name: HOLD/RELEASE STATUS Old value: HOLD New value: RELEASE	TYLERQA
02/07/2020 08:44 AM ET	FUNDS DISBURSED TO VIA ACH.	Field name: DISB STATUS Old value: CANCELLED(PRE-DISB) New value: DISBURSED	TYLERQA
01/31/2020 04:24 PM ET	DISB CANCELED	Field name: DISB STATUS Old value: AWAITING DISB New value: CANCELLED(PRE-DISB)	SYSTEM
01/07/2020 01:57 AM ET	DISB METHOD CHANGED	Field name: DISB METHOD Old value: CHECK New value: ACH	E78548-SUPPORT
01/07/2020 01:57 AM ET	DISB PLACED ON HOLD	Field name: HOLD/RELEASE STATUS Old value: RELEASE New value: HOLD	

Click the **Return to App/Loan Details** button.

[Return to app/loan details](#)

2. Review the available information.
3. Click the **Return to App/Loan Details** button to return to the Application/Loan Details page.