
Navigating the Navient School Servicing Portal

February 2015

Welcome

- **To download today's presentation**

Go to Navient.com/Schools, click Support & Resources. The presentation is in the Training & Webinars section.

www.navient.com/schools/support-and-resources/training-and-webinars/

- **Today's presenter:**



Robyn Hughes
Senior Technical
Solutions Consultant

- **Today's facilitator:**



Steve Wynne
Director
Client Communications

- **If you have technical difficulties**

Audio: Press *0 to speak to an operator

WebEx access issues: Dial (800) 508-8758, select option 3

Servicing contacts

Your Relationship Managers



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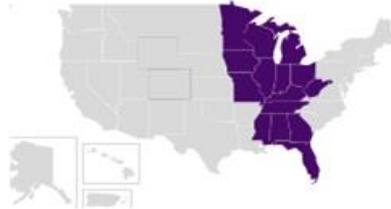
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Electronic Services

Phone: 800-348-4606

Agenda

- Overview of the Navient School Servicing Portal
- Your Federal Loan Servicing Snapshot
- Default Management and Portfolio Management Reporting
- Resources and Best Practices
- Q&A

Navient School Servicing Portal

Navient School Servicing Portal

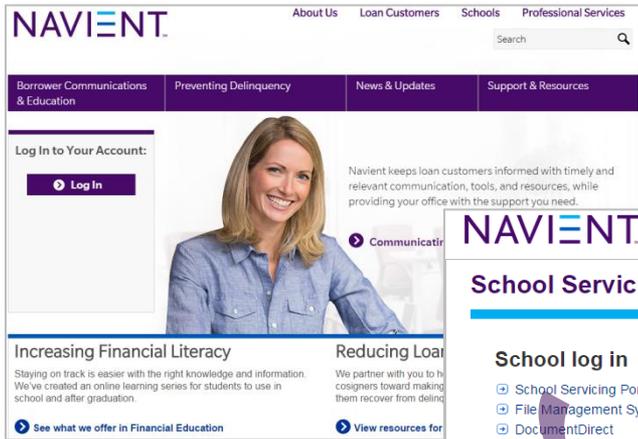
Schools and Navient share a common goal: to help guide students toward financial success.

We've made that easier by giving you the ability to access and download information about the loans we service on behalf of the US Department of Education (ED) through our School Servicing Portal (SSP), including:

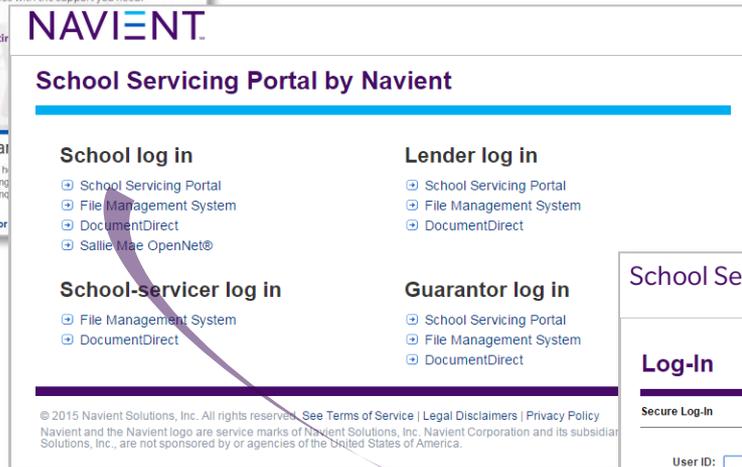
- Loan Portfolio Snapshot
- Default management and portfolio management reports
- Three-way phone support with you and your borrowers

Accessing the SSP

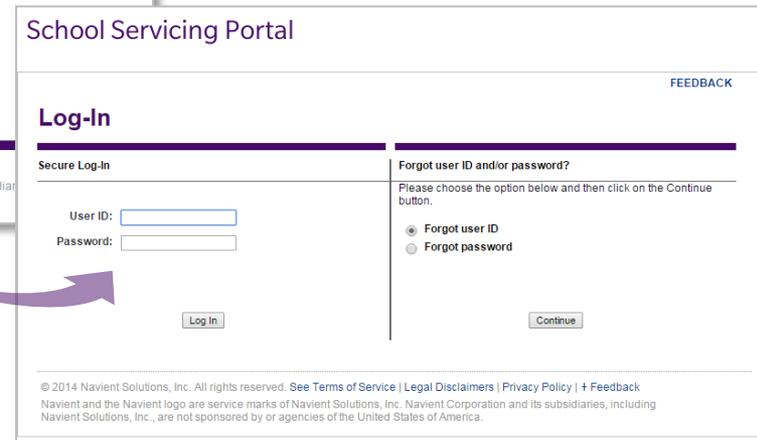
Log in from **navient.com/schools** or through **ssp.navient.com**



navient.com/schools



ssp.navient.com



ssp.navient.com/schoollogin

If you've forgotten your login credentials, you may:

- Use the online option to reset your password
- Ask the SSP Administrator at your institution for help
- Contact CollegeServ[®] to reset your password or for any login-related questions

SSP home page

Once logged in, you are directed to your home page which contains your Loan Servicing Snapshot as well as dropdown navigation to direct you to the listed areas for

INQUIRY/REPORTING

FILE MANAGEMENT

ADMINISTRATION

School Servicing Portal

HOME INQUIRY/REPORTING ▾ FILE MANAGEMENT ▾ ADMINISTRATION ▾

ABC College 00000000

- View Navient Servicing Data
- View ED Servicing Data
- Download Servicing Reports

- File Management System
- Submit Reallocations - ED
- Returns/Refunds - ED

- School Profile
- Maintain Users
- Enable/Disable Service Components

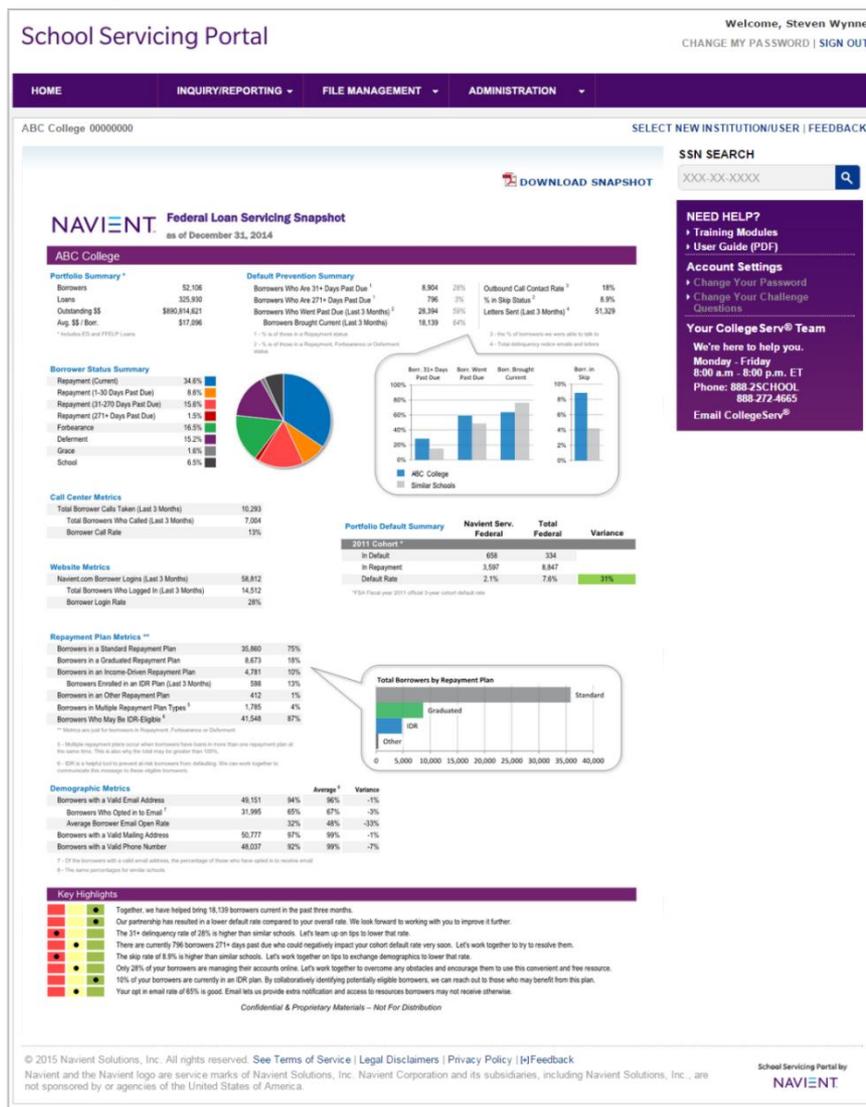
NAVIENT Federal Loan Servicing Snapshot
as of December 31, 2014

ABC College

Federal Loan Servicing Snapshot

Federal Loan Servicing Snapshot

- Your Federal Loan Servicing Snapshot (Snapshot) automatically loads to your SSP homepage, containing:
 - ✓ Overall portfolio loan summary
 - ✓ Borrowers' loan repayment status information
 - ✓ Loan delinquency and borrower repayment plan statistics
- Your Snapshot data contains Direct and FFEL Loans - Loans made under the William D. Ford Federal Direct Loan (Direct Loan) Program and the Federal Family Education Loan Program (FFEL Program)
- Snapshot reporting is typically updated the first part of each month



Snapshot – school portfolio data

NAVIENT Federal Loan Servicing Snapshot as of December 31, 2014

ABC College

Portfolio Summary *

Borrowers	52,106
Loans	325,930
Outstanding \$\$	\$890,814,621
Avg. \$\$ / Borr.	\$17,096

* Includes ED and FFELP Loans

Default Prevention Summary

Borrowers Who Are 31+ Days Past Due ¹	8,904	28%	Outbound Call Contact Rate ³	18%
Borrowers Who Are 271+ Days Past Due ¹	796	3%	% in Skip Status ²	8.9%
Borrowers Who Went Past Due (Last 3 Months) ²	28,394	59%	Letters Sent (Last 3 Months) ⁴	51,329
Borrowers Brought Current (Last 3 Months)	18,139	64%		

¹ - % of those in a Repayment status

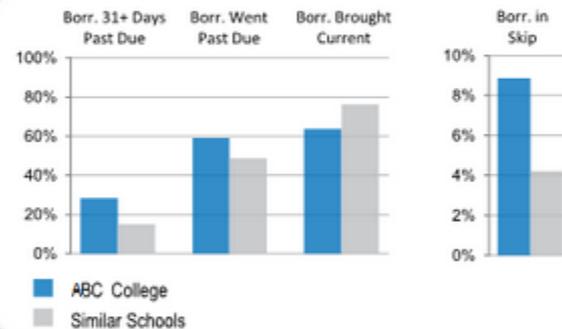
² - % of those in a Repayment, Forbearance or Deferment status

³ - the % of borrowers we were able to talk to

⁴ - Total delinquency notice emails and letters

Borrower Status Summary

Repayment (Current)	34.6%	
Repayment (1-30 Days Past Due)	8.6%	
Repayment (31-270 Days Past Due)	15.6%	
Repayment (271+ Days Past Due)	1.5%	
Forbearance	16.5%	
Deferment	15.2%	
Grace	1.6%	
School	6.5%	



Call Center Metrics

Total Borrower Calls Taken (Last 3 Months)	10,293
Total Borrowers Who Called (Last 3 Months)	7,004
Borrower Call Rate	13%

Website Metrics

Navigent.com Borrower Logins (Last 3 Months)	58,812
Total Borrowers Who Logged In (Last 3 Months)	14,512
Borrower Login Rate	28%

Portfolio Default Summary

	Navigent Serv. Federal	Total Federal	Variance
2011 Cohort *			
In Default	43	720	
In Repayment	624	5,237	
Default Rate	6.8%	13.7%	50%

*FSA Fiscal year 2011 official 3-year cohort default rate

Snapshot – school portfolio data

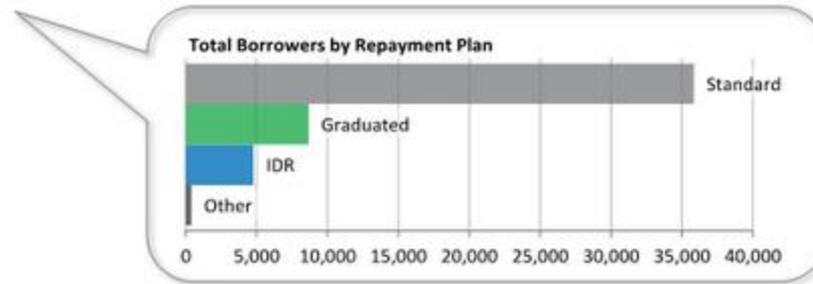
Repayment Plan Metrics **

Borrowers in a Standard Repayment Plan	35,860	75%
Borrowers in a Graduated Repayment Plan	8,673	18%
Borrowers in an Income-Driven Repayment Plan	4,781	10%
Borrowers Enrolled in an IDR Plan (Last 3 Months)	598	13%
Borrowers in an Other Repayment Plan	412	1%
Borrowers in Multiple Repayment Plan Types ⁵	1,785	4%
Borrowers Who May Be IDR-Eligible ⁶	41,548	87%

** Metrics are just for borrowers in Repayment, Forbearance or Deferment.

⁵ - Multiple repayment plans occur when borrowers have loans in more than one repayment plan at the same time. This is also why the total may be greater than 100%.

⁶ - IDR is a helpful tool to prevent at-risk borrowers from defaulting. We can work together to communicate this message to these eligible borrowers.



Demographic Metrics

			Average ⁴	Variance
Borrowers with a Valid Email Address	49,151	94%	96%	-1%
Borrowers Who Opted in to Email ⁷	31,995	65%	67%	-3%
Average Borrower Email Open Rate		32%	48%	-33%
Borrowers with a Valid Mailing Address	50,777	97%	99%	-1%
Borrowers with a Valid Phone Number	48,037	92%	99%	-7%

⁷ - Of the borrowers with a valid email address, the percentage of those who have opted in to receive email.

⁴ - The same percentages for similar schools.

Key Highlights

- ■ ● Together, we have helped bring 18,139 borrowers current in the past three months.
- ■ ● Our partnership has resulted in a lower default rate compared to your overall rate. We look forward to working with you to improve it further.
- ■ ■ The 31+ delinquency rate of 28% is higher than similar schools. Let's team up on tips to lower that rate.
- ● ■ There are currently 796 borrowers 271+ days past due who could negatively impact your cohort default rate very soon. Let's work together to try to resolve them.
- ■ ■ The skip rate of 8.9% is higher than similar schools. Let's work together on tips to exchange demographics to lower that rate.
- ● ■ Only 28% of your borrowers are managing their accounts online. Let's work together to overcome any obstacles and encourage them to use this convenient and free resource.
- ■ ● 10% of your borrowers are currently in an IDR plan. By collaboratively identifying potentially eligible borrowers, we can reach out to those who may benefit from this plan.
- ● ■ Your opt in email rate of 65% is good. Email lets us provide extra notification and access to resources borrowers may not receive otherwise.

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Reporting

Account Servicing Summary – by borrower

Account Servicing Summary

This page displays borrower loan data that resides on Navient's servicing system. The account information represents totals for loans serviced for the borrower that are associated with your institution. Please note that due to Sallie Mae being separated into two companies, there may be additional loans currently being serviced at Sallie Mae Bank. Please check www.salliemae.com for additional loan information.

Report run 09/04/2014 at 4:05:34 PM ET

Borrower

Name: FRANCISCO A
Social Security Number: -0519
Date of Birth: /1971

Account Information

Original Balance: \$23,438.00
Principal Balance: \$24,604.26
Accrued Interest: \$2,144.52
Current Balance: \$26,748.78

10-day Payoff Amount: \$26,789.78
10-day Payoff Date: 09/14/2014
Interest Paid Year-to-Date: \$0.00
Prior Year Interest: \$0.00

Monthly Payment: \$288.58
Total Amount Delinquent: \$0.00
Other Fee(s): \$0.00
Present Amount Due: \$288.58

Next Payment Due:
Last Payment Received: 05/24/2012
Last Payment Amount: \$273.68

Number of Days Past Due on Most Delinquent Loan: 15

Loan Program	First Disb Date	Status / Days Delq	School	Orig Bal / Amt Delq	CommonLine Unique ID or Award ID / Loan Period
DL - SUB	12/07/2010	RPMT 15	UNIVERSITY OF CHOCOLATE (055222-00)	\$4,813.00 / \$573.98	416711674S11G20988001 09/07/2010-02/22/2011
DL - UNSUB	12/07/2010	RPMT 15	UNIVERSITY OF CHOCOLATE (055222-00)	\$6,125.00 / \$868.23	416711674U11G20988001 09/07/2010-02/22/2011
STAFFORD - UNSUB	12/16/2009	RPMT 15	UNIVERSITY OF CHOCOLATE (055222-00)	\$7,000.00 / \$1,038.84	014593000AQBH1S701 09/01/2009-08/17/2010
STAFFORD - SUB	12/16/2009	RPMT 15	UNIVERSITY OF CHOCOLATE (055222-00)	\$5,500.00 / \$693.33	014593000AQBH1S601 09/01/2009-08/17/2010

From the home page, enter borrower Social Security number to access:

- Demographic data
- Loan details / Loan status history
- Number of days delinquent
- Balance details
- Monthly payment amount / Account payment history
- Deferment and forbearance eligibility

SSP File Management Reports

DEFAULT MANAGEMENT

- **Past Due Loans 3 Cohort Years (weekly)**

Identifies loans that entered repayment during the past three cohort years that are one or more days delinquent.

- **Skip Tracing Report (weekly)**

Provides a list of your students whom we've been unable to contact. Gives you a quick and secure method for you to share with us the most current contact information for the students listed.

- **Defaults or Reduced Delinquency* (weekly)**

Identifies loans that entered repayment in the last four years and meet one or more of the following criteria:

- ✓ Are 270 days or more delinquent
- ✓ Have had a claim filed or have had a claim paid
- ✓ Have had the number of days delinquent reduced since the prior report

- **Repayment Past 6 Month/Forecast 6 Month* (weekly)**

Identifies loans that are current and entered repayment within the previous six months, or are scheduled to enter repayment within the next six months.

** By request only. Contact CollegeServ to subscribe.*

SSP File Management Reports

PORTFOLIO MANAGEMENT

- **School Portfolio Summary (bimonthly)**

Provides at-a-glance summary totals of the number of loans, borrowers, and outstanding principal balance grouped by loan statuses:

School	Grace/Interim	Current	Delinquent
Deferment	Forbearance	Inactive	
Transfer to Debt Management Collection System (DMCS) in Process			

- **School Portfolio Detail (bimonthly)**

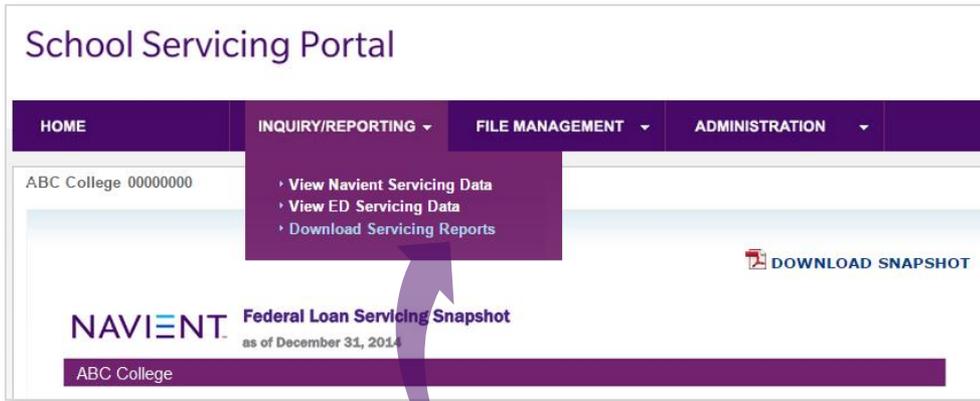
Provides comprehensive and detailed loan-level information with over 70 detail fields, including:

- ✓ Borrower contact information
- ✓ Borrower email address
- ✓ Past due amounts and dates
- ✓ Principal and interest amounts
- ✓ Deferment and forbearance time used
- ✓ Repayment plan type indicator

SSP File Management Reports

DOWNLOADING

The SSP makes it quick, easy, and secure to retrieve the reports you need.



From your home page, click on

INQUIRY/REPORTING

• **Download Servicing Reports**

SSP File Management Reports

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You access your reports in one convenient, completely secure system. There is no need to set up a two-factor authentication process.

NAVIENT School Servicing Portal File Management System - FMS

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Search By File ID: Search Express File Download: All Reports Start

New File(s) Ready For Download Download History Report(s) Ready For Download

Date Range: From Date 12/29/2014 To Date 01/14/2015 (ex: 11/22/2005) Search

Report Filters

All Reports Delinquency Portfolio Skip Tracing Apply Filter

Both ED Servicing Navient

Combine Reports for Download

Files 1-11 (of 11) Files Selected: 0

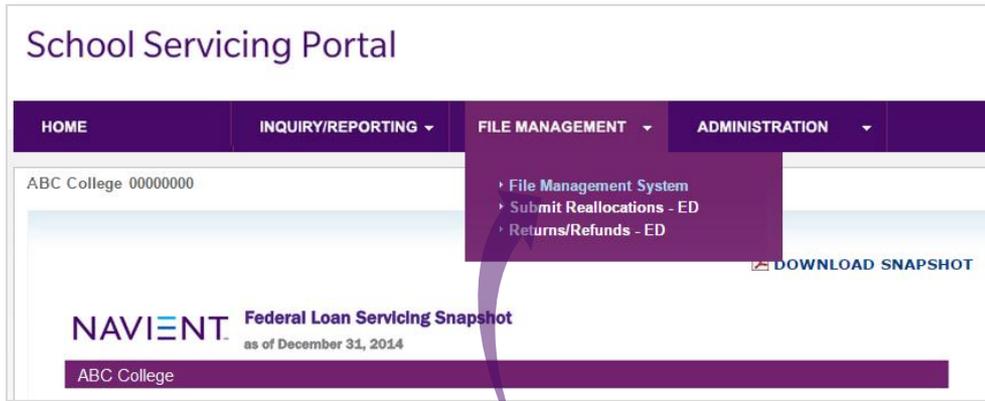
Created / File ID	Institution	Report Name	Report Size	
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<input type="checkbox"/> 01/12/2015 06:30 AM 2541464-0000	00000000 ABC COLLEGE	PAST DUE LOANS 3 COHORT YRS - ED	919 KB	View File
<input type="checkbox"/> 01/11/2015 09:02 PM 59921177-0000	00000000 ABC COLLEGE	PAST DUE LOANS 3 COHORT YRS - NAVIENT	2 KB	View File
<input type="checkbox"/> 01/12/2015 12:20 PM 2570398-0000	00000000 ABC COLLEGE	PORTFOLIO DETAIL - ED	20 MB	View File
<input type="checkbox"/> 01/12/2015 02:41 AM 59953108-0000	00000000 ABC COLLEGE	PORTFOLIO DETAIL - NAVIENT	8 MB	View File
<input type="checkbox"/> 01/12/2015 10:25 AM 2549929-0000	00000000 ABC	PORTFOLIO SUMMARY - ED	1 KB	View File

SSP File Management Reports

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Or . . .

SSP navigation is flexible. You can also retrieve reports from the File Management System page.



From your home page, click on

FILE MANAGEMENT

• **File Management System**

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HOME FILE MANAGEMENT HOME TRANSACTION MANAGER HOME

Select an FMS service from the options below

NavientSM File Management puts you in control of all your student loans by streamlining the file exchange process. You can exchange files with any lender, guarantor, school or service provider, as well as track and monitor your data transmissions. You can also select file formats and preferred communication methods. Best of all, the Navient File Management system works easily within your current system.

FMS Utility >> Maintain Users >>
Select a Customer ID >>

File Activities:

Select one of the following options:

- Initiate Express File Transfer
- Send Files to FMS
- Download Files from FMS
- Find as a Customer
- Find Files in FMS
- Submit Returns & Refunds

Errors:

Select one of the following options:

- View and Correct Errors
- Approve Corrected Errors
- Support Web Errors
- Support Non-Web Errors

TRAINING SESSIONS AND USER GUIDES >>

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On the page that opens,
choose the radio button

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Express File Download

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Date Range: From Date To Date (ex: 11/22/2005)

Report Filters

All Reports Delinquency Portfolio Skip Tracing

Both ED Servicing Navient

Files 1-11 (of 11) Files Selected: 0

Created / File ID	Institution	Report Name	Report Size	
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<input type="checkbox"/> 01/11/2015 09:02 PM 59921177-0000	00000000 ABC COLLEGE	PAST DUE LOANS 3 COHORT YRS - NAVIENT	2 KB	View File
<input type="checkbox"/> 01/12/2015 12:20 PM 2570398-0000	00000000 ABC COLLEGE	PORTFOLIO DETAIL - ED	20 MB	View File

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		SCHOOL NAME	BORROWER SSM	BORROWER NAME	BIRTH DATE	SFX	LNH	HOME# VLD	HOME PHONE	ADR VLD	ADDRESS LINE 1	CITY	STATE	ZIP	E-MAIL VLD	E-MAIL ADDRESS
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26	000000-00	ABC UNIVERSITY	999-99-9907	STUDENT SEVEN	8/23/1991	1	1									
27	000000-00	ABC UNIVERSITY	999-99-9907	STUDENT SEVEN	8/23/1991	1	3									
28	000000-00	ABC UNIVERSITY	999-99-9907	STUDENT SEVEN	8/23/1991	1	4									
29	000000-00	ABC UNIVERSITY	999-99-9907	STUDENT SEVEN	8/23/1991	1	5									
30	000000-00	ABC UNIVERSITY	999-99-9907	STUDENT SEVEN	8/23/1991	1	6									
31	000000-00	ABC UNIVERSITY	999-99-9907	STUDENT SEVEN	8/23/1991	1	7									
32	000000-00	ABC UNIVERSITY	999-99-9908	STUDENT EIGHT	1/21/1986	1	Y		7035551212	Y	123 ANY DRIVE	SAINT LOUIS	MO	63129	Y	STUDENT@FAKE.COM
33																

On Reports Ready for Download, to open a report, click View File

Resources and Best Practices

SSP – Training Modules

NAVIENT
School Servicing Portal
File Management System - FMS

CHANGE MY CHALLENGE

HOME FILE MANAGEMENT HOME TRANSACTION MANAGER HOME

Select an FMS service from the options below

NavientSM File Management puts you in control of all your student loans by streamlining the file exchange process. You can exchange files with any lender, guarantor, school or service provider, as well as track and monitor your data transmissions. You can also select file formats and preferred communication methods. Best of all, the Navient File Management system works easily within your current system.

FMS Utility >>

Maintain Us
Select a Cus

File Activities:

Select one of the following options:

- Initiate Express File Transfer
- Send Files to FMS
- Download Files from FMS
- Find as a Customer
- Find Files in FMS
- Submit Returns & Refunds

Errors:

Select one of the following options:

- View and Correct Errors
- Approve Corrected Errors
- Support Web Errors
- Support Non-Web Errors

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NAVIENT Home For Schools

Guarantors Schools Lenders

Training Modules

Below are recorded training sessions and reference guides that walk you through the features and functions of the Navient School Servicing Portal and Navient File Management System. Please click on the links below to access these training sessions and guides. NOTE: You will need Acrobat Reader, available free from Adobe, to view the documents.

School Servicing Portal

The School Servicing Portal is an intuitive Web-based loan servicing platform that is customizable to support schools' preferred processing methods.

School Servicing Portal Reference Library

Getting Started Quick References

- Login (PDF, 1.037MB) 11/17/2014
- Navigation (PDF, 814KB) 11/17/2014
- Account Security (PDF, 767KB) 11/17/2014
- Training Modules (PDF, 534KB) 11/17/2014
- Quick Tips (PDF, 322KB) 11/17/2014

View Loan Data Quick References

- View Navient Loan Servicing Data (PDF, 859KB) 11/17/2014
- View Department of Education Loan Servicing Data (PDF, 776KB) 11/17/2014

Administration Quick References

- View School Profile (PDF, 487KB) 11/17/2014
- Maintain Users (PDF, 694KB) 11/17/2014
- Enable/Disable Service Components (PDF, 525KB) 11/17/2014

Training modules are available: at the bottom of the File Management Home click **TRAINING SESSIONS AND USER GUIDES**

Systems and service information and definitions

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Guarantors Schools Lenders

Product and Support Documentation

Guarantors

- Customer Information (CI) matrix
- Customer Information (CI) forms
- Production File Exchange
- MGA Form Request

Schools

- System/Service Guides
- Reports by Name
- Reports by ID
- File Specifications

DocumentDirect for the Internet

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Technical Documentation for Schools/School Servicers

These Navient technical documents describe systems and services used by school/school servicer customers. Locate your document below, or use the links in the left menu for other files or sorting orders.

Note: The date associated with each document is the date of its most recent revision.

Auto Rejected PUT Transactions Report File — LFH79 (10/10/2014)

The Auto Rejected PUT Transactions Report File (LFH79) is used to notify schools when an increase-type transaction has been rejected for a loan that has been locked down for U.S. Department of Education (ED) loan purchase program (PUT) sale or that has already been sold.

CommonLine Transactions Pended Due to Loan Sold to DOE Report File — ALHR9 (10/10/2014)

The CommonLine Transactions Pended Due to Loan Sold to DOE Report File (ALHR9) is used to inform the school of change transactions submitted to Navient via a CommonLine file or through the Web that could not be processed because the loan is in TRO (transferred out) status and could not be updated. Loans that have been transferred to the U.S. Department of Education (ED) via loan purchase program (PUT) sale are in TRO status.

ED Auto Debit Report — Debit Information Sent to Treasury Report File — LFH96 (10/10/2014)

The ED Auto Debit Report — Debit Information Sent to Treasury Report File is used to provide schools with a mechanism to identify the amount of funds the U.S. Treasury Department (Treasury) will be auto-debiting from their bank accounts for U.S. Department of Education (ED) transactions.

Electronic Auto-Debit File (10/10/2014)

The Electronic Auto-Debit File is used by Navient to provide schools with a CommonLine Roster that advises the amount that has been or will be debited from their account by the Auto Debit team.

Loan Extract (10/10/2014)

The Loan Extract file is used by Navient to report all loan information on the EAGLE system for a specified institution as of the requested month end. There will be one detail record in the file for each loan disbursement.

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Go to navient.com/techdocs to access detailed lists of all available reports, systems and services available to you.

Best Practices

NAVIENT About Us Loan Customers Schools Professional Services

Search

Borrower Communications & Education Preventing Delinquency News & Updates Support & Resources

Counseling Borrowers Better Default Prevention Default Management Plan

7 Steps to Better Default Prevention

A federal Cohort Default Rate (CDR) is the percentage of a school's federal student loan borrowers who enter repayment during a fiscal year and default within the cohort default period.

Schools with high default rates may face sanctions from the federal government and be prevented from participation in federal student loan programs.

Navient offers ways to help you manage your CDR and get your school and students on the path to financial success.

[7 Steps to Better Default Prevention: Download the helpful information on this page](#)

[10 Steps to Reviewing and Challenging Draft CDRs](#)

1. Establish a university-wide committee to address challenges and outline your plan.

The activities in a default prevention plan promote student and school success by increasing retention and reducing delinquency and default. Schools and students receive benefits when schools implement the activities, techniques, and tools outlined in a plan.

- Define the challenge for your institution's leadership.
- Make the president and other key leadership aware of the risk.

HAVE QUESTIONS? Contact CollegeServ®

Dedicated to helping you with your school-related questions.
Call 888-272-4665
Monday-Friday
8 AM – 8 PM ET
CollegeServ@Navient.com
[Meet the CollegeServ Team](#)

Forms for Borrowers

- [In-School Deferment Request](#)
- [Unemployment Deferment Request](#)
- [Economic Hardship Deferment Request](#)

More forms in Loan Customers
[Documents & Forms](#)

Financial Aid Resources

- Use resources such as those found at **Navient.com/Schools**
- Under Preventing Delinquencies with step-by-step instruction for building your school's default-prevention plan

Q&A

Servicing contacts

Your Relationship Managers



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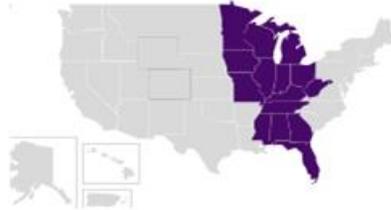
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