

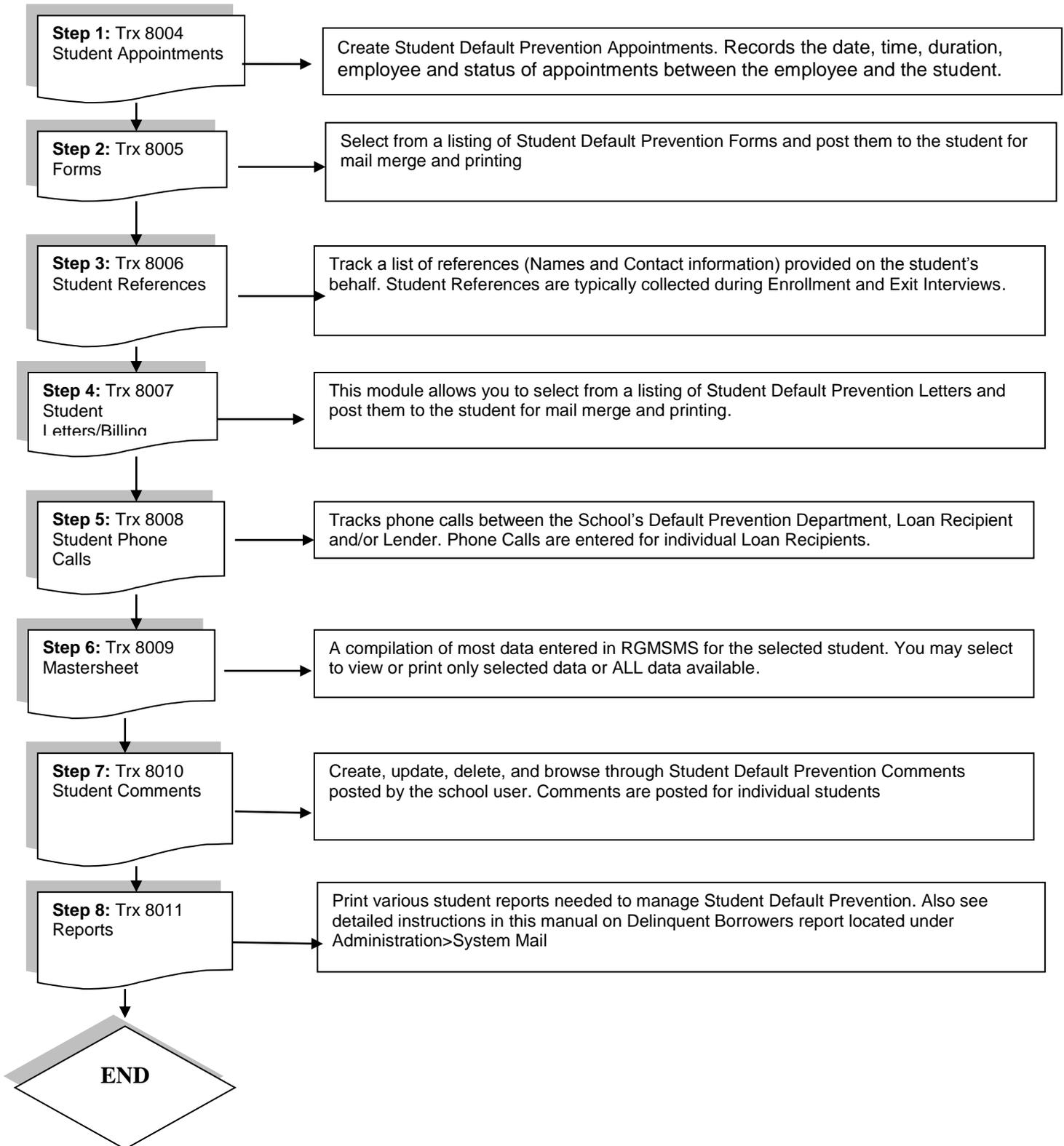
# RGM

## Default Prevention – Help Guide

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# Default Prevention Flow Chart



## Student Appointments [8004]

List of Appointments	Detailed Info	Print Preview
Key: <input type="text"/>		
Department: <input type="text" value="DEFAULT PREVENTION"/>		
*Date: <input type="text" value="03/02/2016"/>		
*Employee: <input type="text"/>		
*Time: <input type="text" value="09:00"/> <input type="text" value="AM"/> Duration: <input type="text" value="30"/> (Mins)		
COMMENTS: <input type="text" value="Student is in default"/>		
Status: <input type="text" value="Done"/>		
Post Appointment Remarks: <input type="text" value="Student is planning to start paying on April 2"/>		
<input type="button" value="Edit"/> <input type="button" value="Search"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Add"/> <input type="button" value="Modify"/> <input type="button" value="Delete"/> <input type="button" value="Print"/> <input type="button" value="First"/> <input type="button" value="Prev"/> <input type="button" value="Next"/> <input type="button" value="Last"/>		

### Module Description

This module tracks the date, time, duration, employee and status of appointments between the employee and the student.

**Note:** Once an appointment STATUS has been selected from the STATUS dropdown field, POST APPOINTMENT REMARKS is the only field that can be modified.

**TIP:** Appointments entered here can be tracked and printed from Student Appointments Report Trx 8036.

Field	Description
Key	Refers to the number sequentially assigned for each entry under the logged in school or campus.
Department	Select Default Prevention since a student appointment is being scheduled with the DP Department
Date	Refers to the date of the Appointment.
Employee	Refers to the Employee who will meet with the student during this appointment. Active Staff members who have been assigned to the Default Prevention modules in their employee profiles will appear as an option on the Staff dropdown.
Time	Refers to the start time of the appointment.
Duration	Refers to the estimated length of the appointment (Example 30 minutes.)
Comment	Enter any comments related to the scheduled appointment such as the purpose, or items to follow up on

Status	Refers to the result of the appointments. If the student showed for the appointment, select DONE, if the appointment was cancelled and not rescheduled select -CANCEL, if the student didn't show for the appointment but rescheduled select- RESCHEDULE. Once a status has been selected, Post Apt. remarks is the only field that can be modified
Post Appointment Remarks	Enter any comments related to the results of the appointment such as items resolved, determined, etc.

# Student Forms [8005]

[List of Student Forms](#) | **Detailed Info** | [Print Preview](#)

Key:  [View Form in PDF](#)

\*Form: 010023-EMPLOYMENT WAIVER

Received By:

RGM Staff:

\*Form Date: 01/26/2016

\*Award Year: 2016

Form Status: 000001-RECEIVED AND CORRECT  << new

## Module Description

As part of the student's enrollment process, forms are exchanged between the school and the student. Also internal forms are used to track student statuses.

As such, these forms can be specified here so that schools can track them and the system can check these forms to facilitate the validation of internal processes such as check processing and package calculation.

**TIP:**

- Some forms are available to view and print as a PDF by clicking on the blue hyperlink after they are posted.
- The institution can create their own Forms under TRX 1025 and assign them to Default Prevention Dept under TRX 1026. Or you can select from existing Forms under TRX 1025. Forms assigned to the Default Prevention Dept. under 1026 will be available here in TRX 8005.

### ADDING MULTIPLE FORMS:

**TIP:** To post and print more than one form at a time, click the Add/View Multiple Forms button

[List of Student Forms](#) | **Detailed Info** | [Print Preview](#)

KEY	FORM	RECEIVED BY	RGM STAFF	DATE RECEIVED	AWARD YEAR	FORM STATUS
1	<a href="#">STUDENT TRACKING FORM</a>	PIERCE, DIANE	DALIA, CIURO	03/11/2007	2007	RECEIVED AND CORRECT

Field

Description

Key	Refers to the number sequentially assigned for each entry
Form	Form Name
Received By	School staff member who received the form
RGM Staff	RGM staff member who received the form
Form Date	Date form is received
Award Year	Award Year form is for
Form Status	Status of form

# Student References [8006]

The screenshot shows a web-based form titled "Student References [8006]". At the top, there are three tabs: "List of Student References", "Detailed Info" (which is selected), and "Print Preview". The form contains the following fields and values:

- Key: [Empty text box]
- Active: YES (dropdown menu)
- Contact Person: Mary Smith
- Relationship to Student: AUNT (dropdown menu)
- \*Address: 122 Dawn Dr
- (address line 2): [Empty text box]
- State: CA (dropdown menu)
- \*City: TUSTIN (dropdown menu)
- \*Country: UNITED STATES OF AMERICA (dropdown menu)
- Contact Number: (228)446-9554
- Other Contact #: (297)558-8455
- Email: marysmith@yahoo
- Created By: [Empty text box] On: [Empty text box]
- Zip Code: 92780 (dropdown menu)
- Foreign Postal Code: [Empty text box]
- Mobile #: (566)988-8544 (with a clear 'x' button)
- Fax #: [Empty text box]

At the bottom of the form, there is a navigation bar with buttons: Exit, Search, Save, Cancel, Add, Modify, Delete, Print, First, Prev, Next, Last.

## Module Description

This module stores Student Reference information. Typically a list of Student References (i.e. Relatives, Friends, etc.) is collected in the Admissions Process and/or Exit Interviews. Schools refer to Student References for various reasons such as emergency numbers and locating the student for Default Prevention once the student becomes inactive.

- Student References are collected during the Exit Interview (at a minimum) for the purpose of contacting the loan borrower in Default Prevention follow-up.
- Student Reference Module is available under ALL areas of RGM (Admissions, Registrar, FA, Fiscal, Placement, and Default Prevention.) A record saved under one area will be available for viewing/modifying in other Student Reference Modules.
- This module is NOT for tracking changes to STUDENT contact information. Updates to STUDENT information are performed in the Student Profile.

Field	Description
Key	Number sequentially assigned for each entry under the logged in school or campus
Contact Person	Contact Person Name at the Address, Phone/Fax numbers and/or Email Address
Relationship to Student	Refers to the Relationship of Reference to Student

Address	Address for the Reference
Phone numbers	Updated Phone Numbers for the Reference
Email	Updated email for the Reference
Fax	Updated Fax Number for the Reference

## Student Letters [8007]

**DEFAULT PREVENTION - STUDENT LETTERS (8007)** ADD MODE

Student: Key: 5049 SS Number: [ ] Last Name: ABARCA First Name: JOSE M.I.: 0 Card No.: [ ] SEARCH CLEAR

Enrolled In: 00234001-000002-000050-GREEN BUILDING CONSTRUCTION SKILLS - FULL TIME - 900 CLOCK HOURS - NON-START ▼

Start Date: 05/10/2010 End Dates : (O) 12/13/2010 (R) 05/10/2010 (M)

List of Student Letters Detailed Info Print Preview

---

Key: [ ]  
 Date: 03/02/2016  
 \*Letter: 000010-FIRST REMINDER ABOUT DIRECT LOAN ▼  
 Response: 000007-REQUESTED DEFERMENT ▼  
 \*Status: SENT ▼

Exit Search Save Cancel Add Modify Delete Print First Prev Next Last

### Module Description

Schools send letters to students periodically. Welcome Letters, Financial Notices, Placement Follow-up and others can be automatically generated from the system. In this screen, users would be able to Post and then view and print the Letters posted to the student's record.

**TIP:**

- The institution can create their own Letters under TRX 1027 and assign them to specific Departments under TRX 1028. Or you can select from existing Letters under TRX 1027. Letters assigned to this Department under 1028 will be available here in TRX 8007.

Field	Description
Key	Refers to the number sequentially assigned for each entry
Date	Date the letter was written
Letter	Topic of the letter
Response	Response received for the Letter
Status	Letter status

## Student Phone Calls [8008]

DEFAULT PREVENTION - CALLS FROM STUDENT(8008) ADD MOD

Student:

<input type="checkbox"/>	KEY	CALLER	REASON	DATE
<input checked="" type="checkbox"/>	000001-STUDENT	<input type="text" value=""/>	000004-REQUEST DEFERMENT	03/02/2016 X

**0 to 0 of 0 RECORDS**

Click/Hit on CANCEL or UNCHECK to cancel data entry

### Module Description

This module tracks phone calls between the School's Default Prevention Department, Loan Recipient and/or Lender. Phone Calls are entered for individual Loan Recipients.

Field	Description
Key	Number sequentially assigned for each entry under the logged in school or campus
Caller	Individual initiating the phone call
Reason	Purpose of the phone call
Date	Date phone call occurred

# Student Mastersheet [8009]

Student:  Key  SS Number  Last Name  First Name  M.I.  Card No.  SEARCH CLEAR  
 Enrolled In: 00377001-000001-000049-DIAGNOSTIC MEDICAL SONOGRAPHY-4 - FULL TIME - 2400 CLOCK HOURS - [v]  
 Start Date: 05/25/2015 End Dates : (O) 05/04/2017 (R) 05/05/2017 (M)  
 Award Year: Entire Enrollment Period [v]

Check the Kind of Information that you want to include in the Mastersheet  ALL [ CLEAR INFORMATION ]  
 \*Click GENERATE button after selecting the sections

<input type="checkbox"/> PERSONAL DATA	<input type="checkbox"/> SUBJECTS COMPLETED	<input type="checkbox"/> FORMS TRACKING
<input type="checkbox"/> ENROLLMENT DATA	<input type="checkbox"/> ATTENDANCE	<input type="checkbox"/> LETTERS TRACKING
<input type="checkbox"/> FINANCIAL AID ELIGIBILITY	<input type="checkbox"/> CUMULATIVE HOURS	<input type="checkbox"/> APPOINTMENTS
<input type="checkbox"/> PAYMENT PERIOD	<input type="checkbox"/> LEAVES OF ABSENCE	<input type="checkbox"/> COMMENTS
<input type="checkbox"/> OTHER PELL	<input type="checkbox"/> SATISFACTORY PROGRESS [Default]	<input type="checkbox"/> PENDING WORK
<input type="checkbox"/> PELL ELIGIBILITY USED	<input type="checkbox"/> TERM PROGRESS	<input type="checkbox"/> DATA EXCHANGE MESSAGES
<input type="checkbox"/> FINANCIAL AID NEED AND AWARDS MADE	<input type="checkbox"/> TERMINATIONS	<input type="checkbox"/> DATA TRANSMISSIONS
<input type="checkbox"/> TUITION ACCOUNTS	<input type="checkbox"/> RETURN OF TITLE IV CALCULATIONS	<input type="checkbox"/> TSM / FAH
<input type="checkbox"/> AID DISBURSEMENTS	<input type="checkbox"/> REFUND POLICY CALCULATIONS	<input type="checkbox"/> SSCR AND SSCE SENT
<input type="checkbox"/> ORIGINATIONS and DISBURSEMENTS	<input type="checkbox"/> REFUNDS DUE BALANCE	<input type="checkbox"/> DATA CHANGES
<input type="checkbox"/> PELL ORIGINATIONS	<input type="checkbox"/> JOB PLACEMENTS	<input type="checkbox"/> FAESA CHANGES

Exit Cancel Show Criteria Hide Criteria Generate Print

## Module Description

This report is a compilation of most data entered in RGMSMS for the selected student. You may select to view or print only selected data or ALL data available. **For additional detailed instructions on the Student Mastersheet, see the Student Mastersheet Manual.**

### TIP: ACCESSING THE STUDENT MASTERSHEET

1. First select the student enrollment you wish to view from the **Enrolled In** dropdown. If a student has multiple enrollments RGMSMS will default to the current or latest enrollment.
2. From the **Award Year** dropdown box, select to generate the report on the Entire Current Enrollment Period (default), ALL Enrollments, or only data in the specified Award Year.

STUDENT MASTERSHEET VIEW MO

Student: 25  Key  SS Number  Last Name  First Name  M.I. M Card No. 5 SEARCH CLEAR  
 Enrolled In: 000001-001-COSMETOLOGY - THREE QUARTER TIME - 1800 CLOCK HOURS - IN SCHOOL  
 Start Date: 08/08/2006 End Date : 09/04/2007 Manual Expected End Date : 09/08/2007  
 Award Year: Entire Enrollment Period [v] Scroll down to see generated [1]

Check the Kind of Information that you want to include in the Mastersheet  ALL [ CLEAR INFORMATION ]

<input checked="" type="checkbox"/> PERSONAL DATA	<input checked="" type="checkbox"/> SUBJECTS COMPLETED
<input checked="" type="checkbox"/> ENROLLMENT DATA	<input checked="" type="checkbox"/> ATTENDANCE
<input checked="" type="checkbox"/> FINANCIAL AID ELIGIBILITY	<input type="checkbox"/> CUMULATIVE HOURS

3. **Select the data** you wish to view by clicking the box to the left of each section. Clicking **ALL** will select all sections available for viewing. To clear the selected criteria, uncheck the box.
4. The report will generate below the criteria. Scroll down using the outer bar to view the report.

Award Year: Entire Enrollment Period Scroll down to see generated report

Check the Kind of Information that you want to include in the Mastersheet:  ALL [ CLEAR INFORMATION ]

<input type="checkbox"/> PERSONAL DATA	<input type="checkbox"/> SUBJECTS COMPLETED
<input type="checkbox"/> ENROLLMENT DATA	<input type="checkbox"/> ATTENDANCE
<input checked="" type="checkbox"/> FINANCIAL AID ELIGIBILITY <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">3</span>	<input type="checkbox"/> CUMULATIVE HOURS
<input type="checkbox"/> OTHER PELL	<input type="checkbox"/> LEAVES OF ABSENCE
<input type="checkbox"/> FINANCIAL AID NEED AND AWARDS MADE	<input type="checkbox"/> SATISFACTORY PROGRESS
<input type="checkbox"/> TUITION ACCOUNTS	<input type="checkbox"/> TERM PROGRESS
<input type="checkbox"/> AID DISBURSEMENTS	<input type="checkbox"/> TERMINATIONS
ORIGINATIONS and DISBURSEMENTS	<input type="checkbox"/> RETURN OF TITLE IV CALCULATIONS
<input type="checkbox"/> PELL ORIGINATIONS	<input type="checkbox"/> REFUND POLICY CALCULATIONS
<input type="checkbox"/> PELL DISBURSEMENTS	<input type="checkbox"/> REFUNDS DUE BALANCE
<input type="checkbox"/> DIRECT LOAN ORIGINATIONS	<input type="checkbox"/> JOB PLACEMENTS
<input type="checkbox"/> DIRECT LOAN DISBURSEMENTS	<input type="checkbox"/> EXTERNSHIPS
<input type="checkbox"/> FFELP LOANS	<input type="checkbox"/> FORMS TRACKING
<input type="checkbox"/> DATA EXCHANGE MESSAGES	<input type="checkbox"/> LETTERS TRACKING
<input type="checkbox"/> DATA TRANSMISSIONS	<input type="checkbox"/> APPOINTMENTS
<input type="checkbox"/> DATA CHANGES	<input type="checkbox"/> COMMENTS
<input type="checkbox"/> FAFSA CHANGES	<input type="checkbox"/> PENDING WORK
<input type="checkbox"/> TRANSACTION TRACKING	

4

5. Use the inner scroll bar to navigate through the report.

<input checked="" type="checkbox"/> PELL DISBURSEMENTS	<input checked="" type="checkbox"/> REFUNDS DUE BALANCE
<input checked="" type="checkbox"/> DIRECT LOAN ORIGINATIONS	<input checked="" type="checkbox"/> JOB PLACEMENTS
<input checked="" type="checkbox"/> DIRECT LOAN DISBURSEMENTS	<input checked="" type="checkbox"/> EXTERNSHIPS
<input checked="" type="checkbox"/> FFELP LOANS	<input checked="" type="checkbox"/> FORMS TRACKING
<input checked="" type="checkbox"/> DATA EXCHANGE MESSAGES	<input checked="" type="checkbox"/> LETTERS TRACKING
<input checked="" type="checkbox"/> DATA TRANSMISSIONS	<input checked="" type="checkbox"/> APPOINTMENTS
<input checked="" type="checkbox"/> DATA CHANGES	<input checked="" type="checkbox"/> COMMENTS
<input checked="" type="checkbox"/> FAFSA CHANGES	<input checked="" type="checkbox"/> PENDING WORK
<input type="checkbox"/> TRANSACTION TRACKING	

**PERSONAL DATA**

ADDRESS: ████████████████████ RENO, NV 89509	CONTACT NUM: HOME: ██████████ WORK: ██████████ MOBILE PHONE: ██████████	MARITAL STATUS: SINGLE UNMARRIED GENDER: FEMALE RACE: WHITE (NON-HISPANIC) CITIZENSHIP: US CITIZEN ALIEN CARD #: VETERAN: N
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**ENROLLMENT DATA**

COURSE: [1] - COSMETOLOGY (DIPLOMA) - 60 WEEKS	ADMISSION BASIS: HIGH SCHOOL DIPLOMA	GRADUATION REQUIREMENT: 1800 HOURS /56 WEEKS
TRANSFER HRS/UNITS: 0 HOURS	ENROLLED HOURS: 1800 HOURS	PREREQUISITE:
PROGRAM START DATE: 08/08/2006	EXPECTED END: 09/04/2007	ATTENDANCE STATUS: THREE QUARTER TIME

5

6. To print the report, click the **Hide Criteria** button, then click **PRINT**.

**ENROLLMENT DATA**

COURSE: [1] - COSMETOLOGY (DIPLOMA) - 60 WEEKS	ADMISSION BASIS: HIGH SCHOOL DIPLOMA	GRADUATION REQUIREMENT: 1800 HOURS /56 WEEKS
TRANSFER HRS/UNITS: 0 HOURS	ENROLLED HOURS: 1800 HOURS	PREREQUISITE:
PROGRAM START DATE: 08/08/2006	EXPECTED END: 09/04/2007	ATTENDANCE STATUS: THREE QUARTER TIME

6

Exit Cancel Show Criteria **Hide Criteria** Print

## Student Comments [8010]

**DEFAULT PREVENTION - STUDENT COMMENTS (8010)** MODIFY MODE

Student:

Last Updated By: RGMUp\_2 on 11/07/2007 92:3:00 hrs.

Key:

\*Enrollment:

\*Standard Comment:

Section:

User Eyes Only:

Section Only:

Comments:

### Module Description

This module shall enable you to create, update, delete, and browse through Student Default Prevention Comments posted by the school user. Comments are posted for individual students.

- Selecting **YES** in the **User Eyes Only** drop down will prohibit other users from viewing the comment.
- Selecting **YES** in the **Section Only** dropdown will prohibit users without access to the Default Prevention Modules from viewing the comment.

Field	Description
Key	Refers to the number sequentially assigned for each entry under the logged in school or campus
Enrollment	If the selected student has multiple enrollments they will display here. Select the enrollment for which the comment should be posted
Standard Comment	A listing of Standard Comments that are automatically posted by the system. A user may select a standard comment or leave it blank and enter a specific comment in the Comments Field
Section	Refers to the section for which the comment is related
User Eyes Only	If YES is selected, only the user posting the comment can view the comment
Section Only	If YES is selected, only users with access to this section can view the comment
Comments	Enter any comments for future viewing or items for follow-up

## Default Prevention Reports [8011]

**KIND OF REPORT TO GENERATE:**

- [1] Student List with EXPECTED End Dates in Past or Next 60 days (not posted)
- [2] Student List with No Attendance posted for 6 months or more
- [3] ACTIVE Student List with EXPECTED End Dates within specified date range
- [4] INACTIVE Student List with POSTED Last Date of Attendance within specified date range
- [5] Mail-Merge Data
- [6] Student List Report (Registrar)

Check this box to generate Feature-Rich version of the report.

IF YOU CHOSE REPORT 3 OR 4, ENTER DATE RANGE:  TO

**STUDENTS TO GENERATE:**

- Students who have FFELP Balances
- Students who have Perkins Balances
- Students who have Direct Loan Balances

**ADDITIONAL GENERATION CRITERIA:**

ENROLLED IN:

This module allows you to print various student reports needed to manage Student Default Prevention. You may generate a report based on the criteria above:

KEY	STUDENT NAME	SS NUMBER	LAST POSTING	EXPECTED END	ACTUAL LDA	FFELP BALANCE	PERKINS BALANCE	DL BALANCE	LETTERS DUE	LETTERS SENT
6226-	MARCELO		02/19/2016	04/05/2016		0.00	0.00	13,375.00		
6229	RECCA B		02/19/2016	04/29/2016		0.00	0.00	8,462.00		
6205	DOUGLAS E		02/19/2016	03/25/2016		0.00	0.00	6,428.00		
6083	ICA M		02/17/2016	04/04/2016		0.00	0.00	5,028.00	D12	
6185	Z, EDDIE S		02/17/2016	04/27/2016		0.00	0.00	8,222.00		
6160	A		02/18/2016	03/21/2016		0.00	0.00	9,400.00		
6207	JEZ, HUMBERTO		02/19/2016	04/22/2016		0.00	0.00	8,413.00		
6180	OLA Y		02/19/2016	04/01/2016		0.00	0.00	3,297.00		
6161	LLE C		02/18/2016	03/17/2016		0.00	0.00	10,954.00		
6205	RISTOPHER I		02/18/2016	04/19/2016		0.00	0.00	7,602.00		

# Student Appointment Report [8036]

ADMINISTRATION | RECRUITMENT | ADMISSION | REGISTRAR | FINANCIAL AID | FISCAL | PLACEMENT | DEFAULT PREVENTION | PERKINS BILLING TRX #:

**DEFAULT PREVENTION - STUDENT APPOINTMENT LIST (8036)**

CAMPUS:  COLLEGE

**REPORT SELECTION CRITERIA**

APPOINTMENT DATE RANGE: 03/10/2016 - 03/17/2016

STAFF: ALL STAFF (8003)

STATUS: ALL

DEPARTMENT: DEFAULT PREVENTION

PROGRAM TYPE: ALL TYPES | ALL PROGRAMS

**REPORT FORMATTING**

**SORT BY:**  Employee  Student Name  Student Key

Page Report by:  Employee  Department

**BATCHING / SCHEDULING**

Batch Report  Repeating Schedule

Student Appointment Listing									
Employee	Student		Appointment				Department	Comments	Post Appt Notes
	Key	Name	Date	Time	Length	Status			
RAMIREZ, DOANNE O	1865 XI,	LINDA YE	04/14/2015	10:00 AM	30	Pending	REGISTRAR	Test	
<b>1 STUDENTS</b>									

The Student Appointment Report allows users to create a listing of Appointment details entered under Student Appointment modules (available under Admissions, Registrar, Financial Aid, Fiscal, Placement and Default Prevention.)

**TIP:** This report can be filtered by **Appt Date Range, Staff member, Appt status, Dept, and/or Program.**

Users can select to sort/display the report by either **Employee or Student Names.**

# Delinquent Borrowers Report [System Mail]

ADMINISTRATION | RECRUITMENT | ADMISSION | REGISTRAR | FINANCIAL AID | FISCAL | PLACEMENT | DEFAULT PREVENTION

**ADMINISTRATION - WEB SYSTEM MAIL**

	Compose	Sender	Subject
Inbox	<input type="checkbox"/>	RGM Web-System Administrator	Campus HAIR DRESSING ACADEMY CARROLLTON, TX (00427C received 11/19/2010
Sent	<input type="checkbox"/>	RGM Web-System Administrator	SSCR Sent for HAIR DRESSING ACADEMY CARROLLTON, TX (0
Archive	<input type="checkbox"/>	RGM Web-System Administrator	Campus HAIR DRESSING ACADEMY CARROLLTON, TX (00427C received 11/16/2010
	<input type="checkbox"/>	RGM Web-System Administrator	Campus HAIR DRESSING ACADEMY CARROLLTON, TX (00427C received 11/10/2010
	<input type="checkbox"/>	RGM Web-System Administrator	SSCR Sent for HAIR DRESSING ACADEMY CARROLLTON, TX (0
	<input checked="" type="checkbox"/>	RGM Web-System Administrator	Delinquent Borrowers Report received on 11/08/2010

## Delinquent Borrowers Report

- 1) **RGM>Administration> System Mail**
- 2) Select the Delinquent Borrowers Report (report will generate below)