

# Welcome to insight<sup>SM</sup>

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## Nelnet's Delinquency Reporting Tool Quick Set up Guide

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## Overview of Program

Nsight is a web-based delinquency reporting tool that financial aid & default prevention professionals can use to view real-time account information for students & borrowers with loans that are serviced by Nelnet. It is a single resource available for Nelnet commercial loans, Direct Loans serviced by Nelnet, and commercial loans purchased by the Department of Education that are serviced by Nelnet.

Nsight is designed to provide a diverse set of information to cover all of the school's needs. With Nsight, the school can view comprehensive delinquency reports for any specified date range, fiscal/cohort year, or repayment status. The school also has the capacity to view the demographic info Nelnet has for the borrower and their references, as well as the borrower's cumulative forbearance & deferment status & eligibility.

The following information is meant as a brief introduction to Nsight, and as a primer to get through the initial set-up process. Nsight can be tailored in any number of ways once it is set up, and there is more thorough information regarding the specific features available in the full Nsight User Guide.

## Step by Step Set Up to Pull a Quick Report

When the user logs into Nsight for the first time, the reports are ready to be run. All the user needs to do is open up the requested report and select "Run Query"

1. Log into Nsight with the user information provided to you in your email
2. Click on 'Document List'
3. Click the plus next to 'Public Folders'
4. Double-click the folder labeled 'School Reports'
5. Double-click on the report you wish to run.
6. The report will open straight to the "prompts" (search criteria) with all prompts pre-filled to pull all available data.  
**\*\*\*NOTE: All date ranges and school codes in the box on the right will be included in the search. If the school code says '0000000,' all available school codes will be included in the search.**

The screenshot shows a software window titled "Borrower Core Level Data-All Schools- No Drill". Inside, there is a "Prompts" section with the instruction "Reply to prompts before running the query." Below this are four prompts, each with a green checkmark and a pre-filled value:

- Enter Delinq Range: 1-30,121-150,151-180,181-210,31-60,61-90,91-120,21...
- Enter Begin Repayment Dt: 1/2/1901 12:00:00 AM
- Enter Ending Repayment Dt: 12/31/9999 12:00:00 AM
- Enter value(s) for LNC School and Branch: 00000000

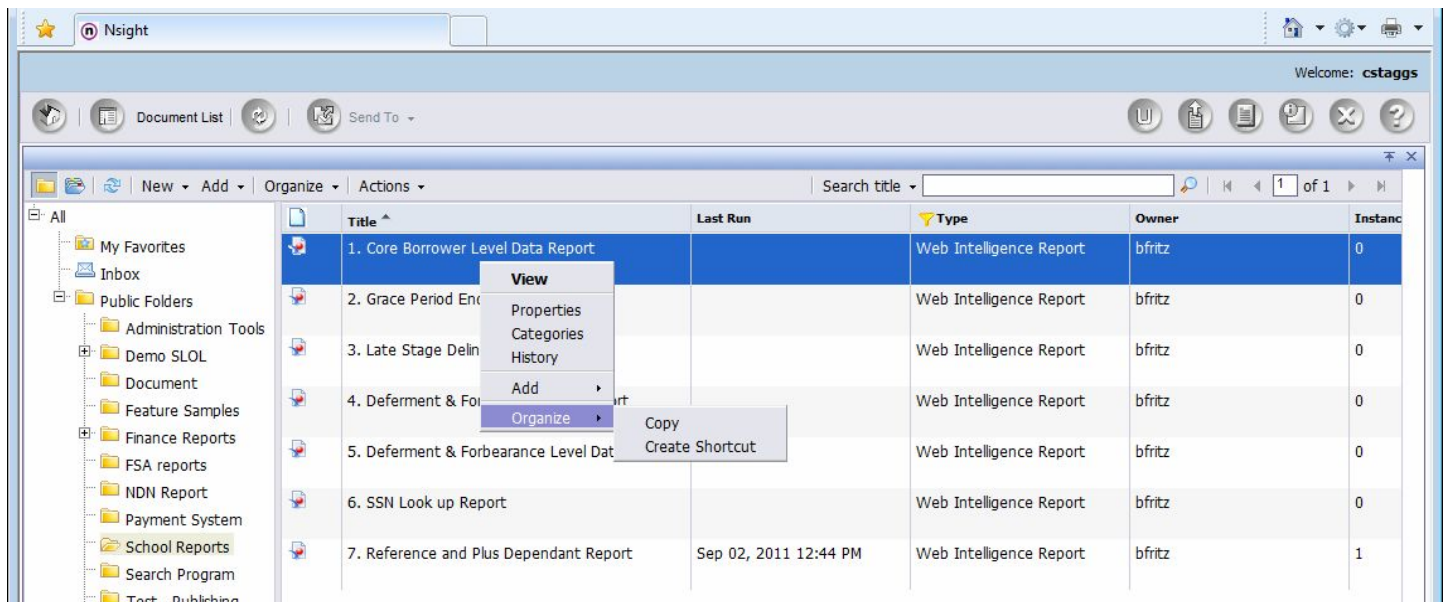
Below the prompts is a search area with a "Type values here" input field. To the right of this field is a list titled "Enter Delinq Range:" containing the following items: 1-30, 121-150, 151-180, 181-210, 31-60, 61-90, 91-120, 211-240, 241-270, Current, and Over 270. Below the search area is a "GRC Delinquent Ranges" list with the same items as the "Enter Delinq Range:" list. At the bottom of the window, there is a "Run Query" button highlighted with a red box and a red arrow pointing to it, and a "Cancel" button to its right.


7. Click Run Query to run your report

## Step by Step Set Up to Save a Report to your Personal Folder to Save Adjustments or Auto Schedule

When the user logs into Nsight for the first time, the reports are ready to be run. If the user wants to save changes to the report/prompts, or wishes to schedule an auto-run report they will need to **save** the reports they want to their Favorites folder. To do that, go through the following steps in order.

1. Log into Nsight with the user information provided to you in your email
2. Click on 'Document List'
3. Click the plus next to 'Public Folders' (Note: Not all folders seen in the screen shot below will be visible)
4. Select the folder labeled 'School Reports'
5. Right-click on the report you wish to save.
6. Hover over the option marked 'Organize' and select 'Copy.'



7. On the left, select the folder marked as 'My Favorites.' Click on the 'Organize' button and choose 'Paste.' You have now saved the report to your Favorites folder within Nsight. Repeat steps 1-7 to save the remaining reports.
8. To open a saved report, click on 'Document List' in the upper left hand corner and open the folder labeled 'My Favorites.' The report should be saved there. Double click to open it.
9. Once you've made the adjustment you wish click the  icon in the upper left hand side to save your changes.

