AMS Servicing Group

Winston-Salem, NC   **May 31, 2003**

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Holiday Schedule Independence Day Friday, July 4 (System III will be available during normally sched-uled hours.)

Inside AMS Servicing
Jan Blalock
Senior Systems Analyst

Visit our Web site at www.amsservicing.com
for up-to-the minute publications, forms, and information.

SYSTEM 3i UPDATE

Available Now!--myamsloan.com

Our new Web site, www.myamsloan.com is now available, and we are very excited about it. This dynamic site, which went live on May 31, allows borrowers to access their account information via the Web. With our SSL security, borrowers can safely create a user name and password to log on to the site where they can:

- Access account information
- Make an electronic payment
- View payment, deferment, and cancellation history
- Download forms

Later in the month , borrowers will be able to sign up for AutoDraft, our automatic direct draft service, and update their address and phone number on-line. Borrowers logging on to www.amsservicing.com are being re-directed to www. myamsloan.com. Customers will continue to use www.amsservicing.com to access our publications , forms, and training information. To find out more about our new Web site, please see the attached *System 3i Update*.

Attachment: *System 3i Update*

EDUCATION DEPARTMENT UPDATE

Final Rules for Students and Borrowers on Active Duty Issued

The Department of Education (ED) recently announced waivers and modifications of statutory and regulatory provisions under the Perkins Loan, Direct Loan, and FFEL programs to assist students and borrowers effected by military deployment. It applies to members of the reserve components of the Armed Forces who are called or ordered to active duty for a period of more than 30 days, or who are regular active duty members of the Armed Forces reassigned to a different duty station for more than 30 days as a result of a military mobilization.

To assist specified Perkins Loan borrowers, statutory and regulatory requirements are waived so that any forbearance based on a borrower's military service is excluded from the 3-year cumulative limit. Also, in cited instances under all three programs, the time that certain borrowers are on active duty will not be considered an interruption in the service required for the borrower to receive a loan cancellation. To view this Federal Register publication, go to: http://www.ifap.ed.gov/fregisters/FR051420032.html.

Changes in 2004-2005 FISAP for Perkins, FSEOG, and FWS Loans

As published in our March 2003 *AMS Servicing Group Update*, ED recently issued *CB-03-03* to include changes in the *Fiscal Operations Report for 2002-2003* and the *Application to Participate for 2004-2005 (FISAP)*. Programming is underway to add new fields to our *Fiscal Operations Analysis Report and Supplement*. Part III, Section C will be updated to add the following fields:

2.1 Assignments due to default or liquidation
2.2 Assignments due to total and permanent disability

We have received clarification from ED that loans that have been **assigned and accepted** will appear in these fields. AMS Servicing Group will leave field "2" blank. ED's on-line software will automatically calculate the totals for fields 2(b), (c) and (d) based on the amounts entered in 2.1 and 2.2.

E-mail Directory for AMS Servicing Group
Management and Customer Service Staff

Debra Adams, Call Center Manager.: **dadams@amsweb.com**
Steve Anderson, Conversion Supervisor: **sanderson@amsweb.com**
Daisy Bass, Customer Service Director: **dbass@amsweb.com**
Beth Bealle, Product Development Director: **bbealle@amsweb.com**
Kim Blackburn, Customer Service Rep.: **kblackburn@amsweb.com**
Mark Bondurant, Alternative Loan Mgr: **mbondurant@amsweb.com**
Betsy Burton-Strunk, Market Dev. Dir.: **bburton@amsweb.com**
Sharon Cameron, Audit/Compliance Spec.: **scameron@amsweb.com**
Bridgett Christian, Human Resources Mgr.: **bchristian@amsweb.com**
Joel Cofer, Customer Service Rep.: **jcofer@amsweb.com**
Charles Cornelius, Default Prevention Svr.: **ccornelius@amsweb.com**
Wendy Cox, Customer Service Rep.: **wcox@amsweb.com**
Sharal Duncan, Customer Service Rep.: **sduncan@amsweb.com**
John Elliott, Info. Technology Infrastructure Dir.: **jelliott@amsweb.com**
LaShonda Fields, School Relations Coord.: **lfields@amsweb.com**
Charles Fulp, Facilities/Distribution Mgr: **cfulp@amsweb.com**
Terry Gaither, Cust. Service Team Lead **tgaither@amsweb.com**
Wallace Grooms, Alternative Loan Svr.: **wgrooms@amsweb.com**
Debra Hairston, Production Control Svr.: **dhairston@amsweb.com**

Paula Hall, Payment Processing Svr.: **phall@amsweb.com**
Raffaele Halsey, Cust. Serv./Help Desk Svr.: **rhalsey@amsweb.com**
Barbara Joyce, Accounts Rec. Supervisor: **bjoyce@amsweb.com**
Lisa Koniuto, Sch. Rel./Contracts/Audit Mgr.:**lkoniuto@amsweb.com**
Lando Little, Borrower Services Dir: **llittle@amsweb.com**
Yvonne Marlowe, Cust. Svc. Rep.: **ymarlowe@amsweb.com**
Pattie Mastin, Account Manager.: **pmastin@amsweb.com**
Charles Parker, Customer Support Dir.: **cparker@amsweb.com**
Branko Pivko, Audit/Compliance Spec.: **bpivko@amsweb.com**
Kathy Riddle,Transaction Processing Mgr.: **kriddle@amsweb.com**
Patrick Roberson, Borrower Ser. Svr.**:proberson.amsweb.com**
Will Shaw, School Relations Coord.: **wshaw@amsweb.com**
Jeff Smejkal, Network and Sec. Adm. Mgr: **jsmejkal@amsweb.com**
Judy Smith, Information Technologies Mgr: **jsmith@amsweb.com**
Andrea Thompson, Cust. Svc. Rep.: **athompson@amsweb.com**
Carolyn Williams, Documentation Svr: **cwilliams@amsweb.com**
Kim Wilson, Technical Coord.: **kwilson@amsweb.com**
Billi Wolfe, School Relations Coord.: **bwolfe@amsweb.com**
World Wide Web Site: **http://www.amsservicing.com**

We are also working on a way to code these loans in order to populate the amounts in the appropriate fields. So we can update this coding accurately, **please inform us if you are processing assignments at your institution.** This process also allows us to report accurate information to the credit bureau. Additional information on coding loans for assignments will appear in future issues of the *Update*.

Changes to the Annual Operating Report Announced

The Department of Health and Human Services (DHHS) notified us that beginning with the Annual Operating Report for 7/1/2002 – 6/30/2003, schools will not be able to submit the AOR if the following edits appear on the edit report. Submission can be completed once changes have been made to clear the edits from the report.

- Negative numbers in the cumulative fields on pages 2 or 3, with the exception of Page 2, Line d.14 - Other Costs. (Refer to your general ledger to determine where the error occurred and make corrections to the appropriate line item on the AOR.)

- Edit 2.2: "Federal Funds Received/Receivable" exceeds "Federal Funds Awarded." Current "Federal Funds Received/Receivable" cannot be more than Current "Federal Funds Awarded."

- Edit 2.3: "Institutional Contributions Deposited" is less than the required $1/9^{th}$ of cumulative "Federal Funds Received/Receivable." To correct this, schools must deposit an amount equal to 1/9th of the amount equal to the cumulative "Federal Funds Received/Receivable" plus "Transferred from Scholarships Fund" minus "Transferred to Scholarship Fund."

- Edit 2.11: "Cash Balance End of Report Period" cannot be negative. This can be temporarily corrected, for example, by making a deposit to "Institutional Contributions Deposited" in the amount equal to the negative amount. This edit may be automatically corrected if any changes were made to the above edits.

- A new edit has been added that cross references Pages 1 and 2. If a school enters figures for "Number of student borrowers" (Page 1), then "Loaned to students" (Page 2) must contain a sum greater than 0.

In addition to the above changes, schools should also pay close attention to the following information:

EDUCATION DEPARTMENT UPDATE (Continued)

- Breakdown of race/ethnicity enrollment – DHHS is determining the best use of this data in awarding funds. Please complete the table using the information available to you through your institution.

- Borrower Accounts Worksheet – It has been noted that schools are reporting a decrease in their total number of borrowers. These figures should never decrease from year to year. They should remain the same or increase as new loans are made from the fund.

- Employment Cancellation – Currently Edits 6.5 and 6.6 address the difference in dollars reported for cancellations on Pages 3 and 6. The cancellation provision is no longer in effect for these programs. No cancellations may be granted. The cumulative employment cancellation figures reported on Page 6 must match the figures reported on Page 3.

- Edit 6.5: Page 6, Column 4, "Principal Cancelled Employment/Professional Practice" total should equal Page 3 "Cumulative Principal" Line 1a. "Health Professions Practice-Shortage" (10%) plus Line 1b. "Health Professions Practice-Rural Shortage" (15%)

- Edit 6.6: Page 6, Column 4, "Principal Cancelled/Nursing Employment" should equal Page 3 "Cumulative Principal" Line 2a. "Nursing Employment" (10%) plus Line 2b. "Nursing Employment (15%) plus 2c. "Nursing Employment" (20%).

For additional information on the AOR for 2002-2003, you may refer to *Campus-Based Policy Memorandum 2003-1* at http://bhpr.hrsa.gov/dsa/weblinks. Select "Program Information" and then click on "Policy Memoranda."

Close-Out of the 2001-2002 Awards
ED has just completed close-out of all 2001-2002 campus-based awards, including those for the Federal Work Study, Perkins Loan, and FSEOG programs. *Dear Partner/Colleague Letter CB-03-06* explains how a school's close-out amounts are determined; how a school will receive an award adjustment letter; how a school can adjust a FISAP report and have funds reinstated if its FISAP expenditure report was incorrect; and where a school can turn to have questions answered. View this letter by entering the following link: http://www.ifap.ed.gov/dpcletters/CB0306.html.

DHCDD Publishes Combined Notice of Award for 2003-2004
The Division of Health Careers Diversity and Development announced that the *Combined Notice of Award for 2003-2004* is available via the Internet. This official document transmits information about awards for all DHCDD Campus Based Branch (CBB) programs. The *Combined Notice of Award* will show all CBB funds awarded for your program for this year on one consolidated form. To access this information, go to:http://bhpr.hrsa.gov/dsa/weblinks. Click on "Award Notices," then "2003-04."

Release of the 2003-04 FSA Handbook
The *2003-2004 Federal Student Aid Handbook* is posted to the IFAP Web site in PDF format. ED has appended a quick reference list to this year's changes, and

planned to print and mail copies of the *Handbook* to all schools participating in the federal aid programs during May. For more information, visit: http://www.ifap.ed.gov/IFAPWebAppcurrentSFAHandbooksYearPag.jsp?p1=2003-2004&p2=c.

IRS To Change Procedure for Obtaining Tax Returns

As of October 1, 2003, IRS Walk-In Offices (Tax Assistance Centers) no longer will provide transcripts of tax returns, copies of tax returns, or 1722 letters (which document information on an individual's tax return). This information will be available from the IRS ONLY by written request or by calling 1-800-829-1040. The IRS has provided AMS Servicing Group with an information sheet that you can download to give to parents, students, and others who need to obtain transcripts.

      Attachment: *IRS Information*

Gramm-Leach-Bliley Act (GLB) Safeguard Policy

As we discussed in the March 31 *AMS Servicing Group Update*, one of the requirements of GLB is that service providers utilized by colleges and universities comply with the safeguard provisions included in the Act. AMS Servicing Group meets the requirements through the establishment of its Information Security Policy that describes the processes and procedures in place to address both the logical and physical security of its servicing system. Information regarding our security procedures was recently mailed to our customers. This information can be provided as AMS Servicing Group's compliance with applicable regulations. A copy of this policy is available from our Web site at http://www.amsservicing.com/Gramm_Leach_Bliley%20Act.asp.

GLB Training Offered by COHEAO

The Federal Trade Commission (FTC) has provided us with more details about the upcoming training sessions on the new regulations governing the safeguarding of customer information, as required by the GLB. (These regulations take effect on May 23, 2003.)

The training will be offered on two alternative dates, June 9 from 10-11 a.m. and June 23 from 2-3 p.m. Both sessions will be held in the FTC offices in Washington, DC, at 601 New Jersey Avenue NW, in Conference Center Room A on the first floor. The sessions are open to the public, and there is no advance registration. Instructions on how to dial in for those who prefer to listen in by telephone rather than attending one of the sessions will be available from the FTC Web site at least one day before the scheduled training. Dial-in participants will be able to e-mail questions to a moderator.

**YEAR-END
PROCESSING**

Get Ready for Year-End Processing

The countdown to June 30 is underway. Use this checklist to close the fiscal year successfully:

1. Reconcile loan and accounting information.
   √ Reconcile all disbursements for the year.
   √ Correct and return all unpostable new loans and advances.
   √ Check and update separation dates.
   √ Reconcile your general ledger.

2. Determine special needs and communicate them to us.
   √ Contact your auditors to determine their needs for reports.
   √ Provide instructions for any special mailing requirements for year-end reports.
   √ Submit change/adjustment requests for processing.

3. Work the *Cohort Default Rate Report*.
   √ Provide your Customer Service Representative with requests for coding changes.

With the end of the fiscal year approaching, our goal is to process all requests for changes in a timely manner. All requests arriving by regular mail, overnight mail, fax, DataLink℠ Dispatch, or e-mail are processed in the order that we receive them. Deadlines for receipt in our office are:

June 5	Requests for duplicate reports
June 6	Requests for special mailing of year-end reports
June 23	Requests for Change/Adjustment memos
June 27	Year-end post begins

Remember you can use *DocumentDirect* to access your fiscal year-end reports immediately following year-end processing. This Internet tool provides you with the fastest method of receiving your year-end information. Please see this month's "How To" if you need a quick reminder on using *DocumentDirect*.

AUDIT UPDATE

It's Audit Time Again!

AMS Servicing Group is pleased to announce the completion of the first phase of the annual third party servicing audit performed by PriceWaterhouse Coopers (PwC). The PwC auditors reviewed our compliance with servicing regulations mandated by the guidance applicable to the Compliance Audits (Attestation Engagements) of the Federal Student Financial Assistance Programs.

The initial audit covered the first three-quarters of our fiscal year which ends on June 30, 2003. Auditors will return in July to review fourth quarter compliance, and the entire audit process will be completed by the end of July 2003. We are projecting that the final documentation will be available at the end of August 2003. AMS Servicing Group will make this material available in paper and convenient CD-ROM versions.

An Audit Request Form for 2002-2003 is attached and is also available from our Web site. Please contact your Customer Service Representative with any additional questions.

Attachment: *Audit Request Form*

Want to Make Your Collection Job Easier?

If you have sticky notes to remind you to make follow-up calls to delinquent borrowers; if you are constantly reviewing your past due loans list and COHORT borrower report to determine who needs a delinquent letter; or if you are manually keying "other costs" fees to borrower loans, AMS Servicing Group can help. Our PC-based *Collections System* (COSY) is designed to help you manage your internal collections efforts. COSY interfaces daily with the primary system of record, DataLink, thus ensuring that accounts on COSY and DataLink are updated with the most recent information. Some of COSY's features include:

- Tickler Files
- Collector WorkLists
- Letter Generation
- Management Reports

If you are interested in streamlining your internal collection efforts, please call Kim Wilson, Technical Coordinator at 1-800-458-4492 ext. 2826 or by e-mail at kwilson@amsweb.com for more information. After talking with Kim, you are certain to agree that we've developed a product that will change the way you work.

To learn more about the lead developer for the *Collections System*, please see this month's "Inside AMS Servicing" profile on Jan Blalock.

Customer P.O. Box Numbers

Customers should use the following address when mailing correspondence, payment transmittals, new loans/advances, change/adjustments memos, forms, credit verifications, and consolidations to our office:

AMS Servicing Group
P.O. Box 2902
Winston-Salem, NC 27102-2902

Payment for AMS Servicing Group fees should be mailed to our Account Receivables department at the following address:

AMS Servicing Group
P.O. 1840
Winston-Salem, NC 27102-1840

Teleconference Schedule

Our popular teleconference schedule will continue in July. Each teleconference is geared towards understanding a particular area of student loans and is an opportunity to gain new insight, ask questions, and hear helpful suggestions from other schools. To

TRAINING UPDATE (CONTINUED)

register, please call Debra Pitts, School Relations Assistant at (800) 458-4492, extension 2272 or e-mail her at dpitts@amsweb.com at least 3 days before the conference call. Remember, no special equipment is needed, and there is no charge to register for the sessions.

July 1, 2003   2:00 p.m. EST
What are Perkins Loans and How AMS Helps (Beginner Class)

July 15, 2003   2:00 p.m. EST
FISCOP (Advanced Class)

August 5, 2003   2:00 p.m. EST
How to Use the Reports Provided by AMS Servicing Group (Beginner Class)

August 19, 2003   2:00 p.m. EST
Assignment (Advanced Class)

September 2, 2003   2:00 p.m. EST
Cohort: What is it and How do I Manage It? (Beginner Class)

September 16, 2003   2:00 p.m. EST
Topic to be Announced

October 7, 2003   2:00 p.m. EST
Where do I Start? A Month-to-Month Checklist (Beginner Class)

October 21, 2003   2:00 p.m. EST
Topic to be Announced

November 4, 2003   2:00 p.m. EST
10 Things to know about Student Loans (Beginner Class)

November 18, 2003   2:00 p.m. EST
Topic to be Announced

December 2, 2003   2:00 p.m. EST
What are Perkins Loans and How AMS Helps (Beginner Class)

December 16, 2003   2:00 p.m. EST
Topic to be Announced

Workshop Schedules

The last session of *Student Loans 101* for 2003 will be held on July 24-25, and the final session of *Student Loans 202* will be held on October 9-10. Both sessions will be held at our offices in Winston-Salem. You can obtain registration information about the workshop by visiting our Web site at www.amsservicing.com or by calling Debra Pitts at (800) 458-4492 ext. 2272 or by e-mailing her at dpitts@amsweb.com.

Regional Meetings

Our July Regional Meetings are scheduled to be held in South Carolina and Washington. Please plan to attend a Regional Meeting near you to talk to our staff and network with other student loan professionals. You will not want to miss news about exciting new products such as *System 3i*, which will allow your borrowers to access their accounts on-line in Phase I. If you are interested in hosting a regional meeting, please contact your School Relations Coordinator.

South Carolina Regional Meeting	July 2003
Washington State Regional Meeting	July 2003
Puerto Rico Regional Meeting	August 2003
New York Regional Meeting	August 2003
Massachusetts Regional Meeting	October 2003
Nebraska Regional Meeting	October 2003
Georgia Regional Meeting	November 2003

EARMA Conference Update

The 12th Annual Educational Accounts Receivable Management Association Conference (EARMA) was held in East Windsor, New Jersey on April 8-9, 2003. AMS was represented by Betsy Burton-Strunk, Senior Vice President of Sales, East; LaShonda Fields, School Relations Coordinator, AMS Servicing Group; and Carri Comer, Account Manager, AMS Monthly Payment Plans. Many of our schools were represented at the conference. It once again provided a great opportunity for colleges, universities, and vendors alike to network and discuss issues of interest. As always, the conference provided wonderful resources and speakers that not only captivated audiences with their topics, but educated them as well.

This year the organizers afforded us the opportunity of spending some quality time with our customers during a busy two days by instituting the Billing Servicers Users Meeting. In our meeting we discussed exciting items such as the *System 3i* project, Web development, and on-line exits. We also congratulate **Dianne Atwell** at the University of Medicine and Dentistry of New Jersey for coming up with the best slogan describing the relationship between the borrowers, the schools and AMS Servicing Group. Her winning line was, "Developing great customer services by connecting the blocks...one at a time." Great job, Dianne! And thanks to all of our customers for attending and interacting with us. We look forward to seeing you at next year's conference.

Conference Schedule

Representatives from AMS Servicing Group will attend the conferences listed below.

CCULAA's 11th Annual Conference will be held June 8-11 in San Diego, CA at the Hyatt Regency. The Web site for the Hyatt Regency is http://islandia.hyatt.com. For more information about the conference, visit www.cculaa.org.

The **2003 COHEAO Mid Year Meeting** will be held in Seattle, WA on July 27-29 at the Red Lion Inn. More information is available at www.coheao.com.

**CONFERENCES
(Continued)**

The **PDG East Coast Conference** will be held October 12-15 at the Hyatt Regency in Miami, FL. Visit www.prodev.com for more information.

The **PDG West Coast Conference** will be held at the Westin Seattle in Seattle, WA on November 16 -19. More information is available at www.prodev.com.

CUTOFF DATES

Cutoff Dates

Cutoff dates for June and July 2003 are presented below:

Transaction	June 2003	July 2003
Last day to receive collection payments	06/24/03	07/28/03
Last day to receive regular payments	06/25/03	07/29/03
Last day for online payments	06/27/03	08/01/03
Date final post begins	06/27/03	08/01/03
Report date used for final post	06/30/03	07/31/03
Last day deposits created for deposit to bank account	06/27/03	07/31/03

UPDATE

System 3i

It's Here: Borrower Account Access on the Web

AMS Servicing Group is pleased to announce the release of System 3i – Phase I.   Borrowers can now log into www.myamsloan.com to view their account information and easily make their student loan payments.

During the summer, your borrowers will be receiving information with their billing statements announcing the availability of www.myamsloan.com. Some borrowers willreceive a direct mail piece as well.   Please provide our Web address--www.myamsloan.com--to your borrowers - all of your borrowers and encourage them to visit the site!

Our Borrower Services Call Center representatives have completed a training course that will assist them in helping borrower with questions about their System 3I experience. Our Help Desk staff, Customer Service Representatives, and School Relations Coordinators are all becoming familiar with www.myamsloan.com so that they are better able to assist our customers.

Although we have met our first major goal by releasing www.myamsloan.com on May 31, 2003, there is still much work to be done. During June, the Product Development team will making enhancements to the site.

Some of the enhancements that are scheduled to be released during the month include:

1) Giving the borrower the ability to change his/her address online

2) Automating the application process for AutoDraft (Automatic Direct Direct) by providing an interactive online application.

3) Adding the capability of providing loan payoff amounts for dates in the future.

In addition to these enhancements, we are also working on Phase II of the *System 3i* project. Shortly, schools will be able to access their borrowers' accounts online and be able to view the information that is being provided to the borrowers.

System 3i Objective

The objective of the System 3i project is to define, develop, and implement the procedures, controls and software necessary to create a web presentation layer for our customers.

A T T E N T I O N!

IRS News
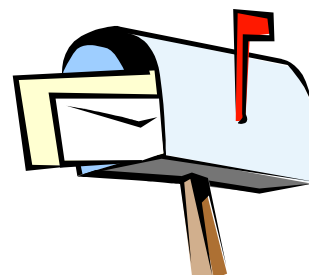
Effective October 1, 2003
IRS Walk-In Offices
(Tax Assistance Centers)
will no longer provide **TRANSCRIPTS OF TAX RETURNS, COPIES OF TAX RETURNS,** or **1722 LETTERS.**
This information will ONLY be available from the IRS by **written request** or by **calling** 1-800-829-1040.

ATTACHMENT

INSTRUCTIONS FOR OBTAINING TRANSCRIPTS OF TAX RETURNS, COPIES OF TAX RETURNS, OR 1722 LETTERS

1. Call **1-800-829-1040** and request a transcript by the automated system. Please follow the options listed below.

WHEN CALLING BETWEEN THE HOURS of 7:00 AM and 10:00 PM, PLEASE SELECT THE FOLLOWING OPTIONS:

- Option 2 (**Personal Tax Account**)
- Option 2 (**Personal Tax Account**)
- Enter your Taxpayer ID Number (**SSN, ITIN, or EIN**).
- Option 1 (**Transcripts**)
- Enter the <u>Numbers</u> in your street address.
- Enter the **year** of the Return you are requesting.

IF YOU ARE CALLING AT ANY OTHER TIME, PLEASE SELECT THE FOLLOWING OPTIONS:

- Option 2
- Enter your Taxpayer ID Number (**SSN, ITIN, or EIN**).
- Option 1
- Enter the <u>Numbers</u> in your street address.
- Option 2
- Enter the **year** of the Return you are requesting.

<u>**Your transcript(s) will be mailed within 10 to 15 days**</u>
OR

2. You may complete Form 4506, REQUEST FOR COPY OR TRANSCRIPT OF TAX FORM, and mail it to the address indicated on the form. You should receive your transcript within **10 -15 days**.

AUDIT REPORT REQUEST FORM

☑ Yes, I would like to receive the June 30, 2003 Audit Report.

(We will automatically ship you a CD unless otherwise specified.)

Please send _____ copy(ies) in CD-ROM format @ $75.00 each

_____ copy(ies) in paper format @ $100.00 each

Mail to: _____

Contact name: _____

Address: _____

City/State/Zip: _____

Telephone: _____

School name: _____

Authorized Signature: _____ Date: _____

Please return to:

School Relations Assistant
AMS Servicing Group
P.O. Box 3176
Winston-Salem, NC 27102-3176

5/03

HOW TO

Use *DocumentDirect*

DocumentDirect provides Internet access to your weekly and monthly student loan management reports. Reports are available for you to view from your browser (e.g. Internet Explorer or Netscape) and print on the first business day following the cutoff date.

DocumentDirect will definitely come in handy this fiscal year-end! Each month after month-end cut off, your reports are available to you on-line first thing Monday morning. You don't have to wait for snail mail! By using *DocumentDirect*, you can either view or print just the reports you want to see. You can print a single page or the entire report using a desktop computer and printer. Several years of reports are available through *DocumentDirect*. Additionally, multiple users at your school can access the reports simultaneously.

To use *DocumentDirect*, all you need is access to the Internet and a Java-enabled web browser - either Netscape Navigator 4.5-4.8 or Microsoft Internet Explorer 5.0+. **Note: Using Netscape 6.0 or higher is not recommended at this time.**

Printing reports

After selecting the "Print" button on the Document Panel Bar, a dialog box appears that allows you to print the current page, which is the default setting. You also can choose to print the current section (i.e., if you're looking at your COHORT report, it will print all pages of this report.). You may also choose to print a range of pages by entering the page numbers in the "From" and "To" boxes.

IMPORTANT: DO NOT select the **"All"** option when you print. This option will prompt the system to print ALL of your reports, which in most cases, is hundreds or thousands of pages.
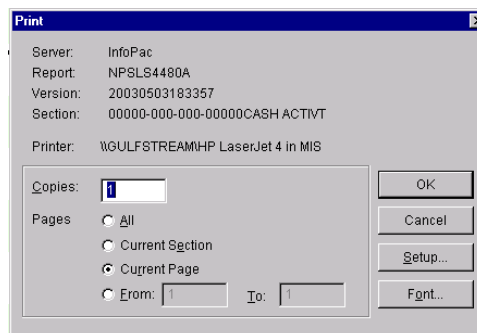

Figure 1

Downloading Reports

The Download function in *DocumentDirect* allows you to save a single page or multiple pages of a report to your hard drive or network. Reports can be downloaded into either Zip or Text Files. The methods for downloading each vary depending on the type of Internet Browser you are using.

Once you have located the report or the page you would like to download, click on the Download button located on the Document Panel Toolbar. Complete the "Download" dialog box. You may choose a range of pages by selecting:

- All (to download all the reports for that date)
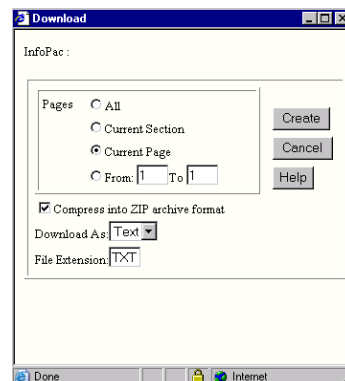- Current Section (to download the current report)

Figure 2

- Current Page (to download the current page you are viewing)
- From-To (to download a range of pages by entering the page number where you want to begin downloading in the "From" dialog box and entering the last page you want to download by entering the page number in the "To" dialog box).

Using Internet Explorer
Downloading Into A Zip File

Before downloading to a zip file, you must have a zip program. Once you have completed the Download dialog box, select the "Create" button. Your browser will prompt you to open the file or save it to your computer. Select "Save this file to disk" to save it to your computer. Once your file has been successfully downloaded, a "Download Complete" message will appear. Select "Close." Now you must locate the file. When you double click, your zip program will auto-matically open.

Download Into A Text File

By default, the "Compress into ZIP" archive format dialog box is checked. Uncheck this box and then click "Create."
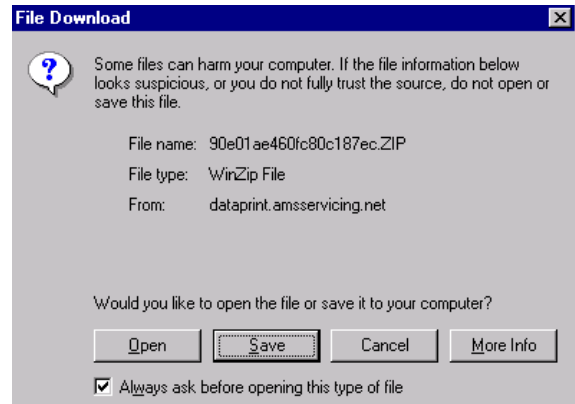
Figure 3

Right click on the background of the report window and select "View Source." The file will open in Notepad. Under the File Menu, select the "Save As" option, and specify the desired location in the "Save In" dialog box. You may change the file name by entering the desired file name in the "File Name" dialog box. Select "Text Documents (*.txt)" in the "Save As Type" dialog box. Then click "Save."

Using Netscape Navigator:

Downloading into a Zip File

An "Unknown File Type" dialog box will appear. Select "Save File" and select the location where you would like to save the file. Once your file has been successfully downloaded, you must locate the file. When you double click, your zip program will automatically open.
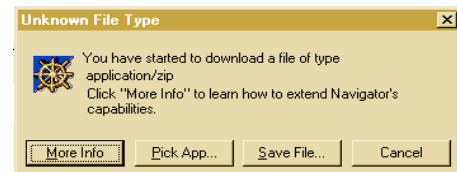
Figure 4

In your zip program, double click on the text file and it will open in Notepad. Under the File menu select the "Save As" option and specify the desired location in the "Save In dialog box." You may change the file name by entering the desired file name in the "File Name" dialog box. You may also need to change the file extension to ".txt (text document)."
.
Download into a Text File

Once you have completed the download dialogue box, select the "Create" button. (See Figure 1). By default, the "Compress into ZIP" archive format dialog box is checked. Uncheck this box, and then click "Create." Right click on the background of the window and select "Open Frame in New Window." Under the File Menu select the "Save As" option, and specify the desired location in the "Save In" dialog box. You may change the file name by entering the desired file name in the "File Name" dialog box. Select "Text Documents (*.txt)" in the "Save As Type" dialog box. Select the "Save button."

Contact the AMS Servicing Group Help Desk at 1-800-458-4492 ext. 2111 if you have questions.

Jan Blalock
Low Profile, Big Impact

With Jan Blalock, Senior Systems Analyst with AMS Servicing Group, what you see is what you get. That quality, coupled with her considerable skills, makes her a valuable asset to our company. Jan makes an immediate impression of being calm, confident, caring, and extraordinarily competent. In our fast-paced, high tech environment where constant attention is placed on exceeding our customers' needs, her stability is a major plus.

As a system's analyst, Jan's job is to design software applications for our customers and staff. Specific applications that she developed include Call Tracking for the Call Center, the SMART system for contact management, the SIR Track for managing system issues, and our highly visible Collections System designed to aid customers in their collections efforts. She also supports our telecommunication system and works with Senior Systems Analyst Vicki Volger to develop and maintain our phone system and complex Call Center software. And she supports the SQL server providing back-end maintenance for this critical area.

Ongoing development of the Collections System software has been a major responsibility for Jan during the last two years. Working as a team with Business Analysts Sharon Swaim and Sheryl Shoaf, as well as Kim Wilson, Technical Coordinator for School Relations, Jan has helped bring a critically needed and innovative product to market. The project to design a PC-based application to help student loan administrators track their internal and external collection efforts emerged in response to requests from customers for such a system. After listening to the suggestions from the initial group of customers using the Collections System, Jan and the team have been able to further fine-tune the application to meet the needs of our customers. "The Collections System is designed to help make the collector's job easier. Features like the Worklist, Contact Log, Payoff Screens, and reporting features allow administrators to track their efforts. The flexibility it gives customers in their collection efforts is remarkable," Jan says.

As you can tell by her accomplishments, Jan is no rookie. She has been a programmer for 16 years, and has worked for our company since 1996. In past jobs, she has developed a mortgage loan origination system, a trailer fleet and shipping container tracking system, a funds management system, a teacher certification status system, and even an invoicing application for a funeral home. After

Jan Blalock:
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receiving a B.S. in Business Administration with a major in Information Systems from Appalachian State University, she went to work as a programmer and has not stopped since.

Jan is very willing to listen to what other department s or customers need and incorporate their suggestions into the programs she develops. The most rewarding part of her job is not the solitary act of writing code, but instead, it is seeing the difference her work makes in other people's jobs.

Jan gets support from coworkers like Vicki Vogler, but she also gets encouragement from her husband, Steve. Married for 13 years, they are both IT professionals and often talk shop at home. They have two children, Jessica, age 8, and Jonathan, age 5. Jan spends a lot of time "hauling kids" to dance lessons and T-Ball and soccer practices and games. Jessica is very involved in dance competitions, but Jan does not push her. Characteristically, Jan says, "I tell her that I could never have gotten up on stage, so no matter how she does in the competition, she is way ahead of me." Maybe we will not be seeing Jan up on stage dancing, but she is way ahead of most of us in knowledge, determination, and the ability to get the job done.