

View and Filter Your Student Loan Portfolio Data



You can view and filter the data in the Portfolio Summary section of Portfolio Navigator to easily identify groups of students who need additional help and guidance, including those who could most immediately impact your future cohort default rates.

1. Access and log into the Financial Aid Professionals portal on the Great Lakes website (<https://schools.mygreatlakes.org>).
2. View your portfolio data in the Portfolio Summary section of Portfolio Navigator.

Tip: Place your cursor over sections in the chart to view the percentage of student loan borrowers, and the total number of student loan borrowers, with loans in each status.

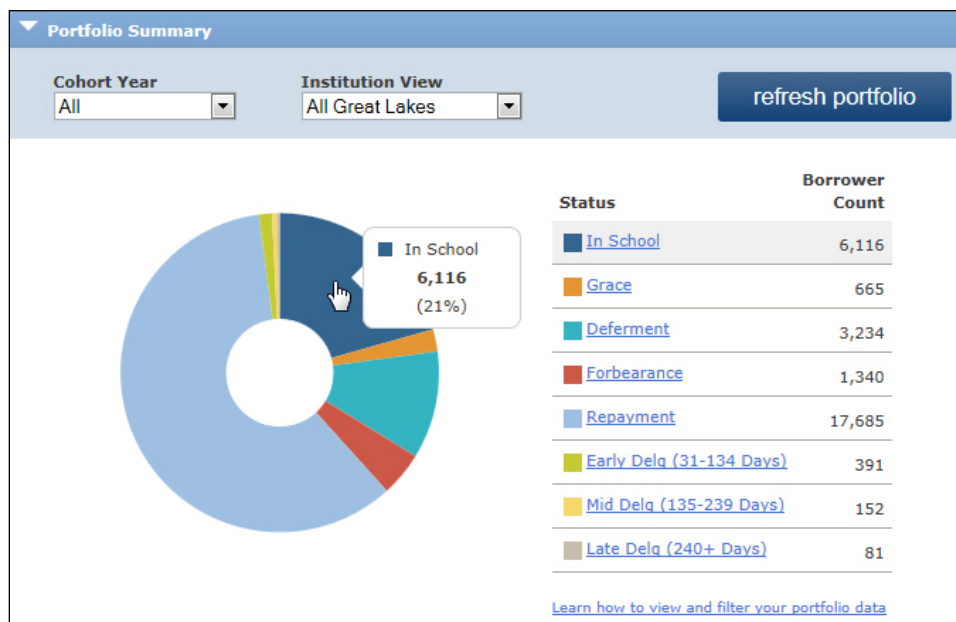


Figure 1. Example of the Portfolio Summary section

3. Select options from the *Cohort Year* and *Institution View* drop-down lists to filter the data.

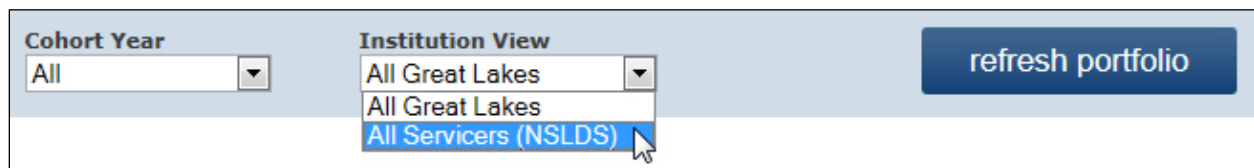


Figure 2. Example of selecting an option from the available drop-down lists

Note: When selecting filter options, keep these things in mind.

Drop-Down List	Things to Consider
Cohort Year	If you choose to view data for a specific cohort year, only certain loan statuses display when you refresh the chart.

Drop-Down List	Things to Consider
Institution View	<p>You can choose from the following options to view different types of data.</p> <ul style="list-style-type: none"> • All Great Lakes: Displays data for loans serviced by Great Lakes. • All Servicers (NSLDS): Displays data for all loan servicers (including Great Lakes), using data from the National Student Loan Data System (NSLDS) website (https://www.nslsfp.ed.gov). <p>Note: NSLDS files must be uploaded in Portfolio Navigator in order to use this data.</p>

4. Click **Refresh Portfolio**.


The screenshot shows a light blue header bar with two drop-down menus on the left and a blue button on the right. The first drop-down menu is labeled 'Cohort Year' and has 'All' selected. The second drop-down menu is labeled 'Institution View' and has 'All Great Lakes' selected. The button is labeled 'refresh portfolio' and is circled in red.

Figure 3. Example of the drop-down lists used to filter data identifying the **Refresh Portfolio** button

Note: Once you've reviewed the data in this section, you can easily drill down to find contact information for students you've identified. Refer to *View a Subset of Industry-Standard Data*, available on Support Central, for more information.