This document provides general information about myCompass, including an overview of its core functionality, with a focus on the components most important to viewing and understanding customer information.

This tool, available from your portal on the Great Lakes website (https://home.mygreatlakes.org), allows you to quickly and securely view information for borrowers and cosigners, including up-to-date account information and available resources. Designed specifically for the unique needs and requirements of the student loan servicing industry, myCompass has been used by Great Lakes Educational Loan Services, Inc. (GLELSI) contact center agents for years. It provides a complete picture of accounts and activities, making it fast and easy to assist customers.

**Note:** Your access to myCompass is limited to view-only; you cannot make updates to customer accounts.

**How Do I Access myCompass?**

After logging into the Financial Aid Professionals portal on the Great Lakes website, to access myCompass:

1. Select *Tools > Federal myCompass*, and then search for a borrower or cosigner by their SSN or customer ID.

2. Enter the borrower’s or cosigner’s SSN or customer ID in the *Borrower Search* field of the Find a Borrower section, and then click *Search myCompass*.

**Note:** This access option is only available from the *Federal Servicing* tab of the portal.

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**Figure 1. Example of the Financial Aid Professionals portal, identifying the Federal myCompass access point**
**What Functionality Is Available in myCompass?**

**Search**

You can search for customers in myCompass using various search parameters. Refer to the following table for details.

<table>
<thead>
<tr>
<th>Search Type</th>
<th>Instructions</th>
</tr>
</thead>
</table>
| **SSN/Customer ID Search**   | 1. From your portal on the Great Lakes website, select *Tools > Find a Borrower (myCompass)* to open the Search for a Customer page.  
  -or-  
  If you’re already viewing an account in myCompass, click *Change Account* in the heading bar to open the Search for a Customer page.  
  2. Enter the appropriate ID in the *Search for a Customer* field.  
  3. Select *SSN* or *Customer ID*, as appropriate.  
  4. Click *Search* to view account details (if a match is found). |
| **Demo Search**              | 1. From your portal on the Great Lakes website, select *Tools > Find a Borrower (myCompass)* to open the Search for a Customer page.  
  -or-  
  If you’re already viewing an account in myCompass, click *Change Account* in the heading bar to open the Search for a Customer page.  
  2. Click *Demo Search* to open the Demographic Search page (*Figure 2*).  
  3. Enter and select the known search parameters on the appropriate tab.  
  - **Primary Demo Search**: Search by primary and secondary demographic information.  
  - **Email Search**: Search by customer email address.  
  - **Phone Search**: Search by customer phone number.  
  4. Click *Search* to view account details (if a match is found). |

*Note:* This functionality is limited based on access rights and is not available to all users.

*Figure 2. Example of the Demographic Search page in myCompass*
Account Details and Actions

After you locate a customer via search, myCompass displays comprehensive account details in various sections, or panels. Refer to the following figure and table for details.

![myCompass Interface](image)

**Figure 3. Example of the myCompass interface, identifying the various panels**
<table>
<thead>
<tr>
<th>Panel</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demographics</td>
<td>Provides details about the customer’s demographic information, including name, address, phone number, email, date of birth, etc. Clicking Original Demo in this panel expands the Original Demo section, which allows you to view address, phone, and name history for the customer.</td>
</tr>
</tbody>
</table>
| Serviced Accounts | Provides details about the customer’s serviced accounts, including a convenient, customer-level summary, loan details, and payment information.  
  • **Summary:** A customer-level account overview.  
  • **Loan Details:** A breakdown of the loan information at the account-level or disbursement grouping. Clicking Show Loans expands the section, allowing you to view more in-depth loan information, such as origination and disbursement details.  
  • **Payments:** A Payment Tool link provides access to information about how customers can pay (by mail or phone) and information on how payments are applied.                                                                                                                                                                                                 |
| Actions           | Contains various functional and informational tools contact center agents use to assist in servicing activities. You can navigate through these workflows, just as any contact center agent can (but cannot perform any actions that update the account). Options include the following.  
  • **Account Info:** Access up-to-date information about the account and its loans (e.g., status history). Refer to View Account Information in myCompass, available on Support Central, for more information.  
  • **Direct Loan Consolidation:** Access information about a customer’s Direct Consolidation Loan application status. Refer to View Direct Consolidation Loan Application Statuses in myCompass, available on Support Central, for more information.  
  • **Enrollment:** Access enrollment information pertaining to the account. Refer to View Enrollment Information in myCompass, available on Support Central, for more information.  
  • **Payments:** Access payment information pertaining to the account. Refer to View Payment Information in myCompass, available on Support Central, for more information.                                                                                                                                                                                                 |
