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.


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.

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

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

<table>
<thead>
<tr>
<th>Drop-Down List</th>
<th>Things to Consider</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cohort Year</td>
<td>If you choose to view data for a specific cohort year, only certain loan statuses display when you refresh the chart.</td>
</tr>
</tbody>
</table>
Drop-Down List | Things to Consider
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Institution View | You can choose from the following options to view different types of data.
  - **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.nsldsfsap.ed.gov](https://www.nsldsfsap.ed.gov).

**Note**: NSLDS files must be uploaded in Portfolio Navigator in order to use this data.

4. Click **Refresh Portfolio**.

![Figure 3. Example of the drop-down lists used to filter data identifying the Refresh Portfolio button](image)

**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.